



European Foundation  
for the Improvement of  
Living and Working Conditions



**CEDEFOP**

European Centre for the Development  
of Vocational Training

# Contribution of collective bargaining to continuing vocational training

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*The EU Member States take a variety of approaches to continuing vocational training (CVT), and the social partners are involved in CVT governance and implementation to varying degrees. The European 'Copenhagen Process' aims to increase participation in adult education by enhancing cooperation in vocational education and training. National-level social dialogue has played a prominent role in most countries, by setting the policy agenda. Sectoral and company-level bargaining on CVT are also important, with the scope and extent depending on the national context. This report has been developed jointly by Eurofound and Cedefop.*

## Introduction

European countries are facing multiple challenges in their quest to become part of the most competitive and dynamic knowledge-based economy by 2010 – the ambitious target set for the European Union by the **Lisbon Strategy**. Both the economic development and social cohesion of the EU are challenged by the progress of globalisation, which in turn is characterised by accelerated industrial and technological shifts, strong worldwide competition between companies and areas, demographic and sectoral transformations, as well as international migration.

Acknowledging these developments, the **European Commission** – supported by the **European Parliament** and the **European social partners** – renewed the Lisbon Strategy in 2005 and formulated new integrated guidelines for fostering growth and jobs, and increasing competitiveness (European Commission, 2005). The key objectives of the new guidelines are to:

- attract and retain more people in employment and modernise **social protection** systems.
- improve the adaptability of workers and enterprises, and the **flexibility** of labour markets.
- increase investment in human capital through better education and skills.

Education and training is singled out as a crucial factor favouring greater employability. It indeed has many benefits. First, it contributes to increasing the human capital and skills base of the population (European Commission, 2007b). Therefore, it is a necessary precondition for modernising labour market policies, which can in turn combine flexible employment patterns with adequate security. Consequently, education and training allows for greater '**flexicurity**' and can thus benefit both employers and employees (European Commission, 2007c).

In order to meet these ambitious goals, policy initiatives to increase participation and retention in education and training need further development. In 2006, almost 80 million of the citizens of working age (25–64 years) in the 27 EU Member States (EU27) had a qualification below upper-secondary level, and 45 million of this population group were in employment (European Centre for the Development of Vocational Training (Cedefop), 2007). The data show that employment rates are significantly higher for those who attain higher skills, whereas they are declining for low-skilled persons.

Continuing **vocational training** (CVT) is a strategic domain in **lifelong learning** policies. It can benefit individual workers by enhancing their career development and skills base, which also benefits the employers and can contribute to the modernisation of business production (Parent-Thirion et al, 2005; European Trade Union Confederation (ETUC) et al, 2007). Therefore, private companies and individuals are encouraged to share the responsibility of updating skills in order to reach the objective of a 12.5% adult participation rate in education and training by 2010.

The '**Copenhagen Process**' on education and training was launched by a **declaration (101Kb PDF)** of the European Ministers of Vocational Education and Training, and the European Commission, in Copenhagen in 2002. Reaffirmed in **Maastricht (37Kb PDF)** in 2004 and **Helsinki (152Kb PDF)** in 2006 and recently in **Bordeaux (170Kb PDF)** in 2008,

the process aims to contribute to the achievement of the 2010 goals in education and training. It can do so by enhancing cooperation in vocational education and training (VET) and by encouraging stronger stakeholder involvement, especially when increasing support for the development of competences and qualifications at sectoral level. The process outlines four priorities:

- increasing the European dimension;
- improving transparency, information and guidance systems;
- recognising competences and qualifications;
- promoting quality assurance.

The contribution of social partner organisations can be of paramount importance to ensure access to lifelong learning for all. This is reflected in a joint strategy, entitled **Framework of actions for the lifelong development of competencies and qualifications**, signed by the following European social partner organisations: the European Trade Union Confederation (**ETUC**), **BusinessEurope** (formerly **UNICE**), the European Association of Craft, Small and Medium-sized Enterprises (Union européenne de l'artisanat et des petites et moyennes entreprises, **UEAPME**) and the European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest (Centre européen des entreprises à participation publique et des entreprises d'intérêt économique général, **CEEP**). The social partners published **first**, **second** and **third** follow-up reports on the framework of actions in 2003, 2004 and 2005, as well as an **evaluation report** in 2006. In particular, the framework of actions sets out that the social partners:

*consider the lifelong development of competencies as a priority and assert the principle of shared responsibility for mobilising and optimising resources. The social partners want to promote co-investment and to encourage new ways of resourcing lifelong learning, through the effective and creative management of funding, time and human resources.*

As the **OECD Employment Outlook: 2003 – Towards More and Better Jobs (430Kb PDF)**, published by the Organisation for Economic Co-operation and Development (**OECD**), points out, several market failures arise in the market of training which

*prevent an efficient sharing of the costs of, and benefits from, training between employers and employees, thereby reducing the incentives to invest in workers' human capital.*

This is particularly true for most groups reporting some vulnerability in labour markets, especially for low-educated, older workers.

Furthermore, according to the OECD report *Beyond rhetoric: Adult learning policies and practices* (OECD, 2003a), social partners' involvement in training and skills has many positive effects. Their involvement can help to overcome the resistance of their constituencies against further tax relief, and their in-depth information on the labour market can contribute to the identification of skills needs. In addition, the involvement of the social partners can increase the efficiency of further training by balancing employer information on the costs and benefits of training.

For the purposes of this study, CVT policies and initiatives are identified as all those which involve persons already active in the labour market or employed, and that aim to maintain, strengthen or update their competencies.

The principal objective of this comparative analytical report is to provide an overview of how **social dialogue** and **collective bargaining** have been contributing to the development of CVT policies and initiatives in the EU27 and

Norway since the introduction of the Copenhagen Process in 2002. The first chapter will outline the regulatory framework. Then, the role played by the social partners in policy setting and implementation, including through collective bargaining, will be discussed in Chapter 2. Chapter 3 will examine the mix of institutional and financial incentives, as envisaged in the Copenhagen Declaration. The fourth chapter considers the opinions of the social partners on the situation regarding CVT. Chapter 5 will then show both EU-level and national-level evidence on the impact of collective bargaining on involvement in CVT. The report has been developed jointly by Eurofound and Cedefop.

## **1. Legal framework of CVT systems**

Across the EU27 Member States and Norway, the CVT systems are regulated at national level. The legal frameworks are diverse and can be differentiated along two axes:

- the (mix of) regulatory level(s);
- the nature of legislative acts regulating the issue.

Regarding the regulatory levels, national-level requirements are often implemented and adapted to local settings, usually at regional level. Romania is the only exception, with adaptation devolved to the county level, which is the lowest administrative level. Only in Belgium, Germany and the United Kingdom (UK) have regional laws directly introduced specific provisions on CVT, as most education and training issues are dealt with by the respective regions in these countries. For example, in Germany, the right to training leave from work for further education is stated at regional level in 12 states (*Länder*) out of 16. Belgium and the UK envisage a wider autonomy at state level in designing the corresponding autonomous institutes, standards and implementation rules. However, other countries organised in a federal sense, such as Austria and Spain, have not developed sub-national regulatory autonomy to such an extent in the field of CVT.

When discussing the second issue, namely the nature of legislative acts, it can give some idea about the regulatory style adopted and the recognition given to CVT in the national employment strategies. The CVT system can be regulated by acts specifically dealing with training issues, and/or by being a part of the educational system structures, or by constituting a part of the employment strategy or labour legislation (Table 1).

In several countries (Bulgaria, Cyprus, France, Greece, Lithuania, Luxembourg, the Netherlands, Spain and Sweden), specific legislative regulation on CVT exists as part of the legislature regulating the wide domain of training. Such laws can also be linked to education policy. The recent revisions of the CVT systems in Denmark and Norway fall inside the educational domain as part of wider strategies on lifelong learning. In Norway, the so-called 2001 Competence Reform is the platform for the reform of the education system, in order to encompass non-formal and informal learning issues. In the Czech Republic, the legislative regulation of CVT is part of the 2006 Act on the verification and recognition of the results of further education.

In an even larger group of countries including Denmark, Germany, Norway, Portugal and several of the new Member States (NMS) which joined the EU in 2004 or 2007 – Estonia, Hungary, Poland, Romania, Slovakia and Slovenia – the respective countries' adult education act constitutes the reference legislation. This is integrated with further measures such as the right to access to CVT, usually regulated by the labour market or employment legislation. Labour market legislation also governs CVT provision in Austria, Belgium and Ireland. In Finland, the legislation concerning CVT is contained in the 2001 Employment Contracts Act.

Some countries regulate CVT systems as part of other policy fields. In Germany, several CVT provisions integrating the Vocational Training Act are included in the Craft Trades Law, in social security legislation and in the work constitution act; the latter regulates consultation and **co-determination** rights.

Italy is an unusual case since CVT regulation was included in various acts according to a piecemeal or ‘patchwork’ (Falkner and Treb, 2003) approach, accompanying the decisions of other actors – mainly the social partners and regional administrations. In Latvia, CVT appears to be a demand driven business rather than a consciously created single national system.

Table 1: *Regulation of CVT at national level*

|                             | Centralised                        | Partly decentralised |
|-----------------------------|------------------------------------|----------------------|
| Specific legislation on CVT | BG, CY, EL, ES, FR, LT, LU, NL, SE |                      |
| Education legislation       | CZ, DK, NO, PT                     |                      |
| Employment                  | AT, FI, IE                         | BE                   |
| CVT and employment          | EE, HU, PL, RO, SI, SK             |                      |
| Several sources             | IT                                 | DE, UK               |

Note: See Annex 3 for lists of country codes and abbreviations.

Source: National reports completed by the **network of correspondents** in the European Industrial Relations Observatory (**EIRO**) on the basis of a questionnaire

Examining the dates of establishment and subsequent revisions of national CVT systems, as outlined in Annex 1, gives some sense of their ability to respond to both company and workers’ needs. Belgium and Austria have the oldest CVT systems, established in 1958 and 1960 respectively. They are based on public employment services, with a strong intervention of the social partners both at national and regional level. While the Austrian system was partly revised in 1994 and was undergoing revision on the basis of tripartite negotiations in 2008, the latest legislative intervention in Belgium dates back to 1985. However, devolution to the regional level – as well as to the social partners, who engage in biennial intersectoral negotiations – allows for continuous adaptation to the needs of both sides of industry.

Several countries established their national systems following a gradual approach covering a relatively long period of time (eight to 13 years); this was the case in Greece, Italy, Malta, Poland and Slovenia. On the other hand, it is not self-evident whether revisions after a rather short span of time – as occurred in Bulgaria – are parts of a continuous process. Finally, Lithuania, the Netherlands, Spain and the UK recently revised their CVT systems despite the fact that they were established – or substantially reformed – only in the 1990s.

## 2. Forms of involvement of the social partners

### General outline

All of the EU Member States have established a CVT system, with the notable exceptions of Cyprus and the Czech Republic. In some countries, such as Italy and most of the NMS, the establishment of such a system is still in progress. In most cases, the social partners have a general right of consultation and proposal over adult education. Social partners’ involvement varies greatly according to national settings of industrial relations and the balance of powers among them. They may act bilaterally, by setting standards autonomously based on the implementation of internationally established certification systems, such as that of the International Organization for Standardization (**ISO**). Alternatively, the social partners may act in a tripartite way by actively bargaining on the national design of the system and by implementing policies at national and local level, either autonomously or jointly within coordination bodies.

### Level of policy implementation

The implementation of CVT policies can be analysed according to the main institutions and public actors dealing with CVT. This chapter will consider the levels at which CVT is implemented and managed by public institutions, the existence of any coordination bodies, and the outcomes of social partners' autonomous bargaining activities in terms of collective bargaining and bilateral joint activities.

Overall, 11 of the 28 countries studied report a centralised policy implementation (Table 2); they are usually smaller countries, with the notable exception of Poland. Social partners are usually involved in these activities on a tripartite basis. These countries are therefore centrally coordinated with regard to CVT: differences among them depend on both the country size and institutional design, thus introducing a certain diversity in contracting out policies, qualification standards, training centre accreditation and learning outcomes.

Meanwhile, a further 11 of the Member States maintain a mix of national-level and regional-level implementation policies. Nevertheless, in most of the 22 countries comprising both groups, at least one coordination body presides over standards and monitoring activities, and promotes studies and research in order to enhance the effectiveness and efficiency of CVT policies.

At the other end of the spectrum are Austria, Belgium, Germany and Romania, which show a strongly decentralised implementation level. In Belgium, each region has a wide regulatory scope with broad regulatory powers over CVT standards. They maintain strong links to employment policies and their own public employment services, which act as coordinating bodies for training and CVT. In Austria, the regional branches of employment services (*Arbeitsmarktservice*, AMS) coordinate CVT interventions with little regulation from the Länder but close interaction with the social partners. On the other hand, German Länder enjoy some legislative powers, and a joint committee among the social partners – with the participation of a teachers' representative – guarantees regional-level coordination.

Finally, neither the Czech Republic nor Sweden has any national or regional CVT policy or level of intervention; this area is left entirely to the social partners at company and occupational or sectoral level. However, in Sweden, local-level tripartite involvement is rather widespread in the area of adult education.

