

# SOCIAL EUROPE

JANUARY 1987

1/87



COMMISSION OF THE EUROPEAN COMMUNITIES

DIRECTORATE GENERAL FOR EMPLOYMENT,  
SOCIAL AFFAIRS AND EDUCATION

*Social Europe*, published by the Commission of the European Communities, Directorate-General for Employment, Social Affairs and Education, deals with current social affairs in Europe. The review is divided into several parts: the first gives an overview of developments and current events in the fields of employment, education, vocational training, industrial relations and social measures; the second part covers conferences, studies and other information destined to stimulate the debate on these issues; the third part reports on the latest developments in national employment policies and on the introduction of new technologies. In addition, once a year, *Social Europe* supplies statistics on social trends in the Member States.

The basic review comes out three times a year — in January, May and September. In addition, a number of supplements/files (10—12 a year) are published annually, each dealing in depth with a given subject, e. g. technologies of the future, education and vocational training, equal treatment for men and women, employment, industrial medicine, migrant workers, etc.

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# Editorial

## Extracts from the speech delivered by the Vice-President of the Commission, Mr Marin, at the conference 'People and technology: Investment in training for the future of Europe' — London, 25 and 26 November 1986

I wish to underline the importance of human resources as a key factor for the success of the internal market and, more generally, for the economic and social development of the Community.

'Investing in the people of tomorrow' — the importance of this objective is acknowledged everywhere but especially by the Community which, at a meeting held in Berlin four years ago, began to consider the implications of the new technologies from the point of employment, qualifications and training and to deliberate on the definition of a Community strategy, which has since found expression chiefly in the launching of the Eutecnet programme.

The time has now come to review the situation and to decide what lines the Community action, in which each of us will have an important part to play, should take. The problem posed by the skills of the labour force is certainly not new.

However, the increasing concern felt as regards this problem arises from the fact that the chronic labour surpluses do not seem destined to last, if only for demographic reasons.

The number of young people arriving on the employment market is going to fall and there is every indication that the number of women in employment has reached its peak.

Consequently, employers may once again be faced with the paradoxical situation where they will be obliged to be less selective in their recruitment and, rather than seek the most highly skilled, will have to recruit less qualified people.

Leaving aside this medium-term analysis, which, given the high levels of unemployment in the Community at the present time, may appear rather contradictory, the fact is that a shortage of skilled and highly-skilled labour is already discernible in certain occupations and in certain regions. The advent of the new technologies has heightened the concern felt at these disparities in skills.

Technological change and the spread of the new technologies in both the industrial and service sectors have

significantly altered quality requirements.

It is becoming increasingly clear that skilled labour is an absolute necessity if full economic advantage is to be taken of technological innovation.

Furthermore, the technological changes which occur at the workplace are accompanied by the sometimes brutal disappearance of unskilled jobs or of jobs for which the new technologies now require occupational skills which those adults who began working several years ago do not possess.

The need to adapt to a whole range of structural changes — including the new technologies — and the uncertainty which reigns as regards the changes to come call for a degree of flexibility on the labour market such as to enable firms to implement a continuous strategy of adjustment.

Outside the firm, i.e. the external labour market, flexibility can be increased if workers possess skills enabling them to move from one job to another in response to changes in qualitative labour requirements.

Admittedly, it is not easy to state precisely what those skills should be or by what means an initial and continuous training policy leading to such skills can be implemented.

Technological change does not have the same profile everywhere in that the responses to the demand for skills which it creates are not identical, being conditioned by the industrial and economic circumstances of the firms and branches concerned.

However, it is clear that human resources are a decisive factor in the competitiveness and productivity of undertakings.

We can state quite unequivocally that a highly-skilled working population can enhance the economic results of firms and that when seen from this angle, the ability of firms to mobilize and harness the full potential of human resources is the principal requirement for economic performance and the effective use of material investments.

However, the harnessing of such potential cannot be achieved without assigning a central role to training policies.

This is true both for initial training designed to ensure the social and professional integration of young people in skilled jobs and for in-service training designed to accompany the general development of job profiles and ensure the acquisition of know-how in the new production technologies.

However, three basic points have to be stressed as regards the role of vocational training in connection with the new technologies:

- (i) firstly, training should not be developed merely for its own sake. More precisely, it must be treated as a decisive factor of modernization and as a primary means of ensuring the efficiency, mobility and qualification of employees throughout their working lives;
- (ii) secondly, the need for greater and more frequent recourse to training schemes must be emphasized both from the point of view of firms' policies and from that of the aspirations and opportunities open to the individual employee;
- (iii) lastly, the development of training as an investment cannot take place without far-reaching changes if not a total reshaping of training methods and structures. It entails the introduction of new formulas for collaboration and partnerships between the users.

In this context, I should like to stress the importance of the participation of workers and their representatives in such initial and continuous training policies.

Without the motivation of the workforce, all efforts in the field of continuous training for employees will be futile.

Such motivation implies that their role as an active partner must be recognized both before, during and after training initiatives. It also requires that training should not be limited merely to the specific, circumstantial and short-term needs of firms. Lastly, it demands that

measures be taken to ensure that the skills acquired are also recognized outside the firm so as to ensure occupational mobility.

Yet it is clear that the rapid adaptation of workers to structural changes in firms will be all the more effective if it forms part of the firms' internal development strategies.

Training must therefore be seen as a non-material investment closely interlinked with the planned management of all factors of production.

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# **Part One**

## **Actions and guidelines**



# Long-term unemployment

## recent trends and developments



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**In December 1984, the Council of Ministers agreed a resolution on action to combat long-term unemployment. Nearly two years later, about 40% of all people registered as unemployed have been without a job for at least 12 months and a growing proportion have been out of work for two years or more.**

### Background

Between October 1980 and October 1984, the proportion of unemployed workers in the Community (excluding Greece) who had been registered as unemployed for 12 months or more rose from about 25% to nearly 40% (See Table 1). Numbers registered for at least one year more than trebled in the case of young people and were about 2½ times greater for people aged 25 and over. Although the proportion of young people in the total of all unemployed people fell from 43% to 40%, their proportion in the total of those registered for more than one year rose from 16% to 30%. Among those aged 25 and over this latter proportion rose from 32% to 45%.

Concern over the growing problem of long-term unemployment led the Commission of the European Communities to examine the situation in detail

and present a series of proposals for positive action by Member States, the Social Partners and the Commission in a Communication to the Council on 'Action to combat long-term unemployment'.<sup>1</sup>

In December 1984, the Council agreed a resolution<sup>2</sup> setting out a series of measures based on the Commission's proposals. In broad terms, these measures consisted of a set of actions to prevent people from becoming long-term unemployed in this first place, together with actions to help reintegrate into the labour market those who had already been without a job for 12 months or more. Stress was also laid on the need to organize the national employment services in such a way as to be able to identify and follow up people at

<sup>1</sup> COM (84) 484 final of 14 September 1984.

<sup>2</sup> OJ C 2/3 of 4 January 1985.

risk of becoming long-term unemployed. The Commission was asked to support Member States in their actions, including through the use of the European Social Fund, and to research, monitor and disseminate information about new developments.

### **Current situation**

Two years after the agreement of that resolution, about 40% of unemployed people throughout the Community have been unemployed for more than one year and nearly half of these for more than two years. Worst affected in general have been those aged over 55 and those under 25: however no age group is unaffected by the problem and the available statistics show that an increasing proportion of unemployed adults in the 25—44 age have been out of work for 12 months or more. Whilst it is not possible to make direct comparisons between Member States given differences of both definition and method of data collection, the latest figures available from Eurostat<sup>1</sup> and the OECD indicate that the overall trend is towards an increase in long-term unemployment. Denmark is the only Member State where the proportion of unemployed workers who have been out of work for one year or more is now smaller than in 1980. Provisional figures up to April 1986 show a recent slight decrease in long-term unemployment in the Federal Republic of Germany, France, the Netherlands and the United Kingdom (See Table 2). However, with the exceptions of Luxembourg and Denmark, the proportion of unemployed workers registered as unemployed for 12 months or more still ranges from 30% to, in most Member States well over 40%.

### **Characteristics of long-term unemployed people**

It would be misleading to generalize about the characteristics of a group of the population which has been identified solely by the lack of a job for a stated period. The individuals who make up that group may have been affected

by a wide variety of labour market disadvantages such as age, geographical location, interrupted unemployment history, level of qualifications, criminal record or health problems, which singly or in combination have led to prolonged unemployment. Recent research undertaken by the European Commission and by the OECD indicates, however, that those worst affected by long-term unemployment have a number of characteristics in common:

- (i) a lack of basic skills, including literacy, numeracy, life skills and basic technological skills;
- (ii) difficulties in entering training programmes geared to specific labour market needs, which presuppose a certain level of experience or qualifications;
- (iii) demotivation and loss of skills following a lengthy period outside the labour market;
- (iv) the risk of being further marginalized in having access only to programmes specifically set up for long-term unemployed people;
- (v) entry to a cycle of deprivation and poverty, particularly in countries where the level of State support diminishes significantly after a certain period — usually about 12 months — when the unemployed person's entitlement to insurance-based benefit expires.

### **Community support for initiatives**

Direct Community support for initiatives to help long-term unemployed people is given through the European Social Fund and the programme of action to combat poverty.

The guidelines for the European Social Fund provide that one of the areas in which fund assistance will be concentrated is operations to promote unemployment in 'areas of high and long-term unemployment drawn up with reference to unemployment rates and to gross domestic product'. Priority for funds for recruitment aids is limited, for budgetary

reasons, to absolute priority regions — Greece, the Mezzogiorno, French Overseas Territories, the Republic of Ireland, Northern Ireland, Portugal and the regions of Andalusia, the Canary Islands, Castilla-Leon, Castilla La Mancha, Galicia, Murcia and the towns of Ceuta and Mellilla in Spain. As regards funds to support vocational training, priority operations for adults aged over 25 include 'the vocational training of the long-term unemployed geared to their needs and including motivation and guidance and offering substantial prospects of unemployment'. These operations are limited to areas of high and long-term unemployment and/or industrial and sectoral restructuring. No distinction in terms of duration of unemployment is made in the case of priority areas for young people aged under 25. It is likely, however, that in this and other areas, a large proportion of expenditure under the European Social Fund has been to support activities which are concerned at least in part with long-term unemployed people. Overall funding allocated for training initiatives to help long-term unemployed people has increased from 32.7 mECU in 1985 to 151 mECU in 1986, reflecting the increase in the scale of the problem and the corresponding increase in measures to tackle long-term unemployment in Member States.

Long-term unemployed people were also identified as a priority group in the programme of Community action to combat poverty. Whilst recognizing the existence of community and national initiatives in favour of this group, it was felt that the new action programme could, in parallel with existing measures, address the problem of those in danger of experiencing poverty in the course of a protracted period of unemployment. A range of projects is being supported throughout the Community for the four year duration of this programme. From a total budget of 23 mECU, approximately 3 mECU has been committed for pro-

<sup>1</sup> Eurostat figures for all 12 Member States at October 1985, based on data from the labour sample survey, will be published in the 1987 volume of Eurostat's annual publication 'Employment and unemployment'.

jects specifically targetted at long-term unemployed people.

### Action taken by Member States

At the end of the 1970s and in the early 1980s the increase in the numbers of unemployed people resulting from the effects of the recession led to the development, by national governments, of a variety of special employment and training measures, many of which were targetted at young people entering the labour market. As high levels of unemployment persisted, the problem of long-term unemployment emerged as a further priority area for action which gave rise to a range of new or adapted initiatives by Member States. Recent research has shown that measures currently taken by national governments throughout the Community can be divided into the following broad categories:

- (i) specially targetted placement and counselling activities, usually carried out by the employment services, designed to ensure increased attention to the needs of long-term unemployed people;
- (ii) subsidies, of different forms, to the employer or, as in the case of the UK, to the individual, designed to promote the employment of long-term unemployed people;
- (iii) training or re-training programmes, either freestanding or linked to other employment measures: many of these aim primarily to improve basic skills, job search techniques, etc.;
- (iv) direct job creation measures generally of limited duration (with the exception of the Belgian Troisième Circuit de Travail) and involving work of public utility, which aim to reaccustom the individual to a working environment and facilitate reintegration into the labour market;
- (v) other measures including the provision of voluntary activities, adult education activities, etc.

In addition to these specifically targetted measures, long-term unemployed people also benefit from other general employment measures, particularly those designed to encourage unemployed people to set up in business. For example, in the UK, long-term unemployed people make up about 25% of all participants in the Enterprise allowance scheme whilst, in Ireland, nearly a third of participants in a similar scheme have previously been without a job for 12 months or more.

### Issues for the future

Despite the stated commitment by the Community to tackle the problem of

long-term unemployment, an increasing proportion of unemployed workers risk prolonged periods without a job. This raises questions about both the scale of the Community's response to the problem and also about the effectiveness of the measures adopted to reintegrate long-term unemployed people into the labour market and to prevent people from becoming long-term unemployed in the first place. A particularly disturbing trend is the increase in the number of people who have been out of work for two years or more — the very long-term unemployed (Table 3), whose particular characteristics and needs have not yet been identified but for whom traditional employment and training measures are likely to be inappropriate.

The 1984 Council Resolution to combat long-term unemployment requested the European Commission to review progress in meeting the objectives set out in that resolution every two years. The review will be presented in the form of a Communication to the Council in early 1987 and based on information obtained from Member States through questionnaires and on the findings of recent reports undertaken by the Commission and other organizations with an interest in policy on long-term unemployment. The report will seek to address the issues outlined above and to present proposals for further action to tackle the problem.

**Table 1: Unemployed**

EUR 9	Total (x 1000)		< 25 years (x 1000)		≥ 25 years (x 1000)		% of total		% of total unemployed for more than one year		
	Total	> 1 year	Total	> 1 year	Total	> 1 year	< 25 years	≥ 25 years	Total	< 25 years	≥ 25 years
Oct. 1980	7 209.9	1 778.2	3 087.2	479.2	4 122.7	1 298.7	42.8	57.2	24.7	15.5	31.5
Oct. 1981	9 535.7	2 426.5	4 092.1	783.0	5 443.6	1 643.5	42.9	57.1	25.4	19.1	30.2
Oct. 1982	11 221.3	3 461.7	4 629.7	1 094.9	6 591.6	2 366.7	41.3	58.7	30.8	23.6	35.9
Oct. 1983	12 109.5	4 323.1	4 937.3	1 394.5	7 172.2	2 928.7	40.8	59.2	35.7	28.2	40.8
Oct. 1984	12 771.4	4 926.5	5 141.9	1 531.0	7 629.5	3 395.6	40.3	59.7	38.6	29.8	44.5

Source: Eurostat.

**Table 2: Long-term unemployed (as % of total unemployed)**

	B	DK	D	E	F	IRL	I	NL	P	UK
Oct. 1980	46.2	8.0	17.0	(27.5)	22.3	31.6	35.6	—	—	—
Oct. 1981	48.0	4.0	16.2	—	22.2	30.7	34.3	—	—	—
Oct. 1982	51.9	5.0	21.2	—	25.2	30.2	39.8	37.0	—	—
Oct. 1983	55.1	6.0	28.5	(53.6)	26.6	36.5	43.0	47.7	(37.1)	36.9
Oct. 1984	58.9	5.9	32.8	(54.2)	26.9	40.9	46.4	54.2	(39.2)	39.6
Oct. 1985	58.1	9.2	31.0	(57.2)	30.4	43.8	—	53.9	(46.3)	41.3
Apr. 1986	64.4	5.9	—	—	30.3	—	—	—	—	40.8

Source: Eurostat. Figures in brackets: OECD.  
—: Not available.

**Table 3: Very long-term unemployment (more than 2 years) (as % of total unemployment)**

	B	DK	D	F	NL	UK
Oct. 1985	42.4	1.4	14.1	11.7	34.8	25.1
April 1986	47.3	1.2	—	11.8	—	25.4

Source: Eurostat. Figures in brackets: OECD.  
—: Not available.

# Specific measures taken under the Community policy relating to the employment market

## Exchanges of officials from the national employment services: an instrument for cooperation and arriving at a common policy in matters of employment

The accomplishment of the internal market by 1992 is one of the Community's priority objectives. It implies not only the free unimpeded movement of goods, capital and services, but also the totally unrestricted movement of persons, i.e. of the very executors of the economic and social progress of the Community. In turn, to be effective, the free movement of persons requires more intensive integration of the Community employment market.

In a recent interview, a journalist put the following question to the President of the Commission concerning the implications of the gradual accomplishment of the 'open market' by the end of 1992: 'If we take a leap forward to 1993, what will have changed, in practical terms, in the daily lives of European citizens?' The reply from Mr Delors was: 'A great deal! Firstly, the free movement of persons: the possibility for a student to enrol at any European university or for anyone in a clerical, manual or managerial occupation to try his luck on the entire European employment market.'

Beginning with this edition, *Social Europe* will devote a series of three articles to a number of specific measures designed to further the integration of the European employment market. The article in this edition deals with cooperation between the national administrative departments responsible for employment through exchanges between officials of the national employment services. *Social Europe* will then also devote an article to 'Sedoc' (European system for the international clearing of vacancies and applications for employment) and initiatives under way with a view to achieving the full integration of the frontier employment markets.

From the point of view of rules and regulations, a great deal has been done to encourage the integration of the national employment markets. Quite considerable achievements have already been made. The Community measures which have such integration as their immediate aim or which contribute indirectly to attaining this goal are many and varied.

Indeed, the freedom of movement of workers has been, virtually complete for nearly 15 years while the social security of migrant workers has been assured for even longer. At the same time, the Court of Justice monitors compliance with Community rules and defends these fundamental workers' rights: a body of case law already exists in this field.

For its part, the Social Fund promotes the geographical and occupational mobility of workers by encouraging vocational training and readaptation within their own country and beyond national borders.

The Community policies on employment and vocational training can rely on quite an extensive range of legal instruments (directives, resolutions, decisions, etc.) laying down obligations and in some cases even implementing instruments and procedures. These too help to establish a solid and effective legislative and operational groundwork for the Community policy on the integration of the employment market.

However, despite the achievements made, the Community provisions alone are not enough. Their legal effectiveness is clearly unquestionable but their impact on real everyday life — which is what really concerns the European citizen — depends basically on the arrangements for implementing Community law, i.e. on the actual commitment of the national authorities.

This is why, in addition to adopting rules, the Community is taking action to encourage this difficult task of integration by another route: that of cooperation between the Member States. Both routes are necessary and mutually complementary. Progress along one route

necessarily requires progress along the other.

Admittedly, such cooperation already exists but it should be developed by means of continuous efforts at co-ordination and relentless encouragement to pursue the common objectives already fixed and clearly defined in the Community acts.

Such cooperation finds effective practical expression in regular exchanges between officials of the national employment departments and the pooling of acquired know-how and experience. These types of exchanges result in a sort of interpenetration of the national administrative bodies allowing a comparison to be made of working methods, approaches to certain problems, the solutions chosen, the instruments used, the structures set up and the results obtained. The whole spectrum of matters connected with the policy relating to the employment market and its management can therefore be the subject of dialogue, study, comparison and, lastly, Community cooperation.

### Exchanges

In adopting the Regulation on the free movement of workers in 1968, the Council instructed the Commission to organize contacts between the national employment departments also by means of exchanges between officials and specialized staff training programmes (Article 23 of Regulation 1612/68).

In its 1980 resolution on the objectives of the Community policy on the employment market, the Council stated, in defining the measures to be taken, that Community action must be directed at developing effective cooperation between the national public employment departments on practical issues such as staff training, the introduction of data-processing techniques in the public employment services and the function of vocational guidance.

On the basis of these provisions, the Commission has been coordinating and financing exchanges between officials of the employment services of the Member States for 13 years.

In 1986, some 350 000 ECU was expended on such activities, 275 officials took part in exchanges.

The exchanges took the form either of 1–2 month traineeships or of visits and meetings lasting only a few days by officials of the central employment department or the recruitment services for frontier regions or officials specialized in the application of the Sedoc system.

While visits or meetings are a useful means of solving specific or incidental problems directly connected with the transfrontier or international clearance of vacancies and applications for employment, the aims of traineeship are more general, relating to information, cooperation and even — from 1987 onwards — the study of subjects relating to employment and the labour market which are of concern to all the Member States.

### **Traineeships**

Thousands of civil servants, of all levels of responsibility, have taken part enthusiastically and profitably in these traineeships since they first began in 1973. Their commitment, competence and open-minded attitude to the outside world have resulted in the growth of a European network of contacts and relations which has proved particularly beneficial to collaboration between the national administrative departments responsible for employment.

More specifically, the study of a given subject during a period as trainee combined with the experience of living and working in an administrative department of another Member State is not only enriching from the professional and human point of view for the trainee but is also fruitful for the national administration from which he/she came since the study, which necessarily culminates in a report, in most cases triggers off a pro-

cess of reflection in the administrative department of origin which may sometimes lead to useful conclusions as regards both the planning of employment policy and the improvement of structures in the employment services. Over the years, these traineeships have therefore shown themselves to be extremely valuable not only as an additional instrument of training for the officials of the employment services but also and above all as a way of enhancing mutual acquaintance with and rapprochement between the national administrative departments and their respective systems for managing the employment market.

The very profitable nature of the experience gained in this field has therefore prompted the Commission and the Working Party on Exchanges — within which a continuous and constructive dialogue has been established between the Member States — to draw up new guidelines for exploiting the enormous potential offered by exchanges in two areas:

- (i) technical cooperation between the employment departments of two or more Member States;
- (ii) the study of subjects of interest to all the Member States so as to reach conclusions useful to the implementation of new national or Community measures in the employment field.

These new guidelines — the text of which is attached — were formally adopted by the Director-General of Employment of the Member States in meeting in Brussels on 26 and 27 November 1986.

### **Technical cooperation**

The idea of technical cooperation through exchanges is by no means new but the need for technical cooperation in the employment field is certainly greater now, i.e. following the accession of Greece in 1981 and of Spain and Portugal in 1986. There is an even greater diversity of social legislation and the dis-

parity as regards the development of the very structures of the employment services is more pronounced in the Community of Twelve than it was in the Community of Nine.

In 1986, the Commission used exchanges between specialized staff in order to implement a programme of technical cooperation in favour of Portugal in matters relating to the management of the employment market. At the request of the Instituto do Emprego e Formação Profissional, which is empowered by the Portuguese Ministry of Employment to organize the employment services, the Commission coordinated and financed, in the form of exchanges of experts, a technical cooperation programme between Belgium and France on the one hand and Portugal on the other on matters such as:

- (i) the structure of placement services;
- (ii) the management of the Portuguese Employment Centre;
- (iii) employment surveys and contacts with firms;
- (iv) the introduction of data-processing techniques to the employment services.

This was a trial experiment in direct cooperation between national administrative bodies coordinated by the Commission and involving a small group of eight national officials. However, it was so successful that Portugal has already requested that a similar programme be carried out in 1987 but on a far larger scale involving 75 Portuguese civil servants and some 40 civil servants from other Member States. Greece, for its part has also requested the implementation of a programme similar to that organized with respect to Portugal.

In the light of the great interest shown, the Commission and the Directors-General of Employment of the Member States have agreed, within the framework of the new guidelines on exchanges, also to use such exchanges for the purposes of technical cooperation initiatives in the future.

## **Study of topics of common interest**

However, the greatest innovation in the guidelines is the use to be made of exchanges as a structure for the joint study of topics chosen by common agreement between the Member States which may give rise to common measures in the employment field. Every year, the Commission and the Working Party on Exchanges will now select two topics of interest to all the Member States from a list drawn up by the Commission on its own initiative or on the basis of suggestions put to it by the members of the working party. Under its traineeship quota, each national administrative body will then choose at least one of its officials to study at least one of these topics within the administrative body responsible for employment in another Member State. This arrangement will not prevent other topics of individual interest from being selected by each administrative body by using the other traineeships available to it under its quota.

A detailed procedure for the Community use of traineeships on topics of common interest has been drawn up. Under this procedure, a seminar will be held in Brussels when the cycle of traineeships begins — generally in March — which will be attended not only by the civil servant trainees appointed to study 'common topics' but also by the directors responsible for such subjects within the administrative body of each Member State. The seminar will enable the participants to make a clear assessment of the value of studying these subjects and agree on a common approach to research. The presence of the competent national directors will, firstly, help to identify the aims to be pursued by studying these subjects and, secondly, demonstrate the resolve of the Member States to take joint action both together and with the Commission.

On completion of his/her traineeship, each official will draw up a report on the topic studied together with a summary setting out his/her basic ideas and any proposals based on the experi-

ence gained both in his/her country of origin and in the host country.

The Commission will assemble and study the reports. It will arrange for the translation of the summaries and their distribution to all the national administrative bodies. Furthermore, after examining the summaries, it will make preparations for a meeting at which the experience gained and the proposals made can be pooled. This meeting, which will take place in Brussels, each year in autumn, is intended to draw conclusions from the work carried out. It will also provide an opportunity for joint reflection and even a comparison of the approaches and experiences of the various delegations on the same subject. But above all, the meeting will have to outline practical proposals for measures which could be implemented as far as possible within the framework of the legal and financial instruments already at the disposal of the Community. Clearly, this does not prevent the ideas which emerge from the joint study of certain topics also from yielding proposals in the longer term. This effort at joint research and deliberation will begin for the first time in 1987. The Working Party on Exchanges has already chosen the following two joint topics from a list of nine proposed by the Commission:

1. Recent experiments carried out with a view to improving the operation of the employment market.
2. Unemployment amongst young people — what can be done to ensure transition from training to employment?

This choice of subjects clearly reflects the current preoccupations of the Member States and the Community institutions. Although the topics are not new, the fact that they have been selected demonstrates the consistent determination of the national authorities and the Community institutions to provide an answer to the disturbing questions which they raise.

**Duilio Silletti**

## *Annex: Working paper*

### **1. Priority aims**

In order to promote the integration of the Community labour market, the Commission and the Member States will make more use of the exchanges of employment service officials for the purposes of:

- (i) studying subjects of interest to all the Member States;
- (ii) utilizing end-of-exchange reports whenever possible to draw useful lessons at the level of Community or national employment policies;
- (iii) exchanges of experience in the field of Sedoc, training of Sedoc staff, development of the Sedoc system and the promotion of information campaigns to increase the use of Sedoc;
- (iv) cooperation with and between frontier employment services;
- (v) technical cooperation between national employment administrations (organization of departments, computerization, etc.).

### **2. The programme of exchanges**

Each year, on a proposal from the Commission and before the end of October, the Commission and the Working Party on Exchanges will draw up a forward exchange programme, taking account of the estimated financial resources for the following year. Armed with this early information on the quota of exchanges allotted to them, the national administrations will have sufficient time to start the procedures for implementing the programme. The forward programme will be definitively adopted at the beginning of the following year once the actual financial availabilities are known. The programme will comprise 'long-term' exchanges, Sedoc exchanges, 'frontier' exchanges and technical cooperation exchanges.

### **3. Financial management**

The financial management will still be dealt with by the agreements concluded between the Commission and the national administrations. The latter will, by 31 January at the latest, inform the Commission of the balance remaining from the previous year and will send it a statement and supporting documents. This will enable the Commission to complete its internal administrative procedure for the commitment of expenditure which must be done to allow the exchanges to start.

### **4. Annual report**

Each year, the Commission will present a brief report to the Directors-General for Employment at their annual meeting, usually held in June.

The report will be drawn up by the Commission in close liaison with the Working Party on Exchanges, and will provide a succinct description of the previous year's activities and the current programme of activities.

### **5. 'Long-term' exchanges**

#### *5.1. Duration:*

In principle, these exchanges will last six weeks. This length of time strikes a happy medium between two requirements: the exchangee's need for enough time to study his theme and the need of the exchangee's own service not to have to manage without him for too long.

#### *5.2. Themes:*

Each year, before the end of October, the Commission and the Working Party on Exchanges will choose two common themes on the basis of a list presented by the Commission and drawn up by it on its own initiative and/or following

suggestions from members of the Working Party. Then each national administration will, unless it gives a reason for not doing so, select at least one of its officials to deal with at least one of the two themes, and will send their names to the Commission.

This does not preclude other themes chosen at will by any national administration being selected as subjects to be studied by other exchangees within the framework of the exchange quota allocated to each delegation for the year in question.

#### *5.3. Selection of exchanges:*

Each national employment administration will select exchangees in accordance with its own internal procedures. A good knowledge of the host country language is a preferential criterion in choosing officials.

At least two weeks before the start of the exchanges, each national administration will communicate to the Commission the list of exchangees selected, giving their names, duties, knowledge of languages, theme chosen, country of destination, length of exchange.

#### *5.4. Starting date of exchanges:*

All participants in long-term exchanges will start their exchanges on the same date, unless unavoidably prevented from doing so (illness, etc.). In principle, this date will be some six weeks before the Easter holidays. In practice, it will be fixed each year by the Exchanges Working Party according to the needs of the schedule. It is important to keep to this date for several reasons:

- (i) the administration receiving the exchangees will not be constantly disturbed by the arrival of individual officials on different dates;

- (ii) it is easier to make reception arrangements for group arrivals (accommodation, general conferences on the host country and administrative arrangements, etc.);

- (iii) the bringing together of officials from a variety of countries allows valuable cross-flows of experiences to take place;

- (iv) since, in this case, the exchanges will in theory end on the same date, it will be easier to organize the exploitation of exchange results, in particular the exchanges with common themes (translation and dissemination of summaries) of each end-of-exchange report; preparation of the Commission communication to the Directors-General for Employment who usually meet in June; organization of the end-of-exchanges meeting on common themes due to be held in the autumn.

#### *5.5. Inaugural meeting on common theme exchanges:*

The day before the exchanges begin, the Commission will organize an inaugural meeting for the exchanges, concerning the common themes. The meeting will be attended by:

- (a) the directors of the departments competent, in each Member State, for the themes chosen;
- (b) the members of the Working Party on Exchanges;
- (c) the exchangees who, directly after the information meeting, will leave Brussels for their respective host countries.

In addition to the general information on Community social policy, this meeting will highlight the value for Member States of studying themes of common interest. The presence of the competent national directors will mark the Member

States' commitment to carrying out a common action, both together and with the Commission.

5.6. *End-of-exchange reports:*

Each exchangee will prepare an end-of-exchange report accompanied by a summary of between two to four pages. Copies of the report and the summary will be sent to the host administration and the Commission. The Commission will see to the translation into English and French of the summaries on the

common themes and will send copies to all members of the Exchanges Working Party for distribution within their administrations.

5.7. *Closing meeting on common theme exchanges:*

In the autumn, the Commission will organize a meeting on the common themes, to close the exchanges. The meeting will be attended by:

- (a) the directors of the departments competent, in each Member

State, for the themes chosen;

- (b) the members of the Exchanges Working Party;

- (c) the exchangees who studied these themes in the course of their visit.

The aim of the meeting is to draw any lessons to be learnt as regards the organizing of the exchanges on common themes and to contribute to the Community's knowledge and study of these themes.

# The deaf community in action

**On 17 and 18 September 1986 the recently founded European Community Regional Secretariat of the World Federation of the Deaf held its second plenary meeting in Brussels. Delegates from the Community of the profoundly deaf attended from 11 Member States (only Luxembourg is not yet actively involved); all the different sign languages of the countries represented were in use throughout the seminar — a sight both inspiring and challenging.**

At the seminar the Secretariat presented to the Commission, in English and French, a carefully prepared paper on the access problems of deaf people, well timed to contribute to the preparatory work which the Commission is currently undertaking on this theme. The seminar also saw two live demonstrations. The first was of an interactive video system for the education of profoundly and prelingually deaf children, linking microchip and laser disc technology, which has been developed at Donaldson's School for the Deaf in Edinburgh. The second was an electronic mail box which is now fully operative between the leading associations in three countries (Ireland, Netherlands and UK): with the aid of the Belgian PTT, messages of good will were sent to the delegates in Brussels from all three countries during the seminar.

It is easy to underestimate the importance and worth of this achievement on the part of the members of the deaf community within our European Community. Indeed, it is only when we have had the opportunity to meet and communicate with them that we can even begin to understand their situation — perhaps the most commonly, largely and disastrously misunderstood of all groups in society. How many of us are aware that, for the profoundly deaf, the invention of the telephone was a social and professional catastrophe, the possibility of recovery from which is only now just beginning to emerge? And, on the other hand, how many of us take it as obvious that deaf people, since they do not have a visual impairment, cannot have problems with reading? To become aware of the reality in this regard is probably the most important single step we need to take if we want ourselves to become open to the deaf community. In fact, recent research has shown that at 16 years 35% of profoundly deaf young people have a reading age of below 7, and 55% a reading age of below 9. As long as that remains the situation, even the miracle of new technology will fall flat, since screens as well as books have to be read.

The Commission is fortunate in two ways. First, because the open character

of the 1981 action programme to promote the social integration of disabled people has given the Commission the mandate to relate directly to the deaf community and to develop its approach on the basis of their own expression of their needs. Secondly, because the deaf community in Europe has responded with astonishing energy and inventiveness as well as inexhaustible good will to the opportunities afforded by the Commission's action programme. There are many examples of this, perhaps the most important being the initiative of the World Federation of the Deaf in founding its first Regional Secretariat, to comprise the European Community countries, in 1985. Important too is the 'Euroaction' group inspired by the UK Breakthrough Trust — responsible for the electronic mailbox project and for holiday activities for deaf young people and adults. The University of Bristol Education Department has pioneered the creation of a European videobank of sign languages and is now developing European courses for sign-language interpreters. For sign interpreters too, a first all-European seminar is being organized in 1987 by the French deaf association. Mobility International includes encounters for deaf young people in its 'Europrogramme' of youth exchanges for the handicapped. Deaf theatre projects are being developed at European level in France, UK and Spain. An experiment in delivering Prestel-type services to the homes of deaf and other handicapped people is under way in Reading, UK. A first European seminar on access to higher education for deaf and visually impaired students has been held in Mons. These are just some of the examples of activities, almost all of them actively supported by grants from the Commission, which together constitute the explosive arrival on the European scene of the community of profoundly deaf people.

And immediately ahead lie two new promising developments. The Commission has this year initiated a first European survey of the situation and aspirations of the deaf community; once this is completed and published we shall have a corpus of up-to-date information which has never been available before.



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At the same time the European Parliament has put forward two draft Resolutions to support the education and communication of deaf people in the European Community.

The 'wind of change' is certainly blowing, but its only just about started. There are probably more fully employed sign language interpreters in one average-sized State of the US than in the

whole of our Community. We're on the road, but there's long way to go.

# European Social Fund: Resocialization project St Brendan's Hospital Dublin

**The project is a demonstration pilot project which is designed to develop into a model for the European Community in the resocialization process of long-stay psychiatric patients and produce research data to this end.**

*The evaluation of the pilot phase of the project had three main aims:*

- (1) To monitor the on-going performance of the unit.
- (2) To provide regular feedback to project staff to enable them to intervene and modify trainees behaviour.
- (3) To develop appropriate and precise research instruments for use on the project.

Underlying these aims was the main premise of the project i.e. that in a democratically run, multi-disciplinary unit, patients (trainees) could be assisted in utilizing existing skills and strengths as well as developing new skills and more effective coping mechanisms. The multi-disciplinary element was important in that it allowed each individual to be viewed from a variety of different viewpoints. Each participant contributed from his/her professional background in developing a holistic picture of the trainee. This was essential both in the initial baseline analysis and in the development of an effective programme for each trainee. The view of each staff member was accorded equal weighting and this contributed significantly to staff morale. As well as the free exchange of ideas at meetings, staff views were sought in a more formal manner through questionnaires, etc. Maintaining high staff morale and involvement is recognized as an essential element in any resocialization process. A good deal of research documentation on this topic has emphasized the difficulties inherent in such work. This is particularly so for the nursing staff, as they are required to make the most radical role change and this must be accomplished within the same general social setting of the hospital, as the old role was performed. In changing from the more traditional orientation of psychiatric nursing to a modern advocational role, they must cope with the potentially more difficult 'Open Unit' without the typically coercive methods (e.g. heavy medication) of the traditional ward. Additionally, there is a more equal relationship between trainee and advocate. This demands a greater emotional

commitment from staff although it does offer potentially more job satisfaction. A change in attitude is also required from other members of the team in that they must learn to function without the security of a recognizable role and position. During the pilot phase of the project, the difficulties inherent in these role changes often caused tensions. However, these difficulties were usually resolved in group discussion and the most obvious proof that the staffing structure was successful lies in the figure for turnover. Of the 21 full-time staff who began working in the project, only two left within the first phase and neither of these people left because of dissatisfaction with the unit. During the second phase of the project, it is hoped to deal with this area of staff attitudes in a more in-depth manner.

The third and final element in the unit's philosophy was that trainees would be assisted in recognizing their own strengths, ultimately attaining self-autonomy. This involved a completely new direction for staff. While many of the staff may have been involved in working with patients in this way before, it had been on an *ad-hoc* basis. In the unit an attempt was made to involve the patient (trainee) as completely as possible in all aspects of the resocialization process including the research procedure. Essentially it was felt the person would regain self-identity through an individual and group interactional experience. The individual approach was provided primarily by the special advocate who was assigned to each trainee. These relationships provided what the majority of the trainees had never had — a warm, supportive relationship, balanced by constructive guidance and criticism. Assessments were carried out regularly and frequently by the advocates. In addition, a different advocate monitored the trainee over the same time period. The results were then channelled back through the advocate system. This enabled progress to be charted, providing encouragement to both trainee and advocate — in effect creating a multiplier effect. It also facilitated the planning of behaviour modification programmes. Trainees were involved in the overall

monitoring process and a number of simple self-evaluation procedures were designed for this purpose.

