

Social Dialogue on Education and Training Annex

Foreword

The cases set out in this annex were presented as part of work by the European social dialogue's education and training ad hoc group. The social partners thought it would be useful to publish a selection of cases, which provide a particularly interesting illustration of one or more of the priorities identified in the European framework:

- identification and anticipation of competencies and qualifications;
- recognition and validation of competencies and qualifications;
- information, support and guidance;
- resources.

For reasons of clarity, all the cases are described using a common format. One or more contact persons are indicated for each case so that interested persons can obtain more information.

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COMPETENCE DEVELOPMENT WITHIN BIRDS EYE WALL'S, UNITED KINGDOM

Birds Eye Wall's motivates individuals to learn and promotes competence development through information, guidance and support for would-be learners as well as offering recognition of acquired competencies

Birds Eye Wall's is a UK frozen food and ice cream manufacturer. The policy in place at its Lowestoft site is to offer national vocational qualifications (NVQs) to all. This policy reflects a shift towards a structure of small teams, which requires a highly motivated, skilled workforce. Individuals' skills requirements are identified either through a formal route (the individual appraisal system) or an informal route (at the employee's request). NVQ assessment consists in measuring the ability to do the job and Birds Eye Wall's has an on-site Assessment Centre. The Food & Drink NVQs (levels 1 and 2 in food manufacturing) are internally verified and awarded. The time taken to achieve an NVQ varies from one to three years, depending on the candidate, and the assessment is tailored to the individual (e.g. time, means). An important tool is the individual learning plan (each employee has one). A special effort is made to provide information and guidance, which is geared to helping each individual take more responsibility for achieving a higher level of competence.

Unions are involved at different stages. For example, trade unions worked with the company to develop the Springboard project for people with low levels of qualifications (one-day courses to give individuals an appetite for learning.) In addition, trade union representatives are trained to become learning representatives – a role which includes activities such as encouraging and advising their colleagues.

Completing an NVQ level 3 is recognised financially by the company. Levels 1 and 2 are necessary to be able to do the job properly and are therefore not translated into pay increases. However, undertaking an NVQ is recognised in terms of career progression and fosters the employee's employability.

Contact:

Ms Anne Lindsay

CBI

Tel.: + 44 207 395 8273

E-mail: anne.lindsay@cbi.org.uk

CONTINUOUS TRAINING IN THE CHEMICALS AND PHARMACEUTICALS INDUSTRY IN ITALY

The social partners at sectoral level jointly carry out an experimental project to develop training in companies

The experimental project was carried out from November 2000 to July 2001, involving 1,044 workers in 25 companies, with a total of almost 28,500 hours of training given. The costs of the project were shared between the state (80%), companies (14%) and the workers concerned (6%).

Promoted by the sectoral social partners, the project was presented by the bilateral body for training Confindustria/Cgil-Cisl-Uil and implemented by an ad-hoc consortium between the companies concerned.

The project had four phases:

- preparation of the project, including analysis of the training needs of companies including matching them with the general objectives defined in the national sectoral agreement concluded in 1998;
- realisation of the project. Six training modules were developed on economic problems, market characteristics and corporate strategy, communication, group working, management of human resources and of IT applications;
- certification of competencies. Several tests were organised by the trainers in order to evaluate the competencies acquired. These were formalised in a certificate;
- project evaluation, comprising an analysis of questionnaires confirming a good level of satisfaction on the part of participants, together with a final report drafted by the project's technical committee

Contact:

Ms Fiorina Ludovisi
Confindustria
Viale dell'Astronomia, 30
I – 00144 Roma
Tel.: +39 06 59031
E-mail: f.ludovisi@confindustria.it

Mr Roberto Pettenello
CGIL-CISL-UIL
Corso d'Italia n°25
I - 00198 Roma
Tel.: +39 06 8476302
E-mail: org.formazione@cgil.it

DEUTSCHE TELEKOM, GERMANY

Developing employees' competencies and enhancing occupational mobility: a necessity for the German IT sector and Deutsche Telekom in order to anticipate skills shortages

In collaboration with the industry association ZVEI (Zentralverband Elektrotechnik- und Elektronikindustrie), two trade unions (Deutsche Postgewerkschaft, IG Metall) and public authorities, the company Deutsche Telekom developed a competence development strategy in order to address and fill the skills gap in the IT sector. This scheme is now being implemented in different companies nationwide and adapted to match the specific qualification needs of each company. Trade unions are involved in each step of the project.