Table 2: Levels of policies and actors in CVT, by country

|    | Policy implementation | Social partner concertation | Collective bargaining | Fiscal incentives |
|----|-----------------------|-----------------------------|-----------------------|-------------------|
| AT | Decentralised         | Bipolar                     | Decentralised         | Yes               |
| BE | Decentralised         | Decentralised               | Bipolar*              | No                |
| BG | Central               | Bipolar                     | Bipolar               | No                |
| CY | Central               | Central                     | None*                 | No                |
| CZ | None                  | None                        | Central               | Yes               |
| DE | Decentralised         | Decentralised               | Bipolar*              | Yes               |
| DK | Mixed                 | Bipolar                     | Bipolar*              | Yes               |
| EE | Central               | Central                     | Bipolar               | Yes               |
| EL | Central               | Central                     | Central*              | No                |
| ES | Mixed                 | Bipolar                     | Bipolar*              | Yes               |
| FI | Central               | Bipolar                     | Central               | Yes               |
| FR | Mixed                 | Bipolar                     | Bipolar*              | Yes               |
| HU | Mixed                 | Central                     | Decentralised         | Yes               |
| IE | Mixed                 | Bipolar                     | Decentralised         | Yes               |
| IT | Mixed                 | Bipolar                     | Bipolar*              | Yes               |

Table 2: *Levels of policies and actors in CVT, by country (cont'd)*

|    | Policy implementation | Social partner concertation | Collective bargaining | Fiscal incentives |
|----|-----------------------|-----------------------------|-----------------------|-------------------|
| LT | Mixed                 | Central                     | Decentralised         | No                |
| LU | Central               | Central                     | Bipolar               | No                |
| LV | Mixed                 | Central                     | Decentralised         | Yes               |
| MT | Central               | Central                     | Decentralised         | No                |
| NL | Mixed                 | Central                     | Bipolar*              | Yes               |
| NO | Central               | Bipolar                     | Bipolar               | No                |
| PL | Central               | Central                     | Decentralised         | No                |
| PT | Mixed                 | Bipolar                     | Bipolar               | Yes               |
| RO | Decentralised         | Bipolar                     | Bipolar               | Yes               |
| SE | None                  | Decentralised               | Bipolar               | Yes               |
| SI | Central               | Central                     | Central**             | No                |
| SK | Central               | Central                     | Bipolar               | No                |
| UK | Mixed                 | Bipolar                     | Decentralised         | No                |

Notes: \* *Also administering bilateral funds.* \*\* *Employers' mutual funds.*

Source: *EIRO national reports*

### Collective bargaining

Meanwhile, collective bargaining on CVT tends to be far more decentralised than is the case for the tripartite involvement or concertation of the social partners (Table 2). Collective bargaining is predominantly centralised in some small countries with either intersectoral training funds (Cyprus and Greece) or where the social partners play a significant role as training providers (the Czech Republic, Finland, Slovenia).

### Fiscal policies

Fiscal policies are an important tool in promoting CVT participation; 16 out of the 28 countries studied offer the incentive of tax deductibility from the company income or from payrolls (Table 2). It is usually managed at central level in an automatic way, apart from Spain where local public employment services have discretionary power. Fiscal incentives are complementary to national-level coordination, with the social partners' involvement in most countries as a reinforcing tool.

Deductibility plays a lesser role in Sweden, which lack both a centralised system and national or local-level coordination bodies. This is not the case in Belgium, where strong local-level coordination exists and where high contributions to national-level sectoral training funds ensure high levels of CVT activities.

In the UK, the government does not provide any tax deductibility but has opted for goal-oriented and targeted training programmes, with a wide involvement of the social partners. Both coordination bodies and standard setting are decentralised at sub-national level – in England, Wales, Scotland and Northern Ireland. However, they are guided at central level, due to a wide array of monitoring tools and government policies (see also Cedefop, 2005).

### Social partner involvement in policy setting

Social partners play an important role in most countries both in the process of building the CVT system and in its implementation (Table 3). The social partners are involved by means of collective bargaining or by participating in joint committees and/or the boards of institutions designed to govern CVT. Their involvement can be grouped as follows:

- no involvement – this is the case in the Czech Republic, where CVT is left completely to market regulations and encouraged by fiscal incentives, mainly tax deductibility for companies and individuals;
- direct consultation on policy setting – this is the case in Latvia and Malta, small NMS where the institutional design could be integrated by direct relationships between each of the social partners and governmental institutions;
- formal consultative councils or advisory bodies – these entities channel social partners' opinions in an array of policy areas extending beyond CVT; they are therefore the institutional setting where their consultation takes place. This is the case in Denmark, Italy, Lithuania, the Netherlands, Norway, Poland, Slovakia, Slovenia and the UK;
- participation in CVT coordination institutions, including tripartite agreements and consultation - this is the case in Austria, Belgium, Bulgaria, Estonia, Finland, France, Greece, Hungary, Ireland, Luxembourg, Portugal, Romania and Spain. Most countries combine consultative advisory bodies or councils with national-level and/or regional-level committees on CVT-related issues. France and Spain are the most recent example of this design: the social partners signed a bipartite intersectoral agreement in 2007 approved by the government and parliament, and participate in a tripartite body managing training policies. In France, this is the National Association for Adult Training (Association nationale pour la formation professionnelle des adultes, **AFPA**), while in Spain it is the Tripartite Foundation for Training in Employment (**Fundación Tripartita para la Formación en el Empleo**); both agencies are integrated with tripartite regional-level consultation committees and bilateral funds.
- involvement only in tripartite or public bodies – this is the case in Cyprus and Germany. In the former country, CVT policies are managed by a tripartite fund, while in Germany bipartite committees at regional level are the main tool in managing CVT policies.

Bilateral funds managed by social partners constitute an important device in implementing public policies and they will be discussed in more detail in the following chapter.

Table 3: *Social partner involvement in CVT policies*

|           | National level                                                                 | Tripartite bodies                                                                                                                                                                       | Local level              | Bilateral funds   |
|-----------|--------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|-------------------|
| <b>AT</b> | Joint employment programme and regular consultation                            | National public employment service (PES) with regional and local branches                                                                                                               |                          |                   |
| <b>BE</b> | Intersectoral bargaining every two years, setting targets. Sectoral bargaining | Regional PES                                                                                                                                                                            | Members of the PES board | Sectoral/national |
| <b>BG</b> | Intersectoral tripartite plus including non-governmental organisations (NGOs)  | National Council for Vocational Training (advisory body); National Agency for Vocational Education and Training (NAVET); National Advisory Council for Vocational Qualifications (NCVQ) | Joint committees         |                   |
| <b>CY</b> |                                                                                | Human Resource Development Authority (Αρχή Ανάπτυξης Ανθρώπινου Δυναμικού, AnAD)                                                                                                        |                          |                   |

Table 3: *Social partner involvement in CVT policies* (cont'd)

|           | National level                                                                                                           | Tripartite bodies                                                                                                                                                                                              | Local level                                            | Bilateral funds                                                   |
|-----------|--------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------|
| <b>CZ</b> | Council of Economic and Social Agreement                                                                                 |                                                                                                                                                                                                                |                                                        |                                                                   |
| <b>DE</b> |                                                                                                                          | Members of the Federal Institute for Vocational Education and Training ( <i>Bundesinstitut für Berufsbildung</i> , BIBB) committees at local, regional and federal levels ( <i>Bildungsausschüsse</i> )        | Bilateral bodies (regarded as tripartite institutions) |                                                                   |
| <b>DK</b> | Tripartite committee on lifelong learning; all public councils and committees dealing with CVT                           | Adult vocational training ( <i>Arbejdsmarkedsuddannelser</i> , AMU)                                                                                                                                            |                                                        | Manufacturing sector                                              |
| <b>EE</b> | Policy formulation                                                                                                       | Members in qualification authority and Adult Education Council (AEC)                                                                                                                                           |                                                        |                                                                   |
| <b>EL</b> | Consultation                                                                                                             | Participation in the board of the National Accreditation Centre for Continuing Vocational Training and the National System for Linking Vocational Education and Training with Employment                       |                                                        | Intersectoral at national level                                   |
| <b>ES</b> | System setting                                                                                                           | Tripartite Foundation for Training in Employment                                                                                                                                                               | Joint Cooperation Committee (JCC)                      | Sectoral at national level                                        |
| <b>FI</b> | National board of education; Advisory Board for Educational Cooperation; 2004 Tripartite Council for Labour and Training | Consultative committees of educational institutions for vocational training; branch-level committees; working groups and committees in planning, controlling and monitoring training; qualification committees | Informal                                               |                                                                   |
| <b>FR</b> | Interconfederal agreements                                                                                               | Employment Policy Council ( <i>Conseil d'orientation pour l'emploi</i> , COE)                                                                                                                                  |                                                        | Sectoral or occupational at national or regional level            |
| <b>HU</b> | Consultation qualification defined at sectoral level                                                                     | Committees and labour councils                                                                                                                                                                                 |                                                        |                                                                   |
| <b>IE</b> | Tripartite national concertation and steering group in Skillnets project                                                 | Irish National Training and Employment Authority ( <i>Foras Áiseanna Saothair</i> , FÁS) tripartite board plus including NGOs (representing education, social welfare and youth interests)                     |                                                        |                                                                   |
| <b>IT</b> | Consultation, concertation, sectoral bargaining                                                                          | Committee on qualifications                                                                                                                                                                                    | Consultation, bipartite bodies                         | Intersectoral at national level on basis of employer organisation |
| <b>LT</b> | Tripartite agreement                                                                                                     | Working groups for drafting/amending legislation, advisory body                                                                                                                                                |                                                        |                                                                   |

Table 3: *Social partner involvement in CVT policies* (cont'd)

|    | National level                                                                                                   | Tripartite bodies                                                                                                                                                                                                                                        | Local level                                                                                                                                    | Bilateral funds                    |
|----|------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| LU | Tripartite agreement                                                                                             | Economic and Social Council; consultative committee; board of National Institute for the Development of CVT ( <i>Institut National pour le Développement de la Formation Professionnelle Continue</i> , INFPC)                                           |                                                                                                                                                | Health and construction sectors    |
| LV | Consultation, do not participate in governance                                                                   |                                                                                                                                                                                                                                                          |                                                                                                                                                |                                    |
| MT | Bilateral agreements with public bodies                                                                          |                                                                                                                                                                                                                                                          |                                                                                                                                                |                                    |
| NL | Bipartite Labour Foundation                                                                                      | Social and Economic Council ( <i>Sociaal-Economische Raad</i> , SER) advisory role also on CVT                                                                                                                                                           |                                                                                                                                                | Sectoral                           |
| NO | Tripartite effort 2000-2003, now in competence development and vocational training                               | Advisory committees                                                                                                                                                                                                                                      | Regional and county training committees                                                                                                        | Envisaged but not financed         |
| PL |                                                                                                                  | Advisory board and Tripartite Commission for Social and Economic Affairs                                                                                                                                                                                 |                                                                                                                                                |                                    |
| PT | Obligatory consultation, tripartite agreements also at sectoral level in tourism (2004) and commerce (2005)      | Employment and Vocational Training Institute ( <i>Instituto do Emprego e Formação Profissional</i> , IEFP) also peripheral; advisory council; standing commission for social concertation                                                                | Regional and local consultative bodies; one regional project was a 2001–2004 agreement on specific VET needs in the Setúbal region near Lisbon |                                    |
| RO | Consultation                                                                                                     | National Employment Agency ( <i>Agencia Națională pentru Ocuparea Forței de Muncă</i> , ANOFM) and National Board for Adult Vocational Training ( <i>Consiliul Național de Formare Profesională a Adulților</i> , CNFPA); tripartite sectoral committees | To be developed                                                                                                                                | Construction sector at local level |
| SE | 2004 bilateral adjustment agreement offering blue-collar workers vocational training when cutbacks are announced |                                                                                                                                                                                                                                                          | Essential role, more extensive in large companies                                                                                              |                                    |
| SI |                                                                                                                  | Councils of experts of adult education and training                                                                                                                                                                                                      | Local Guidance and Counselling Centres for Adult Education coordinating stakeholders at local level                                            |                                    |
| SK | Involvement                                                                                                      | Economic and Social Council                                                                                                                                                                                                                              | Only in regional administrative offices                                                                                                        |                                    |
| UK | Joint project to produce best practice guidance                                                                  | Tripartite sector skills council, led by employers                                                                                                                                                                                                       | Regional (skills and development) councils                                                                                                     |                                    |

Source: *EIRO national reports*

### Social Partners' involvement in public institutions dealing with CVT

A proper design and functioning of CVT systems and training policies in general usually envisages one or more institutions holding the technical expertise regarding the various CVT-related issues. These expert bodies usually set the standards for qualifications, training activities and institutions, develop and experiment with new training devices by means of pilot projects, carry out research and monitoring activities, and provide technical support to the government and social partners. They also sometimes manage or finance training, especially in small countries, or carry out monitoring activities with regard to the labour market or quality of work.

The extent of these institutions varies greatly according to the country size and the division of tasks with the ministries of labour or welfare and of education, and with the national statistical offices. Only in Austria and Belgium are most of these activities incorporated within the agency managing public employment services (Table 4).

In Germany, the role played by the Federal Institute for Vocational Education and Training (Bundesinstitut für Berufsbildung, **BIBB**) in the domain of CVT does not seem as relevant as in other areas of training, such as apprenticeships and higher education. The same is true of the Netherlands' and Flemish Accreditation Organisation (Nederlands-Vlaamse Accreditatieorganisatie, **NVAO**). In Lithuania, Poland and Slovenia, stakeholders in CVT have established several advisory boards or councils of experts. However, these ad hoc bodies lack the important feature of being the depositary of public technical expertise.

These public bodies are usually established at national level, except in Belgium and in the UK – where such entities form part of the devolution process from the central state. No public institutions address CVT in the Czech Republic, Latvia and Sweden.

