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ABSTRACT

This document is composed of European synthesis reports on retail trade, the agro-food sector, and the motor vehicle sales and repair sector. They are based on the most important findings of the European report and the 12 national reports for each sector. Section 1, "Retail Sector," deals in part 1 with the structure of retailing in the different countries, observed trends, and future prospects, and analyzes employment, skills, and labor force issues. Part 2 summarizes the findings concerning continuing training. It emphasizes the importance of training and the promotion of a training culture. Section 2, "Motor Vehicle Repair and Sales Sector," suggests in part 1 that the motor vehicle sector is the key sector for integration in Europe. Part 2 describes the repair shop structure: authorized dealers, independent repair shops, and mega-dealers. Part 3 focuses on social conditions, including remuneration, working hours, and collective agreements. Parts 4-5 discuss employment and recruitment conditions and staff structure. Part 6 describes the progress from repair shops to quality service points with a focus on continuing vocational training and its costs as an investment in high quality service. Section 3, "Food and Beverages Sector," describes the industry, market, producers, employment, training, and the future and discusses such general trends as development in the "human resources" issue, transformation of the work organization, and organization of training and the public targeted. The organizations that carried out the sectoral surveys are listed. (YLB)

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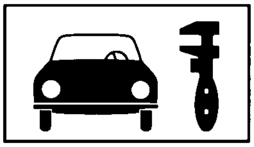
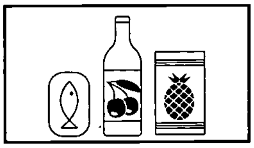
SHORT SUMMARY
EUROPEAN REPORTS

RETAIL SECTOR

MOTOR VEHICLE REPAIR AND SALES SECTOR



FOOD AND BEVERAGES SECTOR



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TASK FORCE – Human Ressources, Education, Training, Youth.

SHORT SUMMARY EUROPEAN REPORTS ON

RETAIL SECTOR

MOTOR VEHICLE REPAIR AND SALES SECTOR

FOOD AND BEVERAGES SECTOR

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CONTENTS

INTRODUCTION

FORCE sectoral survey on in-company training plans

General context

This survey is part of the FORCE Community programme (1991–1994) which is an action programme for developing continuing vocational training in Europe. The main target groups for the programme are firms and social partners in addition to training bodies, public authorities and bodies specializing in the field.

FORCE provides support for implementing the following transnational activities in the field of continuing vocational training:

- an exchange programme;
- pilot projects on design and formulation of the make up, methodologies and common contents of courses;
- projects involved with forecasting qualification and training needs at company level;
- a Community network;
- sectoral surveys on in-company training plans;
- a statistical survey on continuing vocational training;
- analyses of joint bargaining policies;

The sectoral surveys

Three sectoral surveys were launched in the first two years of the programme: one in the retail sector, the second in the food and beverage industries and the third one in the car retail and repair industry. A fourth survey on road transport will be launched at the end of the year.

The sectors were chosen by members of the FORCE committee (Member State government representatives and six representatives of employers and trade unions) on the basis of a reference table formulated by TFHR, showing the importance of these sectors in relation to employment, their contribution to GNP, the presence of SMEs, the effects of the Single Market.

In line with the FORCE Vademecum and the decisions taken by TFHR and CEDEFOP, the latter ensures methodological and technical coordination of the surveys, publication and dissemination on electronic media of the studies as well as the survey follow-up.

In brief, the surveys focused on the following topics:

- the ways in which continuing vocational training plans are formulated at company level,
- analysis of cost/benefit of continuing vocational training at company level,
- agreement and practice at company and collective bargaining level,
- inter-company agreements,
- agreements between companies and public bodies and
- the techniques applied to developing continuing vocational training and improving access for poorly qualified workers, those who work part-time or whose position is jeopardized.

National surveys were carried out for each sector. They examined the national sectoral context, contain company case studies and a third part draws conclusions on the special features, trends, problems, challenges and proposals emanating from a comparative analysis of the first two parts.

A European report which adopted the same approach was drawn up on the basis of the twelve national reports.

The current document is made up of a European synthesis report on retail trade, the agro-food sector and the motor vehicle sales and repair sector.

The synthesis reports have been drawn up by the central research teams and are based on the most important findings of the European report and the twelve national reports for each sector.

The report also contains a list of the researchers who were involved on national level as well as the names of the central research teams. The latter also had the task of drawing up the reports for their own countries.

Readers interested in obtaining a copy of the national report in the original language are asked to contact the research centres directly. Through CEDEFOP or the sales offices of EC publications in all Member States they can order the national reports in English only or the three European reports in the nine Community languages.

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RETAIL SECTOR

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Wilfried Kruse	**(SFS)**

This report is the result of the first sectoral study of the FORCE programme, which aims at the identification and analysis of some of the most interesting and significant experiences of continuing training conducted by European companies. The sector covered is the retail trade[1].

The study was conducted in 1991/92 by 13 national research institutions and coordinated by an international team[2]. It was based essentially on 55 case studies of a variety of training experiences observed in the 12 EEC countries. The case studies were selected, after a consultation with social partners at the national level, with a view to identify some of the most meaningful experiences, but also to take into account the diversity of forms of trade and of size of enterprises. However, considering the small number of observations, they are not supposed to be statistically representative.

In order to better understand the value and the meaning of the case studies, it was deemed necessary to consider them against the background of the national contexts, i.e. of the situation and evolution of the retail trade sector. The first part of the report deals therefore with the structure of retailing in the different countries, the observed trends and future prospects; it includes an analysis of employment, skills and labour force issues.

The second part summarizes the findings of the case studies concerning more specifically continuing training. The conclusion is based on both the overview of the sector and the analysis of case studies. Putting them together underlines the difference between some of the more advanced experiences and the average situation and suggests possible future directions.

The retail sector: present situation, trends and prospects

An analysis of country reports and of the documentation available on the modern development of retail trade suggests that it has roughly followed four stages:

- stage on corresponds to the emergence of the department store (in the late XIXth century);
- stage two can be identified with the development of multiples or chainstores and of cooperatives (around the turn of this century);
- stage three corresponds to the fast expansion of self-service stores (supermarkets and hypermarkets) selling at low prices and usually located in suburban areas. It was initiated in the 50s in Europe and is still going on in many countries;
- stage four can be seen as a time of diversification of structures, of products and of commercial strategies (with more specialization by products and segments of customers and a new emphasis on quality and on service). It is emerging today.

In relation to a variety of geographic, economic, cultural and institutional factors, European countries are in a different position today with regard to these stages: some of them are just entering stage three, while others already belong to stage four. In any case, each country maintains its specificity, but this suggests an overall trend which has important implications for this report: stage three has been usually associated with concentration and a reduction of the number of outlets, going together with increased productivity. It usually had negative effects on employment and on the skill structure. Generally speaking, the occupational structure in the retail sector and therefore the kind of training needs depend heavily upon the predominant forms of commerce.

This being said, all EEC countries are likely to be affected in the future by the same factors: an aging population, more diversified and demanding customers, increased competition and internationalization (in relation to the emergence of the single market) and the more widespread use of information technologies. How internal organizations will be adapted to meet these changes is largely left to the policies adopted by retail companies.

Employment and the labour force

European countries as a whole have recorded during the last decades a slow growth of employment in retail trade despite the productivity gains. It has concerned mostly the non-food business, as a result of a growing consumption and of the persistence of a large number of small shops. The extension of part-time work – which has reached a peak in some countries – has also been a factor of job creation, while concentration has entailed a substantial reduction of the number of independent workers.

Despite the variety of national conditions, EEC countries share a number of other well-known characteristics of retail employment. They include: the large proportion of women and of youth in the labour force, a high rate of turnover (at least in the majority of countries and with interesting exceptions in some of the case studies)

1 With the exception of motor vehicles and petrol filling stations.

2 Composed of representatives from institutions belonging to Euronet Work and Education (CIREM, Barcelona, ITS, Nimegen, SFS, Dortmund) and of CEREQ (Marseilles, Paris).

and a frequency of seasonal jobs and temporary contracts. Information on the occupational structure is inadequate, but the majority of jobs are usually considered as low-skilled and the level of salaries is lower than the average in the economy.

These features are likely to be affected by the structural, economic and technological changes mentioned above. Part of the simple and repetitive tasks may be automated or become redundant. Competition requires a more efficient management. The new emphasis on quality and service would normally require a more competent and more motivated staff. In other words, a shift towards stage four would mean a trend towards upgraded skills and more emphasis on the quality of labour.

Training and recruitment

The variety of education and training systems in Europe is well-known. But the report underlines that, with the exception of managers and of countries like Germany and Denmark where the dual systems of apprenticeship provides a good proportion of well-trained staff, little attention is usually paid to the educational qualifications of the workers recruited by retail companies. They are more concerned with the personality of the candidates that they select. The educational attainment of the workforce is comparatively low in most cases and in many countries it seems that the educational potential of the employees is not used.

The polarization of skills (small number of intermediate jobs) has been observed more particularly with large self-service companies of the food sector and may be associated with stage three. It implies that, as a whole, there are limited opportunities for promotion and career prospects. Women are particularly affected, as they fill most of the part-time jobs and are still subject to a traditional image of their career and of their role in the family.

The analysis of case studies has often confirmed and sometimes qualified these general observations, as will appear from a summary of the second part of the report, which deals more specifically with continuing training.