When the trainees left the unit, a slightly more complicated check list procedure was used. These instruments were piloted during the first phase and it is intended to utilize modified versions of these in later phases of the programme. Again, in keeping with the general philosophy of the unit, the purpose and overall plan of the research was explained initially to trainees and thereafter any queries were answered on request. Permission was always sought from trainees before undertaking interviews. While it is unlikely that chronically institutionalized patients would refuse such permission to those they perceive as in authority, it is worthwhile noting that all the trainees were eager to participate and continued to do so after they had left the unit.

After the initial assessments, a Trainee Needs Profile was drawn up for each trainee. This consisted of an account of each trainee in terms of his/her abilities and 'deficiencies'. Because of the short time available and also due to the underlying vocational aim of the project, the emphasis was on encouraging socially acceptable behaviour while correspondingly keeping unacceptable or deviant behaviour at a low level. Although many of the trainees continued to experience severe psychiatric symptoms, the general aim was to provide an environment which would maintain these symptoms at a level at which they could function adequately.

### **Medication:**

At the initial assessment of trainees, medication was reviewed for each person and a programme of rationalization and/or medication reduction was implemented.

There were significant changes in drug intake over the six-month period. The figures show that the greatest medication changes occurred in the consumption of Thioridazine (a major tranquillizer) and Chlorpromazine (a minor tranquillizer). Sleep medication (hypnot-

ics) was reduced by half. Five of the trainees were able to go off 'Depot' injections (i.e. major tranquillizers) altogether, (four of these trainees in fact went off all medication) and a further nine trainees reduced their drug intake by varying amounts. Only six trainees stayed at their initial medication level.

### **Vocational training:**

During the first weeks of the project the vocational training emphasis was on raising competence levels and increasing trainees' general confidence. There was also an attempt to improve concentration (which is particularly handicapping for psychiatric patients) by reducing medication. The results of the medication programme have already been outlined. When the trainees moved into the workshop phase they were assessed on their performance using the EERC workshop rating scale.

### **General behaviour:**

A resocialization programme has as its main aim to facilitate the re-emergence of positive personality features which will allow trainees to develop more adequate coping mechanisms and attain new skills. Inherent in this is the belief that as negative symptoms grow even healthy aspects of a personality recede. During the first phase of the project, slow and steady improvement was aimed at. This was felt to be most appropriate for the particular type of trainee involved.

### **Changes in average deviant behaviour ratings:**

The deterioration was immediate following the move and it emphasized two major difficulties of the project. Firstly, it demonstrated how traumatic sudden change can be for patients who have lived for so long in the relative security of a hospital. Secondly, it emphasized the limitations of the unit itself. In keeping with the project's original aims, it was envisaged that an essential part of

training would take place in a custom built unit to simulate a domestic environment with provision for recreational teaching and other facilities as well as providing privacy for the individual. The present environment, although it has been made as comfortable and 'home like' as possible reflects the psychiatric institution which by its nature tends to limit the potential of the individual trainee for change as well as interfering with training strategies. Furthermore some of the trainees in the first phase of the project had previously been patients there when it was an ordinary ward. The unit is, and is perceived to be, very much within the hospital and this tends to force trainees into more traditional hospital roles.

Although new strategies to soften the impact of these major changes will be implemented in the second phase of the project, there seems little likelihood that this type of trauma can be radically reduced within the present structure.

### **Social activity:**

In this, perhaps more than in any other area, the successful outcome of the resocialization process can be seen. On entering the unit, trainees were asked to assess themselves in terms of sociability. The majority of the trainees defined themselves as 'bad' or 'poor mixers' and that they had few or no friends. Although all of the trainees had spent many years in the hospital, surrounded day and night by people, they had not formed any close relationship. Most relationships in such a hospital are based on an exchange system, usually involving the borrowing and paying back of cigarettes. Friendship does not develop easily in institutions. This is partly because institutional life does not facilitate the privacy and loyalty which are usually part of ordinary friendships. Also, such relationships, although not openly discouraged, are not actively encouraged as is the pattern in all forms of institutional life. Social isolation is therefore one of the ironic results of long years spent in a psychiatric hospital full of people. This isolation and lack of sociability is easily observable in any long-

stay ward of a psychiatric hospital. The 20 trainees in the initial phase of the project generally reflected this phenomenon. At first they spoke infrequently, and interaction with other trainees was almost non-existent. Gradually this pattern changed and towards the end of the project, the trainees, almost without exception, initiated conversation themselves and more importantly, vigorous discussion often took place even in the absence of a staff member to facilitate this.

**Re-entry into the community:**

Sixteen trainees are now living in the community and are coping successfully. The degree to which they have integrated into the community cannot yet be

evaluated. The first year after re-entry, in particular, the first six months, are crucial in the lives of resocialized trainees and their progress is now being monitored. Of the four who returned to the hospital, one did not complete the six months training and was returned to the main hospital following a serious violent incident; two were judged not to be capable of coping in the community during a two week trial in the houses and one, following a two week trial, asked to return.

**Living arrangements of all trainees (January 1985):**

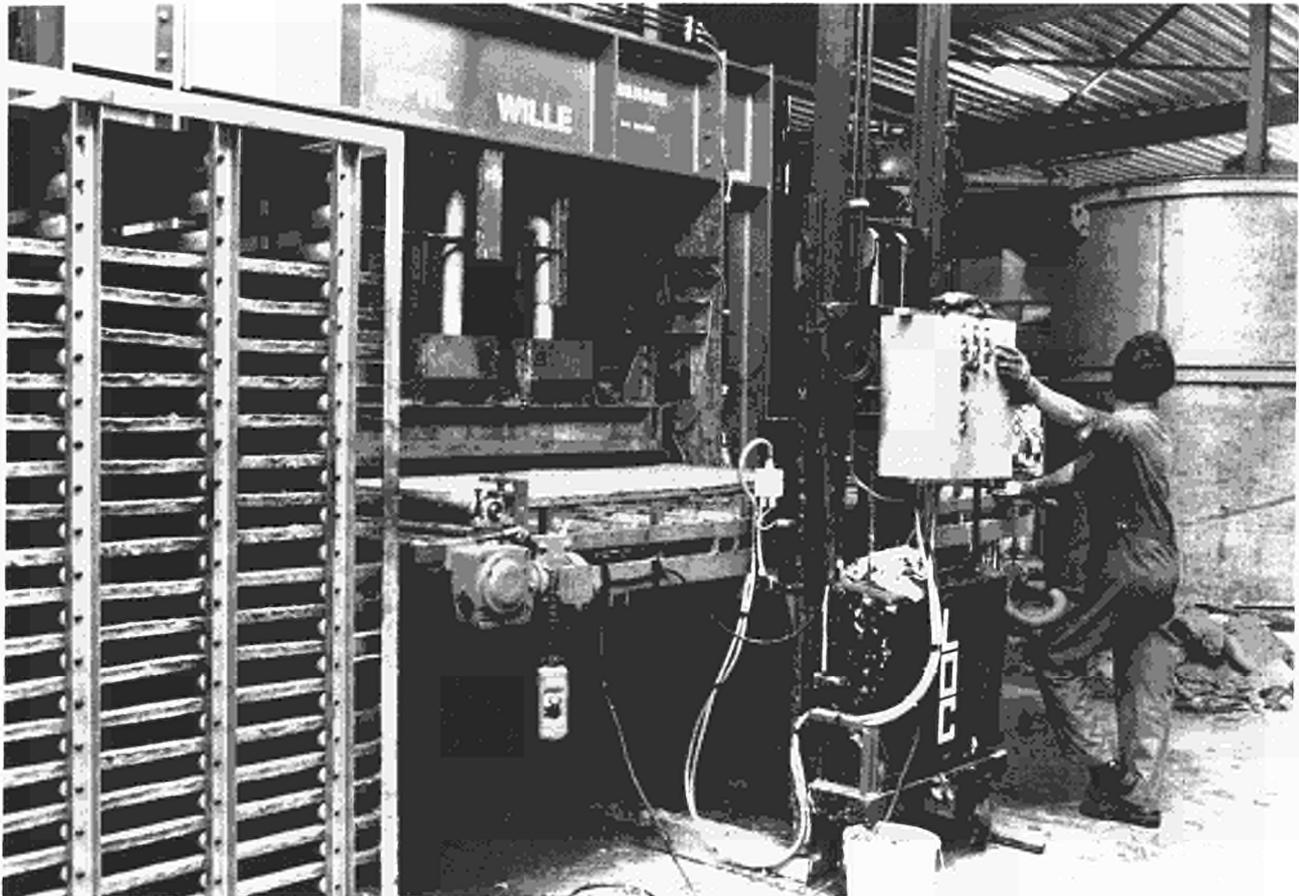
Flat	1
Unsupervised group home	5
Supervised group home	10
Hospital	4

All the trainees are now attending a training workshop and hopefully will move into open-employment at a later date. The fact that 16 chronically institutionalized patients were sufficiently capable after six months to cope in the community can be seen as a successful outcome to the first phase of the programme, and, despite difficulties, they are coping adequately. The real success of the programme ultimately lies in their remaining and working in the community. At present the outlook is optimistic in that regard but, until sufficient time has elapsed, one cannot predict accurately the ultimate success of this pilot phase of the project.

*(Extract from the intermediate evaluation report)*

# European Social Fund: Creation of a self-managing team to develop a new product

## Vivegnis Belgium



Following the discovery by our non-profit organization of a means of using the ordinary mixed waste of a region to produce a new product in the form of a rigid insulating board, with exceptional sound and heat insulation properties containing no binder, formaldehyde or asbestos (which won the Trends/Tendencies (business/economic review) innovation prize for 1984) we went on to develop an entirely new production technology for making it. This process is absolutely original and we have taken out a European Patent on it (European Patent No 83200096.2 of 22/1/1983).

The pilot scheme described in this article was to utilize the resources of an economically depressed region (in our case waste paper, textile waste and veg-

etable waste) to produce a product of general public usefulness using a new production process.

Our pilot plant, which is still essentially a training unit, has provided training for a staff of 18 young people under 25 years old, with no previous experience in this kind of work, in a wholly innovative production technology and the acquisition of a board-fitting technique.

One third of our trainees are from the so-called marginal sections of society (former drug-takers, the mentally and physically handicapped, the long-term unemployed, and the 'drifters').

Training was geared essentially to teaching them to work as a self-managing and co-responsible team.

### The first year's progress

By the end of the first year, it had become clear that most jobs in our Pan-Terre board pilot production plant could be handled competently by each member of the group of trainees, some of whom had little understanding of basic industrial technology; indeed the only job which, today, cannot be done by all team members is control of the drying oven (high degree of technical skill required, electronically-controlled, dangers of overheating).

The pulper and agitator: this is a crucial job calling for a high degree of precision from the operator, both in his manual movements and in dosage, if massive wastage is to be avoided. This

is the key position for board quality assurance and throughput, and the stage on which the entire production line pivots.

The preformer: the technique used is relatively straightforward, but an operator who does not possess at least a very basic understanding of pneumatic and hydraulic technology and electricity may find himself stumbling from one problem to another. More training is required in this area.

Sizing: again, a fairly simple technique, but much care and application to the task is needed to avoid serious problems when fitting the boards, as well as to keep down the level of rejects due to poor pre-sizing.

The finishing line: the training for this is the same as that required for joinery work: operating a saw, panelmaker and router. Absolute precision and observance of safe working practices are a must at all times.

On-going training in self-management enables the group to analyse and criticize their own performance at all stages. Whenever a trainee does something badly or shirks his responsibilities, self-criticism obliges him to think out the whys and wherefores of the situation for himself, and the group helps him work out how to put it right. This insistence on self-evaluation and this workstation-based organization, has not only helped trainees familiarize themselves with the requirements of each task, and sharpened their sense of responsibility, but has also significantly improved our production line and the quality of the board itself.

Job rotation to produce multi-skilled workers has enhanced the attraction of teamwork, co-responsibility in production and optimized the use of plant. It has also facilitated positive self-criticism because each team member has at some time performed all the tasks.

It should also be added that the interest and enthusiasm of the trainees as a whole is due to no less a degree to the completely new approach we have taken to marketing the product.

*We have devised a two-pronged marketing strategy:*

- (i) the first is socially inspired: the product will be marketed in Wallonia through alternative channels (bypassing what has become the established network of large supermarkets and DIY superstores, etc. . . .) and by small independent contractors; this is a sheltered marketing channel and the aim is to create jobs through the sale and fitting of Pan-Terre insulation boards;
- (ii) the second aspect is: maximizing exports to generate financial resources to train an increasing proportion of the unemployed youth of Wallonia to create their own enterprises through the sale and fitting of our insulating board, as well as investing in future manufacturing jobs by the expansion of Pan-Terre production plants; our export earnings will also help provide funds for the technical training of other unemployed young people in other fields: training in the construction of the PT 101 compaction unit, training in the technique of building pedicabs, training in the assembly of continuous operation lime, plaster and Pan-Terre insulation board works using appropriate technology in the Third World (requests to the EEC for assistance with appropriate technologies for developing countries, particularly in the ACP States under the Lomé Convention with assistance from the Centre for Industrial Development).

**Two years on**

- (i) Our trainees are by now carrying out selective refuse collection with the consummate ease of skilled professionals.
- (ii) The same professionalism shows through in the separation and compacting of paper.

A number of improvements have been made to the PT 101 multi-density compaction unit in response to

unprompted suggestions from the trainees themselves:

- (a) the hydraulic transmission has been modified with an appreciable reduction in wear on the main piston;
- (b) the semi-acoustic binding system has been modified to increase throughput.
- (iii) A major improvement was made in product composition thanks to the acumen of the staff. Textile waste has been replaced by straw making the board at once more rigid and more lightweight.
- (iv) Trainees rapidly became skilled in operating the fibre grinder and disintegrator.

The trainees suggested that an anti-noise hood might help reduce machine noise. A prototype was designed and made, and was found to be so effective that another potential market opportunity has now emerged.

The extraction system was also redesigned to appreciably reduce dust hazards in the workplace.

A suggestion was made that the selection of better-quality steel for cutting blades would increase their useful life.

Trainees became actively involved in the selection of new raw materials for the boards: grinding of new vegetable fibres, etc. . . .

- (v) The pulper and agitator: the trainees' application to their work and their acumen enabled us to make substantial improvements to the process at a stage which is of paramount and critical importance to the production of the board.

The improvements made included:

- (a) the purchase of an electronic weight indicator for precision weighing and dosage of raw materials;
- (b) installation of a float level detector to automate the dosage of water into the pulper;

- (c) installation of a submerged pump to speed up refilling of the pulper with recycled water;
  - (d) Changes in the feeding order of raw materials;
  - (e) Development of an automatic method of regulating pulp consistency to obtain boards of uniform consistency and dimensions;
  - (f) Change of composition to improve the heat insulation properties of the boards at a lower production cost.
- (vi) Preforming: a series of improvements were made in response to suggestions made by trainees based on their own observations:
- (a) hollowing of the preformed cake was accelerated by placing a perforated plate on the moving platen of the preforming unit;
  - (b) the time taken to spread the material within the frame was reduced (by adding two filler inlets);
  - (c) transfer of the preformed cake to the elevator using two arms driven by a pneumatic cylinder;
  - (d) automatic return of the elevator to ground level;
  - (e) addition of a second hydraulic pump to speed up the preforming stage;
  - (f) development of an automatic board support hoist;
  - (g) automation of quality and thickness control;
  - (h) enhancement of automation to increase output while improving working conditions.
- (vii) Drying oven: only a very few of our trainees were up to the demands of this job, but the interest shown by them in it enabled us to:
- (a) design a drying curve more appropriate to the product;
  - (b) reduce drying costs;
- (c) work out an energy recovery and fume extraction system.
- (viii) Sizing:
- Our trainees had no problems in coming to grips with this skill, and once again were instrumental in making a number of improvements:
- (a) sizing quality was improved by a change of sizing roller;
  - (b) a different, stronger and easier-to-apply adhesive was chosen;
  - (c) a change of press heating plate gave an improved quality board.
- (ix) Finishing line:
- The training as originally conceived for our finishing line did not give us the degree of quality assurance we needed for the boards.
- Together with our trainee staff, we designed an entirely new, all-purpose board machining centre (adaptable to all forms of prefabricated product such as doors, windows, etc. . . .).
- In conventional machines, the board moves relative to a fixed machine tool. In ours, on the other hand, a numerically-controlled machining head moves relative to the board, which remains fixed. The innovation here is that the board is held steady by suction. This machine was designed, constructed and put into operation within three months.
- (x) Marketing: the trainees designed a series of sales documents, and we concluded that a genuinely offensive marketing policy was called for, with everything that that concept implies.
- (xi) Social aspects:
- This second year showed that self-management can provide trainees with the means of mastering modern production technologies for a new type of product while being wholly responsible for the equipment which they are not only skilled in using, but are also capable of maintaining and improving to in-

crease its reliability and suitability to the task in hand, which is that of manufacturing a product to the highest possible quality standards.

The trainee is thus able to develop his internal resources and abilities to the full, being totally in control of his work and in the full understanding of the importance of what he is doing both for his own job and the future of the enterprise whose goals and culture he has helped to shape.

A 16 mm film was made at the end of the second year on the self-management of these trainees in our pilot plant.

## Conclusion

At the outcome of the training, we can now say that we have a group of 18 people with an average age of 25, one-third of whom are from the 'margins of society', who are skilled professionals in the selective collection of paper and textiles, compaction and the production of 'Pan-Terre' insulation boards.

They are capable of self-organization, self-management and constructive self-criticism.

As a staff, they have shown proof of creativity in the ability to generate imaginative solutions for improving both the product and the production line and by the interest they have taken in the work itself, which they control and in which they have found the total freedom needed to give full rein to their talents, which has given them an identity more than that of a simple tool of production and target for consumption to which they are habitually relegated.

This staff will now be turning its attention to the energy saving demonstration project 'Production of a thermal insulator from recycled raw materials', No BM 029/85 BE.

The aim of the project is to convert the pilot plant into a full-scale industrial demonstration facility, thus transforming this innovative idea from the level of a craft industry to a truly industrial ad-

vanced technology, energy saving product for the European market and offering a solution to the increasingly acute problem of environmental improvement (waste recycling and a partial, but so important, solution to the problem of public tips), and energy conservation through the use of the product itself.

This insulation product, moreover, is the only one which answers the current concerns of many European countries for a new form of insulation to replace

chemically-based insulation products so deeply implicated as causes of cancer, lung disease and other health problems.

This industrial plant with a production of 670 000 m<sup>2</sup> of boards will be a model unit serving as a demonstration centre not only for the whole of Europe (where considerable interest has already been shown in France, Germany, Italy and the Netherlands) but also for non-Community countries through the

granting of manufacturing licences and the sale of patented machinery (prototype).

All of which will take us further towards the attainment of our goal of increasing employment both upstream and downstream of the production process throughout the Community as a whole.

**William Wanters**

# Equivalence of vocational training qualifications between Member States

**Following the Council's approval of the Decision of 16/7/1985, the Commission has been assigned the job of matching up, as frequently as possible, the equivalent vocational training qualifications in the various Member States for level 2 of the classification annexed to the Decision: skilled workers.**

The Commission has therefore set up a consultation procedure with Member States and the social partners pursuant to Article 3 of the Decision aimed at achieving all-round agreement on the priority sectors in which a start could be made on the appropriate technical works. Despite the delays caused by problems with national consultation procedures, the Commission has been able to select three sectors as suggested priority areas on which an initial broad consensus of agreement might be reached. They are:

- (i) the hotel and catering industry;
- (ii) the motor vehicle engineering industry;
- (iii) the construction trades.

As the work moves into its second stage during 1987, the Commission could well add three other sectors to its list as a good 'second team', namely:

- (i) agriculture;
- (ii) the electrical industry;
- (iii) the textile industry.

The Commission has therefore asked Member States to put forward the names of experts who could take part in a series of meetings for each of the first three sectors with the aim of producing results which can be validated before

being published in the *Official Journal of the European Communities*. The technical aspect of the works will be organized by the European Centre for the Development of Vocational Training in Berlin (Cedefop).

The timetable for the works is:

7—8 October 1986: — meeting of officials of the coordination and liaison bodies in the Member States (to finalize procedural details of how to approach the task);

23—24 October 1986: — Berlin — 1st meeting of the Horeca (hotel, restaurant and catering) working group;

18—19 December 1986: — Berlin — 1st meeting of the working group on motor vehicle engineering;

End January/early February 1987: — Berlin — 1st meeting of the working group on the construction trades.

Countries who have only recently joined the Community and who do not yet have the Community catalogue of trades and occupations under the European communicating system for jobs available and jobs wanted under international clearing — Sedoc — will be invited to take part in the works with a view to later validation of the results.

# Development of teaching materials for migrant workers' children

When the Council of Ministers, and the Ministers of Education meeting within the Council, decided in 1976 to mount a Community action programme in the field of education, they resolved to make the education of migrant workers' children a central plank of that programme.

Of the score or so of pilot schemes set up since 1976, two projects in particular concerned with the development of teaching materials were successfully completed in 1986: the first for the benefit of Italian pupils in French-speaking countries, the second to assist Turkish schoolchildren in the Federal Republic of Germany.

TRA NOI is a system for teaching Italian language and culture to Italian primary school pupils in France and French-speaking Belgium. The system comprises:

- (i) four textbooks, each with its own accompanying teacher's manual;
- (ii) games for class use and to test what has been learnt;
- (iii) audio cassettes to assist language learning;
- (iv) six books of stories and rhymes to encourage individual reading;
- (v) an Italian/French — French/Italian dictionary;
- (vi) five videocassettes with a cultural content, dealing with: the violins of Cremona, the glassmakers of Murano, the Venice carnival, and Ferrari racing cars . . .

The teaching method was developed after a study of the situation and language needs of Italian schoolchildren in France and Belgium. Volume No 1 has already been validated in schools. The contents of each lesson were adapted to fit in with the normal school syllabuses of the reception country, with due allowance made for the dual ethnolinguistic identity of the migrant workers' child. The mother culture and reception culture were engaged in a constant dialogue which permeated the child's entire curriculum, graded, naturally, according to age.

In this context, TRA NOI offers an example of successful multi-cultural education.

TRA NOI is also the first attempt, at Community level, to develop a teaching method and teaching materials tailored specifically to the needs of nationals of one Community Member State who have settled in another.

The entire project, from preliminary survey through to design and production of the material, was headed by Professors R. Laporta, F. Schino and R. Simone for the Istituto della Enciclopedia Italiana, in conjunction with the Italian Ministries of Education and Foreign Affairs.

With the backing of the Commission and the German and Italian Governments, the Istituto is now branching out into a new series — TRA NOI Germania aimed at Italian children living in the Federal Republic of Germany. A third series is also on the drawing board for English-speaking countries.

TRA NOI does not claim to provide cut-and-dried solutions for classroom teachers and education authorities. Its value lies in having opted for different versions tailored to the host regions and having pointed to the need for a rethinking of the sort of education being offered to immigrant workers' children.

Since 1985, the Greek Ministry of Education has been engaged in developing curricula and teaching aids for Greek primary- and secondary-school children in the Federal Republic of Germany. The Commission is currently in the midst of talks with Spain and Portugal over the introduction of similar projects for Spanish children in France and Portuguese children in Luxembourg.

These projects are first and foremost a response to particular educational needs, for it is clear that the immigrant family finds itself bathed in a linguistic, cultural and social environment completely divorced from that of its region or country of origin. The education systems and teaching methods of the host country are different to those of the country of origin. Consequently, the teaching aids used in the country of ori-

gin cannot be used in educating 1st and 2nd generation immigrant children. A wholly new approach had to be found which took account not only of the educational and social contexts, but also the various degrees of bilingualism achieved by the children themselves.

The development of curricula and teaching materials for familiarizing children with their language and culture of origin has also grown out of the implementation of Council Directive 77/486 concerning the education of migrant workers' children, Article 3 of which placed an obligation on host States to foster the teaching of the language and culture of origin in cooperation with the country of origin and to blend it in with mainstream schooling.

The setting up of joint committees on curriculum development thus goes far beyond being an exercise in designing an improved philosophy of education to become an aspect of the implementation of a Community instrument.

It would be misleading to conclude from this that the Commission's concern is confined to the mother languages and cultures of Community nationals. In adopting Directive 77/486, the Council unequivocally affirmed its intention not to introduce a form of educational discrimination, and that arrangements made for Community nationals held equally good for immigrants from outside the Community.

The Community as a whole — and the Federal Republic of Germany in particular — has a high population of Turkish immigrant workers. In 1982, the Commission allied itself to a major trailblazing project launched by the Federal German Government and the Berlin city authorities.

Migrant workers' children in the majority of West German *Länder* can now opt to be taught their mother tongue as a second language as part of the normal school curriculum. This differs from the normal run of foreign language teaching in that the language taught is that used at home. Curricula and teaching methods thus had to be adapted accordingly and new teaching materials developed.

The Berlin Senate (executive agency) has published six school textbooks to take Turkish pupils from the 5th to 10th year. The contents are designed to interlock with the mainstream German curriculum, but with a very pronounced cross-cultural bias which continually addresses the problems of the migrant community. The books deal with topics from the geography, economy, ancient and modern history of Turkey. The teaching of Turkish literature is coupled with an introduction to the major streams of European literary and philosophical thought.

The material was validated, with the Commission's help, simultaneously in

Federal Germany, the Netherlands, Denmark and Belgium. A European symposium organized by the Berlin Senate, with Commission support, from 14 to 17 October 1985 afforded delegates from other Member States the opportunity to acquaint themselves with the progress of the project, to see how the materials were used 'at the chalk-face' and to discuss the problems raised by the teaching of minority ethnic mother tongues in mainstream secondary education.

The teachers responsible for teaching Turkish in the Berlin pilot scheme were all Turkish nationals and all employed by the city education authority. Pupils opting for Turkish as principal

second language were also able to opt for a second foreign language — English — in their 7th year. The teaching of Turkish as a second language stops in the 10th year and is replaced by English from the 11th to 13th years of upper secondary education.

Throughout the Community as a whole, the teaching of the mother language and culture has made marked progress, both as an integrated and an elective course, in primary schools. Much ground remains to be covered in secondary education, however. The Berlin experiment has pointed to an imaginative way forward.

# Student handbook

**The Commission began its action to promote the mobility of students and academics long before a People's Europe and Erasmus became catchwords with a political dimension. In the mid 1970s when the first concepts of an education action programme were designed it was felt that practical information about EC higher education systems was one of the keys to stimulate students to spend periods of study in another Member State than their own. The information to be made available needed to have a practical value for students and therefore to cover higher education systems, the conditions of access to them and also the social, economic and legal conditions for study abroad. With such a spectrum of subjects in mind the Commission asked Dr Manfred Stassen from the German Academic Exchange Service (DAAD) to edit the first edition of the *Student Handbook* in 1977.**

Each of the nine member countries, as they then were, nominated a correspondent, usually an official working in their education ministries, to provide a contribution about tertiary education and study requirements in their own Member States.

The first edition also contained information about the College of Europe in Bruges and the European University Institute in Florence. The handbook appeared in all the official languages of the Community.

The interest expressed by students, university teachers, academic advisory boards and the like convinced the publishers that they had discovered a gap in the market. The Handbook was distributed free of charge. The demand was so great that a second edition had to be published in 1979, with the third following in 1981. With the accession of Greece membership of the Community had now risen to 10, and the number of official languages had grown to seven. For the fourth edition the Commission decided that the Handbook should henceforth be published and distributed in individual Member States through commercial channels. The idea was to accelerate distribution and thus reach a wider audience. The uniform structure of each country's contribution was retained, as it had been tried and tested and was effective in providing an overview of what was available. The handbook had now grown from its first edition size of 175 pages to a volume of 356 pages. The urgent requirement for recognition of academic awards and periods of study spent abroad was set out in the texts produced by all the member countries and also in a separate chapter dealing with national councils concerned with the recognition of diplomas. Another innovation is the detailed information and the tables relating to the EC's common study programme, in which some 600 university institutions are now taking part. Detailed information about facilities provided for disabled students in all Member States is yet another new feature.

Apart from information aimed specifically at universities and colleges and

education ministries in the member countries to encourage them to undertake more activities on their own initiative, the book is largely devoted to providing information for students. What can a person wishing to spend a couple of terms in another EC country expect to find? First of all, the Handbook will tell him about the structure of the higher education system and will describe what can be perceived in the way of recent trends at that level. This is both useful and important, as some EC Member States have very recently introduced legislation considerably affecting the structure and length of university courses and the choice of subjects. The reader of the Handbook will also discover the best time to apply and where to, the documents that have to be presented, whether entrance examinations have to be taken, whether there are any conditions imposed regarding admission, whether tuition fees have to be paid, and what bursaries and grants are available to foreigners. The Handbook is also a mine of useful information about the practical aspects of life abroad, entry and residence formalities, the opportunities for finding accommodation and work, insurance, the cost of living and discounts for students. In the appendix to the entry on each country there is in addition to a bibliography and glossary a list containing the addresses of all the important authorities and academic institutions. Last but not least, there are also tables that give at a glance what is available in the way of universities and subjects. As in earlier editions, the handbook still gives a full description of the courses on offer at the College of Europe in Bruges, something many students are still unaware of. The same applies to the European University Institute in Florence.

It was not possible to include the new Member States Spain and Portugal in this edition, as it took two years to prepare. Such information will naturally be contained in future editions. This will bring the number of translations required in the Community languages to nine.

One thing however needs to be emphasized. More than the mere flow of in-

formation is required to facilitate study in different European countries. Much of the information supplied by the Member States, particularly when it is couched in dry officialese, serves to highlight the hurdles rather than present the promising picture with regard to the common study programme. What is described is not pie in the sky but actual developments taking place now, yet too few universities take the trouble to coordinate and negotiate about the possibility of their students following courses at an institution in another Member State, with the result that recognition for such courses after the students return is often not forthcoming. The European Community provides financial assistance, though many students and teachers are unaware of this.

Student exchanges, still the exception rather than the rule, should, in the opinion of the European Council of Milan and many enthusiastic Members of the European Parliament, take place much more regularly. Student mobility leaves much to be desired. Throughout the EC less than 1% out of 6 million students in higher education (at 3 600 institutions throughout Europe) spend part of their course in another Member State. Indeed, academics in Europe travelled far more in the time of the great humanist Erasmus. This provided the impulse for the Commission to propose the Erasmus programme in December 1985. A catchy title, standing for European Community action scheme for the mobility of university students. The intention is to provide EC grants for a one-year period of study in a Member State of the European Community. The aim is to help at least 10% of Europe's future academics to study in their chosen field and develop proficiency in the language of another European country. And the scheme is intended not only for students of the humanities, but for engineers, scientists, doctors, lawyers and, just as important, the politicians of tomorrow. All should have the chance to become acquainted with the language and mentality of a neighbouring European country, and get to know colleagues in their own disciplines. We know from reports received from previ-



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ous award holders that lifelong friendships can develop. This bears fruit in a continuous exchange of knowledge, experience and ideas, forging a political understanding that transcends frontiers. Will the Erasmus programme succeed in giving a powerful new impetus to academic mobility in Europe? The new edition of the Student Handbook will have an important contribution to make in this context.

One last thing: this Handbook does not only provide a useful service for students, academic institutions and other agencies in EC member countries. As it is the only handbook of its kind to provide a condensed survey of higher education and exchange opportunities in the European Community, it has

aroused great interest in countries such as America, Africa, Japan and China which like to give their students the chance to study in Europe.

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# Priority social developments in the sea-fishing industry

One aspect of enlargement which is unique to the fisheries sector is that the sea-fishing industry of the Community of Twelve is, in all respects, double the size of the previous Community of Ten. The challenges and opportunities are therefore commensurate with that backcloth involving as it does such dimensions. Previous issues of *Social Europe* have dealt with aspects of the sea-fishing industry, notably the joint committee forum for meetings of both sides of industry,<sup>1</sup> and the question of accidents at work in sea-fishing and the provision of medical assistance.<sup>2</sup> These earlier publications referred to a number of areas where further action was deemed necessary or even overdue, so now is perhaps the time to review the aims and outline some of the results of projects initiated by the Commission since 1984.

The projects described here are funded under the provisions of the Community budget for social measures in the fisheries sector. In this context 'social' has been laid down as meaning measures in the field of education and training, and also subsidies for certain activities involving medical assistance and safety at sea. This is in addition to the investigatory work being done on accidents at sea,<sup>2</sup> and to programmes presented by the Member States for financial assistance under the rules of the European Social Fund. As a general rule, the Commission has adopted the objective of seeking to promote knowledge about 'good practice' within the Community and — with appropriate adaptation — the wider use of certain teaching materials, ideas etc. In the field of medical assistance at sea, the Community has followed the advice it was given in a study on the subject in 1983.<sup>3</sup> A concerted effort is under way to ensure close collaboration between maritime medical advice centres.

What we have sought to present is essentially a thumbnail sketch of a wide variety of projects where the

Community initiative has innovated an approach or given it impetus at the start-up phase.

## Training projects

*The interchange programme for training personnel* was carried out between 1984 and 1985, and was drawn up to respond to the hopes and exhortations that both sides of industry had been expressing for some years, notably during seminars and workshops on vocational training. Some 24 trainer participants from the maritime countries elected to spend time (on average about 10 working days) in a country outside their own, attending other peoples' training courses, examining other teaching approaches. There was a not unexpected gravitation of participants towards the countries possessing sophisticated simulation equipment (flume tanks) such as Great Britain (Hull) and Denmark (Hirtshals). The seminar organized by the European Commission (Wépion, Belgium, December 1985) had already been planned long beforehand as a feedback and follow-up exercise to the interchange programme. The summary paper by the seminar rapporteur (Mr Robert De Corte, vice-chairman of the Fisheries' Joint Committee) recorded a resounding list of initiatives that the interchange participants and those also present at the seminar wanted to see being taken. Interchange programmes of the kind just described were henceforth to be regarded as an annual exercise. The Commission is not in a position to undertake such open-ended commitments, but in the face of unanimity and the enthusiasm being expressed in the enlarged Community, a further interchange programme for 1987 is underway, again in the capable hands of Pauline Godkin at the School of Fisheries Studies, Hull. Other seminar-inspired initiatives include: the development of a coordinated training programme in safety and survival for EEC fishermen; development of the potential

<sup>1</sup> The European social dialogue within sectors/ *Social Europe* No 2/85, July 1985.

<sup>2</sup> See *Social Europe* No 2/84 September 1984.

<sup>3</sup> Dr H. Lemarchand: Facilities in the European Community for medical assistance to fishing vessels, Brussels, May 1983.



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for 'open learning' training provision; assessment of the need and provision of the means for providing mobile training units in the EEC, and the development of multi-purpose fishing simulators as training aids.

*The United Kingdom mobile advisory and training unit visit to North Sea ports (May 1985).*

Mobile training in various forms is an accepted and successful method of providing certain types of training to fishermen in some Member States. It has assisted in overcoming some of the prob-

lems of access to training by fishermen who are remote from the main centres of fisheries training or who find difficulty in their availability to attend courses. It is probable that mobile training could be expanded in some other Member States but the exact nature of the delivery vehicles and the training programme to be provided depends on many factors such as geography, the distribution of the fishing population, the seasonal nature of fishermen, etc.

The Sea Fish Industry Authority of the United Kingdom pioneered the concept of mobile training in the 1970s and

the Community was already associated with the initiative by 1978/79 with the grant of assistance from the European Social Fund. The initiative for a demonstration visit to certain continental North Sea ports was successfully concluded by the setting-up of liaison committees in the ports of Boulogne (F), Knokke-Heist (B), Urk (NL) and Heiligenhafen (D) and in May 1985 the 18-seat school-on-wheels, bristling with a range of audio-visual aids, computer-driven simulator fish detection equipment etc. was launched on an agreeably surprised public, which was very quickly and efficiently informed by the media and liai-

son committees (Rederscentrale Belgium, CFDT France, Landwirtschaftshaven Schleswig-Holstein Germany for example). The operation could not and was not billed as a training programme; a certain amount of 'skills tasting' was carried out, consisting in many cases of learning through solving real life day-to-day problems presented by practising fishermen to the seasoned on-board trainers. The mobile unit was graced by a ministerial (education department) visit in the Netherlands from Mevr. Ginjaar-Maas.

*The detailed handbook on energy-saving* for use by fishermen and fishing schools alike is an updated version of a 1980/81 report of the same name, but this time is the fruit of close collaboration between the French and Danish institutes — already well-known in their respective fields — CEASM<sup>1</sup> and DIFT.<sup>2</sup> The handbook will be made available as and when the language versions are ready.

*The production of a compendium of available training materials across the Community.*

Unlike the Guinness Book of Records or the works of Shakespeare, the compilation of useable reference guides to available material appropriate to the needs of a sea fisheries trainer is not just a question of supplying the self-evident demand. In French 'choisir c'est renoncer' would roughly translate as somebody's got to make a choice of what's going to go into the reference guide. Thanks to the almost insatiable capacities of computerized databases to swallow immeasurable amounts of material the quantitative aspect is not too difficult. The main contribution of this work will be the drawing up of a multi-language reference system in the first stage, and a multi-language synopsis at a later stage. It is envisaged that a number of original and/or valuable contributions to thinking and practice in vocational training will be translated into other Community languages, and at this stage the Commission foresees giving the task of selection to a group composed of both sides of industry from the fisheries' Joint Committee and a num-

ber of practitioners in vocational training. A summary report will be made available in due course.