The degree of social partner involvement in the public institutions dealing with CVT varies across the countries. It can be divided into the following groups:

- no involvement of social partners – this is the case in Italy, the Netherlands and the UK, where public institutions play a role as technical experts for either the ministry of labour or of education, leaving wide scope in decision-making to the stakeholders in areas such as qualification standards and learning outcomes. Tripartite committees established by social dialogue fall outside their scope;
- partial involvement of social partners – this is the case in Hungary, Malta and Norway. In Malta, only employer organisations are involved in the Malta College for Arts, Science and Technology (**MCAST**), which is the public institution that sets qualification standards. However, Norway shows a clear separation between the Norwegian Institute for Adult Learning (**VOX**), which governs and monitors VET, and the Norwegian Council for Vocational Education and Training (Samarbeidsrådet for yrkesopplæring, **SRY**), a consultative body including social partners on nine subcommittees;
- full involvement of social partners – by incorporating them onto the board of such institutions. In Austria and Belgium, public employment services are the institutions governing CVT, while in Cyprus, Denmark, Germany, Luxembourg and Spain a single institution presides over CVT. Usually, countries with several institutions in this area distinguish between one or more agencies performing technical and monitoring tasks and one or more advisory councils. In Bulgaria, Denmark, Finland, Portugal and Romania, the social partners are incorporated both at governing level and in tripartite committees established within these institutions.

Table 4: *Social partner involvement in CVT public institutions*

|                            | No involvement             | Partial involvement | Full involvement               |
|----------------------------|----------------------------|---------------------|--------------------------------|
| No institutions            | CZ, LT, LV, PL, SE, SI, SK |                     |                                |
| Public employment services |                            |                     | AT, BE                         |
| Single institution         | IT, NL                     |                     | CY, DE, DK, ES, LU             |
| Multi-institution          | UK                         | HU, MT, NO          | BG, EE, EL, FI, FR, IE, PT, RO |

Source: *EIRO national reports*; **Eurydice** – the information network on education in Europe; **2007 national reports to the European Commission on progress towards the ‘Education and training 2010’ strategy**

### Social partner contributions to transparency and efficiency of CVT systems

CVT systems are regulated according to criteria that guide the training methodologies, as well as the assessment of both learners and training providers, and the setting of occupational standards. Such instruments constitute the backbone of any CVT system aiming to ensure the necessary its transparency and efficiency.

The Copenhagen Declaration of 2002 attributes a central role to cooperation with the social partners, especially in the development of competences and qualifications at sectoral level. According to the *Framework of actions for lifelong development of competencies and qualifications* (ETUC et al, 2002):

*the social partners believe that the lifelong development of competencies depends on the implementation of the following four priorities: identification and anticipation of competencies and qualifications needs; recognition and validation of competencies and qualifications; information, support and guidance; resources.*

The most widespread form of social partner involvement in CVT implementation is competence certification and validation of learning outcomes, especially at sectoral level. This type of involvement is due to the knowledge and experience of the social partners in their particular field of economic activity. The social partners are also involved in the accreditation of public and private training centres, and the certification of training outcomes. This is necessary to ensure the transparency of the actual qualification and of the individual worker’s learning process. Finally, social partners contribute to developing guidelines for CVT activities and monitoring their implementation.

Social partners are involved in setting rules for the accreditation of training suppliers in France, Greece, Ireland, Italy and the Netherlands; these are some of the countries where bilateral training funds are established. In Ireland, some training centres belonging to the **Skillnets** network, supported by the social partners, have been approved as registered centres for the administration and delivery of certified qualifications.

Another interesting example is the UK Sector Skills Councils (SSCs), grouped in the **Alliance of Sector Skills Councils**, which plays a vital role in promoting both CVT and social dialogue between the social partners and with government and devolved administration departments across the UK. Thus, the SSCs elicit and promote company-level commitment in CVT activities. Their main tasks are to develop national occupational standards (NOS) and define the competencies needed to carry out a job role effectively. These standards and competency specifications form the basis on which the content of national and sectoral vocational qualifications (NVQs/SVQs) is written for each economic sector. Corresponding training products and services in the sector are provided by a commercial team and the SSCs also develop new university courses, apprenticeship frameworks, and curriculum and vocational diplomas for young people aged 14–19 years. Each SSC is created on the basis of a sectoral agreement and is employer-led since they need strong support from the employers in their economic sector in order to operate and benefit from public funding.

Participation in the board of the national institutions holding technical expertise, including monitoring, is the most frequent form of social partner involvement. However, Norway abandoned this model after the 2001 Competence Reform in favour of a clear distinction between the institute managing training policies and carrying out monitoring, and social partner consultation for policy setting and implementation, such as with regard to qualification standards and curricula. Similarly, Finland integrates CVT monitoring with adult education surveys carried out by Statistics Finland (**Tilastokeskus**) in order to ensure an independent assessment.

Monitoring of CVT activities is performed in a variety of ways. It can be done either bilaterally at sectoral level by joint committees established by national collective agreements – as is the case in Belgium, France, Italy and Portugal – or in a tripartite way through advisory committees (Ireland, Finland, Lithuania, Slovenia).

Table 5: *Involvement of social partners in CVT regulations*

|           | Involvement in accreditation training supply (learning process)                                                                                                               | Involvement in qualification standards and learning outcomes                                                              | Involvement in monitoring                                                                  |
|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| <b>AT</b> |                                                                                                                                                                               | Yes                                                                                                                       | Yes                                                                                        |
| <b>BE</b> |                                                                                                                                                                               | Competence validation. Certification of learning outcomes at sectoral level. Regional PES implement certification systems | Yes (generic); some sectoral joint committees                                              |
| <b>BG</b> |                                                                                                                                                                               | NAVET (tripartite)                                                                                                        |                                                                                            |
| <b>CY</b> |                                                                                                                                                                               |                                                                                                                           |                                                                                            |
| <b>CZ</b> |                                                                                                                                                                               | Council on the verification and recognition of the results of further education                                           |                                                                                            |
| <b>DE</b> |                                                                                                                                                                               | Member of supervisory board on standards or guidelines                                                                    |                                                                                            |
| <b>DK</b> |                                                                                                                                                                               | AMU (tripartite)                                                                                                          | Tripartite committee                                                                       |
| <b>EE</b> |                                                                                                                                                                               | Standards for vocational qualifications systems                                                                           | AEC (tripartite)                                                                           |
| <b>EL</b> | Representation on executive board of the National Accreditation Centre for CVT                                                                                                | Currently at consultation stage                                                                                           |                                                                                            |
| <b>ES</b> |                                                                                                                                                                               | Tripartite Foundation for Training in Employment, design of training programmes at sectoral level                         | Tripartite Foundation for Training in Employment, joint committees at sectoral level       |
| <b>FI</b> |                                                                                                                                                                               | Joint committees in national qualification committees                                                                     | Working group, joint committees                                                            |
| <b>FR</b> | Accredited joint registered collection agencies ( <i>Organismes paritaires collecteurs agréés</i> , OPCA) provide accredited training collective agreements (insurance funds) | National commission of vocational certification and local-level committees. Envisaged in five collective agreements       | Envisaged in collective agreements (sectoral or company-level), often with joint committee |
| <b>HU</b> |                                                                                                                                                                               | National Qualification Register, with tripartite sectoral committees                                                      | National Vocational and Adult Training Council                                             |
| <b>IE</b> |                                                                                                                                                                               | Skillnets offers certified CVT, alongside FÁS                                                                             | Steering group within the 'Towards 2016' agreement                                         |
| <b>IT</b> | Ministry of Labour, Health and Social Policies, regions and social partner commitment in jointly revising the accreditation system.<br>Concertation at regional level         | CVT observatory for guideline setting and assessment of their implementation, and defining qualifications                 | Joint committee at sectoral level                                                          |

Table 5: *Involvement of social partners in CVT regulations* (cont'd)

|    | Involvement in accreditation training supply (learning process)                        | Involvement in qualification standards and learning outcomes                                                                                                                                                                                                                                                                                                                                                                                     | Involvement in monitoring                                |
|----|----------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|
| LT |                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Advisory body on VT and tripartite council (general)     |
| LU |                                                                                        | INFPC                                                                                                                                                                                                                                                                                                                                                                                                                                            | INFPC (to be implemented)                                |
| LV |                                                                                        | Working groups for professional standard education programmes and guidelines                                                                                                                                                                                                                                                                                                                                                                     |                                                          |
| MT |                                                                                        | Employer representation on boards of MCAST and Malta Professional and Vocational Qualifications Awards Council (MPVQAC)                                                                                                                                                                                                                                                                                                                          |                                                          |
| NL | 18 sectoral experts monitor and promote the quality of learning in vocational practice | Sectoral/regional partnerships on dual learning pathways and competence recognition. Sectoral experts co-responsible for the quality of the examinations. National qualification system under revision                                                                                                                                                                                                                                           | Labour inspectorate                                      |
| NO |                                                                                        | Developing tools for documentation and validation of non-formal and informal learning in Norway.<br><br>Setting guidelines and curricula at central and regional level through advisory committees                                                                                                                                                                                                                                               |                                                          |
| PL |                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                          |
| PT |                                                                                        | Tripartite agreement involving the National Adult Education and Training Agency ( <i>Agencia Nacional de Educação e Formação de Adultos</i> , ANEFA). Social partners are members of committees of certification at national level in the Standing Certification Commission ( <i>Comissão Permanente de Certificação</i> , CPC) and at sectoral level in the Specialised Technical Commissions ( <i>Comissões Técnicas Especializadas</i> , CTE) | Bipartite commission in four collective agreements       |
| RO |                                                                                        | Tripartite National Council for the Vocational Training of Adults with the support of sectoral committees.<br><br>Sectoral projects                                                                                                                                                                                                                                                                                                              | CNFPA evaluates quality assurance and sets standard      |
| SE |                                                                                        | Competence validation at local or regional level                                                                                                                                                                                                                                                                                                                                                                                                 |                                                          |
| SI |                                                                                        | Social partners involved in master craftsperson examinations and in proposing VET programmes.<br><br>Trade unions take part in evaluation of vocational education                                                                                                                                                                                                                                                                                | Council of Experts in vocational and technical education |
| SK |                                                                                        | Collective agreements only in some sectors                                                                                                                                                                                                                                                                                                                                                                                                       |                                                          |
| UK |                                                                                        | SSCs are tripartite, employer-led                                                                                                                                                                                                                                                                                                                                                                                                                |                                                          |

Note: No social partner involvement in the above CVT regulations in CY, PL.

Source: EIRO national reports

### Role of collective bargaining in promoting CVT

Collective bargaining at sectoral and at company level plays an important role in promoting CVT. The following issues are at stake, namely the:

- degree of centralisation or coordination of the whole CVT system;
- organising the actions carried out at each level;
- implementation measures in order to ensure that employers and employees benefit from CVT, which could exceed the national regulations;
- employee coverage by collective bargaining.

### *Levels and centralisation of collective bargaining on CVT*

The degree of centralisation of collective bargaining on CVT is strongly, although not exclusively, affected by the configuration of national systems of bargaining. Other issues such as the national legal framework, the competitive profile of the economic sectors leading the collective bargaining, and the balance with tripartite bargaining on CVT are other determining factors.

Countries can be grouped as follows according to bilateral CVT bargaining (Table 6):

- CVT bargaining almost absent – this is the case in Cyprus and Poland, although the former country reports some CVT provisions and activities in the banking sector;
- company-level dominated – either because the company level is the main bargaining level in the country (Hungary, Latvia, the UK) or CVT bargaining is in practice most prevalent at company level (Austria, Lithuania, Slovakia) notwithstanding national collective agreements;
- sectoral-level dominated – Germany;
- dominated by intersectoral national agreements – the social partners mainly regulate CVT issues at intersectoral level in Belgium, Finland, Ireland (through their involvement in Skillsnet), Luxembourg, Norway and Portugal, implemented both at national and company level or directly at the latter level;
- national collective agreements – these are widespread in Bulgaria, Denmark, Italy, the Netherlands and Spain; they also occur in Greece, Romania and Slovenia. The national agreements usually maintain the clauses agreed at intersectoral level, with some adaptation to harmonise sectoral specificities. The national agreements usually leave wide scope for company-level regulation, especially for consultation.

Sweden is an unusual case, with a lack of coordination among levels. The social partners in fact regularly sign adjustment agreements at national level, leading to occupational groups undertaking retraining in order to enhance their employability. Moreover, some national collective agreements, such as in the publishing and engineering industries, agree the extent to which training leave should be paid by the employers, while CVT is highly regulated in most large companies.

Among decentralised systems, collective bargaining on CVT has significantly increased in the UK due to a series of measures included in the governmental strategy aiming to encourage CVT and lifelong learning. These measures comprise the inclusion of CVT among the topics submitted for employee consultation, the establishment of a trade union learning representative with significant financial support, and the promotion of the SSCs to provide wide support to those companies investing in CVT. This initiative ensures coordination between national and regional strategies and the company-level needs of employers and employees.

In Germany, collective bargaining on CVT is a relatively recent issue, introduced by some sectoral agreements over the last five years, the most important of which are in the chemicals and metalworking industries and the public sector. A notable exception is the textiles industry, which established a sectoral fund in 1997. The Foundation for Further Training was set up in 1993 by the social partners in the chemicals, mining and energy sectors. Each year, metalworking employers and works councils identify training needs and the employers bear the costs when CVT is a consequence of company **restructuring**. Printing industry employers consult trade unions every year in order to identify the impact of technical progress and organisational change; they also bear the costs of training. Finally, in the metalworking and textiles industries, company-level joint committees can be established.

In Denmark, national-level sectoral bargaining sets the framework for company-level CVT policies. The social partners generally devolve the design of interventions to joint committees at sectoral and company level, known as ‘competence development committees’ in the public sector, or ‘vocational training committees’ in the private sector. For instance, the sectoral agreement for industry recommends that ‘a systematic education plan for the employees of the company is accomplished’, devolving to the ‘education committee’ at company level the decision about the specific CVT that is needed. Furthermore, company-level committees liaise with the local technical schools, which include social partners on their board.