Business strategies and training objectives

Case studies have indeed confirmed the emergence of a new stage. In a number of firms, it could be defined as a post-self-service era, combining as far as possible the advantages of self-service (for the customer and the firm) and of personal service (for the customer). This has clear implications for training, the function of which is quite different according to the concept of selling and to the product sold.

In a number of retail firms surveyed, the business strategy had recently changed, either towards a higher quality of product and service, or towards different groups of customers, or towards creating a new image. As a rule, this has gone together with a new emphasis on the education and training of the staff, especially of shop assistants. This training includes together an appropriate knowledge of the products and the attitudes and behaviour which are consistent with the image that the company would like to promote.

Generally speaking, it could be said that more advanced firms and associations have reached a stage of fuller integration of training as an integrated part of their strategies and take a more global view of human resources development.

This explains why in many cases, a major training objective has been the adjustment to the new commercial policies and the promotion of the new image of the company. But this is a recent development and it should not hide the fact that, up to now, the priority has been given to the training of newly recruited employees and more particularly of potential managers.

Planning and organization of training

Approximately half of the companies surveyed reported that training needs and objectives were translated in terms of a plan. Training needs are assessed in a wide variety of ways, especially with regard to the degree of participation. In many instances, it is very limited and needs are assessed essentially by management. A central department may simply collect the suggestions made by managers at the local level. It may conduct a specific study throughout the company. A task force may be set up with representatives from the different units.

There are also instances of a more systematic approach, with study groups set up in different areas, who have to ensure that training needs are consistent with the goals of the company plan and that the training content is well suited to the operatives' needs. Identification of needs may go together with the formalization of procedures and of practices and with the formulation and updating of job descriptions. This process may involve a number of specialists and of supervisors from the stores. In other instances, training needs are assessed in relation to annual individual interviews with all staff members. In others, needs are assessed in cooperation with individual consultants, in connection with a global review of personnel management.

The new emphasis on training necessarily requires a new organization. It is worth underlining that a number of the firms surveyed had no training organization at all until recently, when new measures were taken to set up training departments and training centres, to define plans and objectives and to develop curricula. The survey shows that in 70% of the cases reviewed there were thorough organizational changes during the last seven years, many of them during the last two years. 12% of the companies had no training department in 1985.

A significant and widespread trend concerns the tendency to internalize training, which is now the responsibility of the company itself, rather than of outside firms or training centres. This is consistent with the will to relate training with the company's strategy and with the image that it wants to promote. One aspect of internalization is the creation of internal training institutes or universities offering a range of programmes to the staff of the company (or of the network of small shops). Another one is the new role assigned to managers and supervisors in the delivery of training: a role which requires an appropriate training and which may be conflicting with their other duties.

Internalization may well go together with a fair amount of decentralization of training responsibilities at the regional or store level, where there may be a training supervisor. At the local level, training needs are identified and the delivery is planned and implemented, while the central level is responsible for the preparation of contents and of teaching materials. With the delegation of authority for training to the local managers, there may however be some conflicts of priority with more short-term economic objectives.

The participation of trade unions or of employees' representatives in the planning of training and in the control of training expenditure is the object of legal provisions in several countries. They obviously play a more active role in the area of initial training, particularly when there is no specific training for retailing; there are instances of joint initiatives by social partners to create or improve training programmes.

With regard to continuing training, the situation looks somewhat different: although interest for the subject seems to be constantly growing and it is, until now, a less conflicting area, personnel representatives are usually not directly involved (at least at the outlet level) in the planning and programming. There is only one instance of a systematic participation of workers' representatives in this preparation.

Target groups and access to training

Although their relative share is constantly decreasing, independent workers still represent 20 to 30% of employment in retail trade (80% in Greece). Nevertheless, they have been traditionally left out of training activities. But this is beginning to change, particularly when they belong to voluntary chains: in this case, the training of owners/members has become one of the strategic, key questions for the future. Training is seen as an important factor of group cohesion. It may be a means to achieve more homogeneity and efficiency, through the definition in common and the application of homogeneous procedures, organization principles, selling concepts and management methods. Nevertheless, problems remain as many owners of small shops feel that they cannot spare any time for training or do not see the need to be trained.

In larger firms, it is for shop assistants (salespersons) that training opportunities are more common (in 80% of the cases surveyed), particularly in food shops, but to a lesser extent in super/hypermarkets where they are a minority. Stockroom clerks would seem to be the category most frequently left out of any type of training.

The new emphasis on training as part of a global commercial strategy implies normally more attention for the training of all employees. Thus, several companies are expressing a new concern for the training of part-time staff, who bear great pressure and are in direct contact with customers at critical moments. There are two instances of courses designed specifically for ethnic minorities or for "multicultural management".

The report describes several programmes designed to encourage women's promotion and to assist women in identifying and developing their own abilities, personality characteristics and occupational interests, so that they can optimize their career potential. There are also a few examples of training sessions for cashiers and checkpoint clerks.

The survey does not make it possible to quantify these findings and to estimate the impact of training in terms of numbers of people trained.

Access to training is often voluntary, but the identification of potential trainees is in most cases the responsibility of management. The new approach aiming at the training of the whole staff involves de facto an obligation to participate. In several instances, it is reported that there is some reluctance on the part of supervisors to send their employees for training (commercial pressure, lack of interest), but also sometimes on the part of employees themselves (possible loss of bonus for salespersons).

Contents and methods

Curricula are usually conceived in a modular way. Particularly for sales personnel, and also for their supervisors, training contents are meeting the new realities of the market, usually with special emphasis on products and on sales techniques based on the concepts of customer service and attention. They are also responding to the firms' particular needs related to changing policies and organizational restructuring.

An increase in training of sales staff on the company's cultural and organizational features has also been noted. Some firms are extending their training to more general subjects, such as costs, margins and so on. Two firms in the sample had included in their programmes ecological and environmental issues.

It is interesting to observe that, if technology plays an increasing role in the competitiveness and management of retail companies, its place is extremely limited in training programmes. This is because the daily utilization of information systems has become quite simple. Only a few managers or supervisors require a specific training for the adaptation of standard software. The impact of information technologies is more indirect: they imply a more sophisticated and more rigorous organization which can work only with competent people having a broader understanding of their work environment.

Decentralization often implies that detailed plans and teaching aids are prepared by the training departments to be used by managers and supervisors at the local level. It is attempted to set up a multiplier system whereby each level of the hierarchy trains the lower one.

Pedagogical methods are following the general trend in training. The cultural context contributes to the fact that the staff is essentially motivated for a concrete approach of their daily problems and not for an academic one. This explains why there is little classroom and face-to-face training and much on-the-job training.

Five types of pedagogical methods have been identified:

- self-learning, through correspondence courses, textbooks or audio-visual materials;
- simulation of situations in the workplace;
- business games (three firms in they survey);
- sandwich courses, with longer periods of practical experience with the help of tutors. They are particularly common for the training of supervisors;
- short meetings to discuss common interest matters in the work environment. An interesting experience is the practice of delaying for half an hour the opening of the store every week and of providing during this period a training and information session intended for all the staff.

Cost and efficiency

Case studies brought only scarce and inadequate information on the cost of training. About one third of the firms surveyed had no information available. Data collected in the others are incomplete or not consistent with each other: some of them relate the expenditure to the amount of wages, others to the sales, others to the number of employees.

It is only in France that, as a result of the legislation on the contribution of companies to the training personnel, statistics are available at the national level as well as in the firms surveyed. The main findings are: expenditure on training in the retail sector is much lower than the national average; it is higher in the larger firms than in the smaller ones; it has been increasing during the recent years; it is higher among the companies surveyed than in the sector as a whole. It seems quite likely that these findings could apply to most other European countries.

The question concerning the evaluation of the economic returns and more generally of the results of training did not bring any satisfactory answer. Most of the firms had nothing to say about it. Only a few could refer to the evaluation of the training courses by the students themselves, or to the relationship with the final assignment or the promotion of trainees. One of them indicated that it was giving due consideration to this complex problem, which has to be seen essentially in a global and indirect way.

Conclusions, issues for discussion, transferability

The first conclusion which might be drawn from this study is that there is still a lot to be done for the collection of systematic factual data on training. This could not be achieved with the comparatively small sample surveyed and it is the objective of the future EEC statistical survey. But the particular context of the retail sector and especially the informal nature of much of the training activites might make it quite difficult.

At this stage, it is not easy to assess in a quantitative way the magnitude of the training effort in the retail trade: with the most restrictive definition, it might be quite small, as most training sessions are of a very short duration. One thing is sure: it is on the increase and it is likely to further increase in relation to the changing structure of the sector and to the changing policies of retail firms.

This process of change, which is clearly more advanced among the firms surveyed, raises the issue of the meaning of modernization. Up to now, it has been associated with the progress of concentration and of large self-service firms with a high level of productivity. But an alternative approach might be the modernization of smaller firms, thanks to some form of association and of organization.

In any case and at the European level, the training of owners of small shops and their employees seems to be a priority, considering their number and the fact that it has received up to now only a limited attention. The survey has identifed examples of positive experiences in this respect.

Training issues have to be observed in a broader social context. Observations show, with some interesting exceptions, that employment conditions in retailing contribute to a negative image of the sector for the workforce, especially among young and more educated workers. It explains a frequent high rate of turnover, which may make the employers reluctant to invest in the training of their personnel. Bearing in mind the new demographic trends, a shortage of labour available for retailing is often seen as a possibility for the future and is sometimes already observed, at least for management and skilled jobs. At the European level, the question may arise of the trade off between the various implications of the transformation of commerce for the firms, the workers and the consumers.