After a few years of work experience, employees are invited to participate in learning activities on a voluntary basis. The type and content of these activities varies depending on the initial level of education and the area in which the employee wants to specialise.

The project-oriented scheme is open to all (not only employees with formal IT qualifications), because enhancing occupational mobility is a way of tackling the IT skills shortage. First of all, so-called "reference projects" for the different specialisation profiles have been developed by all partners involved, which serve as a kind of curriculum, defining the individual skills and competencies that have to be acquired during project work, prior to obtaining the specialisation certificate. The individual employee interested in an IT specialisation together with the employer then looks for "real" projects in the company matching the reference projects, so as to enable the employee to acquire on-the-job - i.e. on-the-project - the competencies needed for the specialisation certificate. The final certificate is intended to be recognised nationwide, and at a later stage possibly also EU-wide. Learning activities take place at the workplace, in seminars and at home. Different tools are used, such as teleteaching; study modules downloaded from the Internet; learning partnerships; meetings with experts; Internet forum, etc. An important emphasis is put on virtual structures (e.g. virtual classroom) and networks.

A special effort is made to provide guidance for employees and support, for example through coaches and mentors.

Contact:

Ms Martina Westhues
Deutsche Telekom
Central Unit HR Management,
Terms of Employment, European Affairs
Avenue de Tervuren 273
B - 1150 Brussels
E-mail: Martina.Westhues@be.telekom.de

GASUNIE, THE NETHERLANDS

To create the conditions for competence development through provision of adequate resources: the challenge of Gasunie

Gasunie is a Dutch company which trades and transports natural gas. It employs about 1,450 people. Social partners at company level agreed in 2001 on a budget of €1,600 for each employee for personal development. This budget is supplementary to the existing study facilities. It intends to improve the participation of employees in training, and to stimulate people to take responsibility for the development of their competencies. The 'personal development budget' was agreed upon in April 2001 and the arrangement has been operational since October 2001.

Conditions for spending the budget are minimal:

- a development plan is established for each individual (those employees to which the social partner agreements apply - that is to say 99% of all employees);
- a bilateral discussion with the manager is organised. The manager checks the plan broadly (particularly non-violation of the internal code of conduct);
- the budget is spent on activities which take place in the employee's own time;
- the company reimburses training costs up to the amount of the budget.

A committee has also been set up to find out if the activities forecast in the development plan could allow the enterprise to benefit from tax deduction. The criterion for tax deduction is to 'enable paid work in the future'.

Contact:

Mr Hans Uyttenboogaart

Gasunie

Tel: +31 50 5212018

E-mail: J.D.Uyttenboogaart@gasunie.nl

RADIOMETER, DENMARK

Radiometer: possible ways and innovative tools for identifying competence needs, anticipating production needs and becoming a learning organisation

Radiometer is a Danish company, which integrates training into production planning. Different initiatives are put in place in order to enable the company to better follow production needs by changing its work organisation. The initiatives are regarded in the company as the starting point for increasing the effort to make human resources development and training a part of the overall business strategy.

Trade unions are involved in the project, which concerns all employees. The management, especially front-line managers, for whom competencies development is defined as part of their job and represents a criteria for evaluation of their job-performance, are also very involved in the process.

Individual discussions take place yearly with the employee, in order to identify competence needs. In this company, a great proportion of employees are blue-collar workers, low-skilled workers and often immigrants with little knowledge of the Danish language.

Different tools are developed, such as:

- the "second job" initiative, in which all employees have the opportunity to qualify for another job within the company, thereby enhancing mobility within the company;
- different courses, e.g. IT literacy, Danish language but also foreign languages for all employees during working hours;
- a "home PC agreement" enabling employees to keep a PC at home after participating in a distance learning course in IT;

This global approach, combining training and non-formal learning and promoting the participation of all workers and managers, appeared to be highly motivating for employees. The impact on company organisation and capacity to manage change was also assessed as being very positive.