Belgium and Norway are the reference countries for intersectoral-dominated CVT bargaining. In the latter country, the Norwegian Confederation of Trade Unions (Landsorganisasjonen i Norge, **LO**) and the Confederation of Norwegian Enterprise (Næringslivets Hovedorganisasjon, **NHO**) emphasise in their 1997 Basic Agreement ‘how highly important wider education is for the individual, for development of the enterprise, and for the community as a whole’ (see the Norwegian EIRO national report). National collective agreements at sectoral level introduce additional provisions for competence development or training, for instance stating that such issues should be discussed between the social partners at company level, and encouraging the company-level parties to identify competence gaps and to bargain and consult on CVT activities.

The interprofessional agreement signed every two years by the social partners is the cornerstone of Belgian collective bargaining on CVT. It regulates important issues such as paid educational leave, time credits or outplacement, and sets policy objectives in terms of the financial contribution from employers to the sectoral bilateral funds, the participation rate in training programmes and target groups deserving special attention, such as older workers – especially those who lose their jobs. However, the vocational training provisions of the collective agreement are formulated as objectives rather than as an obligation. Sectoral bargaining further articulates these issues according to the specificities of the various sectors in order to achieve the intersectoral goals: where sectoral agreements do not exist, the intersectoral one is applied. Finally, at company level, the employer and worker representatives negotiate an annual training plan. Moreover, extensive cooperation is ongoing with the regional public employment services.

Table 6: *Collective bargaining on CVT and training*

|           | Intersectoral                             | Sectoral                                                                | Company level                                          | Social partners as training providers | Coverage             |
|-----------|-------------------------------------------|-------------------------------------------------------------------------|--------------------------------------------------------|---------------------------------------|----------------------|
| <b>AT</b> |                                           | Less important but increase in educational leave                        | Regulated mostly at this level but no co-determination |                                       |                      |
| <b>BE</b> | Every two years on training setting goals | 123 joint committees at sectoral level                                  | Training plans                                         | Project participation                 | 100%; 80% with funds |
| <b>BG</b> |                                           | Joint committees (tripartite and bipartite), some collective agreements | Fairly widespread                                      | Less than 25%                         |                      |

Table 6: *Collective bargaining on CVT and training* (cont'd)

|           | Intersectoral                              | Sectoral                                                                                                                                           | Company level                                                                                            | Social partners as training providers                                                                                        | Coverage                                                                                                                                |
|-----------|--------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| <b>CY</b> |                                            | No link between bargaining and CVT, except in banking sector, which allows two training days a year                                                |                                                                                                          |                                                                                                                              |                                                                                                                                         |
| <b>CZ</b> |                                            | Collective agreement on paying training costs, in many cases along professional lines                                                              |                                                                                                          | Trade union advisory centres. Joint projects envisaging a unique CVT system                                                  | 62% of collective agreements                                                                                                            |
| <b>DE</b> |                                            | Several collective agreements                                                                                                                      | Joint committee in metalworking, works councils have consultation rights, co-determination               | Minor                                                                                                                        | About four million workers                                                                                                              |
| <b>DK</b> | Joint Consultative Committee (JCC)         | JCC framework agreements to be completed at company level                                                                                          | JCC, implementation of framework sectoral agreements                                                     | Yes                                                                                                                          | 85%                                                                                                                                     |
| <b>EE</b> |                                            | Collective agreement for road transport, sectoral professional councils                                                                            | Several agreements, mainly in transport and public sectors                                               | Professional associations                                                                                                    |                                                                                                                                         |
| <b>EL</b> | As part of the collective agreement        |                                                                                                                                                    |                                                                                                          | Minor offering                                                                                                               |                                                                                                                                         |
| <b>ES</b> | PES, tripartite foundation for training    | JCC                                                                                                                                                | Companies are obliged to inform worker representatives regarding training plans, but not to discuss them |                                                                                                                              | 40% of national collective agreements, covering 55% of employees. 80% of company-level agreements cover 66% of employees in this regard |
| <b>FI</b> | General intersectoral collective agreement | Implementation of intersectoral agreement                                                                                                          | Widespread consultation, discussion and joint monitoring regarding personnel plan and training targets   | Trade union-initiated 'Noste' programme for people who have not completed any education and/or training beyond a basic level |                                                                                                                                         |
| <b>FR</b> | Agreements implemented by law              |                                                                                                                                                    | Annual discussion of training plans                                                                      | OPCA                                                                                                                         |                                                                                                                                         |
| <b>HU</b> |                                            |                                                                                                                                                    | Review of enterprise training plan required by law                                                       |                                                                                                                              | 84% of company-level agreements                                                                                                         |
| <b>IE</b> | Skillnets project                          | Uncommon                                                                                                                                           | Only craft apprentices                                                                                   | Education and Training Services (ETS)                                                                                        |                                                                                                                                         |
| <b>IT</b> | As part of labour market issues            | Collective agreements, sectoral joint observatories. Sectoral bilateral bodies have networks in construction, tourism, commerce and crafts sectors | Training plans must be signed by trade unions. Also at sectoral local level. JCCs at company level       | Yes, financed training                                                                                                       | All with collective agreements                                                                                                          |

Table 6: *Collective bargaining on CVT and training* (cont'd)

|           | Intersectoral                                                                   | Sectoral                                                                                 | Company level                                                                          | Social partners as training providers                                      | Coverage                                                          |
|-----------|---------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|----------------------------------------------------------------------------|-------------------------------------------------------------------|
| <b>LT</b> |                                                                                 | Low level of activity                                                                    | Main level                                                                             | Yes                                                                        |                                                                   |
| <b>LU</b> | Intersectoral level                                                             | Collective agreements in construction, banking and garages devolve to company level      | Joint committees at company level, when devolved from sectoral collective agreement    |                                                                            |                                                                   |
| <b>LV</b> |                                                                                 |                                                                                          | Main level but details not disclosed                                                   |                                                                            |                                                                   |
| <b>MT</b> |                                                                                 | Low-skilled non-administrative collective agreements                                     | Widespread in all company agreements                                                   | Trade unions have training foundation                                      |                                                                   |
| <b>NL</b> | Labour foundation                                                               | Rights of employees regarding training are agreed between the social partners            | Mainly large companies                                                                 |                                                                            | 97%                                                               |
| <b>NO</b> | Basic Agreement between LO and NHO                                              | Both sectoral and occupational, adding to terms of intersectoral agreement               | Developed at company level, either unilaterally or jointly                             | 28% of companies                                                           | 100% of public employees and 50%–55% of workers in private sector |
| <b>PL</b> |                                                                                 | Low level of activity                                                                    | Low level of activity; employers can apply to local county authority for funding       |                                                                            |                                                                   |
| <b>PT</b> |                                                                                 | 2001 bilateral interconfederal agreement                                                 | Consultation rights for worker representatives                                         | Vocational Training Centres (tripartite)                                   | 90% of collective agreements                                      |
| <b>RO</b> | General intersectoral collective agreement                                      | Naval and aeronautic sectors set up two bipartite expert centres for vocational training | Employers with more than 20 employees bound to agree training plan; only 25% fulfil it | Bilateral in construction sector; only trade unions in harbour business    | 100% of employees                                                 |
| <b>SE</b> | 2004 adjustment agreement includes funding for vocational training if necessary | Sectoral-level guidelines                                                                | Main level in large companies (only 10%–15%)                                           |                                                                            |                                                                   |
| <b>SI</b> |                                                                                 | Services sector                                                                          |                                                                                        | Chambers of professions (employers)                                        | 96%                                                               |
| <b>SK</b> |                                                                                 | Yes                                                                                      | Main level. Employers should consult worker representatives                            | 10%–15%                                                                    |                                                                   |
| <b>UK</b> |                                                                                 |                                                                                          | Consultation rights bargaining only in 9% of workplaces.                               | Unionlearn helps trade unions to encourage lifelong learning among members | 9%, strong impact of Unionlearn and bargaining                    |

Source: *EIRO national reports*

### Local-level CVT bargaining

The extent and forms of company-level bargaining are strongly affected by the institutional design and scope allowed by the national-level setting. In Belgium, Finland and France, the company-level training plan, discussed with worker representatives, absorbs most of the regulatory action, while in Italy this does not occur regularly, although some

companies have joint committees on training policies. Several sectoral agreements in Germany introduce regular consultation at company level.

Company-level joint committees are recommended by national collective agreements in Denmark and act in close cooperation with local technical schools. Meanwhile, the UK trade union learning representatives supported by the Union Learning Fund (**ULF**), launched in 1998, finance trade unions' learning projects in an unusual way by encouraging CVT at company level according to workers' needs and also collective bargaining on this topic at company level.

Good practices at local level can be grouped by territorial and company levels. Among the former, training schools are established at county level in the construction industry in Italy and in Romania. Indeed, some economic sectors with high mobility and well-identified professional profiles tried to replicate the model of the Italian construction industry: the most notable examples are a bilateral fund in the textiles industrial district of the central city of Prato in the Tuscany region and the bipartite body for tourism in the northeastern city of Venice.

In general, countries with decentralised bargaining on CVT or a recently established CVT system seem to confer a wider role to company-level good practices. Among the key issues in this regard are an inclusive approach to older and less qualified employees, and the joint development of a CVT programme with worker representatives. Companies exemplifying the latter practice include: Bulgarian Posts PLC, the Bulgarian subsidiary of the Danish brewery Carlsberg – Carlsberg Bulgaria, the Dublin Port Company in Ireland, the UK subsidiary of the electronics and electrical manufacturer Siemens, the UK company VT Shipbuilding and the Romanian Harbour School of Constantia (Fundatia Școala Portuară din Constanța, FSPC). The latter case is an example of cooperation between intra-sectoral trade unions and employer organisations – in this instance, the harbours. Other vital issues in terms of good practice at company level are the use of CVT: in order to optimise overheads (Dublin Port Company); combined with paid leave (Carlsberg Bulgaria, a large Slovakian construction company); and by means of a strategic approach to increase competitiveness (Siemens UK, Dublin Port Company, Carlsberg Bulgaria).

### *Collective bargaining coverage*

The coverage of collective bargaining on training is reported in a heterogeneous way across the 28 countries studied. Some of the national correspondents refer to the employees concerned, while others consider the companies involved or refer to enterprises reporting CVT activities; some other correspondents cite national collective agreements. Overall, the coverage is strongly dependent on the national settings of the collective bargaining.

Countries with centralised or bipolar bargaining on CVT and training issues in general show high coverage rates, representing more than 50% of employees in general. Member States with only intersectoral bargaining, such as Greece and Romania, show the highest coverage rates (Table 7).

On the other hand, countries with mainly decentralised collective bargaining show rather low coverage rates, ranging from 9% of employees in the UK to less than 15% in Germany and Sweden. Nevertheless, CVT is a widespread issue in company-level bargaining in Hungary and covers almost 30% of workers (see the **Hungarian contribution** to the EIRO annual report **Industrial relations developments in Europe 2006**).

Table 7: *Collective bargaining coverage, by degree of centralisation*

|                      | High coverage               | Low coverage | Other criteria | Not applicable                     |
|----------------------|-----------------------------|--------------|----------------|------------------------------------|
| <b>Centralised</b>   | BE, CZ, EL*, SI             |              |                |                                    |
| <b>Bipolar</b>       | DK, ES, IT, NL, NO, PT, RO* | BG           |                | LU                                 |
| <b>Decentralised</b> |                             | DE, SE, UK   | HU             | AT, EE, FI, FR, IE, LT, LV, MT, SK |
| <b>Absent</b>        |                             |              |                | CY, PL                             |

Note: \* *Intersectoral collective bargaining.*

Source: *EIRO national reports*

### 3. Promoting CVT activities

Public authorities and social partners have two main levers in promoting CVT activities at micro level, that is, to both companies and to individual employees. The first is offering financial incentives, which could be done through public financing from national and/or European sources as well as tax incentives. In addition, employment contract-related incentives – such as opportunities for training leave – could encourage an individual to pursue the right to training.

#### Public financing and tax incentives

According to the 2004 follow up of the Copenhagen Declaration, an appropriate design of ‘tax and benefit systems’ as recommended by the Lisbon European Council, combined with the **European Social Fund** and European Regional Development Fund, should be used in order to support the development of VET. These instruments, together with national resources and bilateral funds, can encourage employers and employees to pursue CVT activities.

While public levers aim to lower the threshold for ‘waverers’ – companies uncertain whether to cooperate in promoting CVT, according to the terminology in Culpepper (2003) – the bilateral funds, financed by the company payroll, usually establish a reserve fund for each enterprise that contributes.

Tax deductions or lower taxation for companies is envisaged in 11 countries, in some cases by reducing payroll contributions, while in Austria, Denmark, Finland and Spain, certain forms of reimbursement or subsidies exist.

Germany offers a combination of tax deductions from company income, subsidised loans and a monthly allowance for enterprises which start a CVT scheme that leads to a publicly recognised certification; in 2007, the state offered a further individual grant of up to a maximum of €154 a year as cofinance to persons who do not exceed a certain income threshold. Finally, employees can deduct training expenditure in the Czech Republic and the Netherlands, thus putting them on an equal footing with employers, which is consistent with an ‘individual activation’ approach.

#### Role of European Social Fund

The European Social Fund (ESF) is a further lever in promoting CVT. Figures are available in just 10 Member States about expenditure through the ESF, although only five countries provide an estimate of its contribution to total training expenditure – ranging from 5% in Cyprus to 75% in Latvia (Table 8). A pivotal role is given to the ESF in Estonia, where employers’ CVT initiatives are supported only by European funding, whereas Bulgaria does not distinguish between CVT and other VET activities in its use of the ESF. In Malta, as in other NMS, the role of the ESF is rapidly growing, while in Romania CVT-related projects only started to draw on the ESF in 2008.