*The lexikon of training terms* accompanied by sketches, diagrams. Having started to organize exchange visits or — as reported below — bilateral contacts involving the North Sea Center, Denmark, it became clear to us that a succinct and specific guide to training terms in the Community languages was an obvious necessity. Thus came about the idea of a handbook of training terms in sea fishing, containing the diagrams 'worth a thousand words' and the words as well. This document will be made available to each and every participant in all the programmes we are currently engaged in, and will normally be available on request to training centres. It is appropriate at this point to draw attention to a particularly significant exercise being carried out by the terminology department of the European Communities in Luxembourg who responded promptly and favourably to a request to establish a dictionary of terms in the fishing industry. This work, being carried out under the guidance of Mr Goetschalckx, is expected to provide the definitive reference work in the fisheries' field, and to be of worldwide use.

*The North Sea Center Hirtshals (Denmark) training visit from Italian fishermen.*

The Danish centre is typically *communautaire* having non-Danes in its senior management and a capacity to produce test conditions and model nets based on the variable needs of Community, Third World, and ACP fishing people.

This project nearer to home involved an intensive, work-orientated visit by a small fishermen group from Ancona, Italy. In the words of the director of IRPEM, Ancona, Mr Fiorentini '... the testing of trawl nets was a great success and everyone hoped this visit can be followed by others ...'

Thus we have started to contribute to the Community's own north-south dialogue, because the approach is relatively straightforward involving as it does

the construction of scale models of (in this case) the Italian bottom trawl 'Tartana' by the Danish centre workshops, followed where necessary by modifications. The Italian fishermen visitors were able to simulate a wide variety of fishing conditions.

There are few simulation centres of such capacity, and the point is being debated whether the Community should be the vehicle to promote the installation of more of such structures.

*The visit to South Brittany of the Irish Coastal Training Unit (mobile training vehicle).*

Conceived by Celtic participants at the seminar of December 1985 (Wépion, Belgium) this spring 1986 visit of the mobile fisheries training unit not only followed the example of the British unit's sortie abroad of the spring of 1985, but showed the virtues of mobile training units in those geographically more inaccessible areas in which they appear to have the most significant and, some would say, a unique role to play.

The visit of the Irish unit was facilitated by the Bord Iascaigh Mhara's willingness to allocate staff (thus depriving Ireland temporarily of its facilities) but it also takes two to make a successful operation, and the reception in France would not have been anywhere near as efficient or colourful had it not been for the unflagging efforts of Radio Animation Pêche of Quimper. It was they who not only combined with AGEMA to ensure the comprehensive nature of the visit in terms of programme content and geographical distribution, but produced a special issue of the fisheries review *Cahiers de la Pêche*, containing for the first time in its history an editorial article in part in English penned by Dennis McGrane, Director of BIM.

<sup>1</sup> CEASM — Centre d'Etudes et d'Actions Sociales Maritimes, Paris, France;

<sup>2</sup> DIFT — Danish Institute of Fisheries Technology, Hirtshals, Denmark.

Future training initiatives will involve a continuation of the kinds of programme experience has shown responds to need and which are appropriate to both trainers in schools and those representing both sides of industry. The following types of programme are scheduled for 1987 in the effort to develop projects of benefit to the Community in vocational training in sea-fishing matters:

- (i) the UK and Irish mobile training units will be prevailed upon to undertake visits to Mediterranean countries; the latter are already on the threshold of acquiring mobile units of their own;
- (ii) the simulation centres at Hull (UK) and Hirtshals (DK) will probably be host to further delegations in pursuit

of our policy of promoting access to training facilities amongst the Member States;

- (iii) an investigation on the development and use of distance learning materials is foreseen for 1987.

*Medical assistance at sea and safety*

The sea as a place of work tends to show up man's intrinsic proclivity for contingency planning. The rescue services are a model of international co-operation and unstinting self-sacrifice, but they are still contingency orientated, coming into operation once an accident or illness has manifested itself — prevention always comes second. Until such time as a respect for safety and

health is treated by the seafarer at work, as an intrinsic part of daily life, like breathing or eating, then it will be incumbent upon us to provide the compensatory medical assistance and rescue services to a level of performance such as is available on land, and in some respects at a superior level, because of its being at a remote distance.

Following the publication of the report by Dr Lemarchand in 1983 on medical assistance facilities at sea, the Commission immediately set about identifying areas where closer cooperation between medical centres was both feasible and desirable, and responded to an early request from the centres at Toulouse (F) and Grimsby (UK) to acquire the computer equipment and software which could facilitate the re-



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ording and retrieval of information appropriate to the maritime distress calls they received. From these pioneering beginnings, guidance and assistance, given by the Directorate-General for Employment, Social Affairs and Education and including financial support from the European Social Fund to France and Spain following their application for assistance in 1986, other national Medical Advice Centres (all of which have to upgrade their operating systems in order to comply with international conventions and European or national rules) have now decided to pool their resources and develop a cooperation programme called 'MAC-NET' — acronym of 'Medical Advice Centres Network'.

MAC-NET is based on the introduction, training for, and extensive use of new information processing and telecommunication technologies, working for the progressive development of advanced Community telemedicine services, thus increasing health and safety standards for seamen and stranded people.

Reduced to its essentials, the MAC-NET cooperation programme is phased as follows:

*1st phase (1986—88)*

- (i) agreement on the list of current problems;
- (ii) agreement on the objectives to pursue for common action;
- (iii) modular training programme based on:
  - (a) common requirements for medical advice training;
  - (b) probable training modules;
- (iv) development of an integrated 'Information exchange system'.

*2nd phase (1989—91)*

- (i) extensive use of the information exchange system;
- (ii) development of specialized expert systems for medical advice;
- (iii) periodical review of the training modules and in-depth training of seamen;

- (iv) coordinated actions for preventive and contingency medicine services.

The Medical Advice Centres meeting in Brussels in June 1986 organized by the Directorate-General for Employment, Social Affairs and Education reached an agreement on the 1st phase and are now working on the modular training programme and the information exchange system. The objective is the training of operational teams of trainers who will be further employed under preventive medicine schemes involving seamen's training and in the new telemedicine services involving contingency or rescue operations.

The Spanish, French, and Italian Medical Advice Centres now have advanced computerized systems and Greece is to have its computerized system set up in May—June 1987. These facilities should enable the setting up of the information exchange system on which agreement is reached so as to adopt a common communications agreement and a message handling system (data, voice, . . . and later, image) to improve:

- (i) Radio-medical assistance at sea, hospitalization, and repatriation;
- (ii) On-shore preventive medicine services and assistance.

In addition to the computerized systems, we should stress other results of the MAC-NET cooperation exercise:

- (i) the setting up in Paris, in April 1986, of the '*Group ad hoc*' — France consisting of representatives from all concerned governmental authorities including the 'Mission Fonds Social Européen';
- (ii) the setting up in Madrid, in July 1986, of the '*Group ad hoc*' — Spain with the same structure and functions as the French body.

In due time, similar '*Groups ad hoc*' will be progressively developed in each Member State participating in the programme so as to:

- (i) create a favourable environment at national level, and
- (ii) stimulate a common base of knowl-

edge and understanding and thus further the Medical Advice Centres cooperation programme;

- (iii) ensure there is a governmental body with adequate interfaces to the Community institutions and with coordinated management capacity for radio-medical assistance at sea within Europe and elsewhere.

'Technical support groups' have been set up on a national basis consisting of EDP manufacturers, specialized doctors, informaticians and system managers in order to elaborate common proposals to define the functional specifications and develop advanced devices needed to support the new telemedicine services. These groups are in the forefront of innovation, new technologies, information processing and medical treatment.

Among the 'firsts' of these 'Technical support groups' are the 'Cardiobip', a recording and transmitting device for ECG (electro-cardiogram) signals, and a radio-terminal system for the transmission of biological information such as blood pressure, pulse, temperature, respiration etc.

In France, phases 1 and 2 of an expert system are now being developed providing assistance in the interpretation of ECG.

At the operational level it is noteworthy that as of 1986 Spain and France — the most advanced in the cooperation programme — have already coordinated their facilities and are providing coordinated contingency and medical assistance. The programme is creating advanced health and safety services, specialized functions and jobs, and is saving lives.

Safety in the sea-fishing industry has always been a subject for legislation at national and international level, but since human behaviour can only be partially influenced by legislation one has to turn to the behavioural sciences for guidance on how to instill an intrinsic 'feel' for safety in the day-to-day approach of sea fishermen. It is therefore to the training environment we have to turn since training is '...guiding the

mental and moral development of, preparing or making fit for . . .' (Webster's dictionary definition).

Following many years of work on accidents in sea fishing,<sup>1</sup> the Institut Universitaire Technique de Lorient was invited to prepare audio-visual training aids on safety at sea. The first series of slides and accompanying tapes on coastal fishing are now ready for adaptation and use in Community fisheries schools and other centres of learning. Feedback reports from the latter will indicate, we hope by the end of 1987, both the value and the use of these materials. Our most fervent hope is that we might instill a pervading sense of safety-like behaviour and thus make a dent in the mortality rate of what is the most accident-prone of any paid occupation in the Community.

Viable, regular meteorological forecasts for shipping contribute at least to knowledge of inhospitable conditions. The British Broadcasting Corporation's shipping forecast is held in high esteem by seafarers which is why a request

from the French fishermen's trade unions to put out the BBC shipping forecast in the French language has been approved on a pilot basis by the Commission. This is not going to be a '... la plume de ma tante est dans le jardin...' type of translation exercise, because the matter of information retrieval, codification, broadcasting channels times and zones need to be carefully worked out and monitored. The work has been conferred on Radio Animation Pêche, Quimper (F) who have a solid reputation in radio information and training dissemination.

Glasgow nautical college have also been awarded a small grant to equip their training establishment with material appropriate to the requirements and rigours of accident prevention and survival techniques. With a great deal of sea-fishing industry losses of life and vessels being recorded off the coast of the Scottish mainland and islands, the siting of this initiative is a poignant reminder of the ever present charm and ferocity of the sea.

Any report on social actions in the sea-fishing industry would be quite incomplete if it did not draw attention to the crucial role played by the European Parliament, notably as far as its willingness to ensure the availability of the funding necessary to pursue the vocational training, medical assistance and safety objectives appropriate to the sector. The Parliament's Committee on Fisheries, chaired by Mr Guy Guerneur initiated budgetary provision in 1983 and has always maintained a policy of close collaboration with the Joint Committee and with the Commission. Future actions will reflect the continuation of this collaboration and their continuous adaptation to the needs of a very multi-faceted industry adapting to its Community position.

**Barrie Wilson**

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<sup>1</sup> See footnote 3 earlier.

# Problems of social security

## Themes of common interest

It is almost four years now since a Community-wide discussion was engaged on the full range of problems which national social security systems are facing as a result of the recession. Having given the spur to that debate by its original Communication<sup>1</sup> sent to the Council at the end of 1982, the Commission now feels that the discussion should be broadened and deepened to include certain major factors which have hitherto been overlooked. That oversight has been remedied in the Commission's second Communication on social security topics addressed to the Council and other Community institutions in August 1986.

The new communication highlights certain areas of common interest brought to the fore in the various discussions sparked off at national and Community level by the first Communication.

The problem areas selected — three in all — are already broadly interrelated and seem likely to become more closely interconnected in the medium and long term, calling for a comprehensive approach. They are the problems underlying the financing of current or projected needs in social welfare expenditure, the implications of demographic trends, and the worsening problem of the marginalization — indeed, the total social isolation — affecting or threatening a considerable number of people in Europe.

### Financing needs

The increase in expenditure resulting from persistently high levels of unemployment coupled with the increasing pressure of changing demographic patterns (notably an ageing population) on the sickness and old-age insurance sectors has meant calls for new resources in the form of higher levies on the economy, and thus, indirectly, on business. This flatly contradicts the stated intention of national governments to lighten the burden of social charges on business. The approach generally adopted in most Member States has thus been to deploy a battery of measures designed to 'save' expenditure in the secret hope that the situation will turn the corner before more swingeing cuts have to be made in present levels of spending. It is, in fact, an indirect way of slowing down — reversing, even — the growth rate in compulsory levies.

However, given the stubborn resistance inspired by the notion of 'established rights', this attitude can at least claim the merit of being reasonable. Indeed, it is wholly consistent with the conclusions reached by a recent OECD report (Social expenditure 1960—90) according to which the possibilities for extending the scope of social intervention up to the end of the 1980s are minimal or non-existent — *but not negative* — although overall social expenditure (including that on education and vocational training) could at least keep pace with economic growth. *But what happens after 1990?* The cost of looking after a steadily ageing population will place a heavy strain on pension provision and the health service. How can a consequential increase in compulsory social charges be avoided without resigning ourselves to major changes to the structure and current levels of social expenditure? And even that takes no account of the cost to the community of measures needed to combat the growing social alienation of the young and long-term unemployed.

That is the backdrop to the Commission's suggestion that Member States should mount an urgent discussion at Community level on the objectives

which they should be setting for their social protection systems for the 1990s and beyond.

The discussion on the levels of compulsory levies is inseparable from that of methods of financing, particularly that of earnings-related contributions. For the countries concerned — which means most of the Member States — an across-the-board review of sources of finance has been elevated to the status of a universal panacea, with no consistent course of action so far adopted to identify other sources of finance. While, for example, the argument for replacing earnings-related contributions by those linked to value-added tax may have lost its persuasive force, the idea of capitalization either as a substitute for, or complement to, the still widely-accepted principle of contributions is attracting increasing support. Here again, the Commission proposes that an in-depth study of the various possible alternative methods of funding should be conducted.

### Demographic problems

The slow pace of demographic change offers the necessary breathing space to make the appropriate adjustments; but since the patterns of change are less clearly perceptible in the short-term, they are also easily overlooked. It is their long-term effect which will be decisive for the future of the societies concerned. The most important aspect of demographic change in Europe — as in the majority of industrialized nations — is the ageing of the population marked, among other things, by a steady slowing-down of the mortality rate among older people. This virtually irreversible development will produce strains towards the beginning of the next century on our ability to maintain social welfare systems running at their present levels of operation (particularly regarding the level of benefits). If no change is made to the social protection systems, the re-

<sup>1</sup> COM(82) 716 of 17 November 1982.

sulting burden on the working population — given what will by then be an appalling ratio of non-working to working people — could spark off an 'age war', a sort of demographic mock variant of the class war.

Another noticeable change is the increase in the proportion of elderly people aged 75 and over and the massive rise in health expenditure (particularly for the provision of specialized services) which cannot but result from it.

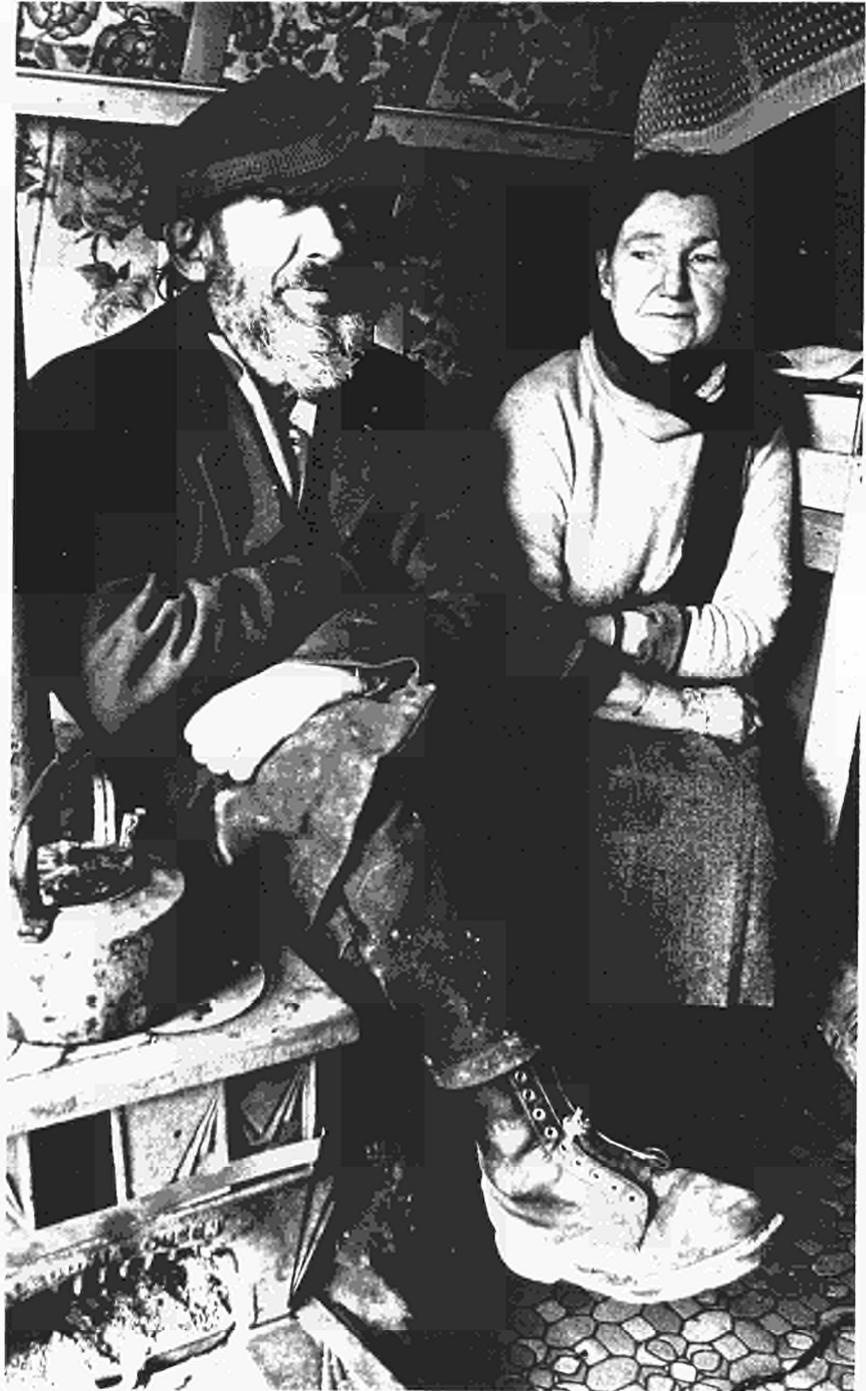
In view of these considerations, the Commission sees it as its duty to initiate a wide-ranging debate on the current demographic situation touched on in its August 1986 communication and on its long-term implications. The future of pension systems will be a key issue in that discussion.

### Marginalization

Better known as the problem of the 'new poor', this phenomenon — which has spread as a result of the slow growth in the labour market caused by industrial reorganization — covers a multitude of sins.

Considered solely from the viewpoint of social security — the subject of this article — the main area of concern must be those who are not — or not sufficiently — covered by existing social protection schemes (social security and assistance).

In many Member States, unemployed young people — particularly first-time job-hunters — simply do not have this particular safety net, while other groups of unemployed people (particularly the long-term unemployed) see their own protection being pared away, either in duration or level of entitlement. And while the numbers of job-seekers has grown appreciably in all Member States, the chances of their ever finding a reasonably secure job become increasingly remote. They are thus liable to end up with no — or an inadequate — income, and threatened with more-or-less long-term social isolation. But they are not alone in that, for side-by-side with their occupational un-



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certainly goes the increasing instability of family life among the new poor in the form of divorces, separations and sim-

ple cohabitation. In the absence of individual rights, the social protection which derived from the rights of the spouse is

threatened when the marriage breaks down. And the situation is even worse for 'cohabitantes'.

Briefly, social protection systems — already staggering under the effects of the recession — will come under increasing pressure from our ageing populations and the threatened social isolation of a large and steadily growing section of society.

For society to accept collective responsibility for these newly-emerging social risks, there must inevitably be a rise in compulsory social charges. But that is hard to square with the current climate of economic policies.

So, where do we go from here? Privatization or a 'one-nation' policy? Extending or rolling back the frontiers of State intervention? There are no easy answers. Discussion and debate are imperative.

Would it not, therefore, be appropriate for Member States to join forces now to initiate exactly such a discussion on the objectives to be set for social protection schemes for the 1990s?

Such action would help obviate the danger that, on the way to completing the internal market, Member States might be tempted to introduce social

measures giving them a competitive edge over their Community partners.

This quest for convergence in long-term goals would also help overcome at least some of the obstacles which — in the present economic climate — remain in the way of a closer approximation of social protection schemes in the Community.

The Commission for its part — as its second Communication indicates — is pledging itself to take further initiatives to reopen the discussion on the future of social security schemes.

# Networks for contact, exchange and action:

## A new instrument of Community policy to promote equal opportunities

Community policy to promote equal opportunities for women has broadened and deepened in recent years,<sup>1</sup> progressing from essentially legislative achievements (directives) to a much more comprehensive policy embracing both the achievement of equality before the law (equal treatment) and the promotion of equality in practice (equal opportunities) by a series of concrete programmes for positive action.<sup>1</sup>

This coordinated interlacing of law and concrete actions is emphasized in the medium-term programme for 1986—90, which received the official blessing of the Council of Ministers of the European Communities in a resolution adopted in July 1986.

The programme extends over seven broad fields of action, namely:

- (i) improved application of existing provisions,
- (ii) education and training,
- (iii) employment,
- (iv) new technologies,
- (v) social protection and social security,
- (vi) the sharing of family and occupational responsibilities,
- (vii) consciousness-raising and changing attitudes.

Legal measures and on-the-ground actions, designed from the outset to interlock with one another, will be taken in each field. Some of these will be carried out through and with the assistance of networks for contact, exchange and action.

### I. The aims and nature of networks for contact, exchange and action

The Commission has developed a battery of machinery for information, research, consultation and action to help it accomplish its task.

Regular consultations with both sides of industry and government representatives are a traditional feature of the Commission's social policy-making activities.

But in the field of equal opportunities, the Commission has also equipped itself with a specific mechanism: the Advisory Committee for Equal Opportunities, whose job is to advise the Commission in the formulation of Community equal opportunities policies (especially by adopting opinions) and to foster exchanges of experiences.

The substantial widening of Community policy, in conjunction with the limited personnel resources available on the one hand, and the disparate situations of the Member States on the other, necessitated:

- (i) an assured, regular and increased flow of information to the Commission on priority issues; and
- (ii) available intermediaries for contact and actions, capable of launching the required initiatives in the individual Member States.

To do this, six networks of experts have been set up.<sup>2</sup>

1. One expert or team acts as network coordinator and leader, putting forward to the Commission names for each Community Member State.
2. The experts (and coordinators) of five of the networks are wholly independent and responsible to no public or private body for the way they perform their network duties.

Experts are naturally appointed on the basis of their proven expertise in the field, but their positions and duties as national figures — and hence the practical advantages for

their performance in their network — are also taken into account.

3. They are drawn from a cross-section of backgrounds (academic, research institutes, national, regional and local public and semi-State bodies, the two sides of industry, voluntary groups and associations, etc.) to meet one of the key criteria for Community action in equality, the need for a multi-faceted policy involving all the actors in the decision-making process and action on equal opportunities.
4. Each expert must be able to draw on a representative national network or team in turn to involve the maximum number of people in each Member State, thus intensifying Community actions.
5. One network, however, has a distinctive character developing out of its own inherent nature:<sup>3</sup> and that is the network on television and women, comprised of representatives of the Community's television authorities, appointed by the authorities themselves but coordinated by an independent expert.

### II. The networks and what they do<sup>4</sup>

A — Three networks were set up under the action programme for 1982—85:

#### 1. The network on the implementation of the equal opportunities directives<sup>4</sup>

This is the oldest-established network, and the one with the closest ties to the traditional legislative task<sup>5</sup> of the Community in the equal opportunities field.

<sup>1</sup> See *Social Europe* — Supplement 2/86.

<sup>2</sup> Cf. *infra*, point II.

<sup>3</sup> Cf. *infra*, point B 1.

<sup>4</sup> Directives on equal pay, equal treatment, and equal treatment in matters of social security.

<sup>5</sup> Cf. *supra*.

Set up in 1982, it consists of academic lawyers and legal researchers, practising lawyers and representatives of both sides of industry.

Its job is to assist the Commission to fulfil its role as custodian of the Treaties.

The Commission has at its fingertips information on all the legislation and regulations (including some administrative orders) implementing the directives. It is kept informed on these matters by the Member States themselves.

It cannot, however, hope to keep on top of all the administrative provisions and terms of collective bargaining agreements — still less actual workplace conditions.

The Commission therefore decided to set up this team of experts to give itself the capability of appraising the progress made towards the implementation of the directives on equality both in law and in fact.

The network has already put forward three reports, and has geared its work chiefly toward the issue of indirect discrimination in the fields of equal pay, equal treatment and in social security matters, with reference to regulations, jurisprudence, collective agreements and actual situations in the workplace (plant-level agreements or rules ...).

These reports also incorporate recommendations for action at both Community and national levels. The first three years' work was to culminate in appraisal by an (independent) expert; the network will move into phase two of its work in 1987, when the experts will begin not only to focus their efforts on particular issues, but also to increase awareness and information levels within legal circles of their own countries.<sup>1</sup>

It should be remarked here that the network has been judged to be making a very useful contribution, not only by the Commission and the various bodies involved in the Member States, but also by the experts themselves, who have found the exchanges of information beneficial to them in their academic pursuits, legal practice or in the workplace,

thus playing their role of intermediary for Community action to the full.

**2. Network on the diversification of occupational choices: advisers on equality in education and vocational training**

This network was established in 1984 to carry out the twofold functions of research and action. Its membership represents a wide cross-section of occupational life: members of research institutes, equal opportunities bodies, representatives of central government departments and semi-State bodies, employers associations and trade unions.

The first item on its agenda (in 1983—84) was to take stock of the existing situation in education and vocational training for young girls and adult women, and on the basis of contacts made, to put forward recommendations for action.<sup>2</sup>

Its second test was to launch on-the-ground actions in this field. Each expert was thus responsible for introducing at least one (sometimes more) broad fronted action(s) in education and vocational training in his or her country.

The result has been, since 1984, to weave a network of positive actions around three main strands:

- (i) awareness/information campaigns,
- (ii) vocational training actions geared towards emerging occupations and/or new technologies,
- (iii) on-the-job training.

In 1987, the experts will be raising the actions so far conducted to national level and increasing their reach, either geographical or in terms of the target public.

At the same time, the experts are working to develop as between themselves (and hence between Member States) regular exchanges of educational materials which could serve as basis for similar or related actions.

**3. Network on women in the labour force: qualitative and quantitative indicators**

This network, set up in 1983, marked the beginning of a more conventional scheme in the economic field focusing on employment at Community level. This network is responsible for analysing the qualitative and quantitative indicators of women's employment in an effort to fill in the gaps, in both statistical and qualitative terms, in analysis of women's employment.

The network is made up of economists, statisticians and sociologists. Its early work (1983—84) was concerned with identifying the necessary indicators to paint an overall picture of women's employment, going on from there to study particular indicators and topics in greater depth.

Among its current preoccupations are (i) the coherence of economic and social policies with measures affecting the employment of women and/or equal opportunities, and (ii) the position of migrant women.

B — The coupling of research and action as interlocking dimensions has been resolutely carried through in the three new networks created under the current medium-term programme (1986—90).

**1. Network on women and television**

The Steering Committee on Women and Television was set up in response to the recommendations to that effect put forward in the conclusions of a joint Community/Free University of Brussels seminar on this topic.

<sup>1</sup> Cf 1984 Report. E. Sullerot: Diversification of vocational choices for young and adult women.

<sup>2</sup> These recommendations notably served as the basis for a 1984 conference on equal opportunities in education, and a resolution of the Council of Ministers of 5 June 1985 on the same topic.



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It differs from the other networks in being composed not of independent experts appointed by the Commission, but of representatives designated by the television authorities of the Member States. The work of the committee is, however, coordinated by an independent expert.

It has been in existence since the beginning of 1986 and consists largely of the personnel or welfare directors of the various television authorities.

It has set itself the tasks of:

- (i) regularly analysing the data concerning the position of women in each television organization;
- (ii) holding exchanges of views and discussions on the situation;
- (iii) continuing existing or introducing fresh positive action to improve the

lot of women in each organization on the basis of suggestions received, notably those made by the coordinator;

- (iv) exchanging information on proposed or existing actions.

## 2. Networks on women in local employment initiatives

The development of the Commission's policy of support — particularly through direct financial assistance — for locally-based employment initiatives by women brought with it the need for greater coordination and coherence of its actions.

The paucity of information available to the groups or individuals launching job creation initiatives, moreover, fre-

quently proved an obstacle to their development into viable businesses.

It was in this twin perspective of liaison and coordination, then, that the Commission set up this new network in November 1986.

Its membership embraces a broad spectrum of interests, all reflecting these two-fold concerns: support and development agencies to set up local employment initiatives, women involved in such business ventures, etc.

The research aspect consists in feeding back data on current initiatives in each country, the provision of direct financial and other assistance, the obstacles encountered by women in launching their own businesses, etc.

As far as action is concerned, each expert is required to promote new local

employment initiatives with the assistance of a national team.

**3. Child-care network**

The sharing of family and occupational responsibilities is a key theme in Community equal opportunities policy.

One of the main planks of that theme is the development of various child-care facilities.

A study conducted for the Commission on this subject in 1983 formed the basis for a 1985 seminar called to discuss the topic.

The chief recommendations of the seminar were that the situation needed continual monitoring at Community level, and that Community rules should be laid down to ensure that child-care facilities of an acceptable standard were available in sufficient number.

These were the bases on which the Commission established the most recent network (end of 1986), again with a dual purpose:

- (i) analysing the qualitative and quantitative aspects of the situation from the two standpoints of equal opportunities and family policy;
- (ii) fostering the development of child-care facilities including a variety of alternative forms.

To accomplish what are, in the present climate of economic recession, daunting tasks, the experts have been chosen with an emphasis on the pivotal role of stimulating development.

They are being drawn from institutions specializing in early childhood and family counselling, research bodies on family life, equal opportunities bodies, etc.

**III. Stocktaking and prospects**

- 1. It is as yet too soon to assess what will be the overall impact of the new instruments which the Commission has added to its armoury, particularly since more than half of them are barely operational as yet.

The first three networks have by now, however, put down firm roots. With three years on-the-ground operation behind them, including the time taken to find their feet, it would be fair to say that they have played an important part in:

- (i) assuring exchanges of information, ideas and material between the Member States and the interests concerned by them;
- (ii) keeping the Commission better informed about the prevailing situation and the impact of the necessary policy;

- (iii) assuring a foundation of knowledge upon which to construct fresh Community initiatives;

- (iv) guaranteeing a multiplier effect for Community policy through the implementation of concrete individual measures in each Community country.

- 2. There is no question that the most innovative, and above all the most practical, aspect of the accomplishments of the networks lies in the concrete measures supported by them, and it is action which will be the focal point of the work of the new networks.

The aim is to facilitate the developments of a series of practical projects in the various fields covered by the Community equal opportunities policy, which will act as a crucible or a mine of experience which the relevant authorities of the Member States can draw on to develop their own initiatives.

- 3. There could be no better reply to the 'doubting Thomases' who question the value of networks and groups of European experts than the concrete role such networks can play, making their own, admittedly modest, contribution — but in deeds, not words — to the building of the 'People's Europe'.

**Odile Quintin**

# Equal treatment for men and women in occupational social security schemes

On 5 June 1986, the Council of Ministers for Social Affairs approved the draft directive presented by the Commission on 29 April 1983<sup>1</sup> on equal treatment for men and women in occupational social security schemes.<sup>2</sup>

The new directive, which was finally adopted by the Council on 24 July 1986<sup>3</sup> has had a considerable amount of ink spilt on its account by the technocrats of the Community institutions, and has, for the last three years, been the focus of interminable debates within the Council, chiefly on the famous Article 6 (1), points (h) and (i), which refers to the taking-into-account of the different actuarial factors for women and men. The Commission's concept of introducing 'unisex' actuarial tables encountered the united opposition of the Member States whose aim instead was to obtain a text enabling insurance companies to pursue their present practices.

While the Commission's arguments were not supported by the Council, and the final wording of the article differs extensively from the text initially proposed by the Commission, we nevertheless believe it would be useful to point out some of the 'acquisitions' obtained by the new Directive (I), and to try to shed light on Article 6 (1), (h) (i) (II), although of course we leave the task of settling any problems of interpretation which could arise when the new text is implemented to the competent bodies.

## I. Scope of the directive

This directive, as was already said in our very first issue (see above-mentioned article) concerns the implementation of equal treatment for men and women in occupational social security schemes. What do we mean by occupational schemes? (A) How does the new Community instrument contribute to the process of equal treatment? (B)

### A. Occupational social security schemes

Occupational schemes fall between statutory social security schemes and purely private insurance contracts. Unlike the former, their content is therefore not defined by law but, unlike the latter, is not defined by free negotiation between individuals and insurance companies. These features apply to various types of scheme whose purpose is to supplement statutory social security benefits (old-age, survivors', invalidity, unemployment, sickness benefits) or, more rarely, to take their place.

They include:

- (i) schemes based on collective agreements between employers' and workers' representatives and applying to an undertaking, an occupational sector or several such sectors;
- (ii) company schemes set up or planned unilaterally by the employer for the benefit of his workers or certain categories thereof, whether he allocates specific reserve funds for this purpose or uses the services of an insurance company (e.g. group insurance) or finances the planned benefit under the heading of staff expenditure;
- (iii) schemes set up by the representatives of a self-employed occupation (craftsmen, doctors, lawyers, etc.).

The new legal instrument concerns all these types of scheme. It should be said that what essentially distinguishes occupational schemes from, for example, the purely individual insurance schemes, is that membership of such

schemes forms part of the working conditions, inasmuch as it stems either directly or indirectly from the employment contract or from the occupational activity itself.

The second paragraph of Article 119 of the Treaty establishing the European Economic Community which provides for equal pay for men and women workers states that pay means not only the wage but 'any other consideration, whether in cash or in kind, which the worker receives, directly or indirectly, in respect of his employment from his employer'. In the case of employed persons, therefore, benefits provided under occupational schemes come within the scope of the second paragraph of Article 119, according to that definition.

Furthermore, in one of its recent judgments of 13 May 1986 (Case 170/84),<sup>4</sup> the Court of Justice of the European Community expressly stated that benefits provided for workers under a company pension scheme constituted a consideration within the meaning of Article 119 of the Treaty. The judgment therefore expressed the Court's will, even in the absence of a directive, to take Article 119 as a basis for settling problems of equal treatment.

In view of the fact, however, that there are situations in which objective differences exist, and that in its *Defrenne II*<sup>5</sup> Judgment (see paragraph 18 *et seq.* of the grounds of the judgment) the Court made a distinction between direct, open discrimination which could be established on the sole basis of the criteria given by Article 19, and indirect, disguised discrimination capable of being identified only on the basis of the implementing provisions, it will be seen that the directive will play an important part in so far as it constitutes the essential complement to the article, and more clearly defines its scope.

<sup>1</sup> OJ C 134, 21. 5. 1983, p. 7.

<sup>2</sup> See *Social Europe*, No 0, p. 25.

<sup>3</sup> OJ L 255, 12. 8. 1986 (attached).

<sup>4</sup> Not yet published.

<sup>5</sup> Court of Justice Reports 1976, p. 455 *et seq.*

Thus Article 2 defines occupational schemes. As regards the persons covered, Article 3 takes the lead from Directive 79/7/EEC on statutory social security schemes. It therefore applies to all employed and self-employed persons. The same is true as regards the matters covered in view of the close links between statutory schemes and occupational schemes. Where occupational schemes apply to employed persons, however, this rule does not apply because benefits under such schemes are part of the consideration received by the worker in respect of his employment from his employer. Thus the scope in relation to subject matter can no longer be limited to certain risks, it extends on the contrary to all social benefits in cash or in kind payable under such schemes.

*B. Elimination of discrimination*

The principle of equal treatment means that there shall be no discrimination whatsoever on grounds of sex, either directly or indirectly by reference, in particular, to marital or family status, especially as regards:

- (i) the scope of the schemes and the conditions of access to them;
- (ii) the obligation to contribute and the calculation of contributions;
- (iii) the calculation of benefits, including supplementary benefits due in respect of a spouse or dependants, and the conditions governing the duration and retention of entitlement to benefits.

As a general rule, benefits for women are proportionally lower than those for men under occupational schemes. One reason is the frequent lack of such schemes in firms chiefly employing women, owing to traditional concepts of male and female roles in society. The second reason must be attributed to the exclusion of part-time work from many occupational schemes. This is in fact indirect discrimination since it is women who are mainly affected. Article 6 is aimed at a whole series of situations which must be re-

garded as discriminatory and therefore prohibited.

The article reads as follows:

1. Provisions contrary to the principle of equal treatment shall include those based on sex, either directly or indirectly, in particular by reference to marital or family status, for:
  - (a) determining the persons who may participate in an occupational scheme;
  - (b) fixing the compulsory or optional nature of participation in an occupational scheme;
  - (c) laying down different rules as regards the age of entry into the scheme or the minimum period of employment or membership of the scheme required to obtain the benefits thereof;
  - (d) laying down different rules, except as provided for in subparagraphs (h) and (i), for the reimbursement of contributions where a worker leaves a scheme without having fulfilled the conditions guaranteeing him a deferred right to long-term benefits;
  - (e) setting different conditions for the granting of benefits or restricting such benefits to workers of one or other of the sexes;
  - (f) fixing different retirement ages;
  - (g) suspending the retention or acquisition of rights during periods of maternity leave or leave for family reasons which are granted by law or agreement and are paid by the employer;
  - (h) setting different levels of benefit, except in so far as may be necessary to take account of actuarial calculation factors which differ according to sex in the case of benefit designated as contribution-defined;
  - (i) setting different levels of worker contribution; setting different levels of employer contribution in the case

of benefits designated as contribution-defined, except with a view to making the amount of those benefits more nearly equal;

- (j) laying down different standards or standards applicable only to workers of a specified sex, except as provided for in subparagraphs (h) and (i), as regards the guarantee or retention of entitlement to deferred benefits when a worker leaves a scheme.
2. Where the granting of benefits within the scope of this directive is left to the discretion of the scheme's management bodies, the latter must take account of the principle of equal treatment.