At the company level, there is today a problem of consistency between strategies aiming at better quality and service and dominant employment practices which do not favour stability, motivation and skill formation of the workers.

This observation has to do with the issue of the target groups for training. Case studies have shown the beginning of a new interest for categories of workers who are usually left out of any training activity: part-time, short-term, less-skilled. How far can this be developed, considering the social interest of catering for these categories, but also the total cost of systematic training for all workers and the financial limits encountered in a highly competitive context. What contribution can be expected from government programmes and from the workers themselves (in terms of time)?

In this connection, it should be mentioned that the issue of a recognized qualification or certification related to training activities, raised by the European opinion on training, is mentioned in only a small number of case studies. Considering the limited size of most programmes and the fact that they are more focussed on specific know-how, some types of certification might be more appropriate than the more academic type involving school examinations. There are, however, a couple of interesting observations concerning the possible relationship between practical in-company training and the preparation of academic qualifications; they seem to meet some of the suggestions made in the context of the European Social Dialogue.

The lack of relationship observed in most countries with the formal system of vocational training and the difficulties met in defining continuing training activities could justify more thinking about the specific nature of training needs for the retail sector. Some of them appear as very general (behavioural skills and a broad understanding of the principles of commerce and management), others as very specific and requiring only short and informal sessions (products, image of the company). In the latter case, which is predominant, there is a risk that continuing training in retailing remains narrow and specific, with adverse effects for the workers' individual development and their opportunities for promotion and mobility. This implies that, as a rule, training is not aiming at the satisfaction of workers' individual needs. This would be contrary to the recommendations of the European Memorandum on Vocational training issued by social partners in the retail trade and the call for minimum training standards included in the Memorandum seems to be appropriate in this respect.

Further analysis of this problem might help to clarify to what extent it is possible to develop common training courses at the level of a group of companies, of a country, or at the European level. This is particularly interesting when it comes to interactive multimedia programmes, which require a very large investment.

This supposes a final look at the diversity of situations within Europe, on which depend the possible identification of European policies and the degree of transferability of experiences. The major difference concerns the position of the country in relation to the stages indentified at the beginning and the type of commerce which is dominant. Obviously, the cultural, economic and institutional contexts specific to each country have also an impact. The study found a number of cases where the national situation is different from the overall view summarized above. In addition to the well-known differences between national systems of education and of industrial relations, case studies have observed for instance:

- the role of cultural factors in the predominance of small family-owned shops in Greece;
- a fast increase of multinational firms in Portugal;
- a high degree of innovation and of sophistication in the Irish case studies;
- a comparatively higher level of education and of concern for education in Denmark;
- the new importance attached to training and to the definition of national vocational qualifications, including recognized standards in the United Kingdom;
- more serious problems for the recruitment of skilled personnel in Germany, the Netherlands and Belgium;

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- a particular opening towards neighbouring countries in Luxembourg;
- an important role of the State in the definition of rules and of orientations and in its contribution to the financing of training in France;
- the most extreme example of a drastic and overall process of change in the Eastern Länder of Germany.

Transferability of experiences should of course take into account these national differences, but also the differences between individual firms. In this respect, the type of commerce and the selling concept may appear even more important than the size, at least for the medium and large companies, the smaller individual shops representing obviously a specific situation.

It is hoped that this study may contribute to the transfer of approaches and experiences. First of all, it identifies new directions and provides a better understanding of the transformation of the sector. It should contribute to a new awareness of the importance of training and to the promotion of a training culture. Secondly, it gives a number of concrete examples of training activities, with their contextual preconditions. Finally, it could be used as a basic document to develop exchanges of views and of experiences and to define criteria for the promotion of training activities.

MOTOR VEHICLE REPAIR AND SALES SECTOR

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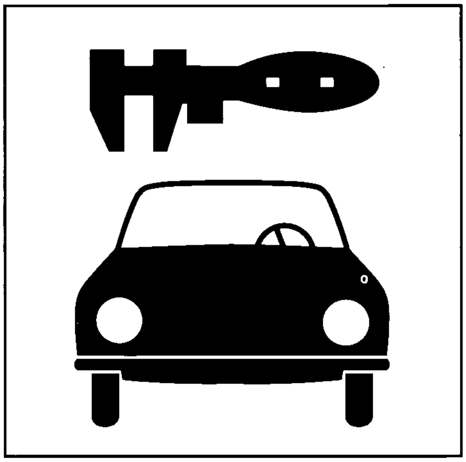

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1. The motor vehicle sector as the key sector for integration in Europe

According to the AID Car Yearbook 1992, more motor vehicles have been newly registered in European countries (EC and EFTA Member States) in 1991 (44.8%) than in the United States (27.1%) and Japan (16.2%) together (43.3%). This is an increase of 2% compared with 1990. If we look at the process of rapprochement between eastern and western European countries and their gradual integration into a pan-european economic area, then it becomes clear that Europe will form by far the largest sector in the world's motor vehicle market in the next decade and beyond. Given that this market – compared with its US or Japanese counterparts – is still far from having reached saturation point, the motor vehicle sector in Europe will continue to grow into the next century.

In the following grid the EC Member States can be classified in four sectors. Two sectors have a high motor vehicle density: sector I with a high motor vehicle density per inhabitant and a high density of motor vehicles per person employed in the sector and sector III with a high motor vehicle density and lower number of motor vehicles per person employed. There are also two sectors with a lower motor vehicle density: sector II with a higher and sector IV with a lower density of motor vehicles per person employed.

Sector II has the most favourable preconditions for a stable development of its labour market. Should the clear trend towards an increase in motor vehicle density (sector II, Ireland) prevail, this will result in an increase in the number of people employed and, to a lesser extent, in higher productivity rates of repair shops as this value is already relatively high.

Sector IV will undergo the most comprehensive structural changes with an increase in motor vehicle density. Both Greece and Portugal show a high number of persons employed in the motor vehicle repair sector in spite of the relatively low motor vehicle density. The expected structural change in sector IV is marked by a change in the composition of the car fleet and an overall increase in vehicle numbers, accompanied by a decrease in the employment in the motor vehicle sector. An important precondition for this development is that the European policy aiming to harmonise the economic conditions in EC Member States will continue to be successful.

The structural change in sector I is by comparison the lowest. The number of persons employed will probably fall slightly. This is due to an improvement in the quality of motor vehicles (including European makes) and to lengthier intervals between servicing. Given the saturation of the motor vehicle market in sector I, there is only a need for replacement (i.e. 8 to 10% of the motor

Grid for the classification of the EC Member States in sectors according to motor vehicle and employment density (1991)

I		II		
Germany	95	Ireland	83	II high
Netherlands	87			
Belgium	97			
Italy	100			
Denmark	41	Greece	34	
Luxembourg	59	Portugal	33	IV low motor vehicles per person employed in motor vehicle sector
France	71			
Spain	70			
UK	73			
III high		IV low		

Motor vehicle density (per inhabitant)

vehicles currently in use). Thus, the number of second-hand cars will increase slightly compared to the total number of cars on the road. This will strengthen repair and service to a minor degree.

Sector III contains those countries most likely to experience a clear decrease in the number of persons employed in the motor vehicle sector in the long run. Spain is the only exception as the rapid increase in motor vehicle density has helped to maintain the employment level. On the other hand this indicates a major structural change (still to be coped with) in the repair shops. The ratio of 1:70 in a producing country indicates a considerable need for modernization.

2. Repair shop structure

Authorized dealers

All manufacturers are interested in exclusive dealers' contracts as they of course only have an economic interest in marketing their own products. In addition, they are convinced that a dealership can only achieve a high standard of service when specializing in the products of a single manufacturer.

The average number of persons employed in dealerships in EC Member States is just under 6. The UK, Portugal, Luxembourg, France and Germany have above average employment figures whereas the dealerships in other countries such as Italy, Spain, Greece, the Netherlands and Belgium employ fewer persons than the European average. Denmark is on average with 6.1.

The share of very small firms (up to 4 members of staff varies between 20% (UK) and more than 60% (Denmark, France, Greece, Italy, Spain). These firms employ between 15% (Germany) and almost 30% (Italy, Spain, France, Denmark) of the workforce in the motor vehicle sector.

Independent repair shops

The independent (free) repair shops are mostly repair companies of type I. Sales, where relevant, are restricted to second-hand motor vehicles.

Mega-dealers

The mega-dealer concept is gaining ground in the United States. A mega-dealer represents a number of makes and offers all kinds of manufacturer-related high quality services "under one roof".

The obvious high quality of these companies and their economic strength are based on a relationship with the manufacturers which is more of a cooperative nature than the strictly supervisional structure in Europe. In European countries the mega-dealer concept does not yet play a major role.

3. Social conditions

Remuneration

Remuneration in the motor vehicle trade is lowest for repair shop staff and highest in the fields of distribution and sales as sales personnel are quite frequently granted sales commissions in addition to their salaries. The level of remuneration in the sector mainly depends on the influence of the trade union carrying out the negotiations. When collective agreements are negotiated by "big" trade unions, the level of remuneration will be higher than in cases where highly specialized branch trade associations are party to a collective bargaining agreement (cf, Spain, France).

Working hours

The regulations on working hours are flexible in many countries given the distinctly informal character of very small businesses with a high proportion of family members. Overtime and work on Sundays – when the need arises – are widespread.

Collective agreements

In the area of labour legislation, the Dutch "Working Conditions Act" has one special and distinct feature. Under the heading "Promotion of wellbeing at the workplace", some highly innovative provisions have been adopted.