Contact:

Ms Lise Skanting
DA
Vester Voldgade 113
DK - 1790 København V
Tel: + 45 3338 9388
Mobile: + 45 2920 0388
Fax: + 45 3393 0842
E-mail: lsk@da.dk

Mr Anders Vind
LO, Kompetencesektionen
Rosenørns Allé 12
DK-1634 København V
Tel.: +45 3524 6144
Mobile: +45 2338 4203
Fax: +45 3524 6303
E-mail: avi@lo.dk

JOINT PROJECT OF THE SWEDISH SME ORGANISATION FÖRETAGARNAS RIKSORGANISATION AND THE UNIVERSITY OF UPSALA

Identifying competencies, anticipating new customers needs and assessing learning results: the strategy developed by the Företagarnas Riksorganisation

Employees (at the level of the secretariat) of the Swedish SME organisation were given an opportunity to follow a law course through on-line distance learning. The aim of this training course was to enable the employees to upgrade their knowledge of law, so as to be able in future to answer basic questions from members. Employees undergoing training had different educational backgrounds, but all of them had basic IT skills (IT driving licence).

The courses were prepared by university teachers and delivered on the organisation's intranet. Teachers and trainees had the opportunity to communicate individually or in groups within the network, for example via a forum and a chat room.

The training took place at the workplace and at home, but no specific leave / time-off was given to the trainees. A final exam was organised.

The results were satisfactory for both employees and employer and all employees concerned successfully obtained a certificate stating the contents of the course. The results of the work carried out after the training were carefully assessed. The number of legal questions increased by 60%, 80% of which were answered by one of the trained employees.

Building on this positive experience, a course in commercial law was organised in 2001 and another one is planned for 2002.

Contact:

Mr Ulrik Ostling

Företagarnas Riksorganisation

S -106 67 Stockholm

E-mail : ulrik.ostling@fr.se

Social partners and the Danish government work together in the complex issue of identification and anticipation of competence needs

In Denmark, social partners and public authorities work closely together in order to promote competence development in companies. This way, consistency can be ensured between the work done in bipartite social dialogue and in tripartite bodies, which exist at local, sectoral and national levels.

Some general features which are laid down in Danish law can be described as follows:

At national level the general framework is defined through tripartite bodies advising the ministers.

At sectoral level, framework agreements can be negotiated between social partners, which define general principles and common features for competence development in companies. These agreements deal for example with the following issues: access to learning; resources for learning; establishment and role of employees' representative bodies.

At company level, different tools are used to ensure co-operation between social partners. Identification of worker's current competencies and future needs is possible through an annual interview between employer and employee. Today, approximately 75% of Danish employees benefit from these interviews. Once the outcomes of interviews are analysed and the company's competence needs are defined, a learning plan can be developed. Local training committees offer the possibility for management and worker representatives to discuss and plan learning activities.

Social partners also participate in tripartite boards with education/training institutions at different levels. These partnerships enable education/training institutions to anticipate competence needs and to define training activities in a more accurate way. Co-operation between social partners and education/training institutions also contributes to ensuring an effective implementation of learning plans and the positive impact of learning on companies and individuals' development.

Contact:

Ms Lise Skanting
DA
Vester Voldgade 113
DK - 1790 København V
Tel: + 45 3338 9388
Mobile: + 45 2920 0388
Fax: + 45 3393 0842
E-mail: lsk@da.dk

Mr Anders Vind
LO, Kompetencesektionen
Rosenørns Allé 12
DK-1634 København V
Tel.: +45 3524 6144
Mobile: +45 2338 4203
Fax: +45 3524 6303
E-mail: avi@lo.dk

DIFFERENT PARTNERSHIPS IN FINANCING ADULT EDUCATION IN DENMARK

Social partners and the Danish government work together in the complex issue of resourcing adult education

The degree of partnership and involvement of the state, the social partners, employers and/or employees varies depending on the type of adult education to be financed. Four different types of adult education exist:

- basic adult education;
- continuing vocational training;
- advanced education (i.e. with the aim of gaining new and higher formal qualifications);
- the whole range of non-regulated adult education.