It is to be regretted, when one compares the wording of this article, especially paragraph 1, (h) and (i), with the original Commission proposal, that the Council did not adopt the text proposed which, moreover, had the approval of the European Parliament and the Economic and Social Committee.

**II. Article 6 (1), (h) and (i)**

The text proposed by the Commission prohibited different actuarial factors being taken into account for the calculation of benefits and contributions.

The new wording provides for:

- (i) equal benefits except under certain schemes which are allowed to use actuarial factors which differ according to sex;
- (ii) equal worker contributions (which conforms to the Commission proposal);
- (iii) equal employer contributions only in the above-mentioned excepted schemes for which different actuarial factors may be used to calculate benefits.

The aim of the Member States in adopting this text was to avoid upsetting insurance companies' present practices too much. Such practices for example

involve giving women a smaller pension on the ground that on average they will benefit longer as their average life expectancy is longer.

The Commission made every effort to convince the Member States, referring *inter alia* to the recent case-law of the US Supreme Court which ruled that this practice was discriminatory. It should be said here that the Court of Justice of the European Communities has not yet been required to rule on whether the difference made between men and women in the calculation (based on actuarial factors) of contributions or benefits under occupational schemes is in conformity with Article 119.

When the Council of Social Affairs Ministers approved the Directive of 5 June 1986, the Commission insisted that the following statement be included in the minutes:

'The Commission has to express serious doubts about the proposed wording with regard to the principle of equal treatment. It continues to consider that the calculation of individual contributions and benefits should in no circumstances take into consideration actuarial data which differ according to the sex of workers. In this connection it would recall that this position, which is justified by the arguments put forward in its initial

proposal for a directive, has been shared by the European Parliament and the Economic and Social Committee.

If the Commission agrees to withdraw its reservation, this is merely so as not to delay the adoption of the directive and in recognition of the progress made on other points, in particular equality in the calculation of workers' contributions and acceptance of reasonable time limits for implementing the directive.'

## Conclusions

The principle of equal treatment has, as we know, been the subject of several Community Directives. Implementation of this principle in the social security field has been gradual owing to the number of problems and the complexity of the different social protection systems in the Member States.

The first step in this direction was Directive 79/7/EEC, now in force, which concerns statutory social security schemes.

The Directive of 24 July 1986 constitutes the second stage of the operation, introducing new Community standards to promote this principle in occupational schemes.

Whilst it is true that the transitional period for the application of this Directive (it expires on 1 January 1993) and for certain risks is very long (see Article 9 (c)), nevertheless discriminatory treatment of men and women in occupational schemes will be eliminated, and we now have a binding instrument and all it entails to this effect. It would indeed be hard to imagine a Member State now taking any measures representing a step backwards in relation to the situation at the time of the adoption of the directive. And indeed Article 9 of the directive already announces the future directive on social security which is to fill the gaps in the first two instruments, notably as regards the determination of pensionable age and survivors' pensions. It could be said that this represents a commitment by the Member States<sup>1</sup> and a mandate for the Commission to finish, by means of a new, binding instrument, the process begun in 1978. Preparatory work in this area is already at a relatively advanced stage and the Commission will be presenting relevant proposals within the next few months.

**Dimitrios Kontizas**

<sup>1</sup> The second programme on equal opportunities also provides for this directive.

*Council*  
**COUNCIL DIRECTIVE**  
**of 24 July 1986**  
**on the implementation of the principle of equal treatment for men and women**  
**in occupational social security schemes**

(86/378/EEC)

THE COUNCIL OF THE EUROPEAN COMMUNITIES,

Having regard to the Treaty establishing the European Economic Community, and in particular Articles 100 and 235 thereof,

Having regard to the proposal from the Commission,<sup>1</sup>

Having regard to the opinion of the European Parliament,<sup>2</sup>

Having regard to the opinion of the Economic and Social Committee,<sup>3</sup>

Whereas the Treaty provides that each Member State shall ensure the application of the principle that men and women should receive equal pay for equal work; whereas 'pay' should be taken to mean the ordinary basic or minimum wage or salary and any other consideration, whether in cash or in kind, which the worker receives, directly or indirectly, from his employer in respect of his employment;

Whereas, although the principle of equal pay does indeed apply directly in cases where discrimination can be determined solely on the basis of the criteria of equal treatment and equal pay, there are also situations in which implementation of this principle implies the adoption of additional measures which more clearly define its scope;

Whereas Article 1 (2) of Council Directive 76/207/EEC of 9 February 1976 on the implementation of the principle of equal treatment for men and women as regards access to employment, vocational training and promotion, and working conditions<sup>4</sup> provides that, with a view to ensuring the progressive implementation of the principle of equal treatment in matters of social security, the

Council, acting on a proposal from the Commission, will adopt provisions defining its substance, its scope and the arrangements for its application; whereas the Council adopted to this end Directive 79/7/EEC of 19 December 1978 on the progressive implementation of the principle of equal treatment for men and women in matters of social security;<sup>5</sup>

Whereas Article 3 (3) of Directive 79/7/EEC provides that, with a view to ensuring implementation of the principle of equal treatment in occupational schemes, the Council, acting on a proposal from the Commission, will adopt provisions defining its substance, its scope and the arrangements for its application;

Whereas the principle of equal treatment should be implemented in occupational social security schemes which provide protection against the risks specified in Article 3 (1) of Directive 79/7/EEC as well as those which provide employees with any other consideration in cash or in kind within the meaning of the Treaty;

Whereas implementation of the principle of equal treatment does not prejudice the provisions relating to the protection of women by reason of maternity,

HAS ADOPTED THIS DIRECTIVE:

*Article 1*

The object of this Directive is to implement, in occupational social security schemes, the principle of equal treatment for men and women, hereinafter referred to as 'the principle of equal treatment'.

*Article 2*

1. 'Occupational social security schemes' means schemes not governed by Directive 79/7/EEC whose purpose is to provide workers, whether employees or self-employed, in an undertaking or group of undertakings, area of economic activity or occupational sector or group of such sectors with benefits intended to supplement the benefits provided by statutory social security schemes or to replace them, whether membership of such schemes is compulsory or optional.

2. This Directive does not apply to:

- (a) individual contracts;
- (b) schemes having only one member;
- (c) in the case of salaried workers, insurance contracts to which the employer is not a party;
- (d) the optional provisions of occupational schemes offered to participants individually to guarantee them:
  - either additional benefits, or
  - a choice of date on which the normal benefits will start, or a choice between several benefits.

<sup>1</sup> OJ C 134, 21. 5. 1983, p. 7.

<sup>2</sup> OJ C 117, 30. 4. 1984, p. 169.

<sup>3</sup> OJ C 35, 9. 2. 1984, p. 7.

<sup>4</sup> OJ L 39, 14. 2. 1976, p. 40.

<sup>5</sup> OJ L 6, 10. 1. 1979, p. 24.

*Article 3*

This Directive shall apply to members of the working population including self-employed persons, persons whose activity is interrupted by illness, maternity, accident or involuntary unemployment and persons seeking employment, and to retired and disabled workers.

*Article 4*

This Directive shall apply to:

- (a) occupational schemes which provide protection against the following risks:
  - sickness,
  - invalidity,
  - old age, including early retirement,
  - industrial accidents and occupational diseases,
  - unemployment;
- (b) occupational schemes which provide for other social benefits, in cash or in kind, and in particular survivors' benefits and family allowances, if such benefits are accorded to employed persons and thus constitute a consideration paid by the employer to the worker by reason of the latter's employment.

*Article 5*

1. Under the conditions laid down in the following provisions, the principle of equal treatment implies that there shall be no discrimination on the basis of sex, either directly or indirectly, by reference in particular to marital or family status, especially as regards:

- the scope of the schemes and the conditions of access to them;
- the obligation to contribute and the calculation of contributions;
- the calculation of benefits, including supplementary benefits due in respect of a spouse or dependants, and the conditions governing the duration and retention of entitlement to benefits.

2. The principle of equal treatment shall not prejudice the provisions relating to the protection of women by reason of maternity.

*Article 6*

1. Provisions contrary to the principle of equal treatment shall include those based on sex, either directly or indirectly, in particular by reference to marital or family status for:

- (a) determining the persons who may participate in an occupational scheme;
- (b) fixing the compulsory or optional nature of participation in an occupational scheme;
- (c) laying down different rules as regards the age of entry into the scheme or the minimum period of employment or membership of the scheme required to obtain the benefits thereof;
- (d) laying down different rules, except as provided for in subparagraphs (h) and (i), for the reimbursement of contributions where a worker leaves a scheme without having fulfilled the conditions guaranteeing him a deferred right to long-term benefits;
- (e) setting different conditions for the granting of benefits or restricting such benefits to workers of one or other of the sexes;
- (f) fixing different retirement ages;
- (g) suspending the retention or acquisition of rights during periods of maternity leave or leave for family reasons which are granted by law or agreement and are paid by the employer;
- (h) setting different levels of benefit, except in so far as may be necessary to take account of actuarial calculation factors which differ according to sex in the case of benefits designated as contribution-defined;
- (i) setting different levels of worker contribution;
  - setting different levels of employer contribution in the case of benefits designated as contribution-defined, except with a view to making the amount of those benefits more nearly equal;

- (j) laying down different standards or standards applicable only to workers of a specified sex, except as provided for in subparagraphs (h) and (i), as regards the guarantee or retention of entitlement to deferred benefits when a worker leaves a scheme.

2. Where the granting of benefits within the scope of this Directive is left to the discretion of the scheme's management bodies, the latter must take account of the principle of equal treatment.

*Article 7*

Member States shall take all necessary steps to ensure that:

- (a) provisions contrary to the principle of equal treatment in legally compulsory collective agreements, staff rules of undertakings or any other arrangements relating to occupational schemes are null and void, or may be declared null and void or amended;
- (b) schemes containing such provisions may not be approved or extended by administrative measures.

*Article 8*

1. Member States shall take all necessary steps to ensure that the provisions of occupational schemes contrary to the principle of equal treatment are revised by 1 January 1993.

2. This Directive shall not preclude rights and obligations relating to a period of membership of an occupational scheme prior to revision of that scheme from remaining subject to the provisions of the scheme in force during that period.

*Article 9*

Member States may defer compulsory application of the principle of equal treatment with regard to:

- (a) determination of pensionable age for the purposes of granting old-age or retirement pensions, and the possible implications for other benefits:

- either until the date on which such equality is achieved in statutory schemes,
  - or, at the latest, until such equality is required by a directive.
- (b) survivors' pensions until a directive requires the principle of equal treatment in statutory social security schemes in that regard;
- (c) the application of the first subparagraph of Article 6 (1) (i) to take account of the different actuarial calculation factors, at the latest until the expiry of a thirteen-year period as from the notification of this Directive.

*Article 10*

Member States shall introduce into their national legal systems such measures as are necessary to enable all persons who consider themselves injured by failure to apply the principle of equal treatment to pursue their claims

before the courts, possibly after bringing the matters before other competent authorities.

*Article 11*

Member States shall take all the necessary steps to protect workers against dismissal where this constitutes a response on the part of the employer to a complaint made at undertaking level or to the institution of legal proceedings aimed at enforcing compliance with the principle of equal treatment.

*Article 12*

1. Member States shall bring into force such laws, regulations and administrative provisions as are necessary in order to comply with this Directive at the latest three years after notification thereof.<sup>1</sup> They shall immediately inform the Commission thereof.

2. Member States shall communicate to the Commission at the latest five years after notification of this Directive all information necessary to enable the Commission to draw up a report on the application of this Directive for submission to the Council.

*Article 13*

This Directive is addressed to the Member States.

Done at Brussels, 24 July 1986.

*For the Council*  
The President  
A. CLARK

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<sup>1</sup> This Directive was notified to the Member States on 30 July 1986.

# The social policy of the European Community

The following account is confined to the social policy of the European Economic Community and does not therefore cover the European Coal and Steel Community or Euratom.

It describes in broad outline, the social policy of the EEC from 1958 to 1985, divided into two periods, 1958—72 and 1973—85.

## I. The social policy of the European Communities in the period 1958—72

### A. The specific social provisions of the Treaty of Rome

The basis of the social policy of the European Community was and remains the Treaty of Rome. However, on reading the Treaty, it immediately becomes apparent that it devotes relatively little attention to social policy and concentrates first and foremost on the economic tasks for which the Community was created. It contains a few general provisions on social policy (see in particular, the Preamble, Article 2 and Article 117) which have little concrete substance, together with specific provisions, which are often expressed in rather vague terms.

These specific social provisions formed the basis of the activities undertaken in the first few years of the Community's existence: the gradual achievement of the free movement of labour (Articles 48 and 49), the safeguarding of employees' rights deriving from social security systems (Article 51), promoting the exchange of young workers as part of a Community programme (Article 50), application of the principle of equal pay for equal work for both men and women (Article 119), the establishment of the European Social Fund, with the task of facilitating employment in the Communities and stimulating the geographical and occupational mobility of workers (Articles 123—127), and the establishment of general principles for the application of a common policy on vocational training (Article 128).

1. The free movement of labour was introduced in three stages and finally completed on 15 October 1968 (entered into force on 8 November of the same year). This was more than a year before the end of the transitional period (end of 1969). All employees in the Community, irrespective of nationality, may accept jobs they are offered, may stay in other Member States for such purposes, may settle there for work purposes and bring their families to live with them. They en-

joy the same rights as the citizens of the host country as regards wages/salaries and other conditions of employment. The only restrictions which still apply in respect of the free movement of labour relate to public order, public security and public health or relate to posts in the government service. At the end of 1972, the Sedoc system (European system for the international clearance of vacancies and employment applications) came into being.

The purpose of the system is to reserve jobs which cannot be filled by employees of one country for employees from other Community countries.

2. The coordination of social security for migrant workers effected on 1 January 1959 in Regulations 3 and 4 was based on the following principles:

- (i) equal status for employees from the Member States and national employees (equal treatment);
- (ii) the possibility of transferring social benefits from one country to another (export of benefits beyond national frontiers);
- (iii) adding together periods of time worked and social contributions paid in more than one Member State for the purpose of calculating benefits (composition and calculation *pro rata temporis*).

Regulations 3 and 4 were constantly adapted in the light of changes in national legislation in the Member States. They underwent a general simplification, improvement and extension in 1971 and 1972; Regulations 3 and 4 were replaced by Regulations 1408/71 and 574/72, which took effect on 1 October 1972. They apply to all salaried/wage-earning employees (including therefore seasonal and border workers, refugees and Stateless persons) and their families. The regulations relate to dangers included in Convention No 102 of the International Labour Agreement. They apply to general and specific social security systems governed by law, contributory or otherwise, but not to supplementary regulations.

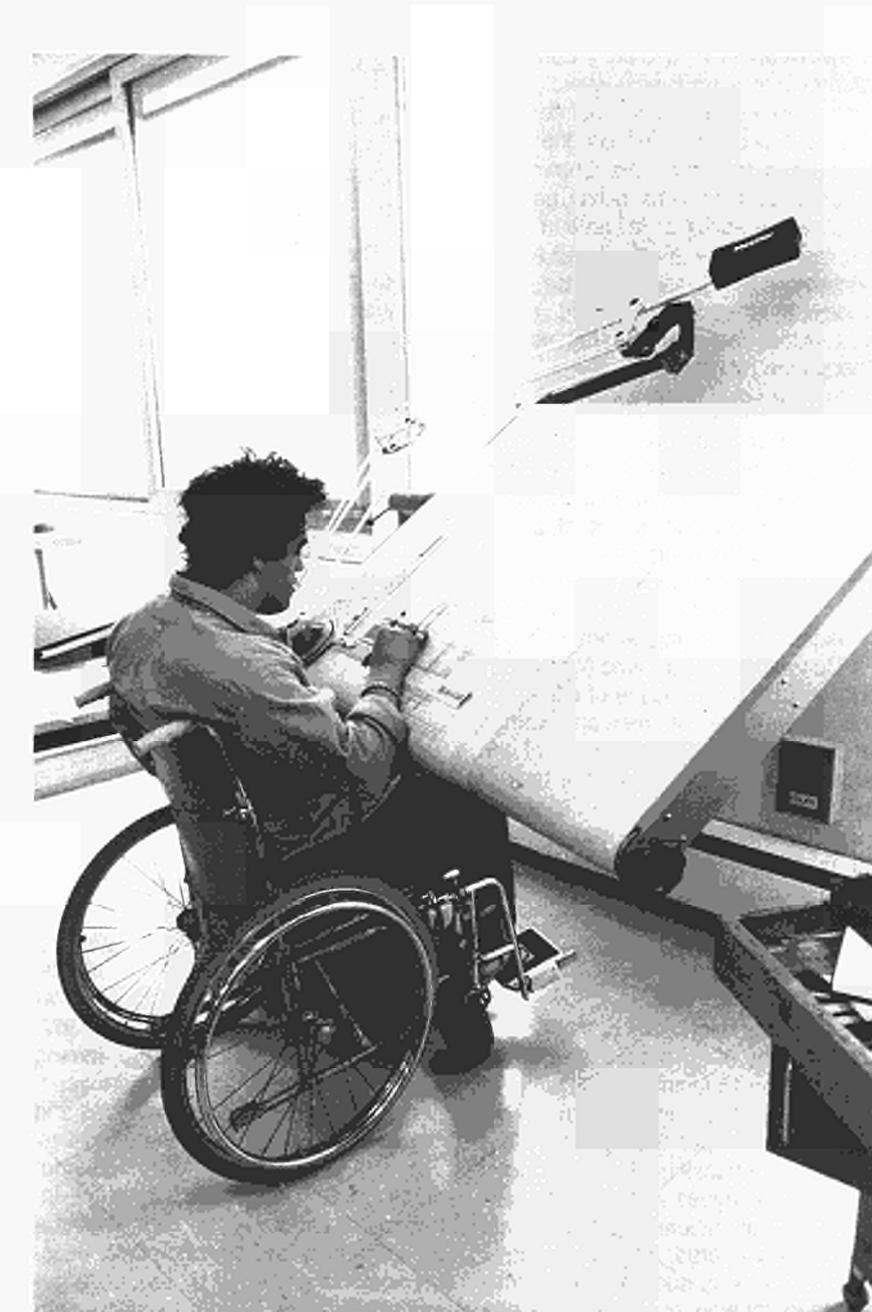
3. Under the terms of Article 119, the principle of equal pay for men and women should have come into effect before the end of the first stage of the transitional period (end of 1961). But agreement could not be reached about the interpretation of 'equal work'. Government representatives and represen-

tatives of the employers' organizations (with the exception of France which had pressed for this article to be included in the Treaty of Rome on account of competition considerations) were in favour of a very narrow interpretation (equal pay only for identical or mixed work) but the employees' organizations

favoured a broader interpretation. The Commission resolved the issue in its recommendation of 20 July 1960: a broad interpretation was chosen in the sense that the principle would not only apply to identical or mixed work but also to work of equal or equivalent importance. It was already clear by this time that even if all the Member States were to follow this interpretation, the principle of equal pay could not possibly be introduced into all the Member States before the end of 1961 (differences in wage levels were as great as 20% or 30% or more). After numerous sessions a compromise was finally reached at the 11th hour and included in the 'Resolution of the Member States united in the Council' of 30 December 1961. The broad interpretation of equal work had become fact. The deadline of the end of 1961 was replaced by a rolling calendar whereby differences in pay levels were to be reduced to 15% before 30 June 1962, 10% before 30 June 1963 and 0% before 31 December 1964.

4. The European Social Fund, the most important instrument created by the Treaty in the field of employment policy, came into operation on 20 September 1960. The Fund provides financial assistance to facilitate employment and to stimulate geographical and occupation mobility, so that the unemployed, the partially unemployed and the disabled can once again become involved in the production process. Assistance is provided for retraining, in-service training and refresher courses and the relocation of employees, amounting to 50% of the costs involved, while the remaining 50% is borne by the Member State.

The financial resources allocated to the Fund were extremely modest to begin with. Furthermore the Fund could only act after the event, in other words once an employee had been employed in a productive job for at least six months after retraining and relocation. Its support also depended to a large extent on the infrastructure and the financial resources available for retraining in the various countries. It was therefore not surprising that the main beneficiary of the first European Social Fund, which operated until 1971/72, was the Federal



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Republic of Germany. In total, assistance amounted to 400 million units of account, the largest part of which was spent on retraining. More than 1.1 million employees benefited from the scheme, including approximately 800 000 Italians.

5. The first programme for the exchange of young employees between the Member States came into being on 8 May 1964. Both the development and the practical application of the programme met with numerous problems, particularly since certain Member States attached considerably more importance to bilateral agreements (for example the friendship treaty between France and the Federal Republic of Germany). It was many years before new programmes of any real significance came into being.

6. As far as the general principles for the application of a common vocational training policy are concerned, 10 principles were laid down by the Council on 2 April 1963. They subsequently gave rise to considerable disagreement. The principles were approved by the Council by a simple majority decision when the Benelux countries and Italy voted against the Federal Republic of Germany and France. The last two Member States consistently contested the validity of the decision.

### *B. The discussion of Article 118*

In 1958, the Commission began preparing the decisions to be taken to implement, either at once or gradually, the specific social provisions of the Treaty of Rome. In Article 118, the Commission was assigned the task of promoting close cooperation in the social field between the Member States on the one hand and between the Member States and the Commission on the other. A number of areas were indicated as a general guide rather than set out as an exhaustive list.

The Commission began to deliberate on the type of social policy that should be pursued at Community level. With the gradual enlargement of the

Community, it needed to gauge what measures had to be taken and implemented on the social level, if the ultimate objectives of integration were to be attained and if the new economic and political reality, which was to be achieved gradually, was to be expressed in provisions, arrangements and structures suited to the needs of the new society and acceptable to the peoples of the new Europe.

The Commission therefore sought the opinions of the representatives of the national employers' and employees' organizations in the six Member States. Consultations were time-consuming but they took place in an excellent atmosphere. After three sessions, agreement was reached: the problems brought up by the employers, namely jobs, the employment of young people and women in industry, and the financing of social security, would be tackled at the same time as the problems raised by the employees, i.e. wages and length of time worked. It was decided that the Commission's departments would collect information on these subjects and that the data would be analysed in work groups assembled on the basis of equal representation, after which the plenary session would discuss the action to be taken in the various fields concerned. A major conference on social security would be organized to which governments and employees' and employers' organizations would be invited and which would deal with all the major issues.

Suddenly several governments questioned the consultations with employers' and employees' organizations. This was the beginning of the most difficult period for the Commission in relation to social policy, a period which lasted for some years.

The basic questions which were being asked at this time can be summarized as follows: does the autonomous control of social policy remain in the hands of governments or should the Community develop its own social policy and, if so, what would be the objectives of such a policy? Should the Community concern itself with social ques-

tions merely in so far as they distort competition or should it develop an all-round social policy? At European level, will social policy have an intergovernmental character where unanimity is always necessary, where each of the Member States has a veto, or will it take the form of a general Community policy where the Council is the competent authority, where the Commission has the right to take initiatives, the European Parliament and the Economic and Social Committee are asked to make recommendations, the Commission determines the subjects on which it will develop proposals and also decides the type of legal instruments in which the proposals will be contained? Should the Commission address itself to individual national governments if it wishes to discover the views of national employers' and employees' organizations on a particular subject or aspect, so that it can also take their views into account or does the Commission have the right, or duty even, to contact both sides of industry (the 'social partners') not only to inform and consult them but also to have them play an active role in preparing and working out proposals?

A solution was found on 19 December 1966 when, at a meeting in Brussels, the Council opted for a very modest form of *ad hoc* cooperation based on studies.

This pragmatic form of cooperation with representatives of government and the two sides of industry in bi-partite and tri-partite groups was gradually extended. A programme of work to implement Article 118 of the Treaty of Rome was approved by the Council in two parts successively on 7 June 1967 and 29 February 1968. Broadly speaking, it contained provisions for 60 or so studies.

### *C. Towards a Community social policy*

1. All the material collected between 1958 and 1970 not only contributed to what has been described as the 'spontaneous harmonization' needed in order to progress; it also laid

the foundations for the Community social policy which has developed since 1971 and even more rapidly since 1974. Studies, usually of a comparative nature, were made of a large number of subjects in the social field, a great deal of statistical data was collected, a large part of it by means of Community surveys, and finally numerous conferences and meetings were held.

2. Secondly, an extremely important process was set in motion: the correlation between social policy and other areas of policy. The Commission systematically brought up the question of social policy in practically all of the forums concerned with other policies, convinced of the desirability and necessity to treat the economic dimension and the social aspect in an integrated fashion at all times. The first three 'Economic policy in the medium term' programmes which were approved by the Council on 11 April 1967, 12 May 1969 and 9 February 1971 respectively, were all interspersed with the social aspect. The Mansholt Plan in the late 1960s gave a new direction to the common agricultural policy. The structural improvements which it entailed were to have far-reaching social consequences. For this reason, temporary social provisions were necessary. They were made among others in the three Directives of 17 April 1972 (early retirement, social-economic information, retraining of agricultural workers etc.) and by making Article 4 of the European Social Fund, which had been reformed in 1971, applicable to the agricultural sector (retraining of workers who leave the agricultural sector to work in other sectors). Within the framework of a common transport policy, the Council decided on 13 May 1965 that a number of social provisions which influence competition in and between the three transport sectors (roads, inland waterways and railways) needed to be harmonized. A regulation was drawn up on the composition of crews, driving and rest periods etc., in respect of goods transport by road and was approved by the Council on 25 March 1969. It remained in force in broad terms until 1985. On 10 October 1970, a proposal was submitted by the

Commission about the representation of employees in a European limited liability company which was to be set up. And finally in the field of the harmonization of company law, on 9 October 1972, the Commission presented a draft directive to the Council (the so-called Fifth Directive) which also addressed the problem of the representation of employees.

In short, social policy was being dealt with in all kinds of contexts.

3. Thirdly, the serious social unrest in 1968 was to have major consequences for social policy in the Member States and at Community level. In practically all of the Member States it had a serious effect on 'labour relations', i.e. the relationship between government, employers and employees. However, the unrest did not affect labour relations alone. It was the youth of Europe, the students, who formed the vanguard of movements protesting against the existing system, demanding new and different ways of living together. They were opposed to what they described as 'alienation', desiring to make human beings active and responsible members of a society where individuality could be expressed more freely.

4. Fourthly, new structures of employers' and employees' organizations came into being at the European level, for example the reorganization into a European federation of the union secretariat of the IVV into a European federation and the strengthening of the European organization of the WVA, together with the establishment of the European liaison body between the two strongest union federations in France and Italy, the CGT and the CGIL which had not taken part in the life of the Community up to that point. This new situation also contributed to more emphasis being placed on European integration, including its social aspects. The Commission consistently stimulated this process and actively supported it by stressing from the outset the need to involve the social partners as actively as possible in the integration process in general and in social and economic policy in particular. They were not only involved in the policy informally; formal structures were

also created providing them with opportunities such as tripartite committees for the European Social Fund, for the free movement of employees, for vocational training for the social security of migrant workers, the Standing Committee on Employment (established 14 December 1970) and a number of joint consultative committees on which the two sides were equally represented, to deal with social problems in specific sectors (agriculture, fisheries, road traffic, inland waterways, railways, the shoe industry etc.).

5. Fifthly there was the Summit Conference of Heads of State and/or Government at The Hague in 1969. On the one hand the summit emphasized reform of the European Social Fund, while on the other it urged coordination of social policy.

(a) Reform of the European Social Fund was to be carried out at the end of the transitional period specified by the Treaty of Rome. It was implemented by the Council Decision of 1 February 1971, which came into effect on 1 May 1972, in response to a Commission proposal. Two areas were dealt with: Article 4 created the possibility of providing assistance if the situation on the labour market were to be disrupted or threatened with disruption as a result of Community policy or if joint action were necessary to ensure that supply and demand on the labour market were in better harmony. On the basis of this article, the Council took decisions on retraining, transfer and similar measures for the benefit of workers leaving agriculture to work in other sectors, employees from the textile and clothing industry who were obliged to seek work elsewhere, migrant workers, the disabled, the unemployed or young people below the age of 25 seeking work, and women.

Article 5 created the possibility of providing assistance in certain difficult situations connected with employment. In this field, activities focused mainly on underdeveloped regions or where economic activity was in decline, problems affecting certain groups of concern, adjustment to progress in technology, the disabled, older employees' and women

above the age of 35. In addition to these two major categories of interventions, the possibility was also created of financing preparatory studies and pilot experiments from the European Social Fund.

From a financial viewpoint, it was important that the Fund should not be financed in the future through contributions from the Member States but from the Community's own funds, that the appropriations and expenditure for measures under Article 5 should not amount to more than 50% of total appropriations and therefore expenditure, that as far as operations which might extend over a multi-year period were concerned, the Commission would have the opportunity to commit itself for a period of up to 3 years, and that as a result of the reformed European Social Fund, assistance could also be provided in the future to private institutions, including industry.

(b) As far as the coordination of social policy is concerned, the 'Blueprint for a Community Social Programme' of 17 March 1971, analyses the situation as it had developed since 1958. It goes on to formulate social objectives concerning which a fair degree of agreement existed among the Member States (full or, at least, optimum employment, greater social justice, better living conditions) and finally it indicates a number of priorities to be included in a Community social programme and effected in the first phase of economic and monetary union. The document was intended primarily as a starting point for wide-ranging consultations within the Community bodies (the Council, Parliament, Economic and Social Committee, Consultative Committee of the ECSC) and the two sides of industry. The deliberations would then be expressed in a coherent programme of work aimed at implementing in stages the closely harmonized social policy of the Member States.

#### D. Conclusion

Looking at the period 1958—72 as a whole, we can conclude that:

- (i) the specific social provisions of the Treaty of Rome were put into effect, some with greater success than others;
- (ii) the struggle to interpret Article 118 hampered progress in the social field for a considerable time;
- (iii) the opportunity presented itself in the late 1960s and early 1970s to create a common social policy.

## II. The social policy of the European Communities in the period 1973—85

### A. The 1974 social action programme

Social policy was dealt with in Item 6 of the final communiqué of the summit held in Paris in October 1972. It stressed that strong action was needed in this field, that it was no less important than economic and monetary union, that it was essential for the social partners to participate to an increasing extent in the economic and social decision-making of the Community and finally that a social action programme should be drawn up before 1 January 1974.

In January 1973, the Commission immediately started working out a programme. First it produced 'Policy lines for a programme of social action' on 11 April and then on 25 October after lengthy and detailed discussions, it submitted final proposals for a programme, together with a draft resolution. The resolution concerning the social action programme was approved by the Council on 21 January 1974. The governments of the Member States agreed to take some 30 to 40 measures over an initial period of three to four years to achieve three main objectives:

- (i) full employment and job-creation within the Community;
- (ii) improvement of living and working conditions with a view to achieving subsequent progress based on mutual harmonization;

- (iii) increasing involvement of the two sides of industry (the 'social partners') in the economic and social decision-making of the Community and of employees in the day-to-day running of companies/enterprises.

It would be impossible to list all the measures which were proposed. What is important is that they gave the Community the opportunity of pursuing a more active social policy than permitted by the Treaty of Rome, in *three* main respects:

- (i) While the Commission had concerned itself thus far primarily with employment, terms of employment, social security etc. relating to employees, the programme of action suggested that more should be done at Community level for categories of people regarded as '*disadvantaged*'. This was the reason for proposals for specialized action programmes to benefit migrant workers and their families (mainly from third countries), the disabled, more vulnerable persons (young people and older workers) and measures to combat poverty in the Community.
- (ii) Under Article 118 of the EEC Treaty, the Commission was restricted to carrying out studies and surveys, publishing recommendations and organizing consultations to promote cooperation between the Member States in the social field. In connection with the social action programme, the *Council — for the first time as far as social policy was concerned — gave permission for the adoption of directives* which, unlike recommendations, were to be binding on the Member States. In February 1975, for example a directive was adopted by the Council (on the basis of Article 100) putting into effect the principle of equal pay for men and women, together with a directive on the approximation of the laws of the Member States on collective dismissals. After these initial steps, other proposals for directives were submitted by the Commission and adopted by the Council: two di-

rectives on employment law concerning the maintenance of employees' rights, in the event of concerns or parts thereof being transferred elsewhere or in the event of insolvency of their employer and, in the field of working women's rights, a Directive of 9 February 1976 on the equal treatment of men and women in respect of access to the labour market, vocational training and promotion, together with a Directive of 19 December 1978 on equal treatment in the field of social security. In addition, a number of directives concerning the prevention of accidents at work and the protection of the health of employees were proposed and adopted, particularly a framework directive on the protection of employees against exposure to chemical, physical and biological substances, which resulted in proposals for more specific directives on dangerous substances (lead, asbestos, cadmium, benzene etc.).

- (iii) Finally, opportunities were created for *ad hoc* consultations between governments and professional bodies in various areas: consultative bodies on employment policy, on social security, on the equal treatment of men and women and safety at work, on the establishment of a European Centre for Vocational Training and a European Foundation for the improvement of living and working conditions.

Broadly speaking, of the 30 to 40 measures proposed in the action programme, the large majority had been put into effect within three years of 1974. In subsequent years, the measures have largely been pursued further.

### *B. The period 1977—80*

The 1974 recession, which was the result of the first oil crisis, had very severe consequences. Unemployment doubled from 3 million in 1974 to 6 million in 1978. The Community was slowly recovering when it was hit by the second oil crisis and confronted with a genuine economic recession. The Commission which took office in 1977 had

five objectives in relation to social policy: a return to full employment, humanization of all aspects of work, combating discrimination and all forms of inequality, increased social security and better public health facilities, and greater participation and involvement by the social partners at all levels. However, rapid rise of unemployment soon made it clear that there could no longer be any question of an expansive social policy.

As a result of the deterioration in the employment situation, the highest priority was given to combatting unemployment. This was to take up virtually all the time and manpower available. It was not therefore surprising that there were no spectacular achievements in the other four fields.

A large number of activities were developed to combat unemployment:

- (i) cooperation between national employment exchanges/job centres was intensified, understanding of the labour market was improved by means of research, statistics, forecasts etc. and the Sedoc system became completely operational and endowed with a uniform language etc;
- (ii) the Standing Committee on Employment was systematically and regularly consulted on all problems relating to the labour market and employment.

The Commission put forward recommendations such as those concerning measures to be adopted by the Member States with a view to preparing the unemployed or young people under the age of 25 threatened with unemployment, for work (6 July 1977) and sent proposals to the Council which were approved by the latter, such as the second programme for the exchange of young workers between Member States (16 July 1979), the Resolution concerning linked work and training (18 December 1979) and the Resolution on 'Guidelines for a Community employment policy' (June 1980).

A second reform of the European Social Fund was carried through on 28 October 1977. From 1978, the resources

of the Fund were to be devoted matter of priority to the solution of employment problems in the less-favoured regions. At the same time, the rate of aid for these regions was to be raised from 50% to 55%. After that date, the greater part of the Fund's resources (amounting to approximately 1 000 million EUA in 1980) went to Ireland, southern Italy, various regions of the United Kingdom and France.

At the request of the European Council of 6/7 July 1978 in Bremen, the Council adopted a Regulation on 18 December 1978 introducing a new form of assistance from the European Social Fund to promote the recruitment of young people for additional jobs in industry or to promote the employment of young people in community-service projects. This created for the first time the possibility of spending money from the ESF directly on job creation. In 1979 approximately 450 000 young people profited from this scheme and more than half a million in 1980; this involved sums of more than 300 million EUA in 1979 and approximately 360 million EUA in 1980.

In early 1979, the Commission issued a communication on various social measures to be taken to accompany the restructuring of the steel industry. It argued, amongst other things, in favour of making financial support available for four new measures: early retirement, the reduction in the number of hours worked, the reduction of overtime and the introduction of a fifth shift. These problems were discussed for two years until in mid-1981 the Council agreed to make 112 million EUA available for the first two measures.

Possibly the most significant activity undertaken by the Commission to combat unemployment consisted in the discussions which it instituted and encouraged in all forums concerning the *redistribution of work*. The subject was on the agendas for the tri-partite conference organized in the period 1977—79 (meetings of the Ministers of Economic Affairs and Finance plus the Ministers of Social Affairs, the representatives of the Commission and the social partners), the



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sessions of the Council of Ministers of Social Affairs and the meetings of the Standing Committee on Employment.

In accordance with its mandate from the European Council of 12/13 March 1979 in Paris, the Commission produced a wide-ranging 'Communication on the redistribution of available work' on 9 May 1979. On 22 November 1979, the Council of Ministers of Social Affairs adopted a 'Resolution on the modification of working times', in which they gave their approval for the guidelines to be followed in this area. In accordance with the resolution, the Commission drew up two draft directives; one concerning voluntary part-time working, a second concerning agency staff or temporary staff, and it also worked out a draft recommendation on the principles of a Community policy concerning re-

tirement age (gradual introduction of a flexible and progressive retirement age).

### C. The period 1981—85

Economic growth declined in this period. In 1979 it was still 3% but in 1980 it sank to 1.7%. The Community even experienced negative growth of -0.5% in 1981. In the 1982—85 period, the Community began to recover but only gradually. The figures for subsequent years were as follows: 1982 +0.6%, 1983 +1%, 1984 +2.2%, 1985 +2.3%. Unemployment, however, remained the same, not only as a result of weak economic growth but also because of demographic developments (the arrival on the labour market of young people born before 1967/68 cou-

pled with a smaller number of people reaching retirement age) and the increasing tendency of women to work. The unemployment figure went up from 6.5 million in 1980 to 8.6, 10.5, 11.8 and 12.4 in subsequent years and to 12.8 million in 1985. Of the total number of people unemployed in 1985, approximately 4.8 million were under the age of 25.