4. Employment and recruitment conditions

Image of the sector

The sectoral surveys all confirm that the image of the motor vehicle repair and sales sector is not the best. It is still dominated by the idea that work there is usually dirty and that wages are low. The sector still has a "blue-collar" image.

Employment contracts

The motor vehicle repair and sales sector can be described as a major full-time employment sector. The number of part-time workers is estimated to be less than 5% throughout the European Community.

Promotion prospects

In general the sector offers few promotion prospects to its workforce. Experienced and well-trained workers with good prospects in other sectors are more inclined to change sectors.

Social context

Employment in the repair and sales sector is affected by the economic situation of the manufacturers. In terms of numbers, there has been a growth in employment in the motor vehicle repair and sales sector in most of the EC Member States during the last decade. These positive developments are expected to level off in the course of the next few years.

Recruitment

Recruitment policies vary considerably within the EC Member States. The recruitment process is influenced very much by the image and quality of initial training.

5. Staff structure

Dominance of men

The highest proportion of women in the sector is 18% in Germany. In Denmark and Belgium their share amounts to 16% while it is between 2 and 12% in the other EC Member States.

High rate of comparatively young people

With regard to the average age of the workforce in the EC Member States, the average age of the staff in the motor vehicle repair and sales sector is relatively low.

High level of staff turnover

The studies give as possible reasons for the comparatively high level of staff turnover in the sector: its poor reputation, the lower level of remuneration compared to other sectors, few prospects for promotion, and the physical and environmental working conditions.

Low rate of employment of disadvantaged workers

In many countries there are regulations and laws to help disadvantaged workers (disabled, long-term unemployed, migrant workers etc.) enter employment in the motor vehicle sector. Some of these laws (Spain, sectoral survey) require the employment of 2% of disadvantaged workers in a company with more than 50 employees. The situation is similar in Italy but existing laws do not, however, include small firms in their provisions.

According to the data given in the sectoral surveys of the various countries, it may be concluded that disadvantaged groups do not play a significant role in this sector.

Low rate of foreigners

The rate of foreigners employed in the sector is very low – with the exception of Luxembourg.

6. From repair shops to quality service points

Quality competition and quality service

The European repair shops face an increasing trend towards quality competition on the global motor vehicle market. Apart from the high quality standards the customers expect when buying a new car (buyers market!), the decision to purchase is increasingly influenced by the quality of the after-sales service and the quality of advice offered during the actual sales transaction. The sales experience plays an increasingly important role in higher price categories. European repair shops are reacting to this trend with varying degrees of success.

The European motor vehicle industry cannot be competitive without high quality service, on third markets too.

The sectoral surveys show that the structural change towards quality service points is in full swing. The European countries must, however, cope with structural change of varying dimensions. A number of regulations and traditions valid in each of the EC Member States are the driving force behind this development (good practice):

- the Dutch "Working Conditions Act";
- experienced-based training – in cooperation with companies – of skilled car mechanics with a wide qualification (multi-skilled worker);
- access to continuing vocational training for a large number of skilled workers leading to qualification as master craftsman or technician (dual continuing vocational training);
- the introduction of standards (e.g. BS 5750) to improve the quality of service in all aspects of the business;
- in some EC Member States (e.g. Germany, Denmark) the motor vehicle sector is training the highest number of apprentices. This results in a considerable input of multi-skilled workers on the European labour market.

High-tech motor vehicles and changing tasks
The trend towards high-tech cars featuring highly integrated modular technology, towards a multitude of cars (which even experts have difficulty keeping track of) even within one make, towards less need for repair, towards a further prolongation of service intervals and a prolongation of guarantee periods has led to fundamental changes in the tasks of motor vehicle repair shops:

- The classical mechanical repair tasks will gradually shift to a replacement of components (e.g. engines, gear boxes, control units).
- Certain skills in handling diagnostic systems have become important and essential.
- The share of repair tasks in the field of computerized or micro-electronically controlled components will be negligible. Should repairs prove necessary, the component will also be replaced.
- By contrast, body work and accident repairs will increase.
- The core of repair shop activities can be found in the fields of diagnosis and regular servicing.

The mastering of these tasks implies extensive knowledge of motor vehicle systems – as far as it is relevant for service and repair tasks – as well as good organizational skills.

Quality awareness and repair
Carrying out repair work – after having diagnosed the fault – requires a certain level of theoretical know-how as mechanics have to be able to use well designed and programmed repair manuals. A knowledge of symbols, diagram structures and technical explanations is necessary as well as the ability to transfer the instructions to repair work. Above all, quality awareness is required here as well as the ability to execute a repair task – even unsupervised – at a high quality level. This challenge for motor vehicle repair shops results from three factors:

- stiffer safety regulations and standards;
- quality service, crucial for the market, with a low level of repair work;
- statutory provisions in the fields of environmental protection, traffic safety and customer protection.

Standardization and modularization versus transferability and mobility
The motor vehicle sector is witnessing two contradictory developments:

- On the one hand, the standardization of the entire motor vehicle technology is being massively promoted by the existing international and manufacturer-specific standards. This process is enhanced by the necessity to cater for the manifold wishes of the customers. This can only be done by drawing on a modular system – a few basic models with different properties thanks to various components and individually programmed control units. This development concept will reach its climax in the "modular car".

  The result of this development will be that the number and variety of cars will increase but that this will go hand in hand with increasingly similar technology.
- On the other hand, manufacturers and suppliers equip repair shops with the tools and technology necessary for diagnosis and trouble-shooting. They differ greatly in their

applicability for similar tasks both in terms of their interfaces and their operation. The basic functions of these devices, however, are the same.

This development leads to significant differences in operating knowledge of tools and diagnostic systems for comparable tasks in the workshop. This operating knowledge can only be transferred to devices of other manufacturers to a very limited extent; this impedes staff mobility. Moreover, when people move to new jobs and new makes of car, they have to be trained and this training investment could be avoided. Trainers are then not available for other tasks such as developing re-usable and, to a large extent, transferable, skills related to work processes such as good organizational skills (e.g. how to carry out diagnosis), functional knowledge (e.g. how do motor management systems work?) and instrumental abilities and skills (e.g. mastering of computer systems).

Adaptive versus forward qualification and qualification planning
There is scarcely any other sector which is further ahead in the development of continuing vocational training systems – in the shape of modular course systems featuring ultra-modern media and methods – than the motor vehicle sector. These measures are developed by the car producers and are continuously updated in order to enable motor vehicle repair shops of the respective dealer and repair networks to be as successful as possible in the marketing of the makes in question.

This direct economic interest of motor vehicle manufacturers in the qualification of their staff in repair shops and sales is the reason for the existence of highly developed modular curricula offered by motor vehicle manufacturers to motor vehicle repair shops for the continuing training of their staff. Successful sales and service in the motor vehicle sector means that motor vehicle firms are well prepared for the introduction of a new model, its sale, repair and service before it is launched onto the market. Most of the motor vehicle manufacturers and "their" authorized dealers and subsidiaries cope with this challenge by forward planning and provision of corresponding continuing vocational training. The motor vehicle repair firms (authorized repair shops) can thus take advantage of a carefully planned curriculum and range of courses.

The role of those providing continuing vocational training
The overall request for quality service, technological developments, environmental and safety regulations as well as the improvement in customer care results in a high demand for continuing vocational training in the sector. In order to meet this request, four groups of training bodies are active in the sector:

A. manufacturer-oriented (customer service training centres of manufacturers and importers; sub-contractors of manufacturers);

B. association and trade union ("social partners") training bodies;

C. public training bodies;

D. private training bodies.

They are all mainly oriented towards intensifying continuing training of current staff during working hours. A number of initiatives are being taken in the sector to respond to the latest developments in the technical and commercial fields and in the field of quality customer service. The tasks, the concepts and the strategies of the various training bodies differ and are mostly influenced by the specific situation prevailing in the sector of the respective country.

The infrastructure for continuing vocational training in the motor vehicle sector in the EC Member States is shaped by the four groups of training bodies mentioned above.

The motor vehicle manufacturers and their training centres are the dominant force in all continuing training provision. They cover a wide range of the necessary continuing vocational training activities. The training bodies run by the trade unions, associations and other employees' or employers' organizations as well as public training bodies must be seen as complementary to manufacturer-oriented institutions. These courses are open to all employees and are, more particularly, a source of training for independent repair shops.

Against this background, the broad activities of INNOVAM (Netherlands), ANFA (France), INEMA (Spain), ZDK (Germany) SIMI (Ireland), Guild Chamber (Luxembourg) or the franchise group LEX (United Kingdom) can be seen as good practice as a variety of training bodies supplement each other's activities. Furthermore, access to these training measures is not exclusively make-oriented.

Continuing training concepts and their adaption to the needs of countries and dealers' repair shops
The training concepts are influenced by the policy of the providers, the situation on the national and international markets (e.g. qualification needs. level of initial training, technological developments, environmental and safety regulations), current and future qualification needs and the formal or informal certification system of some training bodies.

In general the situation can be outlined as follows:

- Training bodies run by trade unions or associations and those of public or private organizations can only be seen as complementary to manufacturer-oriented training bodies. Their concepts and certification systems are oriented towards the structure of the national market. They try to offer an officially recognized certificate whenever possible.

- Manufacturer-oriented training bodies have mostly developed an informal and internal certification system and adapted this to the dealer network. Their international strategies differ. Some of them offer the same hierarchically-oriented course concept with different levels all over Europe (there are usually three levels: basic, proficiency, technician). The structure of the course concept is a so-called modular concept which is horizontally and vertically structured.