Moreover, different financing systems are put in place to cover the range of different resources invested in learning activities: time, training fees, compensation for salary reduction during training periods, etc.

For example:

- most of the basic adult education is financed by the State. A state fund, managed by the social partners, is designed to finance continuing vocational training. Social partners, decide on the purpose and the content of funded learning activities, through framework agreements and joint committees for example;
- collective agreements foresee that, in cases where the state ensures an income equal to the level of unemployment benefits to employees during training periods, employers pay the difference between unemployment benefits and the actual wage;
- investment of financial resources and/or time can also occur on the sole initiative of employers or employees.

In addition, a new system to finance advanced education, called State Educational Support for Adults (SESA), was recently established. The detailed functioning of the system is currently on the agenda of the social partners at national level.

Contact:

Ms Lise Skanting
DA
Vester Voldgade 113
DK - 1790 København V
Tel: + 45 3338 9388
Mobile: + 45 2920 0388
Fax: + 45 3393 0842
E-mail: lsk@da.dk

Mr Anders Vind
LO, Kompetencesektionen
Rosenørns Allé 12
DK-1634 København V
Tel.: +45 3524 6144
Mobile: +45 2338 4203
Fax: +45 3524 6303
E-mail: avi@lo.dk

SOCIAL PARTNERS' JOINT NATIONAL RESEARCH ON COMPETENCE NEEDS, ITALY

Social partners in Italy developed a project, with the aim of identifying and anticipating competence needs and in order to develop co-operation with public authorities in 16 different sectors

The joint research can be traced back to the January 1993 national agreement on training in which the social partners called on the public authorities to introduce an integrated training policy. An observatory called OBNF, composed of employer and trade union representatives, was set up in 1996 for the purpose of this research.

The objective is to identify companies' competence needs in 16 different sectors and to provide public authorities with accurate information on long-term labour market trends. Competencies needed at company level were identified by means of a survey. More than 80 professional profiles were set up, 70% of which are considered "critical" or difficult to find on the labour market. The study also shows that 40% of identified competence needs are similar across all the sectors covered.

The results of the study will be taken into account by public authorities when setting up education and/or training programmes, in order to better match training offers with competence needs. The information gathered will also enable public authorities to anticipate competence needs by taking account of labour market changes and technological developments. The complete success of the implementation depends very much on local partnerships with public authorities. In certain regions, joint laboratories are established between social partners and representatives of the education sector, in order to draw up training programmes and to promote the results of the study.

Contact:

Ms Fiorina Ludovisi
Confindustria
Viale dell'Astronomia, 30
I - 00144 Roma
Tel: +39 06 59031
E-mail: f.ludovisi@confindustria.it

Mr Roberto Pettenello
CGIL-CISL-UIL
Corso d'Italia n°25
I - 00198 Roma
Tel.: +39 06 8476302
E-mail: org.formazione@cgil.it

Achievements of the social dialogue are used to build a global lifelong learning system in Spain

The Spanish situation is characterised by a high level of decentralisation and division of responsibilities between national and regional players in the vocational education and training area. Three main areas can be distinguished:

- initial vocational education and training – which is of the main responsibility of educational authorities;
- training for the unemployed - which is of the main responsibility of employment authorities;
- on the job learning for employees. This is an area in which social partners are deeply involved through national bipartite and tripartite agreements.

The III National Agreements on Continuous Vocational Training (2000-2004) has established a Tripartite Foundation for funding, which allocates resources for company training plans (companies with more than 100 employees), joint plans (involving 2 or more companies usually from the same sector) and inter-sectoral plans. Joint plans, for example, allowed SMEs to significantly increase their activity in training. Individual training allowances can also be funded at the request of employees with at least one year of service in their company. These allowances aim at the development of technical-professional qualifications. Finally, complementary measures, such as research studies, surveys, design of training tools, etc. are eligible for financial aid.