In 1981, the Commission established four main priorities in the social field:

- (a) the development of an economic and social strategy to combat unemployment;
- (b) the reform of the European Social Fund;
- (c) a review of the problem of social security;

(d) the continuance of the programme concerning health and safety at work.

*Point (a)*

1. A first step towards a possible common and constructive strategy to combat unemployment was taken at the Jumbo meeting of 11 June 1981, prepared by the Council of Ministers of Social Affairs on 10 June 1981. The document submitted by the Commission pointed out that it was vitally important at Community level to attempt to strengthen measures agreed in joint consultations in order to do the following: diversify and manage anti-inflation policy with a view to economic recovery; place more emphasis on areas which offer opportunities to extend employment such as energy and technologies on the one hand, small and medium-sized busi-

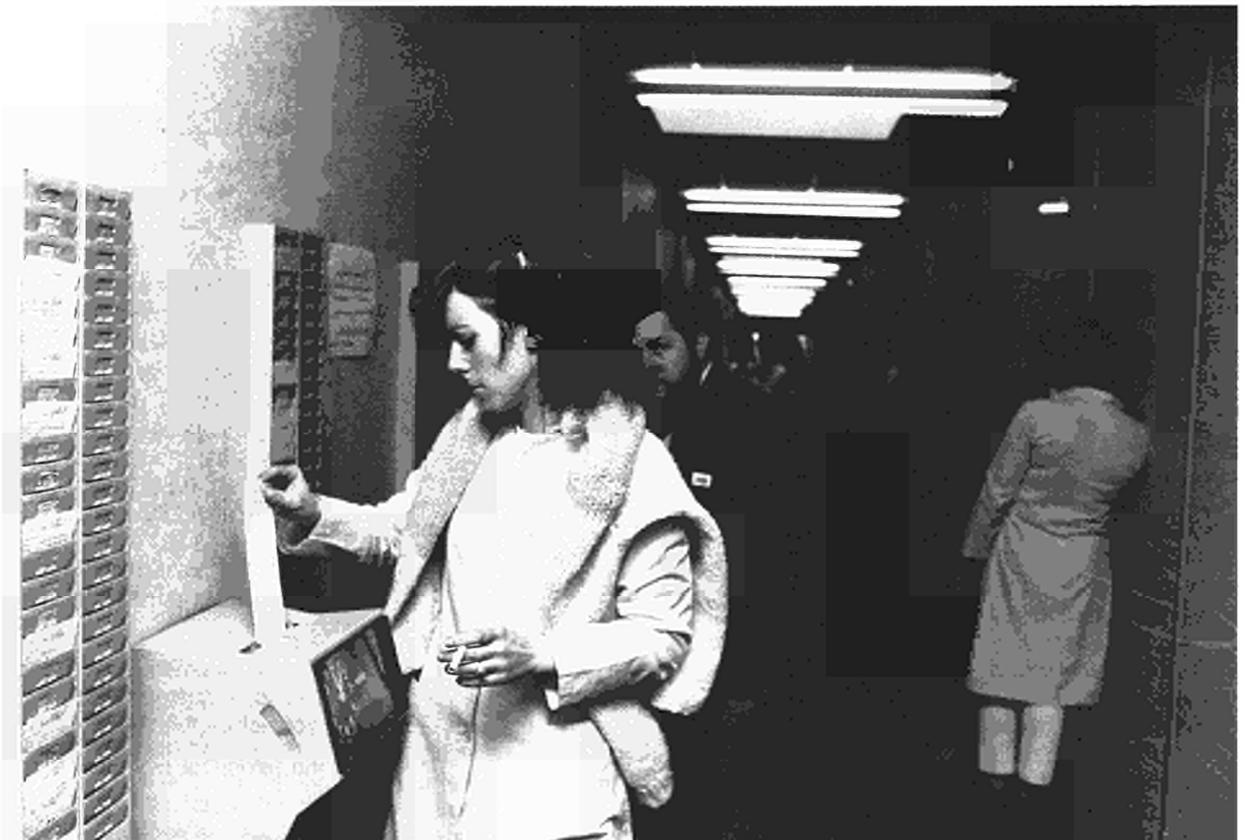
nesses, cooperatives etc., on the other; review the current method of financing social security; stimulate flexibility of working hours; integrate education, vocational training and work for all young people during a transitional period after school; and increase the understanding of all concerned of new forms of information technology.

2. A second step towards this strategy was taken on 12 July 1982 when the Council approved a Resolution on 'a Community programme to combat unemployment'. The main points were: productive private and government investment should be stimulated to increase the competitiveness of industry and promote economic growth and the growth of employment; Community instruments must be used in an effective and cohesive manner, particularly for the benefit of areas most seri-

ously affected by unemployment; industrial restructuring programmes must deal with problems connected with investment for rationalization and at the same time must pay special attention to employment problems; the potential for expansion of medium-sized and small businesses which are a source of innovation and therefore create employment, must be stimulated.

3. The Jumbo Council, which met next on 16 November 1982, discussed three crucial issues: improvement of economic and industrial policy, reduction and reorganization of working time and creation of greater employment opportunities for young people.

The Commission responded on 10 December 1982 with a 'Memorandum on the reduction and reorganization of working time'. In the light of increasing



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unemployment, the Commission wished to repeat that the Community should expressly support and stimulate a policy in that direction, not only in order to improve living and working conditions but also as an instrument of social and economic policy.

Repeated consultations took place on the basis of this memorandum in the first half of 1983 between the Member States and the social partners. On 16 September 1983, the Commission adopted a draft recommendation by the Council on the subject. This recommended that the Member States should agree to the following policies: they would promote the introduction of a reduction in the hours worked by individuals and reorganization of the same, to an extent that would stimulate the positive development of employment in such a way that both competitiveness and social rights would be safeguarded; to limit systematically paid overtime more stringently and to remunerate necessary overtime in time rather than money.

4. Employers' and employees' organizations reacted immediately to the draft recommendation. While the Employers Liaison Committee pointed out that it was in principle opposed to the introduction of any kind of Community instrument in this area (which it regarded as belonging to the competence of the social partners as part of collective bargaining) and disputed whether unemployment could be brought down by measures to reduce and reorganize working time the European Association of Trade Unions felt that reduction of working hours had been and continued to be a significant way of safeguarding existing jobs and making the creation of additional jobs possible.

The Commission did everything in its power to bring the two sides of industry together at a European level and to get them to come to a gentlemen's agreement. Its efforts were unsuccessful. At one point, the dialogue broke down completely. The Commission then attempted to win the support of the Council and governments for the draft recommendation on the reduction and reorganization of working time but that

failed too. In the absence of unanimity, the draft was not approved. The same fate befell the above draft directives concerning part-time working and temporary work.

5. From mid-1982, the general employment situation suddenly deteriorated; unemployment rose to a level which had been considered impossible. Youth unemployment in particular began to assume dramatic proportions. More than 4.5 million young people were out of work i.e. 40% of the total number of people unemployed. The unemployment percentage among young people was twice the average. Very urgent measures needed to be taken to deal with this situation. The Commission had pointed this out in the foreword to the five-year medium-term economic policy programme, indicating that in the next five years it would create the necessary mechanisms and provisions to guarantee all young school-leavers paid employment, vocational training or both at the same time ('social guarantee').

After the Commission had then indicated a number of special measures in its Communication to the Jumbo Council of 16 November 1982, the latter recognized that youth unemployment formed one of the major problems requiring priority treatment. It expressed its deep concern at the employment prospects for young people. The Council repeated its promise that all young people who offered their services on the labour market in the next five years would have the opportunity of taking a vocational training course or having work experience. These proposals prompted the Commission to submit a Communication to the Council in April 1983 entitled 'Promoting youth employment' containing a three-point strategy to combat unemployment: strengthening the general strategy to combat unemployment, solving the specific and acute problem of youth unemployment; and developing a programme of special measures at national and Community level to combat youth unemployment.

Five types of measure were proposed: enlarging employment opportunities by reducing and reorganizing

working time; stimulating employers in the private sector to create new jobs and to employ more young people; helping young people to set up new companies; extending employment outside the market sector; supporting young people by offering improved facilities to develop interest in them other than purely professional interest.

After the Standing Committee for Employment had expressed its full support for the Commission's proposals at its meeting of 20 May 1983, the Council adopted a Resolution on the promotion of employment on 23 January 1984.

Finally, in this context, the Council adopted a social action programme for the medium term on 22 July 1984, one of the main points of which was youth unemployment.

6. As the unemployment situation persisted and deteriorated, another aspect came strongly to the fore; long-term unemployment. Although this is not restricted to young people, there is no doubt that the majority of long-term unemployed are young people.

In accordance with the request of the Jumbo Council of 16 November 1982, the Commission issued a Communication on 22 April 1983 on long-term unemployment, pointing out that general measures to stimulate employment or traditional training courses did little to help the long-term unemployed. The Commission wished to help such people primarily through the European Social Fund, particularly with financial support, by developing specific forms of retraining and by making funds available to create jobs in the collective services sector. The Council accepted a Resolution on 13 December 1984 on combatting long-term unemployment.

7. On 21 November 1983, in accordance with the request of the Council contained in its resolution of 12 July 1982, the Commission sent a Communication to the Council on the contribution made by local job creation schemes to combatting unemployment. More and more emphasis was placed on the role small-scale, local activities could play in the fight against unemployment. This



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Communication rounded off two years of work and gave an overview of the results and conclusions of 20 consultations at local level within the Community. On 7 June the Council approved a Resolution in which it noted that the 'development of these schemes must be supported and stimulated by policy measures on the part of the Member States, which must in turn be accompanied by specific measures at Community level; the latter must include support for innovation projects by developing a programme of consultation and transfer of information and by undertaking studies.'

8. The employment problem and the tensions on the labour market have naturally focused the attention of public opinion on foreign workers. Since the approval by the Council on 9 February 1976 of a Resolution and a 'Programme

of action for the benefit of migrant workers and their families' and a number of measures aimed at these people in the field of social security, no Community initiative had been taken in the field of social security for their benefit. We should not lose sight of the fact that there are at present 12 million migrant workers in the Community, 9 million of whom are from third countries.

The question was asked in various Member States whether in view of unemployment and the economic situation, restrictions on migrant workers living and working in the Community would be justified and to what extent migrant workers in the Community should be encouraged to return to their country of origin. Other questions raised focused on the efforts needed to integrate migrant minorities socially and culturally, particularly members of second or third

generations in the host country. As these questions have an important political dimension, the Council noted in the Community medium-term social action programme adopted on 22 June 1984 that the Commission would submit proposals on this subject. The Commission accordingly submitted a Memorandum on migrant policy to the Council on 7 March 1985 and the Council adopted a Resolution on the subject on 16 July 1985.

9. As far as vocational training is concerned, the Council adopted two Resolutions at the request of the Commission, one on 2 June 1983 on 'Vocational training in the new information technologies' and a second on 11 July 1983 on 'Vocational training policy in the European Community in the 1980s'.

In addition, the Commission published a Communication on 'Develop-

ments in technology and social change' on 26 January 1984. After wide-ranging discussions in the Standing Committee on Employment on 10 May 1984, the Council of 7 June 1984 stated in its conclusions that a common strategy on the influence of the new technologies in the social field must be based on a number of individual principles, among others that a comprehensive Community response must be found to meet the challenge of the new industrial revolution and its social consequences.

Finally, on 18 April 1985, the Commission launched the Comett programme of instruction and training in technology, in which cooperation between the universities and industry is central and which attempts to do for human resources what Community programmes such as Esprit do in other fields, namely combining research and development activities. The Council approved the programme on 5 December 1985. It runs for four years (1986–89) and its aims include support for initiatives taken at the national level relating to research and development in the new information technology.

*Point (b)*

A third review of the European Social Fund took place in 1983. As the instruments available to the Fund and the financial resources allocated to it were no longer appropriate to the social and economic situation which had developed since 1979, both the Commission and the Member States felt a strong need to revise the Fund's rules and to bring them more effectively into line with the labour situation in the Community, which had undergone substantial structural change. Although every Council Decision tends to be a compromise, it established more clearly on this occasion the activities in which the Fund can participate, the groups of potential beneficiaries and how the available resources should be divided up. Since that time, the Commission has taken decisions autonomously. With the exception of super regions (Mezzogiorno in Italy, the Irish Republic, Northern Ireland, the French Overseas Departments and, since 1981, the whole of Greece),

for which 40% of the Fund's resources are reserved, it now decides the eligible areas on an independent basis and to a certain extent chooses the fields of work in which resources are to be channelled.

The general rule is that the ESF's contribution may not exceed that of government with a maximum of 50% of the declarable cost (55% for the super-regions). A contribution by government is therefore a pre-condition for a grant from the Fund.

In view of the large numbers of unemployed young people, 75% of the Fund's resources are for measures within the context of the labour market for young people under the age of 25, particularly those whose opportunities for finding work are extremely limited; the remaining 25% may be spent to benefit the following groups: long-term unemployed, women who wish to return to employment, disabled people who can be absorbed into the labour process, migrant workers and their families, people who for technical reasons need to be retrained and are working in medium-sized and small businesses, people who will be working as training instructors experts in the field of careers information and development consultants.

1984 was the first year in which the reformed Social Fund became fully operational. More than 500 million units of account went to young people under 25 in the less-favoured regions and more than 900 million units of account in the other regions, in other words a total of more than 1 400 million units of account of a total of 1 860 million units of account. Geographically speaking, 32% went to the UK, 22% to Italy, 12% to Ireland, 11% to France and 5% to Greece.

*Point (c)*

As far as social security is concerned, it should first be noted that since 1982, the Commission has instituted a complete reappraisal of the role and the place of social security in the context of socio-economic policy as a whole. As early as 1975, as a result of the Council's Resolution of 21 January 1974 on a social action programme, the Commission decided to set up two con-

sultative bodies: one consisting of Directors-General of social security in the Member States and a second consisting of independent experts. Both groups then monitored developments in the Member States closely, exchanged views and advised the Commission on policy to be pursued in this field.

For some years, the social security systems have been confronted with major problems. On the one hand, incomes are declining (fewer people are in work as a result of the recession and the slowing down of economic growth) and on the other expenditure is increasing sharply (rise in unemployment benefits, increasing costs of health care, ageing of the population etc.). In addition, it has constantly been pointed out that where social security is financed to a large extent by employers' and employees' contributions, labour-intensive companies and industries are at a disadvantage and this does not help reduce unemployment. The way in which social security is financed therefore needs to be re-examined. Finally there is the demographic factor: the birth rate in western Europe has declined dramatically since 1967/68. How will pensions and other benefits be financed in future if this trend continues and the ratio between working and non-working population deteriorates even further?

The Commission indicated the need to deal with this problem at Community level in a draft communication of 17 November 1982 entitled 'Social security problems — Matters for consideration' in which a number of changes were proposed. These included checking the rise in expenditure on social security, particularly in the health care sector, reviewing the method of financing social security (with the objective of achieving a better balance between income from contributions and tax revenue and ensuring that the financing system does not have negative consequences for the structure of production and employment) and promoting greater efficiency in the social security system.

It was intended that this communication should be discussed widely by Community institutions and in the Member States. This is in fact what hap-

pened. Meetings of experts on social security were organized in the various Member States and consultative meetings of government representatives were organized at Community level. A list of priorities was to be drawn up on the basis of what was discussed which should then have to be explored in greater detail at Community level and formed the basis for specific action at Community level or by the Member States.

The Commission decided in 1985 to issue a second communication on the problem of social security, taking into account all the discussions which had taken place since its first notification of 17 November 1982.

The considerable increase in the number of people living below the poverty line caused by the persistent level of unemployment promoted the Council on 19 December 1984 to adopt a new specific Community measure to combat poverty which provides for financial support from the Community for the accomplishment of a number of research projects the main aim of which is to help combat poverty among the unemployed and more particularly young people and the long-term unemployed, second-generation migrants, refugees and migrants wishing to return to their country of origin as well as among elderly people and single-parent families.

#### *Point (d)*

As far as the programme concerning health and safety at work is concerned, as a follow-up to the framework Directive of 27 November 1980 on the protection of employees against harmful exposure to chemical, physical and biologi-

cal substances at work, the Commission submitted five draft Directives concerned with the danger of metallic lead, exposure to asbestos, excessive noise at work, specific dangerous substances and activities and exposure to benzene. The first three have already been approved by the Council.

The Council also approved a basic directive on the prevention of serious accidents in relation to industrial activities, the so-called Seveso Directive, crowning lengthy efforts on the part of the Commission.

On 4 November 1982, the Commission submitted a draft Resolution to the Council concerning a second programme of action on safety and health at work. The programme was adopted by the Council on 27 February 1984. It runs until 1988 and is designed to increase the protection of employees at work by means of 20 priority measures. In practice it will affect approximately 100 million employees in the Community.

#### *D. Conclusion*

To summarize, between 1973 and 1977, the social policy of the Community was a great success, particularly as a result of the adoption and implementation of a large number of the measures contained in the 1974 action programme. The period 1977-80 was more difficult as the economic tide had turned by then. There were however, significant achievements during this period: the reform of the European Social Fund to enable it to be used to create jobs for young people and the broad discussion, initiated and stimulated by

the Community, on the redistribution of available work. However, attempts to achieve a breakthrough at Community level failed. Even in the period 1981-85 there was no Community breakthrough in this field.

However, it is to be hoped that the third attempt will be 'third-time lucky'. The new Commission under Mr Delors took up the theme again in early 1985. On 31 January and 12 November 1985, the leaders of the employers' and employees' organizations in Europe were invited to informal talks at Val Duchesse in Brussels. It would appear that possibilities none the less exist for a positive exchange of views between the ETUC and UNICE in a number of fields (the labour market and the organization and redistribution of work on the one hand and the introduction of new technologies on the other). This would help to reactivate the social dialogue which, since mid-1983, has been very subdued.

It should also be noted that, unlike the previous committee, the *Monet II Committee* which began its work in Bonn on 6 June 1985, consists of employers' representatives in addition to representatives of the main political groupings and employees.

It is to be hoped that both attempts will succeed and will breathe new life into the social dialogue, a dialogue which in the past has been very beneficial to the Community. The Community has enough problems as it is at present. We must be careful not to lose the support which the Community enjoys among major sections of the population thanks to the social partners.

**Dr L. H. J. Crijns**

# **Part Two**

## **Analyses, debates, studies**



# Managing change: employment practices in US and European firms

**Both the US and Europe are going through periods of rapid structural change. How have firms adjusted to these changes? How and what can firms learn from the experiences of others?**

**The Commission together with the United States Industry Coordinating Group<sup>1</sup> organized a seminar in Bruges on 15–16 May 1986 to talk about these questions. Participants included representatives from US companies, European affiliates of US companies, European companies, the services of the European Commission, the European Parliament, UNICE, the Economic and Social Committee, the OECD, the ILO and universities.**

**John Morley, head of the Commission's employment and labour market policy division and Charles Goldman, chairman of USICG acted as co-chairmen for the seminar. Both the presentations and the discussions concentrated on exchanges of information about practical experiences of managing change rather than on theoretical issues. Despite the diversity of the cases presented, a common thread throughout the seminar was that of new technology in the largest sense—not only new technology applied in the traditional, productive sphere but also in the social sense: 'new technologies' of communication and management.**

This article gives brief outlines of the presentations which were made in the course of the three sessions and indicates some initial reactions and areas for future work.

Mr Bruno Liebhaber welcomed participants on behalf of Commission President Jacques Delors. Mr Liebhaber recalled that the major priorities of the Delors Commission were the completion of the internal market by 1992, greater economic and social cohesion and closer technological and industrial cooperation with the aim of reducing unemployment. To achieve these ends consensus is necessary and this is why the Commission launched its cooperative growth strategy in last year's Annual Economic Report. The aim of this cooperative growth strategy is to increase employment — generating growth by encouraging real wage growth which is lower than productivity gains while at the same time supporting demand so that job creating investment will be promoted. Both sides of industry have endorsed this strategy.

Mr Liebhaber said that the seminar, which provided a meeting place for Americans and Europeans, was fully in keeping with the wider industrial cooperation between countries which the Commission feels is necessary.

## **'Competitive needs and planning for change within the company: growth, reduction'**

The first session contained four case studies dealing with the problems of labour force reductions, plant closures, transfers of activities and personnel to different geographical areas as well as changes in labour force composition — e.g. upgrading the technical capabilities of staff in line with technology changes.

*Canadian General Electric* set up a new high-technology plant in Bromont, Quebec, an area with a long history of traditional and declining industries, and a labour force with out-dated skills.

The plant is now the most productive operation within CGE and probably the most productive of its type in the world. This success can be attributed to the innovative approach to management. Employees, who are provided with an intensive training programme, work in teams with a high degree of responsibility. There are no foremen or first line managers and employees are free to make proposals for change, and evaluate their own productivity. Salaries reflect productivity improvements and cost reductions.

The philosophy of the company is that each employee can make a positive contribution to the company in an environment which is conducive to initiative and creativity and where training is paramount.

*Allied Signal Corporation*, a producer of automobile and aeronautic components were forced to close large manufacturing units in Indiana as a result of international competition. The firm consulted the highly unionized workforce at an early stage and investigated the failures and successes of other firms who had also experienced mass lay-offs.

By deciding to close production completely, rather than cutting product lines here and there, the company managed to save the jobs of the technical and administrative personnel (50% of the original 5 000 workforce) and could introduce major employee assistance programmes.

The company provided substantial compensation to the employees and also set up a transition centre. This provided training in drafting CVs and prep-

<sup>1</sup> The United States Industry Coordinating Group comprises: the United States Council for International Business; the National Foreign Trade Council; the National Association of Manufacturers; the United States Chamber of Commerce and the American Chamber of Commerce in Belgium. The purpose of the USICG is to keep its members informed of EC activities as well as of its members' EC-related activities and, where appropriate, to present unified positions to the EC on matters of common concern to the business community.

ation for job interviews with use of videos and films. A computerized job matching and placements service together with counselling to help workers deal with sudden unemployment and early retirement was also provided.

*Dow Chemical* automated an old-fashioned plant in Terneuzen, the Netherlands. Communication with and involvement of all the employees concerned were key factors in ensuring a smooth transition. Delegation of decision-making, widespread dissemination of information, introduction of more flexible working time and training programmes to encourage job flexibility and multi-craft employees have led to a strengthened company which now employs more people than before the change. Some of the original employees took early retirement but none were

made redundant and many have upgraded their skill level through training.

*ICI* petrochemicals and plastics divisions found themselves in dire trouble at the beginning of the 1980s, with heavy losses and over-capacity. Between 1981 and 1983 the workforce was reduced from 18 500 to 12 500 and the company's research and development operations moved from the south of England to the production site in the north. Yet of the 6 000 who lost their jobs, only 100 ended up as unemployed. How was this achieved?

After lay-offs in 1971 which had unsettled the remaining staff, the company introduced a 'Security of Employment' charter which stated that any labour force changes should have a business justification and be fully discussed with

the employees. Attempts should be made to redeploy any displaced employees within ICI, first locally, then nationally. Where this is impossible, the company should help in redeploying personnel outside the company.

To cope with cutting the workforce so drastically, ICI set up a range of re-settlement activities which included:

- (1) Counselling sessions to help employees with interviews and CVs for new jobs;
- (2) Job search;
- (3) Secondment to job creation schemes in local communities;
- (4) Retraining of employees;
- (5) Training employees to set up their own businesses;



- (6) Preparing older employees for early retirement and providing investment counselling.

Frequent and early consultations with employees helped them understand the need for change and facilitated management of the change.

**'Competitive needs, change and innovative resources management within the company: job creation'**

The second session contained four case studies, two dealing with the problems of rapid labour force growth, one with deregulation and the fourth with reorganization of working time.

DHL provides an international courier service for parcels and mail. Operations started in Amsterdam and London in 1976 with a staff of five and a couple of old cars. Ten years later there are 2 700 employees. The company has succeeded in expanding rapidly with no corporate strategy or planning. Key factors have been young, flexible personnel who have been willing to pack their bags and go to set up new offices with little capital and a try-fail-correct-try again philosophy. The average age of employees is 27, of whom 40% are women. Shift systems have been set up to keep offices open 24 hours a day and part-time workers and others on fixed-term contracts are used to supplement the full-time labour force at peak periods — for example, from October to December.

DHL has also introduced a system for individuals in more far-flung places to set up their own business under a DHL licence.

Sun Microsystems produces high performance computer systems. Created in 1982 by four young people (average age 26), turnover reached USD 8 million in the first year and this year its 2 000 staff are expected to produce a turnover of USD 200 million. Employees are highly qualified, own shares in the firm and are allowed to work flexibly — many working from home with only oc-

casional visits to the office. Employees work in an entrepreneurial, participative environment where authority is based more on technical competence rather than management position.

Sun survived the recent recession in the computer industry. Rather than lay off workers, employees agreed to a temporary hiring freeze, to increasing productivity and to a reduction in profits. Those workers who failed to reach performance targets were counselled and, in the end, only 10 people had to be laid off.

Sun's reputation as a good employer encourages larger numbers of applications. Recruitment is currently running at 7% of the workforce every month. An expected turnover of USD 400—USD 700 million by 2000 with between 3 000 and 8 000 employees will mean management may have to become more structured and variable compensation schemes are being considered. Nevertheless, Sun hopes to protect its philosophy of treating people as its primary resource.

**Deregulation of the road transport sector**

The third case study looked at the effects of the 1980 deregulation of the trucking industry. In the regulated industry, new entrants had to prove that they would not damage other business interests in the industry. In the deregulated world, the onus is now on existing firms to prove that the new entrant to the industry would have definite harmful effects on the community. Potential loss of income to their company from outside competition is no longer accepted as a valid argument.

Deregulation was followed by a massive increase in licence applications. The number of carriers rose from 17 000 in 1978 to 33 500 in 1985. The very large firms tended to survive deregulation but many medium-sized firms were undercut by the increasing number of small firms and went bankrupt. Thus, there were direct dislocation costs for the industry itself. Consumers, however,

found prices falling and more diversified services with faster delivery options and so on. The share of freight and inventories in GNP has fallen and it is estimated that there have been overall savings in logistics costs of many billions of dollars. It is difficult to estimate the employment effects of deregulation independently of the cyclical position of the economy, but they are generally regarded as positive. Although salaries have tended to fall, more and more employees are taking advantage of employee share ownership plans. The general feeling seems to be that deregulation has been a good move.

Philips Belgium laid off over 9 000 workers between 1974 and 1982 as a result of international competition. To survive as a going concern for the remaining workforce, the company reorganized working time to increase production capacity by allowing longer use of equipment. The company was stimulated in its efforts by the 'Hansenne' experiments<sup>1</sup> whereby regulations governing evening and weekend employment, overtime etc. were relaxed for those companies who engaged new personnel, reduced labour hours and moderated wages. The new working arrangements at Philips include paying weekly salaries and benefits to workers working two 12-hour days at the weekend.

Philips has also made increasing use of part-time workers and workers on fixed term contracts to allow production to vary in response to demand.

Although the proposed changes met with some initial hostility from the unions, it has now been agreed that the company can modify the work schedules of new employees in accordance with the needs of the company.

The plant is now in operation, on average, by 12% longer than before and employment has increased. Philips believes that the Hansenne experiments have played a vital role in introducing the concept of flexible working hours and labour organization.

<sup>1</sup> Hansenne is the Belgian Labour Minister who introduced the schemes.

**'Competitive needs, change: impact and external considerations'**

The third session looked at links outside industry: public/private partnerships; university-industry links; and industry involvement in social/employment programmes.

*Deutsche Bank, Berlin*, has been very involved in helping Berlin develop as a centre for technological innovation. With a student population of 90 000 and one of the first science parks with over 180 research and development centres, Berlin had considerable potential. However, 100 000 manufacturing jobs had been lost between 1970 and 1983 and the Government decided to step in to halt the employment decline. A series of innovatory schemes included: a public venture capital fund; creating an incuba-

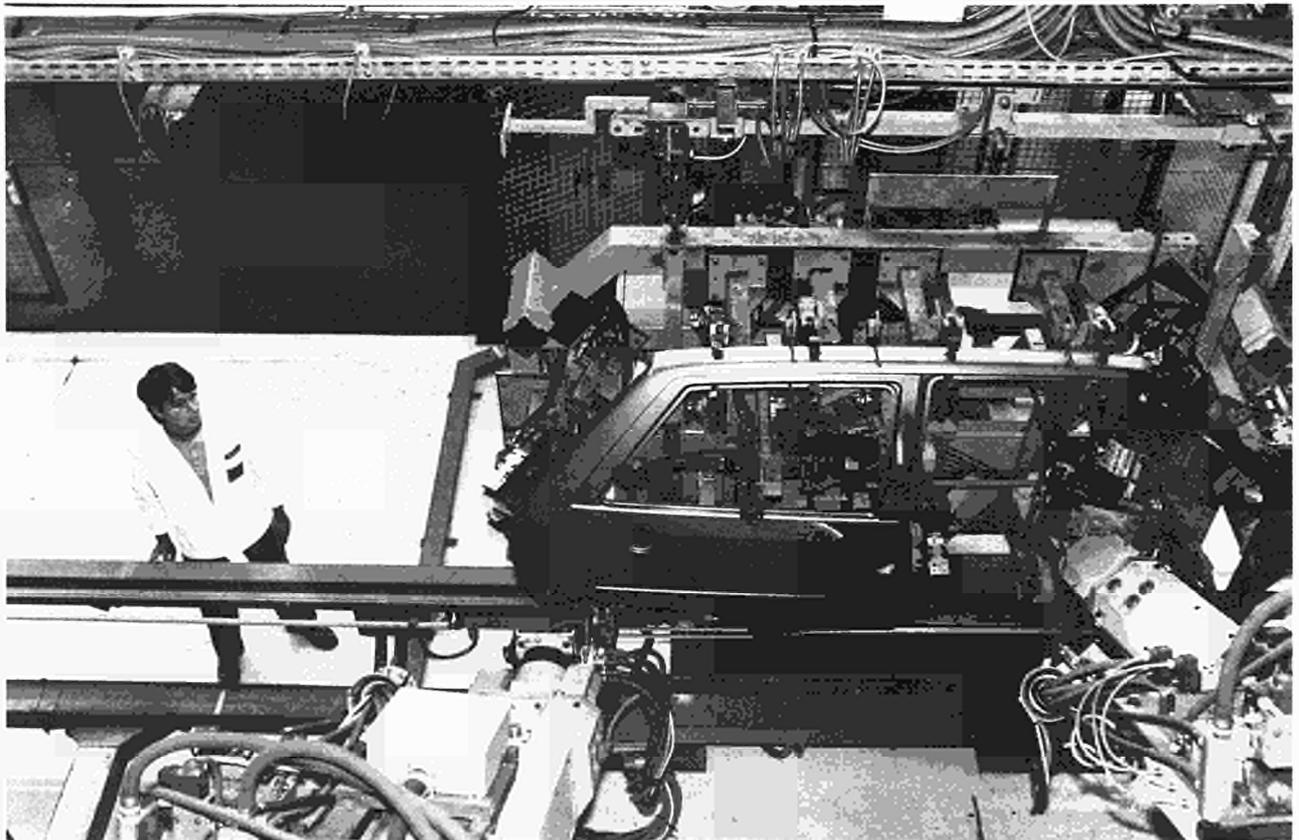
tor centre for new businesses at the heart of Berlin's University of Technical Sciences; and a 'qualification offensive' which provided unemployed people with training in private enterprises.

Links between the universities and the business community have improved greatly: Curricula have been changed to meet the needs of industry; people work both as university lecturers and businessmen; businesses send more of their employees on university courses; research is more market oriented and the opportunities for product development and production are increasing.

300 new companies specializing in new technology have been established over the last five years and large companies have also become involved, e.g. Volkswagen and BMW have a joint project to stimulate technological innovation in the car industry.

*Deutsche Bank* has employed non-traditional criteria in assessing bank loans and has a special team for assessing loans to new businesses. It has also specialized in providing financial and marketing advice to technologically innovative firms. Cooperation between governmental bodies, industry, and the university has led to the creation of 9 000 new jobs since 1984, and Berlin's economic growth is now higher than in the rest of West Germany.

Nobel Prize laureate Dr Kenneth Wilson from *Cornell University* explained how he had set up the Cornell University Theory Center/Supercomputer Facility. Several years ago, Dr Wilson realized that existing array processors were not powerful enough to handle his specific research problems in elementary particle physics. Realizing that other users both in business and other re-



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search disciplines faced similar problems, Dr Wilson sought financial and technical partners to develop supercomputers. IBM agreed to provide both technical and financial backing to the tune of USD 35 million over three years. The National Science Foundation contributed USD 21 million and the State of New York, USD 12 million. The developers of the original array processors 'Floating point systems', also collaborated. Such industry/university collaboration benefits both partners. Industry generally seeks reliability in its computers and technological progress tends to be slow.

Academics, on the other hand, require fast, innovative computers. With cooperation, university users can help develop more complex, efficient computers and the computer industry provides reliable technical and production support. At Cornell costs are further spread by charging research institute members USD 100 000 for use of the supercomputer facilities which would otherwise be out of their reach. Dr Wilson suggested that in future, a major funding pool should be established by governments, universities, and industry to ensure that advanced instrumentation is developed to its full potential.

IBM, in common with many big companies, spends large amounts of money

each year on social programmes. One of the projects in the United States is a network of Job Training Centres which provide training for the unemployed or underemployed and other disadvantaged groups. The aim of the centres is to teach marketable skills which are relevant to the needs of the local labour market. Local community organizations and industry are involved in running the centres and providing additional financial support.

There are now over 140 centres across the United States and since 1968 14 000 people have graduated — 80% of those who enrolled — and 85—90% of graduates have gained good jobs.

IBM spends USD 4.5 million a year on this project but estimates the net gain to the public in terms of cuts in benefit payments, increase in income and taxes generated is over USD 30 million. The involvement of local people in design and maintenance of the schemes has been crucial in determining their success.

The seminar was considered successful by all participants. A number of impressions stand out:

(1) A lot is going on in the employment and industrial relations areas within large companies. Policy approaches have become extremely sophisti-

cated in both heavily unionized and non-unionized companies.

(2) In terms of management objectives, the companies seem very concerned with the morale and motivation of their personnel. Career planning, training and development of the capabilities of all members of the labour force is highly developed. Good internal communications and involvement of all levels of personnel in decision-making are seen as crucial.

(3) Business, universities and local communities are cooperating more closely and in new ways to provide innovative solutions to competitive and social needs.

(4) A flexible organization, capable of adapting to change was important in all companies — unionized and non-unionized. This flexibility applied equally to management and workers. There is a growing tendency for employees to work in teams with responsibility for setting and achieving their own production targets.

Future seminars, perhaps with more limited themes, are being discussed and the possibility of setting up an information network on 'best practices' in companies is being considered.

# Technology agreements in Japan:

## The unions are becoming more concerned about the employment effects of new technologies

**The attitude of Japanese trade unions towards technological innovation is one of positive acceptance, in spite of some differences in the past between the two main worker organizations (the General Council of Trade Unions of Japan and the Japanese Confederation of Labour): the established pattern of industrial relations, based on cooperation between labour and management, and a very low unemployment rate have certainly helped to emphasize the growth potentials of technological change, rather than its labour displacement effects. However, some changes in trade union strategy seem to be now taking place, and some preoccupations and demands similar to those put forward by the trade unions in Europe are emerging in the policies of the labour unions and in the agreements concluded at enterprise level.**

**A report prepared for the Commission by a Japanese expert, Mr Koichi Iio of the Japan Economic Research Centre, gives an account of these recent changes in attitude, and provides some examples of agreements at firm level in new technology sectors.<sup>1</sup>**

The growing preoccupation about the consequences of new technologies is attributed by the report to the awareness that the employment situation is deteriorating at macroeconomic level: the unemployment rate reached 3.1% in March 1986, which looks high to Japanese eyes, even if it does not to European ones. Moreover, the polarization of the labour market is being accentuated by technological change, with the secondary segments of the workforce, such as older workers, women and part-timers being more and more relegated to unskilled and menial jobs. Finally, trade unions are losing members,<sup>2</sup> which is a reason for concern not only for the unions themselves, but also for management, in so far as this development may affect the stability of labour-management relations.

The macroeconomic dimension is rather important: many studies and research on the effects of technological change on employment and working conditions missed out the whole picture, since little or no labour displacement occurs in the large enterprises, where new technology is introduced on a piecemeal basis and where the pattern of labour management is such that surplus workers are reallocated in-house to other tasks. However, the large number of small-scale enterprises is facing more fundamental problems of survival, in so far as their process of automation from their present technological level requires a substantial increase in the capital equipment per worker, and thus a large amount of investment. Their ability to survive will eventually be an important determinant of employment levels.

Something is changing also in the labour market at enterprise level: firms faced with tougher competition are induced to abolish, to some extent, their permanent employment and seniority systems, while computer engineers show less commitment to lifetime employment with the same firm than is normally the case in the core labour market in Japan.

The response of the trade unions, still in a framework of global acceptance

of the adoption of microelectronics technology, is to define guidelines at national level on two main issues, i.e. the definition of desirable and undesirable applications of information technology; and the necessary changes to be implemented at the workshop level in relation to technological change. A national approach is deemed necessary, since these issues could hardly be tackled at the level of individual enterprises.