Others offer a course concept designed to cater for the qualification structure in dealer businesses. This training, which normally consists of four phases, leads to qualification as a mechanic in the space of a few years. The special feature of these concepts is that they are perfectly adapted to the level of initial training available in the respective countries. The continuing training programmes within this concept can be tailored to fit the individual needs of staff and firms within the framework of the courses on offer. This kind of concept is favoured by some Japanese manufacturers.

Concepts which can be easily transferred to other EC Member States and adapted to the conditions prevailing there are an example of good practice.

Continuing training needs and the restrictions imposed by capacity shortages
Given the various changes in the sector the need for continuing training has risen constantly in the last few decades. This trend is continuing. Strategies have been developed to cope with the demand for continuing vocational training by the motor vehicle trade. They include:

- shifting continuing vocational training to the repair shops;
- extending computer-aided diagnostic techniques;
- integrating teaching material into computerized workstations;
- extending continuing vocational training provision by non-manufacturer oriented training bodies.

However, most of the strategies are in some way restricted. The shift of training activities to repair shop level means a decline in direct communication between the workforce and the manufacturer. Elaboration of NC tools and materials require an on-line connection to the manufacturer if feedback is to be guaranteed.

Finally, it must be stated that continuing vocational training in the real work environment can markedly improve the quality of continuing training as long as the necessary framework conditions are ensured. This concept of good practice offers the opportunity for a practice-oriented evaluation of products. To this end, the preconditions and infrastructure for a cooperative model have to be developed by all those concerned (manufacturers, training bodies, repair shop owners, staff).

Continuing vocational training and work organization
Two major models of work organization are competing in motor vehicle repair shops. They have a considerable impact on continuing vocational training provision:

a. the repair shop organized according to specialized tasks which are carried out by experts;

b. the all-round or multi-task concept which implies that multi-skilled workers cater for a wide range of tasks in a qualified way.

Depending on the size of the firm, the first concept is more common. Where there is a growing degree of integrated motor vehicle technology and greater emphasis on good organizational skills, this enters somewhat into contradiction with the trend towards quality service points. To a certain extent, continuing vocational training provision is a reaction to this specialization: specialists attend "their" special courses. An improved evaluation of firms, their internal division of tasks and the resulting demand for continuing vocational training (e.g. Mercedes, Belgium) could lead to better adaption of the course programmes to the requirements of the firms. Innovation in work organization, however, cannot yet be achieved.

The second concept requires a high qualification level in repair shops and considerably increases the flexibility of work organization. This is an important advantage for the smaller repair shops which will constitute the majority of businesses in the future, too. Furthermore, with this model it is easier to use the team concept, as has been successfully demonstrated at a few sites.

Qualification for the team concept is a challenge for continuing vocational training in the motor vehicle trade. The team concept, as a form of good practice, brings with it the promise of major economic and qualificational innovation. This organizational concept facilitates the implementation of a stronger orientation towards the customer in the field of service. This is already being planned or has been introduced by many firms in their sales departments. It also allows for greater integration of older or less qualified staff.

Supervision or cooperation between motor vehicle manufacturers and dealers
Motor vehicle manufacturers are dependent on the marketing of their products. Dealers and repair shops ultimately contribute to their competitiveness. This link between manufacturers, service and sales explains the strong interest of the manufacturers in far-reaching support for and supervision of the sales organizations. Dealers' contracts play an important role in shaping the relationship between manufacturers and repair shops.

Normal practice is clearly marked by a "supervisory relationship" with the manufacturer trying to closely guide and monitor the respective firm's activities. The manufacturers, however, forget that this practice more or less ignores one of the most important sources of information, i.e. the customers' verdict and evaluation of the quality of their products.

A shift in the relationship between manufacturers and repair shops towards a relationship based more on cooperation from which both sides would profit includes, among other things, a process whereby the manufacturers learn from repair shops and dealers.

Towards the quality service point
The actual range of motor vehicle repair shops is clearly dominated by authorized dealers for one make, offering the entire range of services. What makes those businesses stand out is the high level of manufacturer-oriented continuing vocational training of their staff and the increasingly high quality of service. The trend towards exclusive dealers (one make only) will continue. Consequently, motor vehicle manufacturing will show a tendency towards lean service with the following attributes:

- development of sub-contractors for the low-cost execution of special tasks which can be taken out of the repair shops (e.g. bodywork, painting, repair of specific parts);

- development of a clear division of tasks in the authorized repair shops, which will be much more customer-oriented:

a. team concept with a lesser degree of internal horizontal and vertical division of labour (multi-skilled worker);

b. development of a "quick service" department;

c. second-hand sales and service;

d. improvement of customer service by incorporating the administrative tasks involved in the purchase of a motor vehicle, i.e. registration, insurance, accidents, resale, road worthiness test etc.

The freedom of trade, service and repair has proved to be effective and will remain the dominant model for businesses. Likewise, the very small businesses for the repair of used cars and for special repairs, which are tantamount to "moonshine" firms, will still be around although they will dwindle in number.

Given the general trends the average number of employees per repair shop will increase considerably – as was already the case in the UK. Only in this way, will it be possible to provide the funds needed to equip the sophisticated work places in future repair shops, and to meet the quality standards for sales, service and repair as defined by manufacturers and governmental regulations.

Towards universal multi-skilled motor vehicle mechatronics
Qualifications do not automatically evolve in line with developments towards high-tech motor vehicles. A decisive factor is the organizational concept of the business. Team organization and lean service linked with a reduced horizontal and vertical division of tasks (flat hierarchy) and a high and wide qualification level in the directly productive field (i.e. service, repair, sales) require a multi-skilled worker who can reach the level of a service technician by undergoing continuing vocational training.

More than two qualification levels are thus counterproductive. Formalized, specialized motor vehicle occupations with more than two focal areas in dual vocational training on the skilled worker level are not a good idea. Occupational designations such as "electro-mechanic", "auto-electric-mechanic" or "mechanic-electrician" would seem to indicate that one single and comprehensive occupational profile will point the way in future. It may be named car mechatronic.

In sales, a wide range of initial qualifications will be maintained. Special and make-related skills must then be imparted in continuing vocational training.

The quality service point as a site for initial and continuing vocational training
In many European countries the motor vehicle businesses are very much involved in the practical training of skilled workers. In some countries (e.g. Denmark, the Netherlands) the repair shops are indeed the most important sites for technical training in the motor vehicle trade.

The reasons for a further development of this tradition of qualified practical vocational training are above all economic. An occupational qualification imparts not only occupational abilities but also social and personal skills required for quality service: responsibility, interest, ability to work in a team.

The new universal occupation of "car mechatronic" – the name already exists in an informal way in many motor vehicle repair shops – is an important element in a large segment of a European labour market.

Continuing vocational training costs as an investment in quality service

Continuing vocational training costs are made up of:

- the costs for the development and implementation of the modular continuing vocational training systems of motor vehicle manufacturers (including costs for continuing vocational training centres);
- direct costs for loss of working hours due to staff participation in continuing vocational training measures and related costs (equipment, travel costs);
- funds made available to public continuing training bodies by splitting the costs amongst the firms (funds), by the state or from other non-manufacturer-oriented sources.

The duration of continuing vocational training measures varies between 1 and 10 days depending on the manufacturers and their authorized repair shops – with a tendency for them to increase in length. The pressure to provide continuing vocational training places a growing economic strain on the businesses, manufacturers, repair shops and dealers. Should manufacturers and repair shops further individualize continuing training programmes by introducing self-learning material for study at home, this may lead to inordinately high continuing vocational training pressure on staff.

In general, car manufacturers and repair firms and their organizations are of the opinion that continuing vocational training is not just a cost factor but is first and foremost an investment in human resources. Manufacturers and repair firms must strike a balance between two kinds of diverging interests:

- the need to improve continuing vocational training;
- the growing rationalization pressure, triggered by increasing competition and rising continuing vocational training costs.

A balance between these two opposing factors may be achieved in different ways.

In approximately one-third of all the cases studied a concept of continuing vocational training has more or less been introduced for all members of staff. Thus, many motor vehicle manufacturers explicitly wish that the entire staff, in line with the internal division of labour, has regular access to continuing training. Elaborate control and supervision concepts have been designed for this purpose. Motor vehicle manufacturers rarely invest more than 4.5 school-man-days in continuing vocational training per employee a year. Should there be a further need for continuing vocational training, this additional requirement is shifted to the medium level (i.e. importers, subsidiaries). As a continuing training concept of this kind (coupled with extensive manufacturer training) leads to a major increase in costs for the manufacturers, there is a growing trend to involve importers and subsidiaries more closely in continuing vocational training.

The new requirements lead to new task profiles and different concepts of continuing vocational training

The variety of developments in the motor vehicle sector create the need for new task profiles. These task profiles must reflect the philosophy of work organization, division of labour, administration and management as they are very much influenced by the processes on these levels.

The task profiles or the new occupational profiles have to be supported by adapted concepts of continuing vocational training. Three models are discussed in the surveys:

a. specialization model,

b. multiplier and cascade model,

c. comprehensive model.

The new task profiles, which are being implemented especially in the customer service centres of the manufacturers, are now predominant above all in repair shops linked to makes. The staff in independent repair shops has no access to manufacturer related continuing vocational training measures. They have to rely on the support offered by associations, trade unions and state schemes.