Among the 15 EU Member States before EU enlargement in 2004 (EU15), the proportion of CVT expenditure sourced through the ESF is particularly low in Austria (5.7%), while in Italy and Spain, this proportion stands at about 15%–20%.

However, as will be discussed below, the importance of the ESF does not seem to be related to its share of total CVT expenditure, since a variety of incentives exist – bilateral and/or public funds, tax deductibility – to encourage company ‘waverers’ to invest in training. This is particularly true for small and medium-sized enterprises (SMEs) as they have a weak formalised structure and are not used to the administrative burdens that the ESF requires. Rather, it appears that the ESF plays a vital role in two particular areas: the so-called ‘action systems’, especially in the NMS and in recently established CVT systems; and support for wider active labour market policy targets.

Several countries with recently established CVT systems devote ESF resources to setting up the necessary structures: this is the case in Hungary, Italy, Slovakia and Slovenia. Hungary has focused in particular on modernising the National Qualifications Register, which has improved links between initial VET and CVT by introducing module, competence-based qualifications.

ESF resources are concentrated on specific targets in the Netherlands: unemployed persons, people with partial disabilities, low-skilled workers, students and prisoners. Sweden uses the ESF to strengthen the position of employees and, in particular, unemployed people in the labour market. Estonia, Portugal and Slovenia channel most ESF resources towards unemployed persons and the most vulnerable groups in the labour market. These countries aim to raise the skills levels of workers who are at a high risk of unemployment due to the lack of training opportunities, including in the context of restructuring.

Table 8: *Financial incentives for CVT*

|    | Special funding                                                                                                                                               | Incentives                                                                 | ESF                                                                    |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|------------------------------------------------------------------------|
| AT |                                                                                                                                                               | Reimbursement of up to two thirds of expenses                              | 5.7% of active labour market policy expenditure by AMS                 |
| BE | Objective of 1.9% of wage bill to bilateral funds for workers’ training, plus 0.1% for target groups                                                          |                                                                            |                                                                        |
| BG |                                                                                                                                                               |                                                                            | €437 million to VET                                                    |
| CY | 0.5% of wage bill                                                                                                                                             |                                                                            | 5% of CVT expenditure                                                  |
| CZ |                                                                                                                                                               | Deductibility                                                              | Used but no data available                                             |
| DE |                                                                                                                                                               | Deductibility, monthly allowance, subsidised loan and grant for low income | Used but no data available                                             |
| DK | Main source from state, sectoral bilateral funds                                                                                                              | Employers’ Student Reimbursement                                           | Limited role                                                           |
| EE |                                                                                                                                                               | Deductibility for individuals, lower taxation for companies                | 2007–2013 CVT initiatives by employers supported only by ESF resources |
| EL | 0.45% to the Employment and Vocational Training Fund (Λογαριασμός για την Απασχόληση και την Επαγγελματική Κατάρτιση, LAEK) – an intersectoral bilateral fund |                                                                            | Mainly targeted at unemployed persons                                  |
| ES |                                                                                                                                                               | PES subsidies                                                              | 20% of CVT                                                             |
| FI | 90% of certificate-oriented training costs, 50% of in-company training                                                                                        | Refunds of direct costs of study loans for education                       | Not reported                                                           |
| FR | From 0.55% for micro-enterprises to 1.6% of wage bill for companies with 20 employees or more. Can be increased at company level. Public funds also available | Yes                                                                        | One of the available sources                                           |

Table 8: *Financial incentives for CVT* (cont'd)

|           | Special funding                                                                                                                                                              | Incentives                                                                                                                             | ESF                                                                                                                                                  |
|-----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>HU</b> | State pays 40% of costs; a 1.5% levy is applied to pay roll                                                                                                                  | Personal income tax deduction was available from 2003 to 2007                                                                          | Vulnerable groups, modernisation of National Qualifications Register                                                                                 |
| <b>IE</b> |                                                                                                                                                                              |                                                                                                                                        | €50 million                                                                                                                                          |
| <b>IT</b> | 0.3% of wage bill to bilateral and public funds                                                                                                                              | Deductibility                                                                                                                          | About 15% of total CVT expenditure                                                                                                                   |
| <b>LT</b> |                                                                                                                                                                              |                                                                                                                                        |                                                                                                                                                      |
| <b>LU</b> |                                                                                                                                                                              | Direct aid or tax reductions worth 10% of the amount invested                                                                          |                                                                                                                                                      |
| <b>LV</b> |                                                                                                                                                                              | Reduced payroll                                                                                                                        | Funding for national development programme on lifelong learning. 75% of projects for regional lifelong learning support systems                      |
| <b>MT</b> |                                                                                                                                                                              |                                                                                                                                        | Training for over 7,000 workers                                                                                                                      |
| <b>NL</b> |                                                                                                                                                                              | Employers can pay lower taxes and premiums for certain categories of workers engaged in VT. Employees can deduct costs from income tax | €100 million. Targeted groups include: unemployed persons, partially disabled people, low-skilled workers, students and prisoners                    |
| <b>NO</b> |                                                                                                                                                                              |                                                                                                                                        |                                                                                                                                                      |
| <b>PL</b> | Employee contributions of 0.25% of wage bill. Employers can apply to local government to cofinance retraining of employees at risk of redundancy                             |                                                                                                                                        | No mention                                                                                                                                           |
| <b>PT</b> |                                                                                                                                                                              | Indirect from payroll                                                                                                                  | About €100 million a year                                                                                                                            |
| <b>RO</b> |                                                                                                                                                                              | Deductibility for companies and self-employed persons                                                                                  | Cofinance project (first in 2008)                                                                                                                    |
| <b>SE</b> |                                                                                                                                                                              | Deductibility for employers                                                                                                            | 43,700 projects granted funding out of a total of 48,300 training projects. 30% of funding for employees; remainder for unemployed people            |
| <b>SI</b> | Chamber of Crafts and Small Businesses of Slovenia created training funds for the education of employees of independent entrepreneurs, based on a 1% contribution of payroll |                                                                                                                                        | 1,300 workers receiving training                                                                                                                     |
| <b>SK</b> |                                                                                                                                                                              |                                                                                                                                        | Substantial in recent years. Funded the establishment of the Centre for Vocational Training in 2004 and provided grants for hundreds of CVT projects |
| <b>UK</b> | According to various programmes in favour of particular actors or targets                                                                                                    |                                                                                                                                        |                                                                                                                                                      |

Note: No data available for LT, NO.

Source: EIRO national reports

### Role of national bilateral funds

Bipartite funds constitute a further tool aiming to foster CVT activities: they usually are promoted bilaterally by the social partners and are financed by companies with a proportion of their wage bill, ranging from 0.25% in Poland up to 2% in Belgium (Table 8). They are usually established at sectoral level, except in Cyprus, Greece and Spain, where such funds are intersectoral. In Cyprus and Spain, these funds are managed by a tripartite board (Cedefop, 2008). Belgium

and France have the most consolidated experience of bilateral funds, having established them respectively in 1958 and in the early 1970s.

Bilateral funds are established by law in terms of their scope and funding mechanisms in France and Italy, while in Belgium and Denmark they are agreed collectively. French bipartite funds can be established at sectoral or at professional level on a national or regional basis. The legal contribution rate for employers in vocational training development varies from 0.55% of the wage bill for companies with fewer than 10 employees, to 1.6% for companies with 20 or more employees; the monies are collected by joint registered collection agencies (Organismes paritaires collecteurs agréés, OPCA). Collective agreements can make provision for higher rates.

In Italy, the central employer organisations promote intersectoral bilateral funds with trade unions at national level: they have pooled together in establishing sectoral funds in the crafts sector and some services sectors (transport, commerce and financial intermediation). When employers do not join any fund, their contribution goes into a governmental fund for CVT, which plays a somewhat subsidiary role.

In Belgium, the social partners have organised a jointly managed sectoral training fund, with the aim of financing training that fits the demands of companies. They set the objective of an average expenditure of 1.9% of the wage bill on the training of workers and an additional 0.1% on the training of vulnerable groups. However, the current expenditure is lower, amounting to 1.2% of the wage bill, and the social partners cooperate with the public employment services in organising training programmes that fit the needs of the labour market.

The UK SSCs can also establish a levy, according to the sector skills agreement among the social partners (Foundation Degree Forward (FDF), 2007). The levy can be combined with public or other funds for training, such as the bilateral funds set up prior to the institution of the SSCs. This strategy has been adopted, for example, in the construction and engineering sectors.

CVT bargaining tends to be more dense in countries with bilateral funds, except Greece. In Italy and Spain, company-level bargaining is relatively less developed; however, most national collective agreements have introduced national-level joint committees in order to monitor the extent of CVT activities.

In general, the impact of bilateral funds seems to be wider than training networks jointly established by the social partners, as in the case of Portugal, or in parallel with public training agencies, as in Ireland, since these funds channel further financial resources directly to the companies. Their introduction in Denmark, which has one of the oldest CVT systems, introduces the principle of cofinancing the right to training and, implicitly, a joint responsibility of the employer and employee. This development follows the arguments of the 'Supiot Report' on the *Transformation of labour and labour law in Europe* (1998).

### Further mutual funds

The importance of bilateral funds, promoted by social partners at sectoral or intersectoral level, has been discussed above. Further funds aiming to encourage CVT are established in several NMS. They are promoted either unilaterally by representative organisations or by law.

In Cyprus, the activities of the tripartite national Human Resource Development Authority (Αρχή Ανάπτυξης Ανθρώπινου Δυναμικού, **AnAD**) are financed by a 0.5% levy on the wage bill, a model similar to the Spanish Tripartite Foundation for Training in Employment. Meanwhile, in Hungary, employers can spend up to one third (or 60% in the case of micro and small enterprises) of their so-called vocational training contribution. This is a form of tax levied on

enterprises amounting to 1.5% of total labour costs. The incentive for employers was combined with a personal income tax deduction opportunity for training participants from 2003 until 2007 (Table 8).

In Poland, according to the legislative Act regarding employment promotion and labour market institutions of 20 April 2004, an employer may establish a training fund for financing or cofinancing continuous education costs, financed by employees' contributions of not less than 0.25% of the wage bill. The employer may also apply to the local government for a refund – out of the Labour Fund – of the cost of retraining employees at risk of redundancy, covering up to 50% of the training costs. This can be done provided that the participating employees are retained in their newly acquired skill profile by their current employer for at least 12 months after completing the training activity. Finally, the Chamber of Crafts and Small Businesses of Slovenia (Obrtna-podjetniška Zbornica Slovenije, **OZS**), which represents micro-enterprises in the manufacturing, construction and services sectors, has created training funds for the education of employees of independent entrepreneurs, financed by 1% of their payroll.

### **Training leave**

Training leave can be considered as an institutional arrangement encouraging employees' participation in CVT, by their responding to personal training needs not necessarily related to the current job.

Some countries regulate leave for educational purposes differently than for training, while others regulate just one form of such leave. Collective agreements in Denmark and Spain, as well as the law in Finland, Luxembourg and Portugal, do not distinguish between these forms of leave. In Finland, for instance, an employee who has been in full-time employment with the same employer for at least one year is entitled to study leave for a maximum of two out of five years, by including both training and education under the heading of study leave. In the Netherlands, all collective agreements allow for educational leave and most also include leave for training purposes, while employees increasingly benefit from a contractual individual right to training: 22% of workers availed of this right in 2002, compared with 40% in 2006 (Table 9).

In Portugal, the labour code integrates the basic law for education and training organisation by stating that employers must ensure that, each year, 10% of workers with a permanent employment contract participate in a training activity. Furthermore, workers are entitled to a minimum of 35 hours of VET every year.

Norway and Sweden establish by law the right to educational leave to a similar extent as the Finnish legislation, while Bulgaria, the Czech Republic, Estonia, Hungary, Latvia, Romania, Slovenia and Slovakia have introduced the individual right to training by quantifying the total in several cases. For example, 10 days of leave are allowed for training purposes in Romania when the employer does not fulfil the obligatory training plan, while Estonia allows 14 days and Latvia up to 20 days. In Austria and Germany, several collective agreements envisage paid leave for educational purposes.

Belgium and France recently introduced a training credit, established either at company level or as an implementation of the right to training. In France, the 2003 intersectoral agreement, implemented by the 2004 law, introduced the 'individual right to training' (*Droit individuel à la formation, DIF*) by establishing a credit of 20 hours a year of training, which could be accumulated over six years. This credit is fully paid when the training is performed during working hours and is 50% paid when it is performed outside of working time. A 2007 intersectoral agreement has made this right transferable across companies in case of job mobility.

In Belgium, educational leave is organised by law according to the proposals of the social partners at interprofessional level. The 2001 interprofessional collective agreement allows employees to interrupt their career totally or partially by means of a time credit (*credit-temps/tijdkrediet*). Such employees are entitled to social benefits to compensate the loss of wages, as well as redundancy protection and the right to resume their career at the same terms and conditions as

before. Further provisions regarding the implementation of this right are set out in the national collective agreements (see, for instance, the 2005–2006 collective agreement for the insurance sector cited in the Belgian EIRO national report).