Proposals on the content of collective agreements at sectoral level have already been put forward by some unions, such as the Japanese Federation of Electrical Machine Workers Unions and the Japanese Metal Industry Workers Union. The proposals are based upon the precondition that management should not dismiss workers because of the introduction of microelectronics technology, and they fix a number of guidelines on safety standards, the required agreement of the workers who should be reassigned to other jobs, the provision of adequate opportunities to participate in education and training activities, the maintenance or improvement of working conditions. As far as procedures are concerned, the union should obtain information on employer's plans as early as possible and have a first discussion with management; then consult its members; and finally come up with a set of demands emerging from the consultation of the workers to proceed to collective bargaining.

Of the two unions, the Federation of Electrical Machine Workers Unions stresses the equitable sharing of the advantages of technological development, i.e. that greater productivity should be used for reducing working hours, improving working conditions, and maintaining the human aspects of work. Adverse effects should be prevented, and the introduction of the new equipment

<sup>1</sup> Koichi Iio, 'Introduction of new technology and labour-management relations'; report prepared for the Commission of the European Communities, mimeo, 1986.

<sup>2</sup> The rate of unionization has declined to less than 30%.

should not be accepted if it may produce direct negative effects on employment. Prior consultation procedures should be established, and the introduction should not be accepted until they are completed. The Japanese Metal Industry Workers Union, while putting forward similar principles, stresses the aspects of planning and consultation, requesting the companies to present medium- and long-term production and labour force plans for consultation, which is equally requested for any re-allocation of the workers to different job assignments. Clauses concerning the internal mobility of workers and the reabsorption of workers displaced by the technology in other departments are important in the platforms of both unions, as well as all related clauses on

how to smooth the transfer, i.e. training courses, the improvement of skills, and some guarantees for the workers most difficult to retrain.

Making full use of already employed workers and moving them to new tasks is common practice in Japanese firms: in one of the companies quoted in the report 500 employees (out of a total of 3 600) have been reshuffled each year since 1978 and 14% of the total workers are annually placed in new positions. Moreover, the positions of at least the largest companies are not in sharp conflict with union demands. A significant example which may be quoted is that of a note jointly signed by the automobile company Nissan and the Motor Trade Union in connection with the introduc-

tion of automated labour saving equipment. In this document, the company and the union undertake to make efforts to introduce new technology smoothly on a joint basis, and to consult with each other with a collaborative attitude. The company undertakes to present its plan, including the expected effects on the workers; it also undertakes to maintain the current employment level and working conditions. The reassignment of workers following the introduction of new equipment will be done by fully taking into consideration the abilities of individual workers, and will provide them with adequate opportunities of education and training.

**Anna-Silvia Piergrossi**

# New production systems:

## Implications for work and work organization in the factory of the future

A Conference on new forms of production was organized jointly by FAST, Cedefop and the City Council of Torino.<sup>1</sup> It referred to issues of technology, organization, small and medium-sized enterprises, and their implications for long-term oriented aspects of work and training as well as for research and development demands. The conference was held in the framework of a research activity of the FAST programme (Forecasting and assessment in science and technology), DG XII of the Commission of the European Communities, and was co-sponsored by Cedefop (Berlin).

The main task of FAST is to analyse scientific and technical change in its many dimensions — economic, social and political — so as to identify new priorities for a common R&D policy and for long-term action in the Community. In addition, FAST aims to strengthen the bases of European forecasting and forward thinking by exploiting long-term research undertaken in the Member States and encouraging the setting-up of *ad hoc* cooperation networks between researchers and potential users.

In the framework of robots and new production systems, research studies have been carried out by IREP (Grenoble), ISI (Karlsruhe), ISF (Munich) and the University of Roskilde addressing the question of the consequences new information technologies and their potential flexibility and integration of the production process might have on work and training. The research has concentrated on the so-called flexible manufacturing systems (FMS).

At the symposium discussion centred on the results and comparisons carried out by an international audience of 150 experts from all member countries. Over 40 contributions were received referring to the questions:

- (i) To what extent will development lead to full automation and computer integration?
- (ii) Do computer-based highly integrated production systems lead to more flexibility, or will this aspect mainly be ensured by human qualifications and work organization?
- (iii) Which new man/machine relationship will arise?
- (iv) Which measures have to be taken to meet future requirements?

This article will present the results of the discussion which took place in the working party on 'Organizational factors of production, work organization and division of work'.

### Highlights of the discussion of the working party on 'organizational factors of production, work organization and division of work'

The discussion revolved principally around flexible machining systems — specifically, metal cutting — for small and medium batch sizes.

The chief conclusions were:

- (i) the quickening pace at which flexible manufacturing systems (flexible cells and small flexible workshops) have spread since the early 1980s has been a cause of deep-reaching changes not only to the machining process but also in the general operation of the businesses concerned (particularly in the mechanical engineering industry);
- (ii) for the most part, the introduction of flexible cells and workshops represents an extension of numerically-controlled machine tools, and more

strictly reflects a search for productivity gains rather than for the ability to achieve maximum product diversity from a single production line;

- (iii) case studies reveal no causative link between technology and work organization: the existence of a marked or weak division of labour is determined less by technological demands than by existing labour utilization practices at plant and industry level.

These conclusions were the outcome of an engrossing, often impassioned, debate in which some 50 participants were actively involved, and which revolved around a handful of contributions of particular interest.

*The automation of machining in Denmark, France and the Federal Republic of Germany*  
(M. Hollard — IREP, Grenoble)

Profound changes were observable in the companies studied in all three countries, beginning in the late 1970s and gathering pace in recent years. Innovations in metal cutting were less related to machining techniques in the narrow sense than to loading, fixing and unloading workpieces, linking the machines together, production scheduling and management, part engineering, quality control, and machine supervisory techniques... The first major changes were necessitated by the introduction of numerical control techniques, which are now fairly commonplace. The spread of flexible cells and workshops is essentially an extension of numerical control. The situation, however, presents a very different picture depending upon the size and complexity of the system used; a trend towards standardization using equipment selected from manufacturers' catalogues is now beginning to emerge for basic, two-machine systems.

<sup>1</sup> 'New production systems: Implications for work and training in the factory of the future', EC symposium organized and sponsored by FAST/Brussels, Cedefop/Berlin and the City Council of Torino, Turin, 2-4 July 1986.

*A flexible machining system is not a flexible manufacturing system.* The surveys conducted in Denmark lead to the conclusion that manufacturers see the ability to respond rapidly to demands for new products and the installation of integrated automated production systems as irreconcilable opposites. Flexible cells and workshops in France and Germany have by and large simply replaced numerically-controlled machine tool workshops. The conclusion is that what is being sought here is simply increased productivity rather than 'economy of scope'.

This apparent paradox seems to stem from a degree of confusion as to what 'flexible automation' actually means:

- (i) Computer control of a manufacturing line does not, of itself, diversify the range of parts that line can produce. On the contrary, it actually restricts the range of operations to those which the computer can be programmed to handle. The diversity of products which can be manufactured depends first and foremost on the type of machines used. Computers offer a twofold benefit: they enhance productivity, and they can control highly complex systems. In this case, the scope of new products which can be manufactured can only be widened where the manufacturing system is already automated, but it is a situation in which the integration of machines itself creates severe rigidities. A careful distinction must therefore be drawn between automation by linking together what were previously 'stand-alone' machines and the host of changes needed to transfer lines (constitution of 'just-in-case' stocks, the potential for changing the sequence of operations . . .) to enable them to widen the scope of their production potential.
- (ii) The concept of flexible automation also embraces the ability of a system to change from working one product to another over longer periods. Here, the flexibility is linked to the type and cost of changes needed. Major advances are being

made in this field, particularly with the development of CAD techniques and just-in-time process control. The spread of flexible manufacturing systems is only very loosely connected with this kind of flexibility.

An examination of the educational qualifications of workers responsible for flexible cells and workshops reveals a wide variety of forms of division of labour among companies, at the core of which is a general trend towards higher



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levels of qualification, to which the size of training programmes, in particular, bears witness. The situation in Germany is divided along broadly equal lines between robotic installations with a marked division of labour and others where a higher degree of versatility is required from operators. It would therefore appear that the rising levels of qualifications are not necessarily causally related to the technical characteristics of the system installed. Other factors must also be taken into account, such as company policy, established demarcations within the workshop which may also exist in other parts of the factory, and the power relationships between the various occupational groups concerned.

All these findings point to the need for a comprehensive analysis of the technical and social changes wrought in the workplace. The reason for the wide variations between the situations in different companies is a question which must be addressed. The first point to emphasize is that the differences are heightened because virtually all the companies involved are very much feeling their way gingerly through an experimental stage; as yet, therefore, the necessary distance for a satisfactory analysis is lacking. An initial informed guess, however, might be that the differences in question stem to a large extent from factors internal to the companies and that the differences between firms are more marked than those between countries. That, at least, is the general impression which emerges from the comparisons of French and German firms. Account must be taken, however, of the fact that those internal factors cannot be separated from the national context. For one thing, the demography of the firms by industrial sector and size is not identical in the countries studied. And for another, the strength of the various occupational groups within the firms is also conditioned by national factors, such as the structure of the vocational training system (particularly crucial with regard to operators), the relative industrial clout of the different categories of engineers and system experts, and certain broader cultural factors.

*Organizational aspects of FMS in the United Kingdom*

(B. W. Haywood — Brighton Polytechnic, Brighton)

The conclusions of this British study among 50 manufacturers, trade users, research bodies, and others brought to light a number of prerequisites for the successful implementation of FMC/FMS: the need to examine the technological and organizational structures within the company (around 50% of the benefits of introducing FMC/FMS arise not from the system itself but from a general reappraisal of the organization); the integration of manpower and skill resources in the preparation stage, including manpower planning and a less demarcated job structure in the workshop; the fostering of closer industry/university cooperation and the promotion of cross-disciplinary research on systems and engineering aspects; the establishing of closer links between companies and their sub-contractors, and the development of a new form of 'compatibility' between the organization of production and the organization of work (as exemplified by 'just-in-time' deliveries).

*Flexible manufacturing systems and work organization*

(A. Rosenvallon — IREP, Grenoble)

This piece of research into the French situation concludes:

- (i) with regard to job content, that the ideas of the 'polarization of skills' and 'the workerless factory' are not borne out by the case studies; what they do reveal, in contrast, is the increasing complexity of the operatives' work ('new mental stress' — classifying, ranking and retrieving data) and the need for more collective management of work activities;
- (ii) that there exists a great diversity of forms of work organization: it finds 'no strict determinism between technology and modes of work organization'. The case study does, however, reveal a high degree of division of labour/functional specialization and a hierarchy of skill levels within the work teams in the workshop, des-

pite a general tendency towards 'up-skilling'; additionally, the workshops are only relatively autonomous, with maintenance and programming being done outside the workshop;

- (iii) methods of work organization tend to develop over time: after a period of years the relative autonomy of workshop teams becomes more firmly established; leadership and supervisory tasks are redistributed and carried out by the workers more capable of managing the flow of information; and lastly, there is a general increase in flexibility, flowing outwards from the workshop to change the work organization of the company as a whole.

*The present state and development tendencies of FMS and FMC in the Federal Republic of Germany*

(J. Fix-Sterz, G. Lay, R. Schultz-Wild — ISI, Karlsruhe and ISF, Munich)

This study analyses the installation of 85 FMC/FMS systems in the Federal Republic. The predominant objective was found to be automation (85% of the systems surveyed were introduced to achieve productivity gains). The authors also found a marked trend towards the installation of flexible cells and small flexible workshops (no more than five machines) particularly since 1983, an increasing use of shiftwork (two — and increasingly, three — shifts), but no identifiable causality between technology and work organization. Methods of work organization are classified as being based on a strong or weak division of labour. In the former, different tasks are performed by different workers: operator, pallet loader, team leader, etc.; while in the latter, the operator is responsible for the immediate machining functions — machine loading and unloading, to changing, supervision and/or gauging, minor repairs, machining tests and quality control. Their analysis reveals that 56% of the systems studied are based on strong job demarcation. This fairly equal balance between the two forms of division of labour suggests that work or-



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ganization is conditioned less by technological imperatives than by established labour deployment practices in the companies and industries concerned.

*Technological projects and organizational changes. The dissolution of strategies and structures in Danish firms working towards flexible specialization*

(P. H. Kristensen, Roskilde University, Roskilde)

The particular interest of this contribution lies in its setting of the technology/organization ontology against the wider backdrop of an industrial economy confronted with the choice between two fundamental models: neo-Fordism and flexible specialization.<sup>1</sup> Kristensen portrays neo-Fordism as a

form of mass production in which the response to competitive pressure is to reduce production costs. The strategy of flexible specialization, in contrast, seeks to avoid price competition by continually shifting to the production of batches of specialized goods catering to changing market niches. Flexibly specialized firms aim for the capacity to produce the widest possible range of products at any given time — but particularly for the ability to switch between specialized products at will. Flexible specialization excludes the use of high-powered machines dedicated to a single task; it demands general-purpose machines operated by skilled workers, capable of switching between different products at short notice. All of which means that each stage of the manufacturing process retains some autonomy with respect to the whole. The identifying features of work organization under a flexi-

ble specialization strategy can be summed up as: general-purpose machines, qualified workers, and decentralization.

The author postulates that Danish firms are moving along the road to a form of flexible specialization, although as yet no coherent, uniform model typifying that trend has emerged. He starts not from an analysis of the technical system used, but rather from a consideration of the firm as a whole, with technological change being seen as a contributory component in the development towards flexible specialization. The question is: to what extent are the technical and organizational structures of the firm compatible with the general pattern?

<sup>1</sup> M. Piore and Ch. Sabvel in *The second industrial divide* (Basic Books, New York, 1984).

He isolates a number of factors which he identifies as prime movers behind the trend to flexibility:

- (i) workers must be sufficiently highly-skilled to be able to cope with product changes at short notice, which may occasionally involve the complete reorganization of the workshop (transferring machines from one workshop to another, for instance), and be sufficiently well-informed about the company's business for the high degree of autonomy they enjoy not to conflict with the general organization of production;
- (ii) the established pattern of work organization must not be incompatible with the new forms of organization, particularly where influenced by the 'just-in-time' concept.

Kristensen places particular emphasis on the importance attached to the continuance of the collective organization of labour along the lines of the established Taylorist model, and on the need to master the new technologies in the production shop itself;

- (iii) consensus between the different groups within the company is a crucial factor. The build-up of tensions may come to a head in the form of breakdowns in the organizational system, particularly where the conflict involves those groups most exposed to the new developments: unskilled workers and the lower and middle management often trained on the shop floor.

This analysis suggests that one explanation of why Danish industry offers such a fertile soil for the growth of flexible specialization may reside in the relationships between the individual and authority. That so few flexible automation systems are as yet to be found can be explained by the contradiction which currently exists between the potential flexibility of production based on micro-workshops linked by a flexible information system, and the rigidity which would be imposed by integration within automated systems. This is borne out by the author's finding that, since 1979, the spread of numerically controlled ma-

chine tools has continued far in advance of the increase in the country's robot population.

## **Recommendations**

In principle, basic choices with regard to the organization of work and the generation of skills continue to exist under new technology, and in concrete details, they acquire new forms and definitions. It may even be that the range of choice becomes larger with new technology. The crucial problem is therefore not to focus on new consequences of technical change but to redefine, discuss and implement organization and skilling options which are not radically new in principle.

In the field of research and development this means that in flexible and integrated manufacturing, organization is a key issue for the future. This has to be taken into account when formulating industrial innovation policies and developing production technology and manufacturing facilities. R&D policies have not only to rely on 'technocentric' concepts, which are guided by a development logic of technology. In this way the demands of prospective production might not be met. What is required now is a new R&D approach, which is based on organization and skills for the elaboration of adapted technologies.

*On the basis of the working group's discussion and research results the following recommendations are proposed by the reporter (Prof. T. Charles, North Staffordshire Polytechnic, Stoke-on-Trent) which relate to issues where clear strategic choices are available and to possibilities for future research:*

- (1) FMS, FMC and integrated manufacturing technologies lead to job displacement; the danger of further marginalization of the labour force indicates a need for new labour market policy initiatives and training initiatives to promote qualifications for all workers.
- (2) The new technologies in manufacturing will not be effectively developed within the obsolete framework of hierarchic, Tayloristic forms of

work organization. The option of relatively autonomous work groups and project-based or participative forms of organization are more likely to meet enterprise needs for increased flexibility and a multi-skilled workforce and at the same time reduce worker resistance and increase joint worker involvement in technological innovation.

- (3) Participation strategies to be effective require shop-floor and trade union involvement in the early stages of system design which is of potential benefit to all the social parties. This entails real influence of all the social parties at the decision stage through appropriate procedural and substantive legislation and increased access to information and external expertise.
- (4) The continued predominance of technician forms of systems design indicates the need for further research into the training of engineers and systems designers and possibly the need for joint research into new technology design and implementation involving collaboration between engineers, computer specialists and social scientists in order to identify and elaborate the human side of technological change.
- (5) Developments in FMS/FMC and integrated manufacture are still in their infancy and further fundamental research will be needed into work organization and the quality of work as well as relations between enterprises. There is a need to compare research techniques and consider additional research methods to the survey-case-study approach in order to span the whole process of technological innovation from the early stages of design to post-implementation and identify innovative forms of work organization. This entails equal research consideration of both the organization of work at the point of production and managerial practices in the enterprise as a whole.'

**Georges Kintzelé and  
Werner Wobbe**

# New forms of work and activity initiating a new research programme<sup>1</sup>

**New ways of organizing work in order to adapt to changes in demand for products and services, different patterns of behaviour and continuous technological development, coupled with worryingly high unemployment figures, call for a re-evaluation of the labour market and a redefinition of the concept of work. For many people work in the sense of paid full-time employment has lost its original meaning.**

To gain a better understanding of the changes taking place, the European Foundation initiated in 1985 a research programme on new forms of work and activities. The purpose of this programme is to investigate both the ways in which the labour market is reacting to new conditions and the new forms of work that are evolving, and to measure the social and economic consequences of these developments. New forms of work include employment at home and working at a VDU at a distance from the actual place of employment, i.e. activities which have an element of spatial flexibility compared to what were formerly the physically separate worlds of work and home. They also embrace concepts such as weekend work, the 12-hour shift and working 'on-call', which introduce different patterns of time use. Working in isolation at a VDU also comes into this category.

Fundamental changes are also taking place outside the labour market proper. As it becomes increasingly difficult to find paid employment, more and more people are turning towards other types of activity which do not have the same status, e.g. charity work, family welfare work, membership of environmental action groups, to give but a few examples. In a society where a person's social status has long derived from the type of work he or she did, such activities merit reappraisal.

The Foundation has approached the theme of the research from a number of different perspectives. Its aim in so doing is to come to a broader understanding of the specific factors typifying the developments outlined above. The work carried out so far encompasses the following areas:

- (i) external and internal labour markets and job flexibility;
- (ii) development of job-sharing;
- (iii) development of terminal/VDU-based work at home;
- (iv) effects on families and social organization;
- (v) psychological effects of new forms of work and employment;

- (vi) legal and contractual aspects on the limitations of working time;
- (vii) labour law and social insurance legislation — questions arising;
- (viii) the organization of work in cooperative enterprises;
- (ix) changing patterns of time use.

The above topics were the subject of working papers which were discussed at a seminar in Brussels in April 1986. In order to comprehend the wider political and social significance of the problems at hand, the seminar was preceded by a number of brief statements outlining the position of the European Commission, the Parliament, the Economic and Social Committee, employers and employees, by the former member of the Commission Ralph Dahrendorf, who chaired the meeting.

Jean Degimbe, Director-General for Employment, Social Affairs and Education and Chairman of the Administrative Board of the European Foundation, emphasized the great interest expressed by the Commission in the questions raised. A joint effort on the part of all concerned was needed to find workable solutions to the apparent conflict between economic reality and people's needs, desires and expectations. It was the desire to see this conflict resolved that resulted in the endeavours, reflected in the moves to revive and intensify the 'social dialogue' between unions and employers, to heighten awareness of the fact that only by joint action could the labour market evolve to meet changing requirements. This lent even greater importance to the task of acquiring valid knowledge and insight, a process in which the European Foundation could play a significant role.

Michael Welsh, the Chairman of the European Parliament's Social Affairs and Employment Committee, pointed to the common ground that existed between the Foundation and his Com-

<sup>1</sup> by Eberhard Köhler, Research Manager, European Foundation for the Improvement of Living and Working Conditions, Dublin, Ireland.

mittee, given the fact that the themes of their work were closely related. He went on to say that while we in the EC countries had reached an unprecedented level of material and social prosperity, large sections of Europe's population found that their direct access to this material well-being was impeded. In Welsh's opinion the phenomenon of unemployment was not a temporary irritant affecting our social and economic systems but a structural problem that could only be tackled and overcome by far-reaching changes in people's attitudes and expectations. The logical step forward was to cease classifying and defining various kinds of jobs and forms of employment according to a hierarchical system, but to see them in absolute terms, as a continuum, thus tackling at the root the problem of social discrimination against 'atypical' forms of employment. Steps had to be taken to prevent the formation of a new class system, and in particular to avoid the danger posed by the creation of a new 'lower class' which would consist of people with little or inadequate education and training and who, in a more competitive labour market, would find themselves left standing by the wayside, their prospects nil. Recognizing this danger and taking measures to counteract it, whether or not this meant calling for adaptation and change on all sides, was one of the most important political tasks of our time, for, Welsh declared, a society that is unable to integrate its weaker members into its framework is a society without a future. It was Welsh's hope that the close cooperation established between the European Foundation and the Committee of which he was chairman would provide the impulse towards finding a political solution to the problem posed by the need to revive and reorientate the labour market. This collaboration was intensive and mutually beneficial outside the confines of the seminar as well.

Speaking on behalf of the European Community's Economic and Social Committee, Enrico Kirschen underlined the interdependence and interrelation of social and economic trends. The general level of social security achieved

throughout the Community should not be casually put at risk. If technological innovations in production led to costly investment which in turn resulted for reasons of cost and business efficiency in a reorganization of work and working hours to exploit new capacity, the outcome should not be a deterioration in working conditions for those who made greater productiveness possible. This meant that there should be no discrimination against part-time work or periodic working. It also meant that matters such as health and safety at work might have to be reconsidered. In other words the social aspects of the revolution now taking place in electronics and technology should not take a back seat to the macroeconomic aspects of worldwide competition. This perspective had been reflected in important work undertaken by the Economic and Social Committee such as the report 'Europe and the new technologies: research, industry, social', which was published in June 1986. Within this scenario as a whole the European Foundation had an important part to play by helping to elucidate the social consequences of technological developments. The Foundation believed that its research programme was broad enough to meet the challenge posed by the task of finding solutions, and that a contribution could be made towards ensuring that technological change evolved along lines that were acceptable to society as a whole.

Finally, Ralf Dahrendorf, who was present in his capacity as Chairman of the seminar and as head of a high-level group of experts convened by the OECD, drew a line between global problems and possible European Community solutions, which merited wider-ranging discussion. The constantly high level of unemployment made it necessary to consider the future of work in the widest possible context. The structural problems of the labour market had to be regarded as supplementary to global macroeconomics. According to Dahrendorf, who based his views on his work with the above-mentioned OECD group of experts, and its May 1986 report entitled 'Labour market flexibility', the question of labour market reorganization

and reorientation was caught between four interconnected problem areas; each of which can be defined separately (quoted from the above report, p. 6):

- (1) The need for economic adjustment. The 'shocks' of the 1970s (energy, inflation, interest rates, and changing patterns of international trade) have underlined the importance of greater responsiveness in labour markets, as well as product and factor markets, to minimize the effects of such shocks on economic growth and to promote a more competitive and efficient environment.
- (2) The need for technological innovation. New inventions and new forms of human organization ('information society') have combined to open up economic and social opportunities.
- (3) The need to deal with new social problems. Persistent unemployment has become the dominant social issue in many OECD countries; it is often accompanied by other social problems (inner-city squalor, crime) which require responses.
- (4) The need to enhance the quality of life. Changing expectations and aspirations of people as employees, but also in their lives beyond the world of employment, create demands for action.

In Dahrendorf's opinion there is no panacea for these problems, neither if treated individually, nor if treated as a complex whole. It should nevertheless be possible to outline certain strategies for change which might lead to a solution, without these being considered the cure-all that so many people seem to long for. This meant recognizing and acknowledging that it may not be desirable to search for an all-round effective remedy, that indeed, the attraction may lie in a variety of possible and different solutions.

Differences did not necessarily need to be overcome but could indeed be preserved. We ought not to look for an American solution or a Japanese solu-

tion but possibly for one that was specific to Europe, one which, properly and characteristically for Europe, combined flexibility with the guarantee of the 'basic social rights'. In other words, a European solution which would preserve, even strengthen competitiveness in world markets without breaking the historical, cultural, economic, political and institutional framework by which Europe is defined. Admittedly, finding the right balance will be difficult, even painful, but the search should not be regarded as impossible.

The Foundation intends, by creating and preparing scientifically reliable information, to play its part in enabling decision-makers at every level to recognize what, in the search for balanced so-

lutions, is socially and economically desirable, worthy and feasible, and in introducing, overseeing and implementing the changes required both on a Europe-wide scale and in the individual member countries without serious social disruption.

The first phase of the task lay in defining and measuring the problem. The position papers which were commissioned for this purpose by the Foundation and which are reproduced in a European Foundation publication of September 1986,<sup>1</sup> are intended to give the initial 'feel' of the problem and its manifold nature. The position is influenced by the views put forward by the two sides of industry. The question of defining the concrete scope of the ac-

tual field research to be undertaken by the European Foundation is at the moment the focus of intensive discussion by two consultative committees, one 'technical' and one 'political'. These two committees were engaged by the European Foundation to ensure that the project developed along properly defined and acceptable lines.

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<sup>1</sup> Ralf Dahrendorf, Eberhard Köhler, Françoise Piotet (Eds), *New forms of work and activity: Documentation of the colloquium in Brussels, 25. 4. 1986*. European Foundation, Dublin.

The documentation of this colloquium may be ordered through the Office for Official Publications of the European Communities, L-2985 Luxembourg or their national sales offices.

# Cooperation between trade unions and universities

## A German experience

**A better mutual flow of information and greater cooperation between universities and the business world is an objective that is now being pursued in all the advanced industrial States. The efforts that are being taken to achieve this objective include mostly companies, trade associations and chambers of commerce; however, they are also or could be open to the workers' representations.**

**It was against this background that in 1985 the German Federal Government decided to support a project to improve cooperation between universities and trade unions as an initial phase and for a limited period of time.<sup>1</sup>**

**The project which was carried out by the Social Policy Department of the Federal Executive Board of the German Trade Unions Federation (Deutscher Gewerkschaftsbund — DGB) from 1 September 1982 to 31 August 1985, was entitled 'Regional opening of university research to workers' problems by establishing cooperation offices — an examination of the possibilities for continuous cooperation between universities and trade unions'. It was mainly financed with funds from the Federal Ministry of Education and Science and the DGB. The total volume of finance was DM 3.16 million for the first three years.**

### Objectives of the project

The objectives of the project were to research the organizational conditions and the contents needed to open university research to workers' problems on a regional basis, and to try out forms of continuous cooperation between trade unions, workers and universities in research, teaching and further training, in order to open the universities more to the problems of workers and so to part of their regional environment.

### Five regional projects — their organization

For that purpose five university/trade union cooperation offices were set up in the university areas of Dortmund, Hamburg, Kassel, Oldenburg and Tübingen. When choosing the cooperation regions the aim was to have as wide a range as possible of university and trade union conditions. The following were the main criteria: the structure of the universities and the range of subjects represented, the union infrastructure and attempts at cooperation hitherto.

The cooperation offices were to promote the development of continuous cooperation between the workers and their unions and the universities in the region.

Each cooperation office had two local project leaders, one from the union side and one from the university. The work of the cooperation office in the region was followed by a regional advisory council, half of whose members were representatives of the university and the other half union representatives from the region. A national coordination office was also set up at the DGB Federal Executive Board to coordinate the work of the offices and support the central direction of the project.

The provision of funds was the same for all the cooperation offices in the three-year period. It amounted to around DM 185 000 a year, with a further DM 152 000 in staff funds.

### The organization has proved its worth

As mentioned, the main focus of the project was the working out of organizational forms of research transfer for workers. A decisive factor in its success proved to be the integration of the cooperation offices in the existing regional trade union structures. This together with the offices' close ties to the national unions were their greatest structural advantage. They found out what the need for cooperation was, initiated and followed cooperative projects and helped to implement the results. With their ties to the workers and their organizations they were in a position to establish the need for research and articulate this to the universities.

However, the work of the cooperation offices was much supported by the regional councils in which union representatives from the region and representatives of the universities together laid down focal areas for cooperation; this played a very positive role in shaping and building up channels of cooperation. The communication processes in the regional councils brought research and the world of work closer together. Thus the participation of the researchers in the regional councils made the workers aware of the difficulties of producing research results, while on the other side the participation of the trade unions in the region, and the possibility this offered for them to give an account of their main areas of work gave the researchers a greater understanding of the difficulties and problems facing the workers in the region.

The work of the cooperation office closely followed by the regional councils enabled cooperation between the various individual unions to open university research in the area. Up to then

<sup>1</sup> The project followed on from the results of the research project carried out from 1977 to 1980 in the University of Bielefeld and financed by the Federal Ministry of Education and Science, 'Workers' living and working conditions as a subject for university research'.

the workers and their unions in the region very often were not acquainted with either the research facilities or individual academics who might be interested in cooperation, nor did cooperation with universities play any part in local and regional union work.

Since care was taken in appointing members to the regional councils to ensure that the whole range of university subjects in that region was represented, membership of the regional council provided the first contacts for academic disciplines that had so far played little part in channels of communication.

Altogether it can be said that the organizational form used so far in the project has proved its worth. It has also proved flexible enough to cope with the differing degrees of maturity of the cooperation channels. Whereas in Tübingen, for instance, the cooperation office still had to perform a considerable amount of initial work in building up channels of cooperation, the Oldenburg office could draw on a traditional cooperation structure. But in both cases the basic principle and organizational form of the cooperation office with regional project leaders and a regional council proved effective.

Although the starting conditions differed, all the cooperation offices succeeded in building up and widening channels of cooperation. With the existing differences in the state of cooperation there were disequilibria in the starting conditions at first, but as the work went on, channels of cooperation developed in university areas which had previously had no experience of this at all. In addition to trying out and researching the organizational conditions necessary for lasting channels of cooperation, great emphasis was laid on reducing structural obstacles to access for workers to regional university research and the promotion of applied research which would take into account the problems of workers.

### Impact on research

The impact of the cooperation offices on university research can to date

only be described as minor, since the length of the project was too short to allow larger cooperative research projects to be carried out. However, so far it can be said that the need for cooperation expressed by the workers through the channels of communication to university research facilities, some of which is already emerging in research projects, has raised new questions in the research institutions involved. So the cooperation has helped to make university research more oriented towards the problems of workers in the region.

It was also evident that the channels of cooperation changed the degree to which the research workers involved penetrated problems and opened up new perspectives for the university researchers.

More than anything, the cooperation offers the opportunity, to a degree of intensity not otherwise easily matched, to gain an insight into social processes by involvement in the real social controversy and to check and correct this insight in dialogue with those directly involved. This can then be followed by a process of mutual analysis.

Of course, such proximity to social reality is not possible, or methodologically appropriate, in every case of scientific analysis. However, it is not limited to specific subject areas.

The project proved it possible to include workers' problems in some scientific disciplines that had so far had no experience of cooperation through the channels opened up. Such activities can very greatly widen the circle of university staff and the number of university disciplines participating in cooperation.

### Student counselling

A further consequence of the project was the greater recourse to the cooperation offices for student counselling. Students who were looking for a suitable subject for a diploma or doctoral thesis in the field of labour studies in the regions where cooperation offices have been set up now frequently contact the offices for this purpose. Students

also need contacts with trade unions and workers for the purposes of their work.

A further group who came to the cooperation offices with requests for advice were teachers and pupils who needed help in developing teaching modules.

### Increasing interest in cooperation

Altogether it can be said that in the five regions involved, with their very different conditions, interest in this kind of cooperation has grown:

- (i) workers have learnt to make their own demands on research workers and put new questions to them;
- (ii) trade unions have received answers from research workers to a wide range of problems;
- (iii) research workers have learnt to come to grips with new questions;
- (iv) there has been a joint search for new forms of cooperation, not only in defining problems but also in publishing and handling the results of research;
- (v) new social dimensions have been opened up for research that are related to practical experience and in inter-disciplinary cooperation;
- (vi) a great deal of mediation and translation work has been undertaken to make the cooperation between the universities and the trade unions profitable and beneficial for both sides.

### Much still has to be learned

The project also encountered a number of difficulties, such as:

- (i) workers have difficulty in formulating their research and transfer requirements, so that it is scarcely possible to work on these; in some cases they do not even know that it is possible to carry out research on these issues;

- (ii) research results that are available and that affect workers' problems need to be put into practice so as really to reach those concerned;
- (iii) research workers often have little direct contact with workers' practical problems and so they can receive no stimulus from these for their work;
- (iv) workers often have little experience of contact with research facilities, and so are unfamiliar with the time horizons, working methods and possibilities of research;
- (v) the organizational structure of the trade unions according to industries and sectors requires greater coordination between the unions to group workers' problems together and enable them to be presented to the research facilities as a common problem;
- (vi) so far neither workers, trade unions, research workers nor universities have much experience of translating

the everyday problems of workers into questions that can be handled in research.

### **Continuation of the project**

Initially the German project was planned for three years only; however, in the course of the work it became evident that a longer-term institutionalization of the cooperation offices was essential and it is evident that an institutional framework with a minimum provision of staffing and equipment is a prerequisite for a cooperation process. As a first step the promoters of the German project have therefore agreed to finance a continuation of the project up to 31 August 1987.

Considerable amounts of public money are spent on the transfer of knowledge, research, etc. from the universities to the economy, much of which goes to company counselling. The German project demonstrates that much still remains to be done in the interests

of the workers and their trade unions and the union representatives in the plant in cooperation with the universities and other research establishments.

So far there have been only a few practical cases of workers and their representatives participating in an institutionalized research process and the type of cooperation, as applied in the German case, is only an example of how cooperation between unions and universities or other research institutions can be carried out.

### **EEC conference**

In order to carry the matter a stage further the European Commission is organizing a conference on 15 and 16 June 1987. At this conference a number of cases, such as the German one, will be presented and experiences discussed.

**Lars Erik Andreasen**

# Cedefop conference on the vocational education and training, and employment prospects, of young people in the European Community

22 and 23 September 1986

**The aim of this conference was twofold: to present a balance-sheet of current Community action, particularly concerning the education and training of young people and to raise, with participants, the issues and challenges for future action.**

**On current issues, reports were given by the Commission on the second Community programme on the transition from school to working life, on the implementation of the 1983 Resolution on vocational training for the 1980s, and the 'six-month training guarantee' for young people in particular. The role of the European Social Fund and Cedefop projects on 'Social and vocational integration' and on 'new forms of training and employment' and 'vocational training and job creation programmes' were outlined.**

Despite continuing high youth unemployment, the mid-1980s were seeing a change of emphasis. As the emergency programmes to deal with large numbers of jobless young people became a permanent feature of training provision, the central theme of political debate was shifting to training the adult workforce and to the problems of the long-term unemployed.

The European Community, however, numbered more than 53 million young people (14–25) many of whom continued to face longer and longer periods of transition into the labour market, including ever longer periods of unemployment. The European Council, meeting in Milan in June 1985, recognizing the need for a continuing commitment to young people, adopted the Adonnino Report asking 'Member States to do their utmost, within national policies, wherever possible in association with enterprises and social partners, to ensure that all young people wishing to do so receive one year's or if possible two years' vocational training in addition to their compulsory education'.

The Commission was asked to implement this commitment in concrete form and to this end discussions had already taken place in the Advisory Committee for Vocational Training, whose opinion was discussed in working groups during the conference.

The conference also addressed some specific questions, fundamental to any consideration of action to be taken by the Member States and by the Commission to implement the Milan commitment.

The conference, taking as a starting point the commitment already made by the Heads of State or Government, considered that a number of important issues of principle needed to be addressed by the Commission in carrying out its mandate:

(i) It was generally accepted that an extended period of up to two years access to training following compul-

sory education was of value to young people, provided that quality was guaranteed and that this was not simply a means of keeping young people off the labour market.

- (ii) In providing vocational education and training in general terms for all 16–18 year olds, the systems needed to be flexible enough to cope with all the needs of young people, while being sufficiently coordinated to appear coherent to the young people entering and moving through the system.
- (iii) Experience to date of previous temporary programmes showed the need to set higher standards and ensure the provision of recognized qualifications.
- (iv) More account needed to be taken of the views of young people themselves, particularly with regard to their social and material status as they move towards full independence.
- (v) Attention needed to be paid to rendering guidance and counselling more effective to ensure that young people most in need of guidance received it and received it in a motivating form.
- (vi) More concern was being expressed, particularly by employers, that large numbers of young people leave school lacking the basic skills, (literacy, numeracy and communication skills). This was a problem that needed to be tackled within the school systems, while recognizing that for many young people already leaving school specific provision needed to be made.
- (vii) The role of social partners and employers needed to be more active particularly in so far as young people still within the compulsory education system was concerned.

The conference, in general, endorsed the opinion of the Advisory Committee on Vocational Training as the outline of a way forward for the

Member States and the Community as a whole. The importance of concrete action in this area was underlined and great interest expressed in particular in the stimulation of partnerships between all the bodies and organizations involved with young people. Closer coordination was an objective, particularly of

education and training authorities together with employers, in many Member States, and additional impetus from the Commission would serve to emphasize the importance of this coordination. The organization of an exchange of experiences in this context and across the range of issues discussed at the confer-

ence was considered vital, particularly for Member States where the training process was under examination or in a stage of development. The Commission was asked to take account of the views expressed during the conference in the implementation of the Community's policy commitment to young people.