The new dimension of quality service requires comprehensive service and encompasses corporate policies on recruitment and promotion. This not only stresses the skills side; it ultimately rests on the commitment of the individual to perform even better. This philosophy means developing group consensus on overall aims and measures and calls for a link between the wellbeing of the individual and that of his/her employer. This might prove to be an important strategy for the successful development of future competition.

Smaller sized repair shops may disappear because of the scale of investment necessary

The rapid technological development in the motor vehicle sector (see section 4) leads to more and more investment in tools, machinery, and testing

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and diagnostic equipment. This, in turn, leads to increased demands with regard to the staff's qualification level in the repair sector.

The repair shops with close links to the manufacturer or those in typical importing countries with close links to the importing agents strengthen their positions through the support they receive from the manufacturer/importer. Furthermore, the manufacturer/importer is obliged to provide continuing vocational training courses on new models and new techniques for the staff of these repair shops (B, DK, NL, IRL, D, F, L).

The question has still to be answered whether smaller independent repair shops can meet the challenges imposed by development of technology and the new tools, environmental demands, computerization of office work and administration, and quality-oriented legislation (e.g. BS 5750 (UK) and Law 122 (Italy). A reduction in the number of smaller outlets who are not able to meet the new requirements or keep pace with the expansion and reinforcement of the larger outlets (size III and more) might be the consequence.

Environmental issues have to be considered by a quality-oriented service point
Environmental issues already have a major impact on the sector from two angles:

a. The product itself, the motor vehicle, will gradually be adapted to enable most of the materials used in its construction to be recycled. This leads to new product developments by motor vehicle manufacturers.

b. The repair shops themselves have to learn how to comply with environmental legislation on the disposal and recycling of materials which are detrimental to the environment. In addition, more non-polluting materials should be used (e.g. water soluble paints).

There are laws for the protection of the environment by reducing emissions in all EC Member States (cf. Sectoral Studies). Some countries also have laws to regulate how repair shops deal with materials detrimental to the environment.

In future, the importance of environmental issues will undoubtedly increase for all categories of repair shops. The workforce has to be trained in how to respect the environmental requirements and to make every effort to comply with these provisions.

FOOD AND BEVERAGES SECTOR

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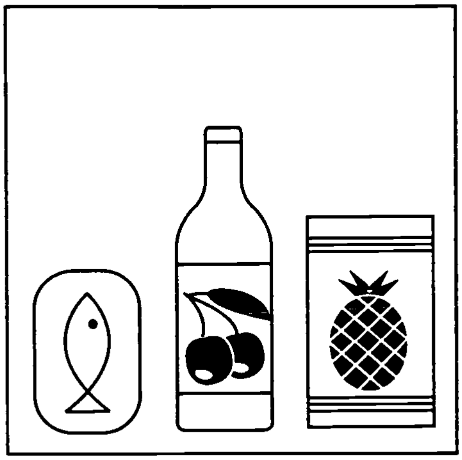

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SOCIO-ECONOMIC MARKET FORCES

The industry

The food, drink and tobacco sector[3] is influenced by a special combination of factors that lend to it particular importance for the EC's producers, consumers and governments: it is a large industry in all countries, a major employer, and undergoing considerable change and development; it provides for fundamental human requirements, although consumers now seek far more benefits from food and drink than simply meeting nutritional needs; it deals with raw materials and products that are subject to spoilage and which may give rise to concern over food safety; it is closely allied to agriculture, which is the sector subject to biological and seasonal variability and most influenced by community intervention policy and accounts for a majority of EC budgetary expenditure. The nature of the processes and products make FDT an industry where training is a major factor in protecting consumers, since food poisoning is potentially lethal. These characteristics apply to all food producers in all EC Member States, and necessarily bring about some commonality across the Community's food and drink industries.

We have noted already the heterogeneous nature of the food and drink industry in Europe: the wide spread of sub-sectors covered and the various forces that impinge on the industry and determine its growth and success. In part these influences reflect the agricultural- or consumer-orientation of the sub-sectors, and may originate from supply or demand sides of the market. Moreover national and supra-national government policies have an impact on many parts of the food chain, and although farm and first stage processing interventions are most commonly considered, attempts to regulate markets and protect consumers' markets have been significant, and most important recently, the progress towards the Single European Market, has precipitated changes in the food and drink industry's structure and competition.

Fundamentally supply-side features reflect the nature of the agriculture raw material: seasonal or continously produced; long or short time lags in production; more or less perishable. Agricultural production is frequently small-scale, but increasingly linked with processors through cooperatives, groups and contractual arrangements as processors aim to secure supply chain management. Agricultural policy, particularly the CAP, but also national policies, have been important, but as a system of guaranteeing an outlet for production through intervention buying and subsidised exports its days seem numbered as a result of the twin forces of budgetary constraint and international trade agreement. First stage processors are increasingly looking to commercial markets: the second stage manufacturers and the consumer. Many of these influences apply equally to all Member States and encourage similar responses from the FDT industry.

The market

Food and drink consumer markets in the Community are still widely different between Member States, although certain common features are driving their development. Consumption is slowing or stable in the EC as a whole, but especially in the northern countries with their slow population growth and relatively high incomes. Within the sub-sectors greater dynamism is apparent, as some markets decline and others expand to fill the various nutritional, convenience, health, pleasure, status, and other consumer requirements. Consumption variations spring from the stage of maturity of food and drink markets: particularly brought about by differing real incomes, where the obvious contrast of GDP/head between south and north reinforces the different eating styles. The southern or Mediterranean diet traditionally emphasised fresh food, bread or pasta, wine and olive oil; the north has been more reliant on processed foods, meat, milk and dairy products.

Variations between countries have lessened through the diminution of income differences, through wider communication and easier travel, and through a movement towards northern lifestyles on the part of the south. Meat consumption, for example, has grown very rapidly in Spain, Greece, Italy and Portugal, to approach or even surpass levels in Denmark, France, Germany and the UK. In many northern countries, consumers with health concerns have looked towards the Mediterranean diet, and moved away from meat, dairy produce, and some forms of processed foods. Convenience, combined with good quality as the consumer sees it, remains a significant benefit sought by consumers. Thus major segments of the European food and drink market are becoming more alike, while differences in the declining more traditional areas remain.

The producers

Within this context firms too represent a heterogenous picture: the vast majority are small or medium sized, and their numerical predominance is especially apparent in the southern Member States. By contrast the large firms and giant multinationals dominate the output and employment of countries like UK, France and Denmark. Cooperatives, for example in Denmark and the Netherlands, and state funded or inspired firms, as in Italy or France, have been important in their food industry's development but have become more commercial. Once more we find areas of commonality. In all States industrial concentration

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is increasing, as large firms strengthen their grip across more markets and as small firms continue to leave the industry. Cross-border mergers and acquisitions amongst major firms, both European and US owned, have been a feature of the run up to the completion of the Single Market.

As firms become more pan-European, many derive synergies from specialization production and location combined with centralized distribution, from Eurobrands and marketing strategies which capitalize on the similarities increasingly found across EC markets. Locational decisions based on comparative advantage are likely to include not only raw material access and costs, but also labour quality and efficiency, derived at least in part from training. The large firms success also may be built on diversification, while still enjoying corporate-level advantages of finance, management and control.

A most noticeable feature of the food chain in all Member States has been the developments in retailing and distribution in recent years. Once again the large companies, typically multiple chains with hypermarkets and superstores, have commanded an increasing share of the food trade, taking over not only the packaged grocery business, but also specialist food and drink retailing areas. Again differences arise between countries, with highly concentrated retail trades in Germany, France, UK and Ireland, much less so in Italy and the other southern States. Yet once more we find common tendencies across the Community. Large multiples derive advantages from economies of scale, centralized control and buying power, combined with meeting consumer preferences for one-stop shopping. Retailers' requirements on suppliers influence not only quality and cost, but may extend to quality assurance and the achievement of ISO 9000 or other standards, with clear implications for training.

In the process of developing corporate image and customer loyalty, many retailers in the EC have emphasised their own-label products. While major manufacturers may profitably supply retailer own-labels, they have provided medium-sized food manufacturers with opportunities for penetrating regional or national markets through multiple retailers' distribution systems. By contrast the very small firms are almost inevitably serving local markets. However the persistence of traditional tastes, of preferences for fresh foods, or for ones that are freshly produced, and for specialized foods, implies a continuing if decreasing role for small producers. With these structural changes the total size of the industry's labour force looks certain to continue to decline.

Employment

While in every Member State the employment in the FDT forms a significant proportion of that in all manufacturing industries, considerable variations are evident between countries. Germany, with its large manufacturing base, had under seven percent of its employees in this sector in 1990, whereas by contrast in Ireland the proportion was 26%. Proportions did not change greatly during the period 1980 to 1990, although the numbers in employment in the Community's EDT industry fell by over eleven percent. Again contrasts were evident with losses of only around seven percent in Spain and Italy, but over 21% in Ireland. The evidence suggests that this downward trend has continued across the Community.

The importance of the sub-sectors varies considerably between Community countries, but the baking, dairy, meat processing and brewing industries form a consistently high proportion of food and drink sector employment. Some Member States such as Greece show a pronounced specialization in one sector, while others have a more even spread of employment across the whole industry. A common feature across the EC has been that the largest sub-sectors within a country maintained or enhanced their employment during the last half of the 1980s, often against the general trend. Over the decade as a whole, employment within the slaughtering and meat processing sub-sector showed a remarkable increase, which could be attributed to a rise in the production of convenience foods, frequently a labour intensive operation.