Table 9: *Institutional incentive for training leave*

|    | Training leave                                                                                                                     | Paid leave                                                                                                                                      | Unpaid leave                                                                         | CVT as individual right                                                                 |
|----|------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| AT |                                                                                                                                    | Usually paid by employer – one week of educational leave in collective agreements of oil, textiles, clothing and leather, and education sectors | Yes, public financial support                                                        | No explicit right                                                                       |
| BE | Time credit.<br>In insurance sector, total training credit days in company set according to number of employees multiplied by four | Educational leave, by law                                                                                                                       | Yes                                                                                  | No explicit right                                                                       |
| BG |                                                                                                                                    |                                                                                                                                                 |                                                                                      | By law                                                                                  |
| CY |                                                                                                                                    |                                                                                                                                                 |                                                                                      |                                                                                         |
| CZ |                                                                                                                                    |                                                                                                                                                 |                                                                                      | By law                                                                                  |
| DE | Several collective agreements set part or total cost of working time on employer                                                   |                                                                                                                                                 | Vouchers (restricted access since law reform in 2003)                                | Clauses in collective agreements refer to procedures                                    |
| DK | By collective bargaining                                                                                                           | Refunded by the state                                                                                                                           |                                                                                      |                                                                                         |
| EE |                                                                                                                                    | 14 days a year                                                                                                                                  |                                                                                      | Entitlement of 14 days                                                                  |
| EL |                                                                                                                                    |                                                                                                                                                 |                                                                                      |                                                                                         |
| ES | Widespread in national and local agreements                                                                                        | Envisaged in several agreements                                                                                                                 |                                                                                      | Royal Decree 395/2007 has extended the right: all workers are now eligible for training |
| FI |                                                                                                                                    | Employers pay salaries according to collective agreement but get a subsidy for workplace training                                               | No legal obligation on employer to pay wages to employee for duration of study leave | General right to study leave with salary-related grant subject to certain criteria      |
| FR |                                                                                                                                    | 50% paid when training is outside of working time; 100% when during working time                                                                |                                                                                      | 2003: 20 hours a year of paid training. 2008: transferable across employers             |
| HU |                                                                                                                                    | By law                                                                                                                                          |                                                                                      | By law                                                                                  |
| IE |                                                                                                                                    |                                                                                                                                                 |                                                                                      |                                                                                         |
| IT | Cofinanced with time account                                                                                                       | Collective agreements of chemicals, textiles, banking and public sectors allow for educational leave                                            | Financed with time account                                                           | Poor implementation                                                                     |
| LT |                                                                                                                                    | Implementation left by law to collective bargaining                                                                                             | Yes, working time arrangements                                                       |                                                                                         |
| LU | 80 days over the working life                                                                                                      |                                                                                                                                                 |                                                                                      | 80 days over the working life                                                           |
| LV |                                                                                                                                    | Up to 20 days of study leave                                                                                                                    | Yes                                                                                  | Specified by employment contract                                                        |

Table 9: *Institutional incentive for training leave* (cont'd)

|    | Training leave | Paid leave                                                                                                                                                                                                                                                                                                             | Unpaid leave                                                                 | CVT as individual right                                                                                                                                                                            |
|----|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| MT |                | Study leave in collective agreement when approved by employer, plus six days of paid leave for exams in company-level agreement; training sessions offered or approved by the company                                                                                                                                  | Yes                                                                          |                                                                                                                                                                                                    |
| NL |                | Educational leave always, if covered by collective agreement, training leave very often                                                                                                                                                                                                                                | Yes                                                                          | 40% of workers according to collective agreement, up from 22% in 2002. For example, the call centre sector obliges employers to offer their employees training for the so-called Basic Certificate |
| NO |                |                                                                                                                                                                                                                                                                                                                        |                                                                              | Adults have a statutory right to upper secondary education. Employees with three years of seniority (two years with the same employer) are entitled to full or partial leave for up to three years |
| PL |                | Entitled to salaried leave when assigned to an educational or training course by employer (1993 law)                                                                                                                                                                                                                   |                                                                              |                                                                                                                                                                                                    |
| PT |                |                                                                                                                                                                                                                                                                                                                        |                                                                              | 35 hours a year for permanent employees                                                                                                                                                            |
| RO |                | Employers are obliged to grant leave at their expense to all employees at least once every two years, if they employ 21 or more workers; the obligation is once every three years if the number of workers is up to 20 persons                                                                                         |                                                                              | 10 days of leave for vocational purposes when the employer fails to fulfil training plan                                                                                                           |
| SE |                | State financial support to employees in formal education aged up to 45 years. The employee has to study for at least three weeks and at least half time. Collective agreements in printing and media allow average of five days and that all employees are entitled to at least two days of CVT during its time period | Some collective agreements state that all CVT should be paid by the employer | Right to educational leave. Training as an individual right in some collective agreements                                                                                                          |
| SI |                | Yes                                                                                                                                                                                                                                                                                                                    |                                                                              | Yes, connected to working process needs, by law                                                                                                                                                    |
| SK |                | Not specified in collective agreements                                                                                                                                                                                                                                                                                 |                                                                              | Ensured by the Labour Code                                                                                                                                                                         |
| UK |                | Individual Learning Accounts                                                                                                                                                                                                                                                                                           |                                                                              | Only when required by profession                                                                                                                                                                   |

Note: No data for CY, EL, IE.  
Source: EIRO national reports

#### 4. Social partners' views on development of CVT systems

An overview of social partners' opinions on this topic should take into account the development of the CVT system, based on interviews carried out by the EIRO national correspondents. Several countries, in fact, report recently established CVT systems or that their establishment is still in progress – mainly in the NMS and southern EU Member States (Table 10). On the other hand, the northern European countries (except Sweden), as well as Belgium, Cyprus, France, Luxembourg, Malta and the Netherlands report long-established CVT systems. Finally, Austria, Germany and Sweden report highly structured qualification systems for adult education but poorly regulated CVT systems.

In countries where the CVT system was established only recently, the social partners agree in particular on the need to promote CVT both to improve human capital and to fill gaps in the labour force caused by emigration. Their proposals may differ, such as in Romania, where trade unions proposed subsidies to unemployed persons, while employers argued for the introduction of vouchers. The social partners share similar views in Spain and the UK, where the establishment or revision of CVT systems is recent. In Austria, the social partners presented in the autumn of 2007 a joint employment programme, aiming to replace the generalised system of apprenticeships with individualised qualification programmes for young and unemployed people, especially for older workers. The plans were expected to be largely adopted by the government in 2008.

In France, the social partners expressed their disapproval of a 2007 senate report on the CVT system. The report criticises the 'system's inability to fight inequality' and proposes to reform the system by individualising the right to training throughout the working life, making people responsible for themselves. The senate therefore recommends abolishing the employers' contribution to the training plan, transforming it into a joint decision-making scheme between employees and employers, similar to the individual right to training. While employer organisations claim that the proposal is 'a trap', trade unions fear that the suggestion of the senate would undermine the employers' obligation to provide training to their employees.

Austrian and German social partners share similar views when analysing the weaknesses of their CVT systems. They are calling for a central coordinating body responsible for all matters related to lifelong learning, a comprehensive database concerning all lifelong learning measures and their funding, transparency in financing and evaluating the learning, and quality assurance. In Austria, the social partners agreed on a joint reform proposal in order to overcome system shortcomings. Meanwhile, in Germany, the trade unions are seeking to establish at national level the right to training; this right should be implemented by suitable working time arrangements. However, according to the employer organisations, no such right should be granted and CVT should instead be promoted by means of loans, by establishing market-oriented monitoring of quality standards and by the certification of skills acquired through CVT schemes, without the intervention of public authorities.

The Belgian employers highlight the rigidity of their long-established CVT system, which does not allow, for instance, on-the-job training – thus implicitly raising the issue of non-formal learning. In Finland, trade unions complain that CVT is currently too focused on highly educated employees and they are calling for a more cohesive role. The social partners agree on the need for a deep conceptual revision of the lifelong learning systems and their importance for improving competitiveness. However, they tend to disagree over the crucial issue of who pays for the funding; this disparity prevented the implementation of bilateral funds in Norway. Elsewhere, Dutch employers call for an open system in the educational market by accrediting training courses by private providers, while trade unions would prefer a revision of the system through collective bargaining.

Some recently established CVT systems still leave some criticisms unresolved. Italian trade unions complain about the lack of coordination across regions, while in Bulgaria and Slovakia, trade unions report that employers have little propensity towards CVT.

In general, conflicting issues seem more likely to arise when the need for revising the established CVT requires all actors to take on new cost burdens in order to face new demands from knowledge-based competition. While trade unions seem more concerned about the risk of increasing inequality, they appear to be rather reluctant to agree that employees should cofinance the costs of training.

Table 10: *Social partners' views on CVT systems*

|                                            | Shared                     | Different focus | Conflicting  |
|--------------------------------------------|----------------------------|-----------------|--------------|
| <b>In progress or recently established</b> | CZ, EE, ES, IE, RO, SI, UK | IT              | BG, SK       |
| <b>Developed but not fully regulated</b>   | AT, SE                     | DE              |              |
| <b>Long-established</b>                    | CY, FR, MT, (PT)           | BE, LU, NL      | DK, FI, (NO) |

Notes: No data from HU and LV, and only from one side of industry in EL, LT and PL.

Source: *EIRO national reports*

## 5. Impact of social dialogue on CVT participation

The effect of social dialogue on CVT participation is a key issue, which has been considered in European and national research. The CVT surveys carried out in 1994, 1999 and 2005 by Eurostat, the Statistical Office of the European Communities, periodically investigate companies' involvement and workers' participation in CVT activities. In examining CVT participation, the survey takes into account formal and informal training. It also encompasses non-formal learning such as participation at seminars and trade fairs, on-the-job training and particular work organisation practices, such as job rotation.

Eurostat specifically addresses the impact of social dialogue; unfortunately, the question wording varies from one survey to another. The 1999 CVTS-2 referred to 'joint agreement with employees or their representatives' and in a subquestion to 'agreement between the social partners' (Question B7, see Annex 2). However, the 2005 CVTS-3 investigates only this latter aspect, excluding agreements between the employer and works councils at company level (Question D12). Question D13 then investigates the role of worker representatives in the various stages of CVT activity. Comparability is therefore limited to Question D12 in CVTS-3 and the sub-question of B7 in CVTS-2. Furthermore, the available data from both surveys in relation to social partner involvement refer mainly to companies; it should be noted that the data from CVTS-3 were still provisional at the time of writing.

### Higher participation with company agreement

The 1999 Eurostat survey shows higher employee participation in CVT across all economic sectors at EU15 level when the companies have a joint CVT agreement (Figure 1). The gap in participation rates in enterprises with and without such an agreement is wider in the 'mining, utilities, hotels and restaurants, transport and communication' group of sectors (24 percentage points) and is smaller in wholesale and retail trade (six percentage points).

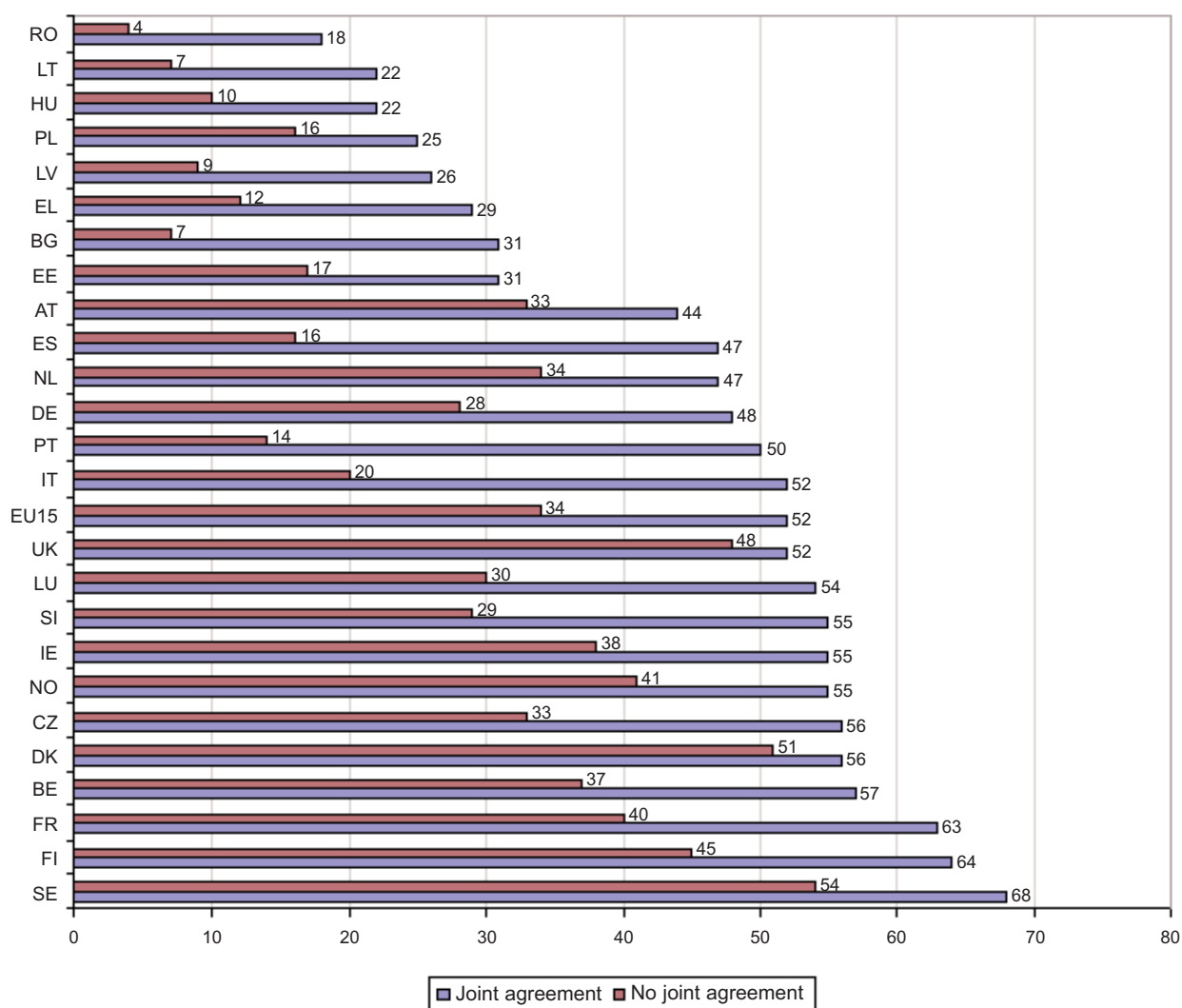
Figure 1: CVT participation in companies with and without joint CVT agreement, by sector, EU15, 1999 (%)



Source: Eurostat

The average totals for the EU15 in 1999 reveal that employee participation in CVT is 18 percentage points higher in companies with a joint CVT agreement, standing at 34% for companies without such an agreement and 52% for companies with such an agreement. At national level, the gap is narrow in the UK (four percentage points) and Denmark (five percentage points), where companies without a joint CVT agreement have far higher participation rates than is the case for the EU average (Figure 2). By way of contrast, the gap is widest in Portugal (36 percentage points), Italy (32 percentage points) and Spain (31 percentage points), where the CVT system is relatively recent.