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# Education in the European Community

## Charting the differences

**'The education systems in the Member States of the European Community vary widely: from the locally organized and delivered, to the centrally structured and controlled. This variety reflects the cultural diversity and richness of Europe: it is a richness which cannot be harmonized out of existence, but must be preserved for the future.'**

Fine words — and received wisdom, indeed. No one in the Community's institutions wants to see the education systems reduced to a low-grade common denominator, which is all that a compromise between our various Member States would come to. After all, not only with 12 Member States, but also with 11 different and independent systems in the Federal Republic of Germany alone, and three in the United Kingdom, and with Spain with its process of devolution in this field under way, it becomes difficult to compute the number of educational systems within the European Community at all.

On the other hand, the Community is interested in sharing the experience of this diversity — in building channels for the passage of information between neighbouring Member States, whose historical links may not have been with their current partners in the Community. This is one of the foundations of Community activity, foreseen as such in the education action programme in February 1976, as well as being a primary reason for the existence of the Community's network of information centres — the Eurydice network on education policy, the European network of centres for information on the academic recognition of degrees and diplomas acquired abroad, the Eurylee network on the new information technologies in the schools systems, to give but three examples.

But merely recognizing the differences is not enough. Two studies launched by the Commission and recently come to fruition chart particular ways in which aspects of the system vary — the first deals with the conditions of service and career development of teachers, and the second with their in-service training.

There is little more sensitive in education than the questions of who can be counted as a teacher, and how much do they get paid. Are all teachers university graduates? If not, should they be? Should they earn more than the average industrial wage, and how much more? And how does their perceived income level affect their status in the eyes of the

public? The study on the conditions of service and career development of teachers, which is funded jointly by the Commission and the Netherlands Ministry of Education and Science, and carried out by the Leiden-based 'Stichting Research voor Beleid' (the Dutch Government's administrative research foundation) consists of 11 'national monographs'<sup>1</sup> (Scotland, for this purpose, counting as a separate part of the United Kingdom), and one comparative and analytical report at European level.

Much of the basic work on the national monographs has been carried out by and through the national Eurydice units; it is they who have provided the mass of factual information that has had to be gathered, and it is through them that national agreement has been delivered to the final text of each monograph. But the analytical and comparative study is purely the work of the research institute, and as such provides interesting and neutral food for thought on the different ways in which teachers are treated and regarded in the different Member States.

The national monographs cover: the structure of education in the country; teaching appointments; salaries; nature of duties expected of the teacher; other conditions of employment (e.g. pensions or health insurance), and career development prospects. The study provides a mass of detailed, and verified, factual material and represents the first comparative study in this detail in Europe.

But if this study is purely factual, the study carried out through the Laboratoire de Pédagogie Expérimentale of the University of Liège by one UK and one French expert, on the in-service training of teachers, is different in nature. True, it demonstrates with admirable clarity through seven coloured diagrams just how the in-service training of teachers functions in the Member States, and in what context. But it seeks above all to set this within a policy context; to see what answers have been given in the various Member States to the two great questions:

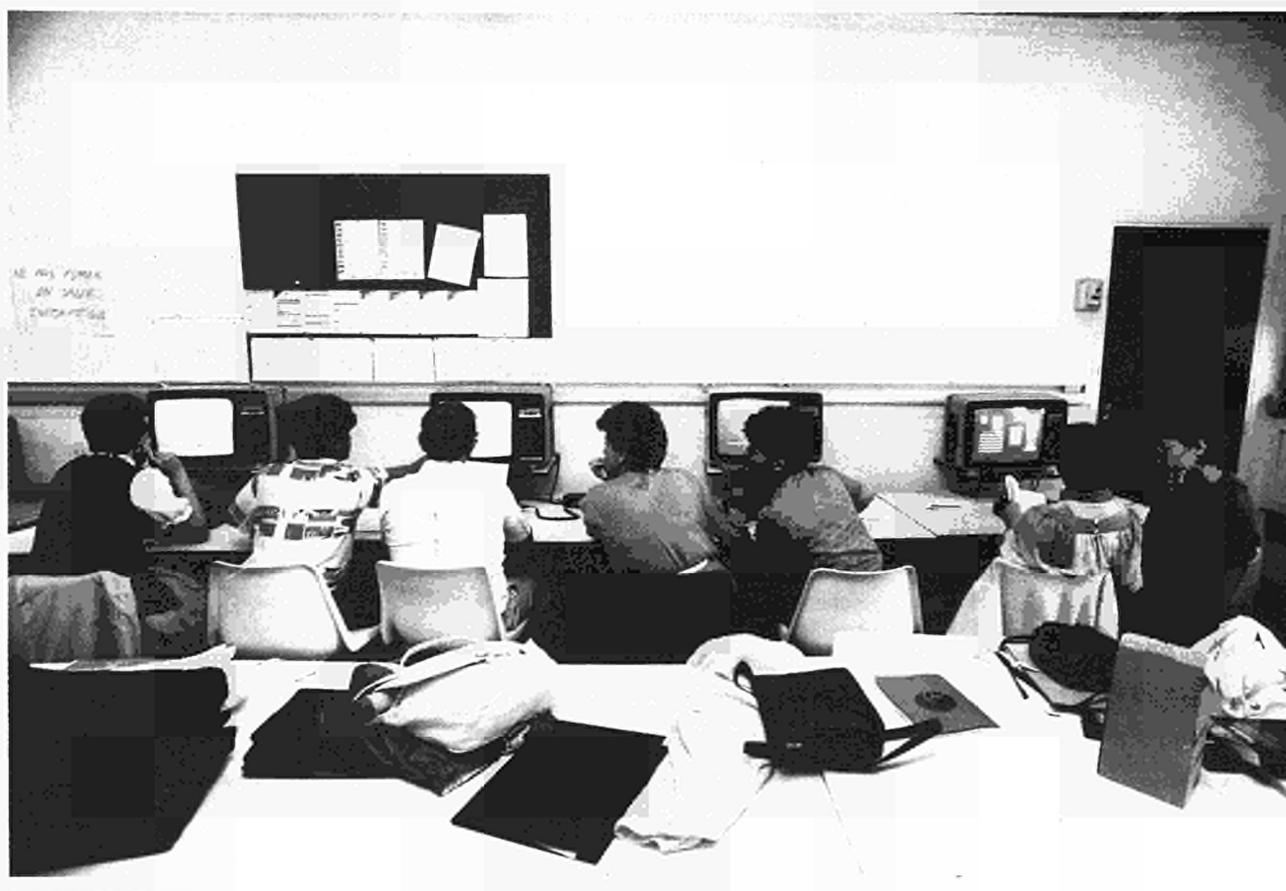
- (i) The critical mass: how can in-service training provision be developed and diversified so as to reach a number of teachers sufficient to make the activity worthwhile in terms of its impact on the education system as a whole?
- (ii) Changes in attitude: how can the resources, content and types of in-service training be organized and delivered so as to bring about a real

change in the professional practice of the individual teacher?

Given the 'diversity', the 'richness' of our educational systems, there can be no simple or generalizable response. But the report sets out the major problems and suggests what may be the main conditions for effectiveness of provision. It is in this respect that it provides food for continuing thought and discussion at Community level, and may

lead, in due course, to some further collaborative efforts.

*For further information about these two studies, please contact the European Eurydice Unit, 17 Rue Archimède, 1040 Bruxelles, Belgium; telephone: 02-230 0398.*



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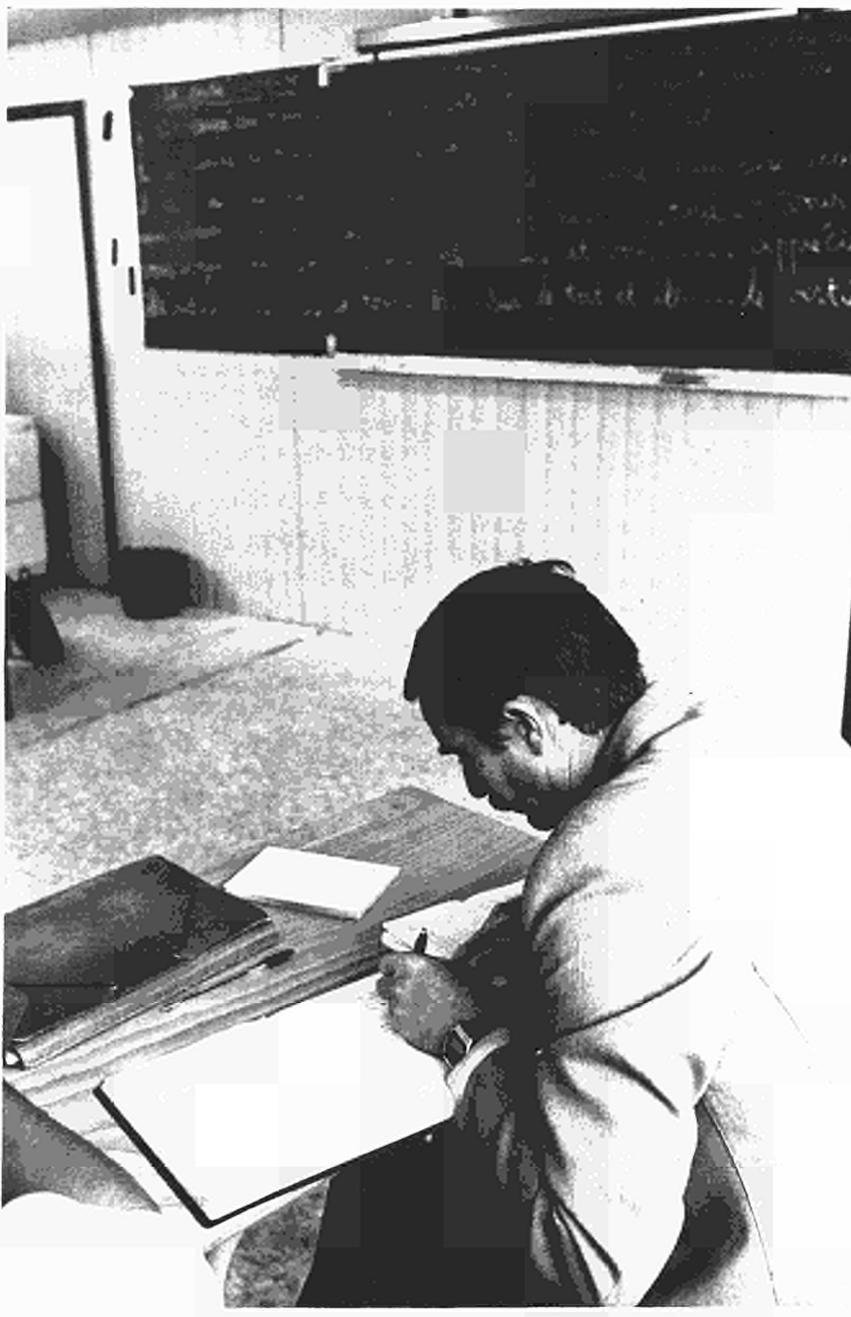
# The drive against illiteracy in the Member States

In line with the conclusions adopted by the Ministers for Education on 4 June 1984 on methods of combating illiteracy in the Community, the Commission has asked 'Lire et Ecrire' ('Read and Write' — a literacy campaign body) to conduct a study on 'the pathways of illiteracy'.

The agency acts as an umbrella organization for the bodies involved in a wide-ranging literacy campaign, coordinating the work of the various agencies throughout French-speaking Belgium offering community-based assistance to help adults and young people improve their literacy skills.

The purpose of the research was to explain the process by which adults who have completed their basic formal education can emerge from the school system without having learned to read or write.

The authors of the study conducted a survey among people with impaired or no literacy skills undergoing literacy tuition at the time of the survey. 'Lire et Ecrire' also gathered comparative data from literacy resource agencies in a variety of countries (Belgium, France, the Netherlands, the Federal Republic of Germany and the United Kingdom). The survey is split into two sections: the quantitative aspect, and a qualitative analysis based on structured group recall interviews. From an analysis of the data gathered, the researchers advance proposals for the prevention of illiteracy at school, using both educational and social tools. These proposals form the third section of the research report.



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## *Conclusions of the study*

In their analysis of the data produced by the structured group recall interviews, the authors sought to bring to the fore the mechanics of illiteracy as they spring from the conflict between

the sociocultural heritage of the child and the very different sociocultural logic of the school.

Starting from the visible face of illiteracy — opting out of school — the authors move on to an analysis of the

ways in which the school system stigmatizes children with learning difficulties (being sent to the back of the class, public humiliation, punishment...) and which seeks to legitimize that discrimination by throwing the blame on the child.

The same type of discrimination recurs in the child's peer relationships, superimposed by class discrimination against children whose outward appearance and attitudes do not reflect the 'official' social norms.

The authors have also sought to analyse the values and behavioural patterns transmitted to the child by its parents; for instance, the leisure of the child, like that of its parents, is centred on communal recreational activities, where form (togetherness) is more important than content (which tends to be non-cerebral).

Their analysis leads the authors to formulate the following hypothesis. The values and rules of the school (competition between individuals, the suppression of freedom of movement and expression, the primacy of intellectual activities over physical ones) are in open conflict with the values and behaviour learned at home (importance of manual labour, little intellectual activity, communal leisure). Children from working class backgrounds are thus confronted with two sets of values. Their successful integration into the school system will therefore be decisive for (or decided by) which of those two cultural systems they finally accept (or the degree to which they succeed in reconciling the two).

A child who rejects the school culture will manifest his rejection in ways of

avoiding writing (cheating, indifference, creating disturbances,...) and by seeking other outlets for the assertion of self-esteem (manual activities, fighting,...).

He thus develops a learning block — what the authors describe as creating 'an illiterate self': to resolve the conflict between the individual's view of his ideal self and the way in which society regards impaired literacy, those with literacy problems withdraw into themselves, identifying only with those similarly afflicted, or externalize their conflict in aggressive behaviour, which reinforces and legitimizes the discriminatory attitude of the school.

#### *Pointers towards the prevention of illiteracy at school*

Particular attention should be devoted to children with learning difficulties — what the authors describe as 'positive discrimination'. This pivots on the attitude of the classroom teacher, on the need to pay special attention to those in the greatest difficulty, those in danger of 'opting-out'. Assessment could be a valuable tool for this: not used to brand children as under-achievers, or to drive them into 'low attainment' social roles, but as a continuous diagnostic tool for determining the child's progress not in terms of the volume of work produced but rather of basic skills acquired.

With the method and attitude towards the child decided, the next task is to define the content. And faced with the wide cultural divide between the home and school environments, the content of

literacy tuition must more firmly complement what the child learns at home, it must build on his own life experiences to create learning structures which both open up to him, and allow him to dominate, his immediate environment and the reality which is his own world within the network of relationships by which it is criss-crossed.

In this respect, nursery provision has a role to play not only in preparing children for reading (familiarizing them and bringing in the connection with writing), but also in the realm of self-discovery, realizing their own potentials and learning about the world around them.

In view of the importance of the parental role in successful education, and the lack of social confidence of working class parents in the school context, the authors have sought to map out tracks or pointers for a community education project in which parents would be committed partners in the education of their children. Such a project can only succeed by 'de-schooling' parent/school relations to the maximum, by opening the school up to the family and personal experiences of the child, by making the school more accessible to parents (an outreach approach), by a project for training parents in an expanded educational framework and by involving parents in school life.

The authors conclude with a few remarks specific to two groups of student: migrant workers' children and the children of gypsies and itinerants for whom schools must apply themselves to the task of providing structures and content relevant to the realities of the children's everyday lives.

# International symposium

## Workplace air monitoring

### Diffusive sampling — an alternative approach

Luxembourg, 22—26 September 1986

This symposium was organized by the Commission of the European Communities in cooperation with the World Health Organization, the Health and Safety Executive and Royal Society of Chemistry of the United Kingdom.

The 1978 action programme of the European Communities on health and safety at work stresses the need of a common methodology for monitoring both pollutant concentrations and measurement of environmental conditions at places of work; to carry out inter-comparison programmes and to establish reference methods for the determination of the most important pollutants.

A diffusive sampler is a device which is capable of taking samples of gas or vapour pollutants from the atmosphere at a rate controlled by a physical process such as diffusion through a static air layer or permeation through a membrane, but which does not involve the active movement of the air through the sampler.

The objectives of this symposium were:

- (i) to review the state of the art of diffusive sampler techniques;
- (ii) to stimulate the exchange of technical information;
- (iii) to assess the suitability and range of applications for workplace monitoring;
- (iv) to promote the further development of this technique and its wider use.

The following main topics were covered:

- (i) philosophy of diffusive sampling;
- (ii) current field applications;
- (iii) role of diffusive sampling in workplace air monitoring;
- (iv) current trends in the development of diffusive sampling and analyses systems.

The symposium was attended by more than 200 participants (industrial hygienists, occupational physicians, analysts, researchers, employer and trade union representatives, and officials from regulatory agencies) from all Member States of the European Communities and a number of other countries such as Austria, Canada, Finland, Japan, Norway, Sweden, Switzerland and the United States of America.

On the basis of 23 invited papers and oral presentations, 55 poster presentations, extensive discussions and a panel on the acceptability of diffusive sampling as a monitoring technique, the symposium reached the following conclusions and recommendations.

#### *Conclusions and recommendations*

1. In recent years there has been:
  - (i) a very significant increase in use of diffusive samplers in various circumstances (wide range of applications, including epidemiological studies);

- (ii) a continuous evolution of new designs;

- (iii) an increasing interest among manufacturers for the production of diffusive samplers.

2. The theoretical basis for diffusive sampling has been confirmed by laboratory and field trials.

3. Active and diffusive sampling are complementary approaches each one having areas of applicability which may overlap. Each have their roles in a strategy for monitoring workers' exposure.

4. The suitability of diffusive samplers for short sampling times and/or concentrations should be further investigated.

5. The follow-up analysis of diffusive samples does not appear to present specific problems.

6. Cost-benefit analysis with respect to other monitoring systems is a complex procedure due to the many parameters involved.

In routine operations when comparing with active systems diffusive sampling presents usually:

- (i) higher costs in terms of the sampler;

- (ii) no costs in relation to pump and maintenance;

- (iii) less manpower requirements for system handling.

7. In general there seems to be no significant difference between the accuracy and precision of diffusive sampling and other monitoring systems such as active pumped sampling.

8. Validation of all sampling systems is essential both in the laboratory and in the field.

For diffusive sampling, on the basis of theory and experience, the following main parameters must be included in a validation procedure:

humidity,  
face velocity,

temperature, concentration, exposure time, storage, shelf-life, interferences, orientation.

The currently used protocols have many features in common, which should facilitate the elaboration of a unique, simple validation protocol, adaptable to future needs. The existence of such a protocol will help users interpret performance data provided by manufacturers.

Intercomparison programmes and the availability of certified standards should complement the validation studies.

On the basis of validation protocols, acceptability criteria for the performance of diffusive samplers can be established by appropriate authorities as a function of the applications (such as compliance with limit values).

9. Quality assurance in the production and preparation of diffusive sam-

plers, and in particular for the sorbent material is essential. Such quality assurance should be based on elements of the validation protocols; the quality assurance procedures and results should be available to users.

10. Manufacturers of diffusive samplers should provide users in addition to the validation and quality assurance data, information on applications and limitations of use.

11. To better identify the possible range of application (in terms of chemicals) of the various types of diffusive samplers, it would be advisable to establish a widely agreed list of chemicals, (including suitable sorbent materials), monitor types, practical uptake rates and diffusion coefficients.

The establishment of such a list should assist with the prediction for other suitable systems and/or chemicals.

12. The use of diffusive samplers may introduce flexibility in the monitoring strategy.

13. An increasing range of direct reading (colour) diffusive samplers is becoming available; they are likely to play an increasing role in the future as no laboratory analysis is required. The development of such monitors for both organic and inorganic substances should be encouraged.

14. Diffusive samplers do not interfere with worker activity and are unlikely to affect the behaviour pattern of the wearer. In this connection, at no extra inconvenience to the workers, two or more diffusive samplers with different applicabilities are often used simultaneously.

The use of these samplers, and especially direct reading monitors, can help to lead to safer work patterns.

15. It was agreed that as a general principle, any method is acceptable by regulatory authorities and hygienists if used by experts within its defined limitations; this applies equally to diffusive samplers.

# **Part three**

## **Recent developments**



# Employment policy in the Member States

In response to the wish expressed by Member States delegations in the Council to receive information on developments in national employment policies, the Commission set up a mutual information system called MISEP. The system operates on the basis of contributions from correspondents in public administrations or organizations and a Commission representative.

It provides the relevant authorities in each Member State with regular quarterly information on measures and trends in the employment policies conducted in the other Member States.

*Social Europe* presents a selection of the information exchanged through MISEP in each issue. The Commission accepts no responsibility for the use of this information, which comes from official national sources. It is presented as a summary, on a regular basis to enlighten the reader on the evolution of various aspects linked to national employment policies.

## Developments at a glance

### Overall developments

- Greece Programme of measures
- France Redundancies law; ANPE budget 1986
- Italy Wage indexation; Fiscalization
- Netherlands Encouraging self-employment

### Aid to the unemployed

- Spain Public utility projects
- Netherlands Clarifying unpaid work

### Training

- Spain Council established; 'Taller' schools
- France Modular traineeships evaluated
- Ireland Youth traineeship initiative
- Netherlands Management courses for women
- United Kingdom TVEI extended; College of the Air; Career development loans

### Job creation

- Italy Cultural assets programme
- Portugal Government LEI criteria

### Special categories of workers

- Denmark Women
- Germany Enhancing the employment opportunities of the severely handicapped
- France 16—25 year olds programme
- Ireland Long-term unemployed analysed
- Italy 1986 Youth employment scheme
- Netherlands Act on work for the disabled

### Working time

- Netherlands Reductions; Training leave

### Placement

- Germany Equal treatment
- France ULYSSE
- Netherlands Removals aid change

### Miscellaneous

- Denmark Nordic cooperation

### Short notes

# Overall developments

## Greece: Applying the 1986-87 programme

In pursuit of its 1986-87 programme for improving the balance of payments situation and the rate of inflation, the government is now orientating its action towards new measures specifically for creating new jobs and improving the competitiveness of enterprises.

Unemployment is not only a quantitative problem of those currently seeking work. Various studies show that the Greek labour force is increasing annually by some 30 000 new job-seekers, these being both school-leavers/graduates and returning migrants.

These studies also indicate that to eradicate unemployment by 1990, 90 000 new jobs are needed in addition to those for the currently unemployed. The increase in unemployment, as shown by statistics, mainly affects women and young persons under 25 years of age.

In the light of this situation the government is taking measures to enhance the solidarity of the labour market. The concept of increased labour market flexibility is being examined by employment officials.

The following measures are going to be implemented following the necessary legislative arrangements:

- (i) *Pre-retirement status:* Employees over 60 years of age or those over 55 who have not completed the requisite years of employment to qualify for retirement, can make an agreement with their employer to remain part-time in their job. These part-time jobs are of at least four hours a day and paid accordingly; they last until all the conditions needed for retirement are fulfilled.

Both employers and employees pay social security contributions according to the time actually worked, with the National Manpower Agency, OAED, making up the difference with full-time contributions. Employees who thus have full social security coverage are naturally not allowed to take on a second job.

The employer should hire a person in receipt of benefit to fill the remainder of the full-time job.

The government will appraise the results of the measure after six months and thereafter decide on its continuation.

- (ii) *Employing pensioners:* Pensioners are not allowed to work in the public sector except in cases of special consultants. Nor is their employment allowed in the private sector if their pension exceeds a certain threshold. Exceptions are foreseen in some cases of their being hired as advisers.
- (iii) *Implementing shift-work:* Following agreement at the enterprise level, a fourth shift can be introduced for taking on new employees.
- (iv) *Overtime:* Working overtime will not be allowed in the public sector. In the private sector the upper limits of overtime are unchanged, but it will start after 45 hours of work per week, rather than 48 hours as today.
- (v) *Implementing local initiative programmes:* The creation of a special committee for local initiatives is foreseen for each region. This will cover technical, financial information etc. assistance to small local enterprises, municipal firms, producer cooperatives and all other efforts covering local needs.
- (vi) *Enhancing worker mobility.*
- (vii) *Improving vocational training.*
- (viii) *Self-employment initiatives:* A Presidential order has been published enabling OAED to finance those in receipt of unemployment benefit to set up in business on their own.

## France: Abolition of administrative authorization prior to dismissals (Law of 3 July 1986)

This law dealing with the abolition of the need for prior authorization when

declaring redundancies comprises two sets of measures. The first come into force immediately whereas the others become effective from 1 January 1987.

After having briefly gone over the situation as it was until the new law came into force, this article reviews successively those measures which are of immediate effect and those which come into force later.

### I. The previous situation

Ever since the law of 3 January 1975 any individual or collective redundancy for economic reasons, whether cyclical or structural, required the authorization of the competent public authorities. Only companies which were being wound up or whose affairs were under court administration were exempt from this rule; in these cases the public authorities were only *consulted*.

The law furthermore distinguished two cases:

- (i) where enterprises were considering the dismissal of at least 10 employees within a single period of 30 days;
- (ii) where enterprises were considering the dismissal of less than 10 employees within a single period of 30 days.

In both cases the public authorities were required to monitor the validity of the grounds for redundancy. But in the first case they had furthermore to check the adherence to the procedure for consulting employee representatives as well as the scope of the redeployment measures ('social plan'). In the second case monitoring dealt solely with the validity of the grounds for redundancy.

Furthermore, any employer who, during the 12 months following a dismissal for economic reasons, wanted to recruit personnel, had to request authorization from the competent authorities.

### II. Measures taking immediate effect

These measures, *three in number*, concern:

- (i) the abolition of the procedure to obtain prior authorization for recruitment in the 12 months following redundancy;
- (ii) the abolition, in all cases, of the public authorities monitoring the validity of the grounds for redundancy;
- (iii) the abolition of consultation with public authorities over redundancies declared in the context of a recovery procedure or a winding-up procedure by court order.

- (1) The first immediate measure concerns the abolition of the requirement to obtain *prior authorization* for recruitment and dismissals in the 12 months following redundancy, a requirement which stemmed from the 24 May 1945 Order on controlling employment.

Thus there is no longer any employment control except the sole requirement for establishments and professions specified in an inter-departmental decree to *inform* public manpower services of any hiring or termination of an employment contract. The current monthly statement of manpower flows which concerns establishments with more than 50 employees is thus maintained.

In its new version, the law nevertheless keeps open the possibility of recruitment monitoring but on a negotiated basis between government and companies when the latter reduce their manpower while drawing on special early retirement allowances from the National Employment Fund.

- (2) The requirement to monitor the *validity of the grounds for redundancy* and, in consequence, to obtain prior authorization for redundancies affecting less than 10 employees in a single period of 30 days has also been abolished.

- 2.1. Abolishing the monitoring of the validity of the grounds for redundancy has two aspects. For redundancies affecting at least 10 em-

ployees within a single period of 30 days, prior authorization will still be required until 31 December 1986 but will only involve the adherence to the rules of consulting employee representatives and the scope of the social plan drawn up by the employer. For redundancies affecting less than 10 employees in a single period of 30 days, the procedure which involved only monitoring the validity of the grounds for redundancy has been abolished since publication of the law.

In other words, until 1 January 1987 when the authorization procedure will completely disappear, the only enterprises or establishments which are subject to public authorities' authorization are those falling under Article L.321.3 of the Labour Code: *those which usually employ more than 10 employees* and when the number of redundancies envisaged is at least equal to 10 during a single period of 30 days.

- 2.2. In cases where the authorization procedure disappears, i.e. dismissals of less than 10 employees, the law seeks to ensure that the employees concerned receive all the requisite information of the grounds for the redundancy and give them an opportunity of making known their views on this subject. It does this, as in the case of individual dismissals, by requiring there to be a previous interview with the employer for employees with at least one year's seniority.

This requirement is being provisionally extended until 31 December 1986 to cover redundancies in all enterprises or establishments, including those with less than 11 employees.

- (3) The third measure with immediate effect concerns the abolition of the *consultation* with public authorities over redundancies declared in the context of a turn-around or a winding-up procedure by court order.

Under the new law, in cases of turn-arounds or winding-up procedures

by court order the administrator or, failing him, the employer or the liquidator, depending on the case, must inform the competent public authorities prior to declaring redundancies.

### III. Measures to be carried out later

- (1) The entire procedure to obtain *prior authorization for redundancies* will be abolished from 1 January 1987.

Before then, the government will put a Bill before the first 1986-87 ordinary session of parliament. Taking into account the results of collective bargaining on this subject between the social partners, the Bill will set out the procedures aimed at ensuring the adherence to the rules concerning the information and consultation of the employee representatives and the drafting of redeployment measures and compensation envisaged by the employer for redundancies. This same Bill also has to define the changes to be made to labour law to respect the EEC Directive 75/129 of 17 February 1975 on collective redundancies.

- (2) Article 6 of the law provides for the Ministry in charge of labour and employment to present to parliament on 30 June of each year, from 1987 onwards, a *report on dismissals and hirings* which occurred in the course of the past year. This report should include in particular exact indications on the numbers, reasons, size of enterprises and industries to which they belong.

### France: 1986 budget of the national employment agency (ANPE)

Deciding on ANPE's annual budget is a fundamental act which conditions its action and collective intentions as well as sets out its limits. ANPE's room for manoeuvre is not unlimited: it falls within the framework of general directives for preparing the budget of the State and

the internal constraints of on-going activities.

The draft budget is the outcome of collective thinking which takes account of multiple local and national data, the medium term orientations of the IX Plan as well as ANPE's own multi-annual plans. It seeks to closely espouse the objectives defined with the programme contracts.

Moreover, it is the outcome of progressively bringing together the needs expressed by the network and programme coordinators and the resources made available at the end of the arbitration process through State grants and ANPE's other resources.

Representing 0.3% of the State's budget, the ANPE budget has exceeded from 1985 the figure of FF 3 billion (bn), amounting in 1986 to more than FF 3.3bn. Compared with the recent past (the 1980 budget amounted to FF 1bn) this is a considerable sum, the management of which is, to a large extent, decentralized. It has to be rationally divided up, managed with rigour and its utilization at all levels monitored.

**(i) Preparing the budget**

In conformity with the decisions taken in 1984 concerning financial reorganization, ANPE's budget is now presented in the form of a programme budget. Its preparation, implementation and monitoring are divided up between programme coordinators at the national level, the centres having budgetary responsibility (these being those in charge of regional centres, of *départementale* sections, of regional computer centres, of training centres and of some divisions and local offices), and DABCB, the directorate for administration, the budget and budgetary control.

This recent approach, which is being continuously improved, aims to bring closely into line the operational objectives and the management of budgetary and material resources. It renders managers responsible at the same time as guaranteeing the overall financial equilibrium of the agency. Drawing in 1985

on manual management information systems, the approach is being completely computerized from the first quarter of 1986 through implementing the computerized application of SAGA-Pyramide. Hardware is currently being brought in to the central office, regional centres and departments. This is being accompanied by the completion of the decentralization of the budgetary process and the implementation of the first elements of the policy of budgetary control.

**(ii) Overall orientations**

The programme contracts and the budget were prepared on the basis of the following orientations:

- (i) developing actions on behalf of job seekers, in particular those starting their fourth and thirteenth month of unemployment;
- (ii) strengthening actions towards enterprises with a view to improving matching job offers and developing services to enterprises, particularly related to alternance training measures;
- (iii) continuing the programme of computerizing the agency both for operational needs and internal management;
- (iv) improving the reception areas of employment offices and continuing the programme of refurbishing the premises.

Each of these main areas of action was the subject of an analysis in terms of operational achievements and subsequently of a budgetary study taking into account the new resources made available to ANPE in 1986.

**(iii) The programmes**

The programme of services for job seekers is receiving additional finance amounting to FF 35m. This will cover the development of various programmes described in issues 9 and 12 of *Informisep*: SOA (in-depth guidance session), TRE (job search techniques) and

ENCP (appraisal of the level of vocational competence), as well as taking over young people at the end of the scheme aimed at preparing their insertion into working life. These resources also enable the activities of the agency concerned with industrial restructuring to be continued.

The *'prestations-interventions'* programme consists both of activities which are included within the agency's budget (FF 208m in 1986) as well as actions financed by the State through the national employment fund (FNE) or through the (new) alternance training fund. On FNE financing, ANPE can draw on FF 287m in 1986 to continue running modular training periods for the long-term unemployed (a scheme which is really successful by exactly meeting the needs of the users). On the other hand, the 'up-grading' actions (*actions de mise à niveau*) will be continued at the same rhythm as in the past, with a budget of FF 50m. ANPE will play a central role in carrying out the scheme of training periods providing initiation into working life, the necessary resources having been written into the initial budget.

The programme for developing ANPE's computerization is being given significant additional funds: FF 107.9m. This is being used in the area of computerizing operations by running GIDE ('computerized management of jobs sought') in all units (the hardware having been acquired in the time allotted), and bringing the Nord-Pas-de-Calais platform into operation. The 1986 budget also enables new projects and applications: GIDE 2, SAGE 2 (*computerized job offers' management system*), the Provence-Alpes-Cote d'Azur regional platform, extension of CTIN (*national computing centre*) and vocational information technology and the general public.

For its internal management, ANPE will be able to provide its *départementale* services with micro-computers linked in to the major information systems: GIP (computerized personnel management); SAGA (system for helping administrative management); FAR (file for analysing the

network); and SAO (system for helping guidance). These micros will also be able to operate on their own, in line with the orientations of the information technology plan (*plan bureautique*). The sum available amounts to FF 12.7m.

For the whole of its computerized programmes, ANPE is receiving an additional endowment of FF 107.9m, which raises its 1986 operational budget for computerization to FF 236.3m. As regards investments, the amount of authorizations for programmes for purchasing computer hardware and software and for studies amounts to FF 49.5m.

The modernization of offices and installations will be actively pursued in 1986 at the same rhythm as in 1983 and 1984. This is because the amounts made available for operations and investments will enable some 13 500 m<sup>2</sup> to be refurbished and brought into use. ANPE intends, over and above the strictly necessary refurbishings, to emphasize adapting the premises to new services, improving the public reception facilities and enhancing the quality of the facilities which contribute considerably to ANPE's image.

The training budget (FF 25.2m) enables the action of past years to be maintained at a high level. These particularly concern recurrent training and ensuring the operating of the training centres.

Finally, there is a need to stress that management will be further tightened during the year, drawing in particular on computerization. The development foreseen in the level of activities will thus be made possible despite a more difficult budgetary situation brought about by a 3% reduction in the State operating subsidy. It should also be stressed that personnel remains the largest budgetary item, amounting in 1986 to FF 1.72bn.

### Italy: Agreement on decimals

On 8 May 1986 Confindustria, the Confederation of employers, and the trade union confederations CGIL, CISL

and UIL signed an agreement on the cost-of-living 'decimals', sanctioning the social partners' rediscovered willingness to negotiate. The parties thereby agreed on the timeliness of overcoming the contentious issue of the decimals in the cost-of-living index by:

- (i) reintroducing into the pay packet the two additional contested points in the index, the one in May and the other in September;
- (ii) paying a compensatory one-off amount of 100 000 lira in two part payments of 50 000 lira each with the September and December 1986 pay packets.

This same principle was subsequently adopted by the Confagricoltura (20 May) and the Confapi (24 May) agreements.

The agreement was necessary to clarify uncertainties concerning the application of the agreement of 22 January 1983 between the government and the social partners and of the draft agreement of 12 February 1984. The agreement also provided the opportunity for laying down a regulation to accelerate the procedure for approving training-cum-work contracts for member companies of Confindustria.

### Italy: Fiscalization of social security contributions (DL No 328)

The decree-law No 328 of 3 July 1986 proposes the same reliefs in social security contributions which had been fixed with the two preceding decree laws: DL 34 of 20 February 1986 (see *Informisep* No 14) and DL No 123 of 26 April 1986. The application of the measure has been extended to 30 November 1986.

The rates of the relief are fixed at:

- 1.60 points for male personnel;
- 4.00 points for female personnel.

The additional reliefs have been maintained at 5.24 points for industrial and craft firms in manufacturing and mining and for firms in the mechanical

engineering sector, and at 2.54 points for companies operating in the Mezzogiorno.

In agriculture the additional relief has been maintained at 17.50%.

### Netherlands: Draft resolution on assistance to the self-employed

In the future, interest-bearing loans granted to the self-employed to provide them with working capital will be limited to HFL 200 000.

If the self-employed person's own assets are valued at more than HFL 250 000, assistance will no longer be given in the form of a non-refundable capital grant, but as a loan which will bear interest once the assistance granted has expired.

If the self-employed person's assets are more than HFL 75 700 but less than HFL 250 000, he/she will be given a non-refundable capital grant only if his/her own funds amount to less than 30% of the total investment.

As a rule the subsistence allowance is paid to the self-employed person at the outset as an interest-free loan. Subsequently a settlement is made taking into account the actually earned income.

If the income in the first two years following the granting of the loan has remained below the assistance level, relief in interest charges may be granted.

### Aid to the unemployed

#### Spain: Revision of the regulation governing 'community' work

The Basic Employment Law of 8 October 1980, amended by law 31/1984 of 2 August on unemployment protection, instituted works of social assistance. This allows works and services of public interest and social value to be carried out by unemployed persons receiving

compensation under the unemployment insurance or the unemployment assistance scheme. To this effect the public administrations can request INEM to provide the unemployed workers they need on condition that the jobs proposed are of social value, benefit the community, are temporary, correspond to the person's physical ability and occupational skills and do not involve a change of regular residence.