Employment contracts and collective agreements have started to show signs of change, and recently some have included training provisions. As factory operating hours have increased, contracts have allowed for more flexible arrangements, especially part-time working. A significant proportion of the workforce now consists of part-time workers, especially in the northern countries such as the Netherlands, while in some countries they are very little used.

The proportion of women in the sector is generally below that for manufacturing industry, although a very high fraction of part-time workers are women. The level of professional people employed in the sector is also below average for industry, particularly in the southern countries of the Community. Some restructuring of the occupational pattern in these countries can be expected. It was generally reported that the educational level of the workforce is low compared to the rest of industry.

Training

Three categories of initial training are distinguished: craft, which is highly sub-sector specific and delivered mainly through apprenticeships; factory operator, which includes apprenticeships, dual system and school-based systems; and management, involving college or university courses. Some countries provided little national focus for continuing vocational training. The majority had some institutional arrangements but the UK appears unique in having a highly structured qualification system for CVT. Financing for training comes from the interprises, sometimes channelled through government-designated systems, with some support from the European Social Fund in specific countries.

The future

The demand for higher quality, as seen by the consumer and judged by health and safety standards, and for more variety and specificity in foods, will increase the pressure on large and small firms alike. Quality assurance and flexibility are crucial features of future food production systems, but retailers pressure on prices will also require firms to control and cut costs through improved working practices and capital investments. This implies a smaller and typically more highly motivated workforce. Most will require at least basic levels of taining, such as in hygiene, and many workers will become more highly skilled, particularly in the handling of more sophisticated machinery.

Across the diversity of raw materials and processes in food and drink manufacture some lend themselves to continuous handling, for example, milk and grain, while others, meat and vegetable tissue, are less amenable. In addition, a food production line can be continuous, continous coupled with labour intensive operations, or completely labour intensive. The consequences for future employment and training are likely to be determined by the nature of the process used as well as the sub-sector. Increasing levels of technology will demand higher skills in the work force, but will also reduce employment levels particularly of semi-skilled and unskilled.

Processes using a mixture of high technology and manual operations are likely to require employees with high skills but with less pressure to reduce semi-skilled and unskilled labour. Typical of this type of process is the production of convenience foods. A human hand is much more adept at placing a mushroom slice on a pizza top one minute and then changing to adding other toppings as the requirements demand. Because of the generally low educational levels reported for the work force it is unlikely that the increase in highly skilled employees is likely to be met by training the semi-skilled. Additionally technology is likely to put more pressure on decoupling working hours from operating hours.

Food safety requirements and competitive pressures are resulting in the wider implementation of quality assurance systems, including working to ISO 9000 standards and the use of HACCP procedures. These will generate increased training requirements, especially HACCP procedures which are not used extensively at present. Hygiene training will remain an important feature for some years until the requirements of the EC Hygiene Directive are met. A basic hygiene qualification could be advantageous to the mobility of members of the workforce.

We have seen how pressures on manufacturers to improve labour productivity arise from the economic and competitive situation of the industry, and these imply changes in human resource structures. Often changes will be associated with a commitment to Total Quality. In these schemes, training in personal skills needed for effective team working can be expected to be as important as skills training.

With the emphasis on quality assurance enterprises will look to all their suppliers to use systems to guarantee the quality and reliability of their products. This will include training suppliers, external and internal. Schools, colleges and other training suppliers can therefore expect pressure to demonstrate the presence and use of quality assurance procedures such as ISO 9000 in their delivery of training.

Finally it is apparent that a number of countries are considering the introduction of transferable qualifications for CVT, and given the changing structure of the food and drink industry the development could be an important feature in future labour mobility across the EC.

KEY ELEMENTS OF CASE STUDY TRANSVERSE ANALYSIS

3.

Case studies:
Objective – Methodology – Presentation of sample – Choice of operation

In each country, national teams have performed case studies in businesses, within the context of the sectorial study, with a view to *describing and analysing* interesting, efficient and transferable continuing training practices.

While leaving real latitude in conducting the interviews in the field, each national team was to meet with the various protagonists within the business (human resources managers and training course officers, but also employees, personnel representatives...) to tackle the following subjects:

- the company context (product, market, technology, organization, strategy)
- Management of human resources (staff, recruitment policy, mobility, wages...) and notably the continuing vocational training practices (objective, organization, programme...)
- the analysis of a particular training activity
- their respective positions in relation to training practices, and notably in relation to this particular action.

Fifty five case studies were made. If no statistical representativity objective was targeted, the study officers have sought to put together a sample illustrating the diversity of this important sector of activity, notably in terms of sub-sector activity, company size, status, country.

The study officers chose these 55 cases from amongst the more than 100 proposed by the national coordination bodies. Thus, it is easy to imagine that the work covered companies which are somewhat "advanced" in the art of training.

Each case study required 5 to 10 days of work for each national team – whereof 1 to 2 days inside the company, which resulted in a 20 to 60 page monograph.

The transverse analysis of these monographs, subject of this synthesis, privileged:

- certain subjects – notably those adopted within the context of board and Vademecum discussions
- the critical analysis conducted by the corporate partners and the interviewers themselves to attempt to go above and beyond an eventual company manager official discourse.

The results are presented in three parts:

- general trends
- the organization of training and the public targeted
- the specific operation per country and type of company.

Results

General trends

Significant economic constraints shared by all the companies, but different "training" responses

Whatever the activity, the size or the country, each business felt and spoke of the current economic development notably characterized by:

- an increasing pressure on prices, quality, hygiene, delivery times
- the development of consumer demand
- the progressive opening up of frontiers and the construction of the Single Market.

Within this context, the concern of businesses is twofold: increase productivity, make production more flexible.

In a word, all businesses are looking to improve their *overall efficiency.*

The general feeling, on reading the monographs, is that automation is in process in the sector (more or less advanced according to the activity and size); it will thus continue with its foreseeable consequences in terms of job elimination and changes in qualification structures.

Training responses do, however, differ and are to a large extent dependent on the national institutional, historical and local culture contexts. Businesses are also differentiated according to their experience in the subject; it appears that the business apprenticeship phenomena in relation to training practices do exist: this is why training expenditure, for example, starting from nothing, has a tendency to increase regularly during a certain period, then stagnate, or even decrease.

The development in the "human resources" issue

Even if the sample businesses are very much advanced, they lay all the stress on the importance of the role the employees as a whole play in the progress to be accomplished: the human resource is a decisive resource. We will cite some examples here:

On the whole, quality certification is either already obtained or "in process". Attaining certification appears to be explicitly linked to "culture" aspects, through the change from an industrial logic to a commercial logic, and through advancing of the internal customer/supplier notion. Business managers appear to be convinced that all areas in the management of human resources will assist in the "desired change in behaviour".

The average growth in training expenditure within the businesses encountered, even if the situation is variable depending on the position of the business on the training apprenticeship curve (see above paragraph).

The fact that training now concerns groups that were once disregarded (low levels of qualification), notably because they are also affected by new requirements (capacity to exchange information...).

The transformation of work organization

The transformation of work organization is a topic that is very present in the businesses encountered and it appears to have a direct link with the training topic.

The changes in work organization will have an impact both on staff numbers and on job contents (primarily supervisors and servicing/maintenance departments).

The desired development of versatility, whether on the same line, on several lines or within a department, often demands more worker autonomy and a greater capacity for leadership insofar as is concerned supervisory staff.

Changes appear in the functional organization (organization per stage of the process – organization per product) which require developing knowledge and understanding of the entire preparation/manufacturing/packaging chain.

The present-day work organization situation is manifestly one undergoing change; the new models which are developed in certain businesses, or even in certain sectors of a business, are based on a new breakdown of capabilities and skills, but above all imply different professional relationships.

This is a favourable period in that nothing is static and thus there is scope for experimentation and social dialogue remains.

Training clearly has a major role to play, not only in accompanying these changes, but in "provoking" them.

Training – Product quality – Reliability of processes – Total quality management

Through the very nature of the sector studied, we can easily understand the very special importance of the quality dimensions... even if this word in fact conceals very different approaches which cover at least two different problems:

- The "quality certification" aspect, which is essential because it is vital on economic grounds in all countries and for all businesses. The certification stage is a fundamental one, as it explicitly requires a training effort. However, this training effort is not understood in the same way by all businesses, this being more particularly linked to their position on the training apprenticeship curve.

- The "total quality" aspect; from this viewpoint, the challenge is no longer to improve the efficiency of the work station, notably through respect for strict procedures, but to improve the efficiency of the *interfaces* between the stations. Therefore, the task is to develop autonomy, develop the capability to work together, to solve problems together, to adapt to each other.

Two fundamental ideas can be adopted as to the relationship between training and quality approaches:

- Technical mastery is not sufficient: "the basic idea is that inter-trade qualifications are far more important and that a handful of technical specialists should suffice to solve the technical problems".

- To improve the overall productivity of the business, functional barriers must be broken down, and inter-departmental relationships and opportunities to work together multiplied (production, maintenance, sales, marketing...). Two key qualities, which can be described by two verbs, are expected from all employees: to know and to understand.

In this perspective, it is becoming less possible for training to be limited to acquiring theoretical knowledge; training must be concrete, applied to the business.

These "quality" approaches can entail excluding certain groups of people. This certainly partially explains the somewhat mixed positions of certain trade unions whereas management is often more enthusiastic and speaks of "profound change".

Organization of training and the public targeted

Recruitment policies

The general trend is to raise the level of recruitment.