Figure 2: CVT participation in companies with and without joint CVT agreement, by country, 1999 (%)



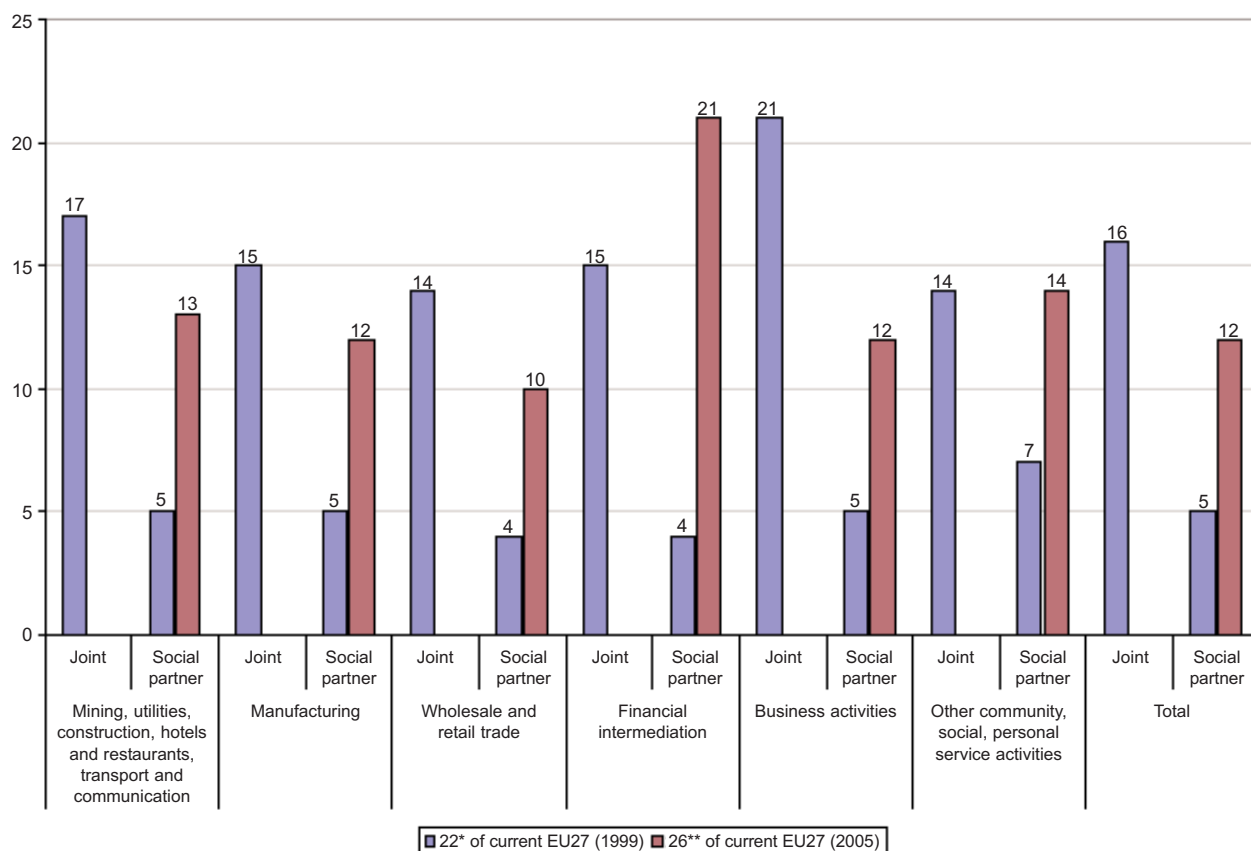
Source: Eurostat

### Increase in companies with social partner agreement on CVT

Looking at enterprises with an agreement on CVT, the Eurostat data show a strong increase in companies involved in such activities on the basis of a social partner agreement: from a total average of 5% in 1999 to 12% in 2005 (Figure 3). This increase is particularly notable in financial intermediation, rising from 4% to 21% of companies.

As explained, the 2005 survey did not refer to joint agreements in a comparable manner. However, the 1999 figures indicate that company-level agreements without the involvement of external social partners are a much more common feature of regulation on CVT, especially in the business activities and financial intermediation sectors. More specifically, in 1999, 5% of companies in the business activities sector had CVT agreements developed by the main social partners, while 21% had agreements based on joint discussions in the workplace. The corresponding proportions in financial intermediation were 4% and 15%.

Figure 3: Companies with CVT agreement, by sector, EU, 1999–2005 (%)

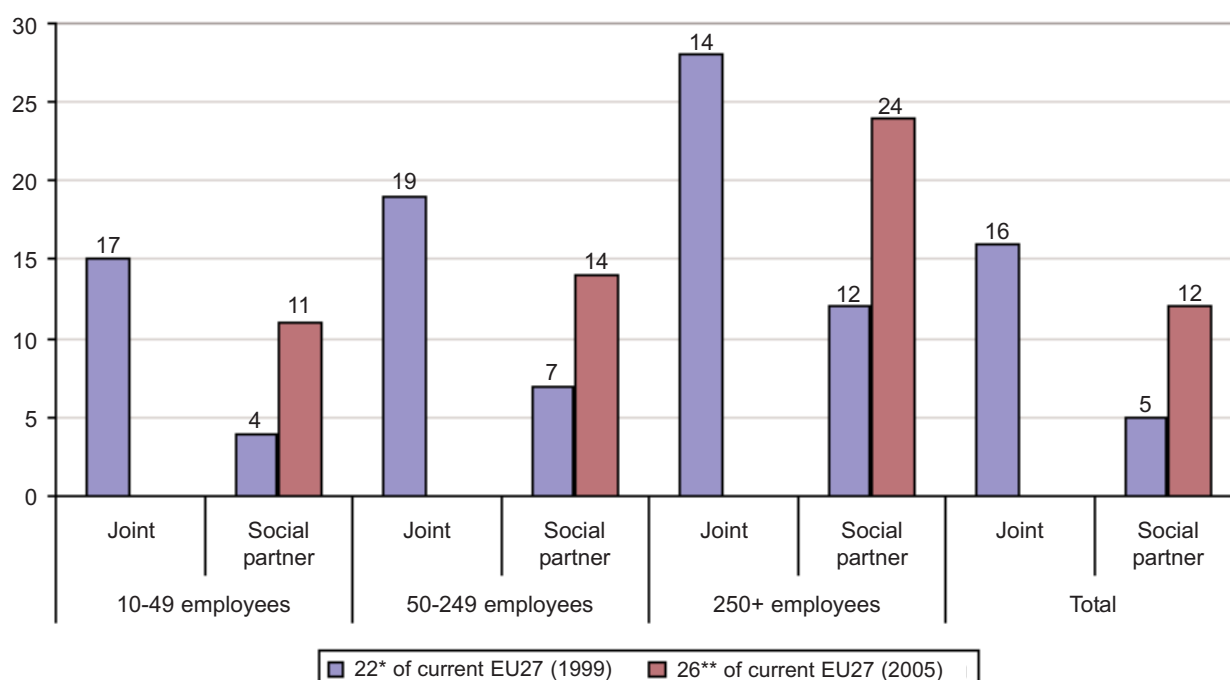


Notes: The 2005 survey did not cover 'joint agreements' in a comparable manner (see Annex 2). \* No data for CY, MT and SK in 1999; data for AT and BE excluded due to unreliability. \*\* No data for IE in 2005. Provisional data for 2005.  
Source: Eurostat

### Effect of company size

The proportion of CVT agreements strongly increases with company size, especially those concluded at a higher level of collective bargaining. CVT agreements in small enterprises, reached on the basis of external social partner influence, report the highest relative increase (from 4% to 11%), thus underlining the systemic impact of higher-level bargaining (Figure 4). On the other hand, the 1999 figures indicate that small companies show the lowest proportion of agreements signed by social partners, compared with larger enterprises.

Figure 4: *Enterprises with CVT agreement, by company size, EU, 1999–2005 (%)*



Notes: The 2005 survey did not cover 'joint agreements' in a comparable manner (see Annex 2). \* No data for CY, MT and SK in 1999; data for AT and BE excluded due to unreliability. \*\* No data for IE in 2005. Provisional data for 2005.

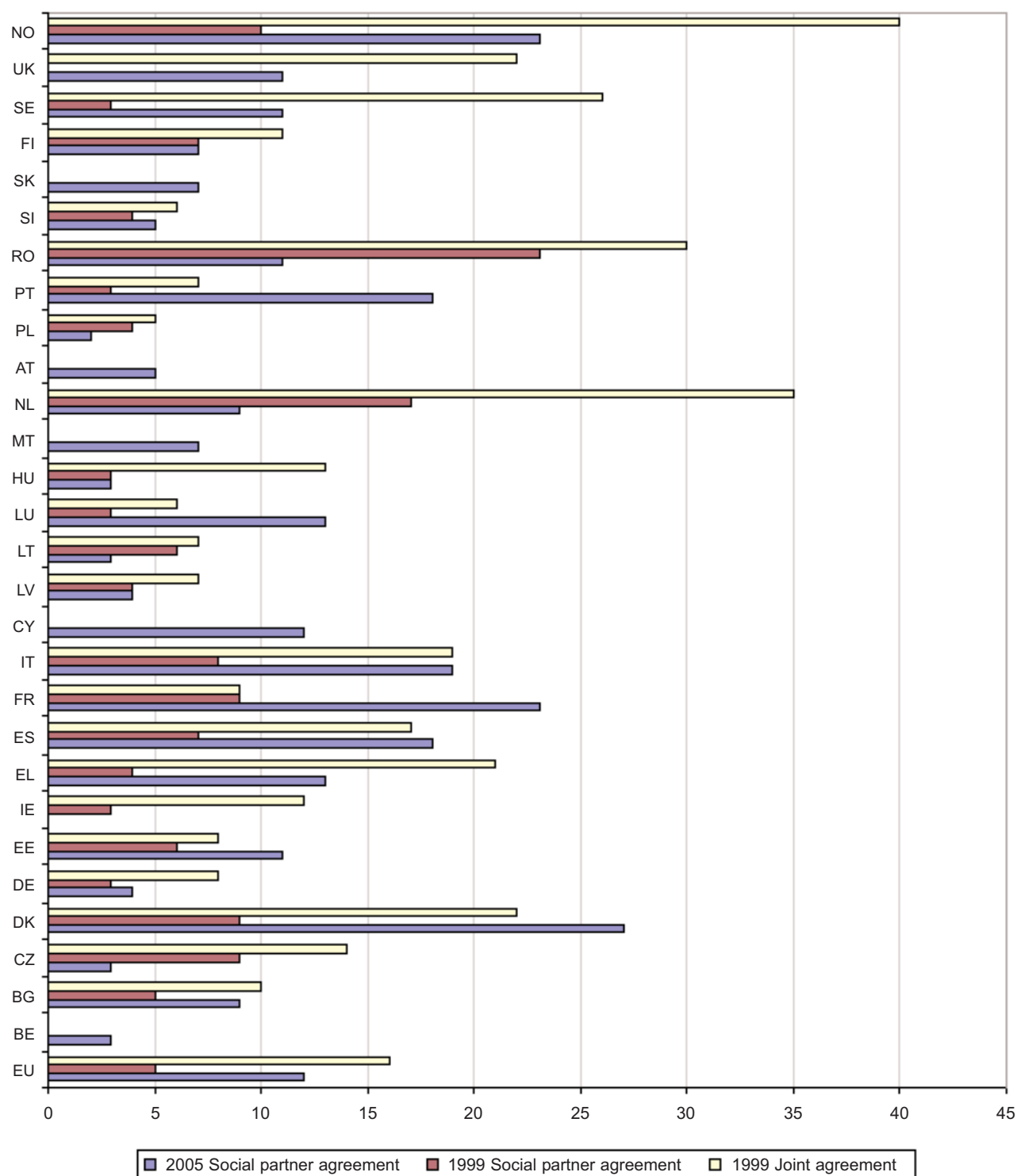
Source: Eurostat

### Influence of national context

Looking at companies' involvement in CVT at national level, Denmark (27%), France and Norway (both 23%) show the highest proportions of activity led by social partner agreement in 2005, while Poland (2%), Belgium and the Czech Republic (both 3%) reveal the lowest shares (Figure 5). The low proportion for Belgium contrasts with its national figures for total participation in CVT activities, comprising about 40% of workers and 63.5% of companies (see the Belgian EIRO national report for further details), and with its institutional design.

Several NMS and the Netherlands report a significant decline in the proportion of companies with a CVT agreement reached by the social partners – for example, in Romania from 23% in 1999 to 11% in 2005. This development could be partly due to the changes in the Eurostat questionnaire, especially after translation into different languages, and is also due to the national industrial relations settings.