Despite this segmentation, a global social consensus in vocational education and training could be reached by social partners and public authorities and formalised in a National Vocational Training Plan (1998-2002). Furthermore, a Bill on Vocational Education and Training and Qualifications was recently adopted that develops the measures and objectives agreed in the National Vocational Training Plan. This Bill aims at establishing a global framework encompassing not only the different types of vocational and educational training but also the validation and certification of informal learning, e.g. competencies acquired through work experience. Emphasis is also put on issues such as information and guidance, evaluation and quality of training, innovation.

Building on achievements of social agreement, the new system should facilitate and support the acquisition and validation of competencies regardless of where, when or how they were acquired.

Contact:

Mr Menéndez-Valdés
CEOE
C/Diego de León, 50
E - 28006 Madrid
Tel. : + 34 91 5639641
E-Mail:
menendez@ceoe.es

Ms Marta del Castillo Coba
CC.OO. - FOREM
Calle Longares, 6-8
E - 28022 Madrid
Tel.: +34 91 3135915
E-mail:
mdelcastillo@forem.ccoo.es

Mr Luis Galiano Rabago
UGT
Hortaleza, 88
E - 28004 Madrid
Tel.: 34/91/5897685
E-mail:
lgaliano@cec.ugt.org

USINOR, FRANCE

At Usinor, a competence development policy was introduced which made it possible for employees to enhance their employability and adaptability, and for the company to increase its capacity to respond to changes and to enhance its competitiveness

For Usinor, a leading French steelmaker employing more than 50,000 people in the world, the competence development policy for all employees is at the heart of the company's overall strategy and is crucial to its competitiveness. A change in the overall strategy of Usinor was necessary to cope with restructuring.

A framework agreement at company level negotiated in 1990 and updated in 2000 defined the main lines of the new strategy. The main objectives are to develop the qualification of employees, to enable a smooth career progression for employees and to keep up-to-date with technological and environmental developments. Consequently, far-reaching changes in the work organisation were introduced, such as, for example:

- introduction of a work organisation based on occupational profiles (filières métier) and no longer defined in relation to specific posts;
- every employee can make proposals with regard to his/her training;
- new competencies acquired are translated in terms of work organisation and salary.

Experience showed that adopting this new approach was a necessary though lengthy process, requiring the involvement of all stakeholders. Support and guidance for employees are vital to workers' motivation and hence to the strategy's success. Through competence development, employees enhance their employability and adaptability and the company gains in its capacity to respond to changes and enhances its competitiveness.

Contact:

Mr Henri CUNIBERTI

Usinor

Tel.: +33 1 47 49 60 92

henri.cuniberti@usinor.com

VOLKSWAGEN, GERMANY

A collective agreement to promote employment and competence development through the investment of different types of resources

A collective agreement called "5,000 x 5,000" was signed in Volkswagen on 28 August 2001. This agreement foresees that 5,000 employees will be hired by Volkswagen, 3,500 of which are currently unemployed, and will be paid DM 5,000 /month. Once the staff have been selected, would-be employees will be trained by public training institutions to acquire key skills. In a second phase, the 5000 new employees will be employed with a six month fixed-term contract, during which a training period in the company is organised (employees are only paid DM 4,000 at this stage). If they are successful during this period, they will be offered an unlimited contract.

In the collective agreement, it is also foreseen that employees will participate in on- going on-the-job learning of up to three hours per week, in addition to the 35 hours of regular working time. Half of this time for learning is to be contributed by the employee. Individual training plans are developed for each employee. A broadly recognized certificate "Fachkraft für Automobilbau" can also be granted to employees.

This strategy is detailed in a "qualification charter", which is seen by the company as an integral part of the company's overall business strategy.

Contact:

Mr Stefan Küpper
Stellvertretender Abteilungsleiter Lohn- und Tarif
Bundesvereinigung der Deutschen Arbeitgeberverbände
Im Haus der Deutschen Wirtschaft
Breite Str. 29
D - 10178 Berlin
Tel: +49 30 2033 1302
Fax: +49 30 2033 1305
E-mail: s.kuepper@bda-online.de