But whereas some are in favour of raising the level of general training ("the attitude is more important than the qualification"), others are in favour of raising the level of vocational training (notably when considering asking the production operator to be responsible for a first level degree of maintenance).

It would appear that multiplying "trial periods" is becoming increasingly frequent: start as a temporary or seasonal worker, then contract and finally fixed contract... both through the fear of variations in activity at short term, and because it is "the most certain way of testing".

The motivation of those trained

Many managers, and even the trade unions, make real efforts to encourage training, because they are convinced that "you do not learn against your will" and that this is decisive in relation to the new capabilities required from the employees.

This idea of motivation can also be seen as an argument in favour of sharing the "costs" of training between the business and the employee.

The procedure for establishing training schemes

All protagonists agree that more efficient training is linked to a better assessment of current capabilities and future requirements. All also agree that it is technically difficult to achieve and is a sensitive subject, which explains the somewhat reserved position taken by the unions on actually taking steps.

Internal training/external training

For businesses which have already made some progress on the training apprenticeship curve, the clear trend is to internalise the training, both on grounds of cost, efficiency and operationality, but also because in this way training and communication, can be better linked together in the same way as training and work organization.

In businesses which internalise training, the task of tutors tends to develop; this is in fact a way of maintaining the qualification of experienced workers or of giving a new role to the supervisors.

It also better integrates training into the normal working activity. The result is often a very positive one, and even if the tutors are rather frightened "beforehand", they are often stimulated "afterwards".

Assessment and follow-up of training

Indicators that are either collective (rates of absenteeism...) or individual ("matrix of capabilities"...) do exist. The need to progress on this subject is felt even more strongly in this period of economic recession and today it can be said that the firm desire to progress on this subject is shared.

Nevertheless, much still remains to be done and the corporate partners are often cautious as soon as it is a question of instituting concrete tools.

Content and methodology of training

Most vocational training activities still remain short term: one week is already a considerable period. However a trend is evolving towards development of long-term training, notably when the labour force has a low level of skills.

The three terms: behavioural training, general training, basic training are often mixed together. The idea is clearly expressed of a complementarity with technical vocational training which requires a "prepared" terrain in order to be effective.

The computer appears to be used for training in several businesses, both owing to its flexibility but also because the tool demands strict formalization.

The targeted public

Women:
They often occupy low-skill jobs and are therefore in the front line when jobs are cut back. Moreover, they are often knowledged to possess essential informal qualifications (concern for the quality of products...).

Seasonal workers:
In our sector the seasonal work remains considerable; nevertheless, seasonal staff is still not given a great deal of training, even if this status, as we have seen, can open the door to stable employment.

The workers who are at risk:
Actions have been described which are linked either to the foreseeable departure on the short term of employees (cutback in jobs) or to the recruitment of the unemployed... but these actions still only appear to be the attributes of certain northern European countries.

Specific analyses

NB: This third part summarizes the subjects already dealt with but favouring either the "country" input – because certain practices are highly marked by the institutional, cultural or social context – or the business type input (activity sector, status or size).

Three subjects greatly dependent on national contexts:

The initial training/continuing training relationship
A more or less hazy boundary, notably in countries with a vocational training system firmly based on the business, or in countries proposing numerous devices promoting vocational integration.

Financing of the training actions
The share of public financing varies greatly from one country to another as does the source

of this financing (Europe, government, region...); but clearly the aid system is always very encouraging for a business which is commencing its apprenticeship in vocational training.

The position of the corporate partners

Continuing vocational training still remains to a great extent the affair of the employers; the unions are nevertheless interested in three subjects:

- The training/wage recognition link with different partners from one country to another
- The training/job maintenance link
- The training/working conditions link

Analysis of three types of business

The brewery sub-sector

A sub-sector characterized by a high degree of business concentration, significantly advanced automation of production processes, powerful brand names and marked seasonal consumption.

It is a sub-sector in which qualifications are organized around process mastery. Today, it is clear that this mastery requires both technical know-how and a capacity for team-work.

The role of "groups"

Two main categories of groups appear to exist:

- If the acquisition logic is firstly a financial one (acquisition of market shares), the training policy is often scarcely centralized.

- In return, if the acquisition logic is firstly an industrial and commercial logic, the management of human resources is conceived within a logic strongly integrated from above; the "training" problems are the same from one country to another and only the implementation procedures vary depending on the country.

Cooperative structures

The specificity of this type of business (absence of any tie or of subordination between members) demands a procedure for producing training programmes which leave a lot of room for information and negotiation; the training products should be highly attractive, because in this type of structure, the idea of volunteer takes on its full meaning.

Small businesses

Despite often limited means and little capacity to anticipate, small businesses form a real terrain for experimentation and innovation. Moreover, based on the assumption that the business is growing, this evolution involves, at a given moment, posing the question of setting up a structured organization, which has consequences for all areas of human resources management.

LINES OF REFLECTION FOR THE FUTURE

3.

To conclude, three sets of questions are proposed here. These questions summarize the essential challenges and therefore can provide a useful field of exchange to all those concerned by the development of training in the sector.

Foreseeable evolution in capability requirements and consequences for the needs for training – Quantitative aspects

The sector will certainly lose jobs, the main reasons being the following:

- It is possible that on average, markets will be stagnating in the coming years, even decreasing in terms of total sales owing to the increase in the market shares of products under "distributor and first price" brands.

- Automation will continue with its usual consequence of job cutbacks, notably regarding those jobs with low levels of qualification.

- The integration phenomena will certainly continue. Although new integration may only be "financial" and "commercial", they can also go further and lead to a restructuring of the industrial tool.

- Changes in work organization and notably the repatriation to the production operator of certain functional operations, such as first degree maintenance, will lead to the elimination of functional jobs.

The situation makes it both increasingly necessary and more difficult to institute anticipatory approaches at different levels (business, region, country), as questions of a technical nature arise (estimate analysis methodologies adapted to small structures, for example), together with those linked to the role of the various protagonists:

- For example, concerning the internal organization of training, one may ask to what extent the unions could be further associated with the definition of requirements, employee information or the assessment of the training results.

- In a period of high unemployment, another possible area of discussion is the question of the business participating in certain training actions oriented towards the labour market, in more or less direct liaison with its own development.

Foreseeable evolution in capability requirements and consequences on training requirements – Qualitative aspects

The contents of numerous jobs are in the process of changing, notably owing to the development of automation, the transformation of work organization and the spread of quality approaches.

Through this evolution, either observed or foreseeable, job contents and organizational structures appear to be elements which describe what could be termed a "new employee profile" in the agro-food sector: a higher level of basic training, a capacity to change job or broaden the range of one's work, a specific hygiene/quality capability, a culture oriented towards the customer.

But it poses a fundamental question to the employers' organizations and unions: from these new profiles, what are the new bases for the future collective organization of the employees? What will be the new aspirations of the new groups of employees, chiefly with regard to training?

The transformations taking place in work organization play and will play a major part in the capability and training requirements in the sector.

This topic often appears to be an essential one today in the sector, even if it covers realities which greatly vary from one business to another, or even from one workshop to another within the same business: development of versatility, enrichment of tasks.

How can one capitalize on the experiments in process in order to avoid "starting from scratch" each time?

What should be done so that these transformations do not result in the casting aside of the present workers?

How can the contradiction be settled between "more autonomy, responsibility" and work organizations, which, in many ways remain highly Taylorist?

Is it possible to better define and set up qualifying organizations, i.e. organizations which, according to possible definition, "will enable the employees to invest in permanent improvement of their capabilities"?

In this context, how can the question of the recognition of the employees' knowledge acquired through professional experience be dealt with?

The "quality" approach

If there is one specific feature of the agro-food sector, it would be hygiene and microbiological safety. It is for this reason that quality approaches develop so rapidly. Can these approaches, conceived both as strategic options and forms of management, provide bases of discussion between corporate partners on continuing vocational training?

The attitude to the question by the different business partners is currently very different: the unions are often sceptical as to the real effect of these actions, whereas management often talks of profound change affecting the organization, the responsibilities of the employees, the autonomy...

Is this partially due to the difficulty/fear expressed by certain unions in view of investing in the areas of work organization?

Is it not partly due to the heterogeneity of the inputs on the quality subject and the action taken in this respect?

In certain cases (quality certification processes), the procedures along which workers operate in their work station are clearly affected.

In other cases (total quality management), the priority interest is often the interfaces between the stations, between the functions: it is not "a priori" a matter of acquiring technical capabilities but of learning to work better together, to resolve problems together; the dimension is more one of attitude, behaviour, which often appears more difficult to measure and remunerate.

In view of the importance of the subject in this sector, should there not be an effort to clarify what the term "quality" actually covers together with its link with the practices and policies of continuing vocational training?

ORGANIZATIONS AND INSTITUTIONS

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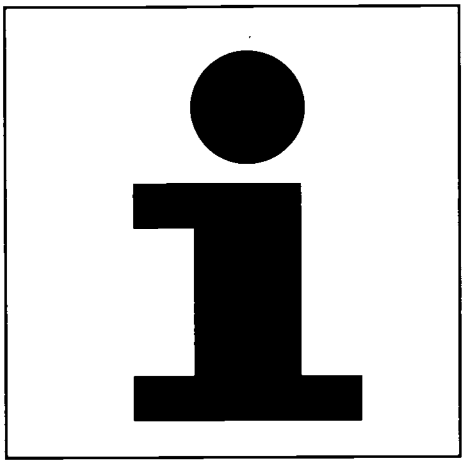

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