Figure 5: Companies with CVT agreements, 1999–2005 (%)



Notes: The 2005 survey did not cover 'joint agreements' in a comparable manner (see Annex 2). No data for CY, MT and SK in 1999; data for AT and BE excluded due to unreliability. No data for IE in 2005. Provisional data for 2005.

Source: Eurostat

The EIRO national reports provide limited evidence at national level regarding the impact of social dialogue on CVT participation. In Ireland, indirect evidence emerges that employees in unionised workplaces benefit from more CVT activities. Furthermore, training is much more common in the public sector, which has higher unionisation levels. The Irish data show that 60% of workers in the public sector, compared with 45% in the private sector, participated in employer sponsored training (see the Irish EIRO national report).

In Germany and the UK, where employee coverage by collective bargaining is low (15% and 9% respectively), econometric studies report a positive impact of works councils on the incidence and coverage of CVT. Stuart and Robinson (2007) differentiate between workplaces that recognise trade unions, or where managers negotiate, consult or simply inform representatives on training issues. Trade union recognition combined with negotiations on training increases the probability of receiving training by 24%. In addition, workplaces with trade unions report longer periods of training than non-union companies. Moreover, Metcalf (2004) shows that unionisation not only increases women's access to training, but that the benefit of the trade union influence may be significantly greater for women than for men. Furthermore, the post-training wage was 21% higher for trade union members than the pre-training wage; however, the corresponding increase for non-union members was only 4%.

## **6. Conclusions**

Although largely incomplete, the results at EU and national levels are consistent in showing a positive impact of collective bargaining on CVT participation. However, it should be noted that the Copenhagen Process encouraged most EU Member States to introduce or revise their national CVT systems. It paid particular attention to increasing their transparency and provided incentives to foster both companies' and individuals' demands for CVT. The European education and training strategy also aimed to improve the efficiency of the CVT systems in order to keep them economically sustainable.

Reforms introduced after the launch of the Copenhagen Process share similar features. The involvement of the social partners has a strong impact on the reform process and its implementation. In France and Spain, the social partners have played a major role by concluding intersectoral agreements which are then implemented by national laws. Likewise, the Luxembourg 2007 law complemented the 2003 intersectoral agreement. In Finland and the UK, the social partners were widely consulted in the preparatory phase of the CVT reform. The 2003 Portuguese law reform was followed by the 2007 intersectoral agreement.

The increasing involvement of the social partners is confirmed by the Austrian social partner agreement to launch a tripartite concertation in order to develop a CVT system enjoying wider autonomy from the public employment services, thus devising a new governance. Meanwhile, the governments in Denmark and the Netherlands have promoted wide consultation towards an in-depth revision of the whole CVT system.

However, the turning point for a new approach to both CVT and lifelong learning was the Norwegian Competence Reform launched in the 1990s and realised by the 2001 law. It devised the issue of non-formal and informal competence recognition as the cornerstone for achieving greater transparency in qualifications. Moreover, it reorganised the CVT governance by clearly separating consultative bodies, which are responsible for qualification setting, and technical agencies, which manage the whole system and carry out monitoring.

Furthermore, bilateral funds became more prevalent across the EU as a response to the cofinancing issue among all stakeholders, introduced by the Copenhagen resolution. This institutional manoeuvre was introduced as an incentive tool in countries with poor traditions in CVT, such as Greece and Italy. In countries with longstanding CVT traditions, such as Denmark, the process aims to augment social partners' responsibility.

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## Annex 1: Establishment and revision of CVT systems

|    | Establishment of CVT system | Last revision | Expected revision |
|----|-----------------------------|---------------|-------------------|
| AT | 1968                        | 1994          | Yes, underway     |
| BE | 1958                        | 1985          |                   |
| BG | 1999–2001                   | 2006          |                   |
| CY | 1999                        |               |                   |
| CZ | 2006–2007*                  |               |                   |
| DE | 1969                        | 2005          |                   |
| DK | 1960                        | 2000          | Yes, underway     |
| EE | 1993                        |               |                   |
| EL | 1997–2006                   |               |                   |
| ES | 1993                        | 2007          |                   |
| FI | 1978                        | 2005          |                   |
| FR | 1971                        | 2008          |                   |
| HU | 2001                        |               |                   |
| IE | 1987                        |               |                   |
| IT | 1993–2003                   |               |                   |
| LT | 1992                        | 2008          |                   |
| LU | 1979                        | 2007          |                   |
| LV | 1999                        |               |                   |
| MT | 1990–2001                   |               |                   |
| NL | 1990s                       | 2001          | Yes, underway     |
| NO | 1976                        | 2001          |                   |
| PL | 1993–2006                   |               |                   |
| PT | 1991                        | 2003          |                   |
| RO | 2000                        |               |                   |
| SE | 1974                        |               |                   |
| SI | 1991–2002                   |               |                   |
| SK | 1997                        | 2001          |                   |
| UK | 1992                        | 2007          |                   |

Note: \* *Specific issues arising.*

Source: *EIRO national reports, Eurydice*

## Annex 2: Eurostat CVT surveys

Eurostat has conducted three surveys on CVT, in 1994, 1999 and 2005. The latter two surveys have included questions on collective bargaining in relation to CVT, as outlined under the following headings.

### CVTS-2 (1999)

Question B7. In 1999 was the enterprise a party to a joint agreement with employees or their representatives covering continuing vocational training for some or all categories of its workers? (Yes/No)

If YES, was this a formal agreement between the social partners? (Yes/No)

**CVTS-3 (2005)**

Question D12. Did any written national, sectoral or other agreements between the social partners (def. 40) explicitly include among its subjects CVT plans, policies or practices for the enterprise? (Yes/No/Don't know)

Question D13. Did the enterprise have a formal structure involving employee representatives (def. 41) such as a committee or works council? (Yes/No)

If YES, did the formal structure play a role in respect of the following elements of the enterprise's CVT management process?

- Objective and priority setting for CVT activities (Yes/No)
- Establishing the criteria for the selection of the target population who should participate in CVT (Yes/No)
- The subject matter of the CVT activity (Yes/No)
- The budgeting process related to CVT (Yes/No)
- The procedure for the selection of external CVT providers (Yes/No)
- Evaluation of the training outcomes (Yes/No)

**Annex 3: Abbreviations and country codes****List of abbreviations**

| Abbreviation   | Full name                                                                                                                                                                                                                    | Country  |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| <b>AEC</b>     | Adult Education Council                                                                                                                                                                                                      | Estonia  |
| <b>AFPA</b>    | National Association for Adult Training ( <i>Association nationale pour la formation professionnelle des adultes</i> )                                                                                                       | France   |
| <b>AMS</b>     | Employment services ( <i>Arbeitsmarktservice</i> )                                                                                                                                                                           | Austria  |
| <b>AMU</b>     | Adult vocational training ( <i>Arbejdsmarkedsuddannelser</i> )                                                                                                                                                               | Denmark  |
| <b>AnAD</b>    | Human Resource Development Authority ( <i>Αρχή Ανάπτυξης Ανθρώπινου Δυναμικού</i> )                                                                                                                                          | Cyprus   |
| <b>ANEFA</b>   | National Adult Education and Training Agency ( <i>Agencia Nacional de Educaçao e Formação de Adultos</i> )                                                                                                                   | Portugal |
| <b>ANOFM</b>   | National Employment Agency ( <i>Agenția Națională pentru Ocuparea Forței de Muncă</i> )                                                                                                                                      | Romania  |
| <b>BIBB</b>    | Federal Institute for Vocational Education and Training ( <i>Bundesinstitut für Berufsbildung</i> )                                                                                                                          | Germany  |
| <b>CEEP</b>    | European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest ( <i>Centre européen des entreprises à participation publique et des entreprises d'intérêt économique général</i> ) |          |
| <b>CNFPA</b>   | Adult Vocational Training ( <i>Consiliul Național de Formare Profesională a Adulților</i> )                                                                                                                                  | Romania  |
| <b>COE</b>     | Employment Policy Council ( <i>Conseil d'orientation pour l'emploi</i> )                                                                                                                                                     | France   |
| <b>CPC</b>     | Standing Certification Commission ( <i>Comissão Permanente de Certificação</i> )                                                                                                                                             | Portugal |
| <b>CTE</b>     | Specialised Technical Commissions ( <i>Comissões Técnicas Especializadas</i> )                                                                                                                                               | Portugal |
| <b>Cedefop</b> | European Centre for the Development of Vocational Training                                                                                                                                                                   |          |
| <b>CVT</b>     | Continuing vocational training                                                                                                                                                                                               |          |
| <b>DIF</b>     | Individual right to training ( <i>Droit individuel à la formation</i> )                                                                                                                                                      | France   |
| <b>EIRO</b>    | European Industrial Relations Observatory                                                                                                                                                                                    |          |
| <b>ESF</b>     | European Social Fund                                                                                                                                                                                                         |          |

List of abbreviations (cont'd)

| Abbreviation | Full name                                                                                                                                           | Country     |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| ETS          | Education and Training Services                                                                                                                     | Ireland     |
| ETUC         | European Trade Union Confederation                                                                                                                  |             |
| FÁS          | Irish National Training and Employment Authority ( <i>Foras Áiseanna Saothair</i> )                                                                 | Ireland     |
| FSPC         | Romanian Harbour School of Constantia ( <i>Fundatia Școala Portuară din Constanța</i> )                                                             | Romania     |
| IEFP         | Employment and Vocational Training Institute ( <i>Instituto do Emprego e Formação Profissional</i> )                                                | Portugal    |
| INFPC        | National Institute for the Development of CVT (Institut National pour le Développement de la Formation Professionnelle Continue)                    | France      |
| JCC          | Joint Cooperation Committee                                                                                                                         |             |
| LAEK         | Employment and Vocational Training Fund ( <i>Λογαριασμός για την Απασχόληση και την Επαγγελματική Κατάρτιση</i> )                                   | Greece      |
| LO           | Norwegian Confederation of Trade Unions ( <i>Landsorganisasjonen i Norge</i> )                                                                      | Norway      |
| MCAST        | Malta College for Arts, Science and Technology                                                                                                      | Malta       |
| MPVQAC       | Malta Professional and Vocational Qualifications Awards Council                                                                                     | Malta       |
| NAVET        | National Agency for Vocational Education and Training                                                                                               | Bulgaria    |
| NCVQ         | National Advisory Council for Vocational Qualifications                                                                                             | Bulgaria    |
| NGO          | Non-governmental organisation                                                                                                                       |             |
| NHO          | Confederation of Norwegian Enterprise ( <i>Næringslivets Hovedorganisasjon</i> )                                                                    | Norway      |
| NOS          | National occupational standards                                                                                                                     | UK          |
| NVAO         | Netherlands' and Flemish Accreditation Organisation (Nederlands-Vlaamse Accreditatieorganisatie)                                                    | Netherlands |
| NVQ          | National vocational qualification                                                                                                                   | UK          |
| OECD         | Organisation for Economic Co-operation and Development                                                                                              |             |
| OPCA         | Joint registered collection agencies ( <i>Organismes paritaires collecteurs agréés</i> )                                                            | France      |
| OZS          | Chamber of Crafts and Small Businesses of Slovenia (Obrtna-podjetniška Zbornica Slovenije)                                                          | Slovenia    |
| PES          | Public employment service                                                                                                                           |             |
| SER          | Social and Economic Council ( <i>Sociaal-Economische Raad</i> )                                                                                     | Netherlands |
| SMEs         | Small and medium-sized enterprises                                                                                                                  |             |
| SRY          | Norwegian Council for Vocational Education and Training ( <i>Samarbeidsrådet for yrkesopplæring</i> )                                               | Norway      |
| SSC          | Sector Skills Council                                                                                                                               | UK          |
| SVQ          | Sectoral vocational qualifications                                                                                                                  | UK          |
| UEAPME       | European Association of Craft, Small and Medium-sized Enterprises ( <i>Union européenne de l'artisanat et des petites et moyennes entreprises</i> ) |             |
| ULF          | Union Learning Fund                                                                                                                                 | UK          |
| VET          | Vocational education and training                                                                                                                   |             |

## Country codes

| Code      | Country        | Code      | Country | Code      | Country     | Code      | Country        |
|-----------|----------------|-----------|---------|-----------|-------------|-----------|----------------|
| <b>AT</b> | Austria        | <b>EE</b> | Estonia | <b>IT</b> | Italy       | <b>PL</b> | Poland         |
| <b>BE</b> | Belgium        | <b>EL</b> | Greece  | <b>LT</b> | Lithuania   | <b>PT</b> | Portugal       |
| <b>BG</b> | Bulgaria       | <b>ES</b> | Spain   | <b>LU</b> | Luxembourg  | <b>RO</b> | Romania        |
| <b>CY</b> | Cyprus         | <b>FI</b> | Finland | <b>LV</b> | Latvia      | <b>SE</b> | Sweden         |
| <b>CZ</b> | Czech Republic | <b>FR</b> | France  | <b>MT</b> | Malta       | <b>SI</b> | Slovenia       |
| <b>DE</b> | Germany        | <b>HU</b> | Hungary | <b>NL</b> | Netherlands | <b>SK</b> | Slovakia       |
| <b>DK</b> | Denmark        | <b>IE</b> | Ireland | <b>NO</b> | Norway      | <b>UK</b> | United Kingdom |

## Country groups

|             |                                                                                                                                                                                                                      |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>EU15</b> | 15 EU Member States prior to enlargement in 2004 (Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, the Netherlands, Portugal, Spain, Sweden and the United Kingdom)          |
| <b>NMS</b>  | 12 New Member States, 10 of which joined the EU in 2004 (Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia) and the remaining two in 2007 (Bulgaria and Romania) |
| <b>EU27</b> | 27 EU Member States                                                                                                                                                                                                  |

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