If the worker in receipt of unemployment benefits does not accept the proposed job, benefit rights will be suspended for six months for a first refusal and will be cancelled altogether in the case of a second refusal. INEM pays the unemployment benefit or unemployment assistance. This sum will be topped up by the public administrations to the reference amount on which the calculation of the amount of benefit is based, or to the collective wage, depending on each case; the public administration will also cover travelling expenses the workers might incur and take over the corresponding contributions for accidents at work and occupational diseases.

The government has just approved an amendment to the regulation governing 'community work' on the duration and workers' remuneration. Firstly, whilst maintaining the temporary nature of such jobs, the amendment provides for the possibility of a longer duration than that previously foreseen, i.e. five months, the maximum duration allowed being that which the worker needs to be entitled to unemployment benefit or unemployment assistance. Secondly, the public administrations will top up the unemployment compensation to the reference amount on which the contribution-related benefit is based which the worker receives or received before coming under the assistance scheme, with a guaranteed minimum amount equal to 100% of the national minimum wage in force at any one time.

**Netherlands: Bill on unpaid work for persons in receipt of benefit**

The intention of the Bill on unpaid work for persons in receipt of benefit

(WOAU) is two-fold: on the one hand, to make working whilst in receipt of benefit legal; for many jobseekers want to do unpaid work as long as they do not have a paid job. On the other, a monitoring procedure will be introduced to ensure that doing unpaid work will have no detrimental consequences on others.

WOAU provides for the establishment of a number of regional inspection committees to approve or reject applications for doing work whilst in receipt of benefit. Such activities are only approved if they entail no distortion in competition or lead to regular workers being made redundant.

The inspection committees will be composed of representatives of trade unions and employers' organizations, of all municipalities in the region and of organizations involved in activities for the unemployed. Anyone considering that his interests have been damaged through such jobs or through the permission of carrying out unpaid work, can appeal to the committee and subsequently to one of the five review committees to be set up.

Under the WOAU persons who can claim benefits and have been registered at the regional employment office (GAB) for over a year will be allowed to work whilst in receipt of benefit.

In principle, the authorization for doing unpaid work is valid for one year. The validity of the law has been provisionally fixed at four years.

**Training**

**Spain: Establishment of the General Council for Vocational Training**

The General Council for Vocational Training (CGFP) was set up on 26 June in accordance with law 1/1986 of 7 January. It is an advisory body to the government on both 'regulated' vocational training (i.e. that which falls under the regulations of the Ministry of Education and Science (*formación profesional reglada*) and recurrent vocational training

(*formación profesional ocupacional*, see *Informisep 14*).

Council members represent institutions: 13 representatives each of the most representative employer and trade union organizations as well as 13 from public administration. The last are drawn from the Ministries of Labour and Social Security, of Education and Science, of Agriculture, Fisheries and Food, of Industry and Energy, of the Prime Minister's Office, of Economics and Finance, of Culture and of Defence.

During the first year of operations the Council will be chaired by the Minister for Labour and Social Security, who will subsequently rotate on an annual basis with the Minister for Education and Science.

Two plenary meetings have so far been held. The second was devoted to drafting the Council's by-laws which must now be submitted by the two ministers to the government for its approval. These by-laws lay down that the Council will operate in plenary sessions and as a standing committee in addition to which there will be working groups. The standing committee will be made up of four representatives each of trade unions and of the employers elected from among the plenary members.

Plenary meetings will be held at least twice a year and the standing committee will come together at least once a month. Decisions will be taken by an absolute majority of those present.

**Spain: 'Taller' schools**

'Taller' schools are vocational training centres mainly for young people. They can contribute to work schemes promoted by any kind of institution with a view to providing integrated training for young people. This integrated training combines practical experience on the scheme with theoretical training, opening up access for the young person to stable employment. These schools are thus employment-cum-training centres having four aims:

- (1) to facilitate the integration of young unemployed people into working life

by providing them with training and some work experience;

- (2) to train specialists for some vanishing crafts for which there is still some demand and some specialists who are holders of a degree to enable them to find jobs as wage-earners, self-employed or members of a cooperative society;
- (3) to promote the restoration and conservation of the artistic, architectural and physical environment, thus contributing to make the cultural heritage better known;
- (4) to stimulate and start up various artistic, cultural and social activities by making them known and heightening awareness of them.

For their work of restoring the historical, artistic, cultural and natural heritage in question, 'Taller' schools are able to draw on the aid provided by municipal authorities, the autonomous communities and other institutions through their own investment budgets. The Ministry of Labour and Social Security provides the requisite resources for the establishment and smooth functioning of the schools through additional and coordinated activities of the Solidarity Fund for Employment and INEM, the national employment institute. The 'Taller' schools are involved in the areas of restoring architectural and archeological sites, crafts, ceramics and the environment.

'Taller' schools' vocational training and integration of students in the labour market takes place in three steps which combine measures for training and employment promotion:

- (1) During the first stage (four months) students aged between 16 and 25 years receive a study grant and as such do not have an employment contract. These grants are given by the Solidarity Fund of the Ministry of Labour and Social Security. This is a training stage of initiation and qualifying.
- (2) During the second stage (eight months) students become student-workers spending one part of the day working and the other undertak-

ing qualifying and specialization training. The wages of the student-workers are paid by INEM by virtue of an agreement concluded with local corporations for 1986. This stage can subsequently be extended by new arrangements.

- (3) During the third and final stage, student-workers can use their training to become wage-earners in enterprises specialized in restoration or set up as groups of self-employed workers within a cooperative or any other type of enterprise entitled to offer their services both to local units as well as to individual initiatives. For this purpose the Ministry of Labour and Social Security has developed a set of incentives aimed at facilitating their vocational integration.

Each 'Taller' school consists of one or more training modules. Each module has 24 students. There are four teachers for theoretical subjects and four vocational training instructors or monitors for practical training. Each 'Taller' schools furthermore has a director of training, a studies' tutor and a tutor for practical training.

The overall 'Taller' schools' programme has developed in two phases. The first started in February 1986 with the approval of 37 schools. In June 1986 the second phase got under way with the recognition of a further 77 schools and the extension of 7 of the first. A total of 5 184 students has been trained by 1 959 teachers. The budget earmarked for the two phases is 11 993 million pesetas of which 6 500 million come from various local and regional administrations, 2 100 million from INEM and 3 393 million from the Ministry of Labour and Social Security (Social Fund for Employment). The average annual training cost per student is 65 400 pesetas.

### France: Preliminary evaluation of 'modular traineeships'

In July 1985, the Minister for Labour, Employment and Vocational Training

decided to launch training and aid action for the vocational integration of job seekers. Priority was given to those who, enrolled at ANPE (the national employment agency) for more than one year, were experiencing problems in finding work. At the same time the aim was also to respond better to the needs of enterprises hiring them.

Within this context, ANPE was given the job of putting on 50 000 'stages modulaires'. Lasting some 600 hours on average (which varies from 300 to 1 200 hours according to the needs), these modular traineeships meet a set of criteria laid down by ANPE on the basis of an analysis of the difficulties of re-integration and local employment opportunities.

The aim is to build up, with the trainees in question, a 'path to integration' passing through various stages of evaluation, 'retraining' for employment, broadening knowledge, training periods within enterprises and help in job search. With this in mind, the training body (or the enterprise) in question must design a method for training and help towards vocational integration which at the same time takes account of the real situation of the users so as to meet their needs and is adapted to locally available employment openings.

### Setting up a coherent system of evaluation

This scheme, which reached some 70 000 job seekers in 1985, brought about the setting up of an evaluation system to appraise the extent to which the objectives were being achieved, the methods used as well as their relevance and effectiveness.

Thus, two files are opened at the beginning of each traineeship. One concerns the main characteristics of the traineeship: name of the training body, number of trainees, length of the traineeship. The other is for each trainee. These individual files enable both a statistical analysis to be made of the characteristics of the trainees and an enquiry to be launched on what happens to a sample of trainees.



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A qualitative follow-up of the implementation of the measure in four regions (Upper Normandy, Rhone Alpes, Nord-Pas-de-Calais and Paris) is being carried out by four research teams and ANPE's directorate of studies.

### First lessons from the preliminary evaluation

The preliminary evaluation of the measure carried out jointly by ANPE's directorate of studies and statistics and that of actions ('interventions') brings out that:

- (i) very different training bodies have responded to the call for tender launched by ANPE: AFPA (the adult vocational training association), GRETA (the group of training establishments), independent bodies of the chambers of industry and commerce, professional bodies, joint training bodies and enterprises;
- (ii) the quantitative objectives were reached: more than 79 000 trainees really did start on a traineeship over an eight-month period. Furthermore, it is clear that training has been

given to the target group in line with the objectives;

- (iii) to help the integration of adults since the majority of trainees (86%) are aged between 25 and 50 years, with 20% more than 40 years and 40% more than 50 years;
- (iv) to help the target groups facing integration problems, in particular women, since a majority of women (57%) has entered modular traineeships;
- (v) to give priority to the long-term unemployed since a majority (55%) of trainees has been registered between one and two years at ANPE, but 35% have been so for more than two years;
- (vi) to give priority to enhancing the vocational skills of those needing them most (since 87% of the trainees had a training level between VI and V<sup>1</sup>);
- (vii) to take account of all types of skills which are needed by companies. Thus, 35% of the participants were skilled employees, 18.5% skilled workers and 42% had no qualifications at the outset.

The training periods organized appear to have focused on three main types of approaches according to the characteristics of the target group and the nature of the objectives striven for. These were:

- (i) 'insertion' training periods aimed at re-instilling trainees with confidence and synergy, emphasizing both re-training for employment, particularly through in-company traineeships and upgrading their general and vocational level;

<sup>1</sup> Level V corresponds to leaving school after the last class of the first cycle of secondary education or giving up the short form of the second cycle of secondary education before the terminal year.

Level VI corresponds to those leaving the first cycle of secondary education before the last year, those leaving vocational education lasting one year or education of the 'lightened' or practical type.

- (ii) specialization traineeships focused on jobs available and technical knowledge;
- (iii) vocationally broadening training periods emphasizing the heterogeneous character of the groups and aiming to impact on vocational mobility by moving towards adjacent occupations through the transferability of skills.

Furthermore, despite some problems in implementing the programme (for instance, as regards learning as such, given the current situation as regards the supply of training, there are some obstacles, essentially organizational, limiting the development of the individualization and the modularization of the training), the result of the scheme has been positive, provided that its original character is kept.

Moreover, in addition to the considerable mobilization of all those concerned at various levels and the recognition of the firm as a training place, the following should be pointed out:

- (i) that the open and positive stance of firms towards the scheme contributes in particular to modifying the often negative image which the company manager has towards job seekers and to associating the enterprise both socially and economically in the reintegration of the unemployed;
- (ii) that significant behavioural changes have taken place in the majority of trainees who have reasserted their self-image and thus have been able to find entry points which previously seemed to be beyond their grasp (the training period itself being structured as a cluster of resources with an emerging spirit of mutual help and solidarity);
- (iii) that the strong commitment of training bodies to the training objectives and structures proposed (individualization, modularization, heterogeneity of the trainees, alternance) augurs profound change within the landscape of the supply of training as well as in the development of the

relationships between employment technicians and trainers.

### **Ireland: Youth traineeship initiative**

AnCO — The Industrial Training Authority have introduced on a pilot basis a youth traineeship initiative in two areas, one rural and one urban. The target set for each area is to achieve 80 employer/employee training agreements.

The *objective* of this scheme is to fill a gap in the training needs of young people in first-time employment whose jobs do not provide any real opportunity of structured training. This is particularly relevant to the needs of early school-leavers with little or no qualifications.

The *main elements* of the scheme are:

- (1) Training agreements will be arranged between each participating employer and employee.
- (2) Training will consist of two elements:
  - (i) 'on-the-job' training provided by the employer with assistance from AnCO on programme structures and content.
  - (ii) 'off-the-job' training provided through a combination of AnCO training centres and local educational-colleges (Regional Technical Colleges, Vocational Educational Committees, etc.).

Progress and effectiveness in the operation of this pilot scheme will be considered in 1987.

### **Netherlands: Management course for women re-entering the labour market**

The Centres for Administrative Vocational Training for Adults (CAVVs) which are the training institutions of the Ministry of Social Affairs and Employment, will soon be organizing courses in

the field of management. These will be aimed at 'reintegrating' women, i.e. helping women who have not done any paid work for a number of years and are looking again for a job on the labour market. The courses are organized in connection with an experiment which was carried out in East-Groningen in the autumn of 1985. The experiment has shown that former course participants have succeeded very quickly in finding a paid job.

The courses are essentially geared to the requirements of working-life and last for six months. Subjects dealt with are job-hunting, marketing, financial management, informatics and skills in social matters. Lessons are given in 10 blocks, each of four days with a concluding traineeship in a company.

Participation is open to women between 25 and 40 years of age who are looking for a job and who have at least a higher vocational education (HBO) background. Courses are free of charge, the costs being borne by the Ministry's Directorate-General for Manpower.

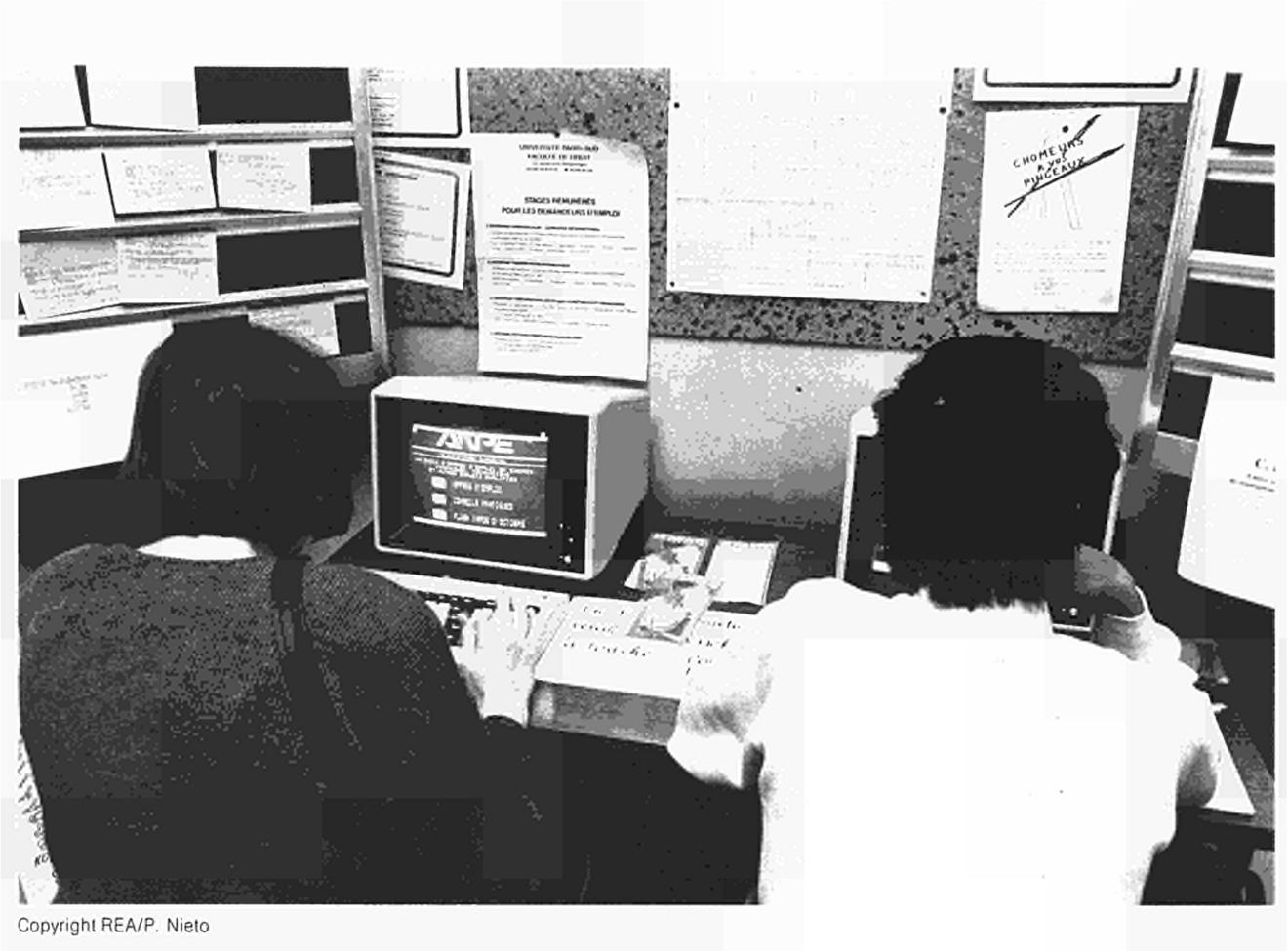
### **United Kingdom: Developments in vocational education and training**

On 2 July, the UK Government published a White Paper<sup>1</sup> which made two major announcements concerning vocational education and training. The first is the intention to make the Technical and Vocational Education Initiative available to all 14—18 year olds in Great Britain; the second is the establishment of a National Council for Vocational Qualifications.

### **Technical and Vocational Education Initiative (TVEI)**

TVEI was launched in 1983, to widen and enrich the curriculum for 14—18 year olds of all abilities. Each education authority in Great Britain has been given the opportunity to run a pilot scheme to

<sup>1</sup> 'Working together — education and training' (CMND 9823).



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explore and test ways of stimulating the provision of technical and vocational education. There are currently 74 projects involving nearly 40 000 pupils in some 500 schools and colleges. By 1987, 98 of the 116 authorities will be involved, and over 100 000 pupils are likely to benefit from the pilot schemes, at a total programme cost of around UKL 250 million.

From the pupil's point of view, the main features of TVEI are its emphasis on practical learning using problem-solving techniques and the close relation between the curriculum and the world outside the school. TVEI aims to equip young people more effectively for entry into employment at whatever age they decide to leave full time education. The TVEI projects have been popular with pupils whilst at the same time cap-

turing the enthusiasm and commitment of both teachers and education authorities.

The extension of TVEI will begin in 1987 and the Government has committed itself to substantial funding for this development averaging UKL 90 million a year over the next 10 years. The extension, like the pilot phase, will be administered by the Manpower Services Commission in close association with the Education Departments. All education authorities in Great Britain will be invited to take part. It is seen as a significant step towards the Government's objective that all young people in schools should have the opportunity of following a more relevant and practical curriculum leading to the achievement of reorganized standards of competence and qualifications.

### The National Council for Vocational Qualifications (NCVQ)

In 1985, the Government established a Working Group to review vocational qualifications in England and Wales. Its remit was to put forward proposals designed to bring coherence, and comprehensibility to a system which was overdue for reform. Emphasis was also to be placed on the need for accessibility and progression within the system, together with the demand that qualifications should reflect a person's competence and capability in the application of knowledge and skill.

The main recommendations of that Working Group have now been taken up by the Government, which has decided to bring vocational qualifications in England, Wales and Northern Ireland within

a new national framework to be called the National Vocational Qualification (NVQ). It will also be setting up this autumn a new National Council for Vocational Qualifications (NCVQ) to develop the NVQ framework.

The NVQ framework will initially consist of four levels. Each level will reflect increasingly complex levels of practical competence as well as theoretical knowledge — from that needed for jobs now entered by 16 and 17 years olds up to that required at higher technician level or equivalent. The standards these qualifications represent will then be apparent and the routes of progression to other full or part qualifications will become clear. The aim is to have the new four-level framework in operation by 1991, and to begin discussions immediately to clarify the relationship between these levels and higher professional qualifications.

The new National Council will promote quality and the recognition of competence in the field of qualifications. It will also accredit qualifications to form part of the new framework. So the Council will not itself be an examining or validating body. The existing bodies will continue to develop their qualifications, and if the qualifications satisfy National Council criteria they will be accredited for a limited number of years, and assigned to one of the levels of the framework.

The National Council will have a basic annual budget in the initial years of some UKL 3 million. The Government will provide pump-priming funding but the aim will be for the National Council to become self-sufficient after three years, from income received from bodies whose qualifications it accredits.

### United Kingdom: College of the Air

The Government has announced plans for an open college, the College of the Air. It is hoped that it will be able to start broadcasting from September 1987. Both radio and television will be used to help deliver and support open

learning courses in all areas of vocational competence.

#### Aim

The aim of the college would be to promote a large-scale increase in access to open learning, providing up to one million people with training opportunities within the first five years. Both employed and unemployed people could benefit from a wide range of general and specialist vocational training courses.

The development would thus extend to a new and much wider audience the benefits of open learning, which takes education and training outside the classroom and puts the student in control of his or her own studies. The college would build upon previous developments in open and distance learning — particularly the Government's Open Tech programme — and upon the experience of educational broadcasters and private and public sector colleges involved in open learning techniques.

#### Structure

The college itself would be a company limited by guarantee, registered as a charity and independent of government. It would attract industrial and commercial sponsorship and become self-financing. It is intended that the college should have access to as many television and radio stations as possible, to ensure its needs for a wide audience are met. Both the Independent Broadcasting Association and the BBC have expressed a willingness to be involved in the project, as have a number of companies, and discussions are proceeding on how best to pursue these opportunities.

A small central unit would bring together into active collaboration those organizations already involved in open learning including broadcasters, colleges and employers. Through them the Unit would make use of existing training, information and marketing materials and develop new ones. It would also arrange for students' enrolment, tutor support, practical training facilities and assessment and certification of performance. The college would work to ensure that

the highest quality of materials and support services was maintained and achieved.

#### Courses

Over the initial five years it is hoped that a full range of courses would be developed in such broad areas as:

- (i) *basic education*, including training for learning and attracting students back into vocational education and training;
- (ii) *general education*, including languages, general science and health, leisure and welfare;
- (iii) *subjects of general interest*, including budgeting, consumer rights;
- (iv) *vocational education and training*, including support and encouragement for the would-be entrepreneur, and new technology skills;
- (v) *technical and business updating* provision, including in-service teacher training in key and shortage skills.

Students would be able to choose which courses they wanted to undertake, paying for materials, tutor support, assessment and certification services to the extent that they needed them. They could be funded by their employers, or if unemployed, by government training schemes, and would be able to gain a qualification or a credit towards one where these were relevant.

#### Next steps

The next step will be for the Government to appoint a Chairman for the college. His or her first task will be to hold detailed discussions with interested parties with the aim of drawing up more definite plans for the formation and development of the college. It is hoped that these will be announced later this year.

### United Kingdom: Career development loans

The UK Government is testing demand from individuals for a greater role

in choosing their own training courses. Career development loans are intended to make it easier for people to undertake training of their own choice independently of an employer or the government.

A three-year pilot project was launched on 15 April by the Secretary of State for Employment. Initially it is operating in four areas (Aberdeen, Bristol and Bath, Greater Manchester and Reading and Slough) selected to reflect socioeconomic variations in the UK as a whole.

Unlike many training schemes there are very few conditions attached to the scheme. Anyone over 18 who lives in or intends to train in one of the four pilot areas can apply for a loan, provided the course is vocational and likely to improve their employment prospects. They must intend to work in the UK or elsewhere in the EEC after the course and must not be receiving any government grant for education or training or any help from an employer for the course. The scheme is administered for the Government by three commercial banks: Barclays and the Clydesdale in Aberdeen, and Barclays and the Co-operative in the three English pilot areas. Their local manager decides whether or not the applicant is eligible and whether he or she is likely to be able to repay the loan.

So far, nearly 6 000 information packs have been distributed to people seeking further information. Questionnaires to a sample of these suggest that some 14% have taken out a loan or are thinking of doing so. A further 14% have yet to decide. Comments from all respondents were overwhelmingly favourable suggesting that there is a significant interest in this more independent approach to training.

Of the approved loans notified so far by the banks to the Department of Employment an equal number are from those in work and those who are unemployed. (The scheme is open to both.) A wide range of courses are being taken from chiropody to computer programming. The average length of the courses so far is 31 weeks and the average size of loan nearly UKL 2 000. Most of these

trainees are taking full-time courses and the proportion of men to women is about 3:1.

The Department is arranging a follow-up survey of trainees after the end of their 'repayment holiday', that is the period during which the Government pays the interest on the loan (the length of the course plus up to a further three months). The repayment holiday is the key incentive for potential trainees and makes the cost of borrowing significantly cheaper than for normal personal bank loans.

Career development loans have been publicized through advertising on local radio and in local newspapers, using a Freefone and Freepost facility to obtain further information. Direct contact with local training providers is thought to be a key way of reaching potential trainees who may have had difficulty in obtaining funds from other sources. The banks taking part publicize the scheme through leaflets in their branches and at local exhibitions. The Department itself is able to arrange publicity through ministerial visits, articles and its Action for Jobs Campaign.

## Job creation

### Italy: Programme to encourage initiatives aimed at enhancing and salvaging cultural assets

Article 15 of Law No 41 of 28 February 1986 concerned the areas of priority for initiatives aimed at enhancing and salvaging cultural assets. By a decree of 27 March 1986 the Minister for Cultural Assets and the Environment, in agreement with the Minister for Labour and Social Security, approved the programme guidelines for interventions.

This decree specifies that projects are eligible which:

- (i) provide for companies or consortiums of companies to be entrusted with the execution;

- (ii) aim at enhancing cultural assets in areas foreseen under Article 15, Law 41/86;
- (iii) aim at creating additional employment, by young persons under 29 years of age who have been unemployed for more than 12 months being recruited under a limited term contract. These workers may be chosen directly by the employer (unlike the normal arrangement which obliges the employer to accept the candidates proposed by the labour exchange). Technicians and graduates who are older than 29 years and have already worked on cultural assets can also be hired;
- (iv) set out the contents and arrangements of the training activities intended for the recruits;
- (v) make use of 'new' technologies;
- (vi) foresee a minimum duration of six months and a maximum of 36 months and costs of not less than 3 000 million lira and not more than 50 000 million lira;
- (vii) are immediately feasible.

The request for finance had to be submitted not later than 31 May 1986 to the Ministry of Cultural Assets and the Environment and the Ministry of Labour and Social Security, containing all information necessary, as set out in the decree, for the project to be approved.

A special committee, set up *ad hoc* by decree of 21 March 1986 checks on adherence to the eligibility conditions and monitors the effects of the project on enhancing cultural assets, reducing youth unemployment, using the most advanced technologies, and contributing to economic development, by applying cultural, employment, technological, economic, quality and reliability parameters.

### Portugal: IEF supports LEIs

DN No 46/86 of June 1986 lays down the first legal framework for local employment initiatives. It sets out the con-

ditions for drawing technical and financial help from the IEFP, the national employment and vocational training institute.

Priority in support is given to projects fitting the following situations:

- (a) highest percentage of applicants looking for their first job and unemployed persons to be hired in the LEI;
- (b) highest percentage of persons cooperating in, associated with or partners of the total initiative;
- (c) location within regions most affected by unemployment or least favoured by economic and social development;
- (d) the lowest capital-intensity of the investment envisaged.

Absolute priority will, however, be given to projects meeting conditions (a) and (b) taken together.

DN No 46/86 also foresees the evaluation of the results of actions being undertaken on the basis of annual reports.

## Special categories of workers

### Denmark: Women in the labour force

In the public debate which has been taking place in Denmark over the last decade, the increase in unemployment has been linked with women's entry to the labour market. In the last year, developments have shown that the rising employment has only had a minor impact upon women's unemployment.

By the end of 1983 there were some 2.6 million Danish females. Half were in the labour force. Of the 1.3 million outside the labour force a little more than 1 million were not economically active because they were children, young persons undergoing education or training, or elderly persons receiving pension or voluntary early retirement pay. The remaining 1/4 million women outside the

labour force were not economically active without belonging to any of these categories. This last category of women outside the labour force must thus be more or less identical with the group of women working in the home.

About 100 000 women in the labour force were employed in their own or their husband's business. Furthermore, there were about 130 000 unemployed women.

This means that there were just over 1 million female employees in employment. Of these a little more than 700 000 were working full-time, while more than 300 000 were working part-time.

Since 1977 the unemployment rate of women has been higher than that of men, but the number of unemployed women only exceeded the number of unemployed men in one year before 1984. That was in 1979 when the introduction of the voluntary early retirement pay scheme removed a considerably larger part of male unemployment than of female unemployment.

Female unemployment not only differs quantitatively from that of men — it is also different in its structure since it is somewhat more concentrated. This is reflected in the fact that the average degree of unemployment was significantly larger for women than for men. On the other hand, there is no difference as regards the average number of unemployment periods.

The fact that women are experiencing a disproportionately large share of unemployment and that female unemployment is concentrated on a comparatively small number of persons means that there is a group of women shouldering a very large share of total unemployment. Thus about 125 000 women were unemployed for more than half of 1984.

### Germany: Enhancing the employment opportunities of the severely handicapped

The Federal Parliament ('Bundestag') has passed a Bill on the revision of the

Act on the Severely Disabled. The most important goal of the amendment is to enhance the hiring and employment opportunities of the severely disabled on the employment and training places market.

The new Act includes the following changes:

- (i) The concept of 'reduction of earning capacity' ('Minderung der Erwerbsfähigkeit') has been replaced by that of 'degree of disablement' ('Grad der Behinderung'). This is because the former was misleading and hampered employability.
- (ii) Employers who fail to meet their legal obligation to employ the severely disabled or do not employ the required quota have to pay a compensatory levy. The monthly amount of this levy for each compulsory job has been increased from DM 100 to DM 150. This increase is in line with the rise in gross income since 1974. The intention is to get employers to hire and employ the severely disabled to the prescribed quota of 6% of those employed by the enterprise.

The levy should also create cost compensation between those employers who employ the severely disabled and those who do not comply with hiring requirements and thereby have cost advantages. Without the adjustment made by the law, the compensatory levy could not properly fulfil its functions.

- (iii) Training places are no longer to be counted in the computation of the number of jobs which have to be reserved for the severely disabled. The aim here is to increase the willingness of enterprises to provide training. The job quota for the severely is 6% of all employees, so that as from 16 jobs there must be at least one reserved for a severely disabled person.

Assistance to the severely disabled undergoing training ('Azubis') is being increased. Generally speaking, one severely disabled Azubi should



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count for two compulsory places. This rule is valid until 31 December 1989.

- (iv) The special protection against dismissing the severely disabled remains in force. However, to provide employers with the opportunity of testing a severely disabled person on a given job, the special protection against dismissal has been adapted to the general one. Thus, the special protection against dismissal of the severely disabled will, as with the general dismissal protection, come into force after six months of employment.

Special protection against dismissal remains necessary. But it could impact negatively on hirings if it comes into operation too early and impedes employers from testing sufficiently the severely disabled in spe-

cific jobs. Hence special protection against dismissal is being adapted in its time dimension to general dismissal protection.

- (v) The hiring and employment of the severely disabled is being financially supported by the compensatory levy. Support from the compensatory levy will be given in priority to those groups of the severely disabled who because of their disability have particular problems on the employment and training market. Those falling into this category are the severely disabled who could not do a job without additional assistance (visual and movement aids). Furthermore, employers will be reimbursed for the additional costs incurred by employing a particularly badly disabled person (costs for a personal reader for blind people). In

this way the good experience gleaned from the previous four special programme is turned into reliable permanent rules.

- (vi) The legal status of the representative for the severely disabled has been strengthened. The representative is given the right of participating in checking whether vacant jobs can be filled by the unemployed who are severely disabled. In this way he/she can contribute to the severely disabled being offered a job or training place.

### France: Employment measures for 16-25 year-olds

On 16 July 1986, the Minister for Social Affairs and Employment submitted to the Council of Ministers a draft ordi-

nance on the employment of young people between 16 and 25 years of age. This was an application of the Law of 2 July 1986 authorizing the government to take various economic and social measures.

Since every third unemployed person is under 25 years of age, the fight against youth unemployment is a national priority.

### **I. This scheme mobilizes significant resources**

FF 4 billion (bn) were allotted under the modified finance law adopted by parliament. This amount is added to funds already earmarked for the long-term unemployed, in particular adults, representing a total effort for 1986 alone of FF 4.5 bn.

### **II. This plan relies on enterprises**

In order to encourage enterprises to make massive hirings of young people and to participate in their training, social security exemptions are being granted by the State for each wage-earner or trainee between 16 and 25 years of age recruited.

There are three cases of exemption:

- (1) Exemption of 25% on employers' contributions to social security for each hiring of a young person between 1 May 1986 and 31 January 1987. This relief holds until 30 June 1987.
- (2) Exemption of 50% of the same contributions for any hiring of a young person during the three months following the end of an apprenticeship contract, alternance training, a training period for a young long-term unemployed person or extended military service with vocational training.

This exemption, valid for training completed by 30 June 1987, holds for all hirings made from 1 June 1986 for the whole of the year following the recruitment.

To enable this scheme to get under way without delay, the exemption is

increased to 100% for the 30 days following the publication of the ordinance.

- (3) Exemption of 100% of employers' contributions to social security for all apprenticeship or alternance training contracts ('adaptation' or 'qualification' contracts). Furthermore, no employer or employee contribution is due on the supplementary allowance paid by the employer to persons finishing within the enterprise a training period providing initiation into working life. The length of these training periods will moreover be increased to six months.

As from the publication of the ordinance, this 100% exemption will hold for all contracts in operation and new contracts concluded by January 1987.

### **III. The formalities which enterprises have to comply with in order to benefit from these aids have been deliberately cut down**

All employers (enterprises and individuals) compulsorily insured with Unedic (the national social security administration) can claim these exemptions. Only the State, local communities and public establishments for administration are excluded.

For the employer, the administrative formalities consist of a declaration to the *départementale* directorate of labour and employment within 15 days following the hiring and of a deduction of the amount of the exemptions at the time of the normal payment of contributions to the URSSAF. These exemptions are reimbursed by the State to the Social Security.

Finally, the arrangements for alternance training, including apprenticeship, are simplified at the same time. They are in particular being opened without any restrictions to all those aged 16-25 years.

This whole set of measures should enable enterprises to participate effectively in the national effort for employing young people.

### **Ireland: Survey of the young long-term unemployed**

The Youth Employment Agency (YEA) have recently published the results of another survey on young people. This survey which was conducted by the Economic and Social Research Institute (ESRI) on behalf of the YEA examines the young long-term unemployed, their characteristics, labour market and training experiences and use and attitude to State manpower and training programmes.

The survey was carried out in May and June 1985 using a random sample of young people aged between 19 and 25 years who were unemployed for more than a year.

One of the most significant findings of the survey was that the young long-term unemployed tend to be the unqualified and lesser qualified early school-leavers. (This confirms one of the findings of the YEA follow-up survey of 1981/82 leavers.) The results of the survey also indicate that the young long-term unemployed come from families which encounter well above average levels of unemployment and that these young people are predominantly male, single and in their early twenties.

The survey also showed that the young long-term unemployed have few skills. Only slightly over one-third had received training since leaving school and participation on State work experience and temporary employment schemes was found to be low. The young long-term unemployed do not appear to have high career aspirations, the majority of those looking for work at the time of the survey were seeking relatively unskilled jobs, those who had been previously employed had occupied such jobs.

Other findings of the survey were:

- (i) the average duration of unemployment was around two and a half years;
- (ii) over half of the respondents had not been unemployed prior to their current spell of unemployment;
- (iii) just over a quarter had never worked since leaving school.

### **Italy: Implementation of the special youth employment scheme provided for under Law No 113 of 11 April 1986**

The decree implementing the special youth employment scheme, provided for by Law No 113 of 11 April 1986 was passed on 23 June 1986.

The decree elucidates the operational details for enforcing the law. Under Article 1 it reaffirms that projects for hiring workers by means of a training-work contract can be submitted by private firms, public enterprises and their consortiums, as well as by associations and foundations carrying out research or providing technical assistance to companies.

Persons to be hired for the projects must be aged between 18 and 29 years and have been registered at the employment office for at least 12 months. Projects have to specify the time to be devoted to training and work and the way in which training and work activities are to be carried out. They furthermore have to outline the training programmes and indicate what vocational qualifications are to be acquired. Projects have to be submitted to the Ministry of Labour and Social Security whose approval takes account of the advice of the Technical Evaluation Committee with respect to the priority criteria fixed by law No 113/86 and detailed in the implementing decree.

According to the criteria laid down in the decree of implementation, *priority* is given to projects which:

- (i) are to be carried out in provinces where the rate of youth unemployment is higher than the average regional rate;
- (ii) provide for hiring women for jobs leading to managerial positions, for which a university-level diploma is required with technical and industrial qualifications;
- (iii) provide for the recruitment of manpower with higher education for highly specialized jobs which imply a training programme of at least 200

hours of technical training in new technologies and a diploma of not less than higher secondary education level;

- (iv) foresee the recruitment of workers from particularly disadvantaged groups, such as young persons who have been unemployed for more than two years, young person as heads of household without any income, or young disabled persons; and
- (v) which are prepared in agreement with the regional associations of trade unions or of the categories of workers who are members of the most representative organizations on the national level; such agreements have to be backed up by a requisite declaration of the parties concerned.

### **Netherlands: Act on work for the disabled (WAGW)**

The Act on work for the disabled (WAGW) came into operation on 1 July 1986. This law obliges employers, employers' organizations and trade unions to take action within three years at the latest aimed at maintaining or (re)integrating disabled workers into working life. If they fail to do this or do it only insufficiently, the employers will be compelled to employ a certain quota of disabled workers. This quota ranges from a minimum of 3% to a maximum of 7%.

The purpose of the WAGW is to foster and ensure the participation of the handicapped in working life. It furthermore aims at reducing the number of disabled who have to depend on social benefits.

The law improves the opportunities for the disabled to enter working life during the first year of sickness. Any employer who refuses to offer suitable work in the first year of sickness can now, through a modification of the Sickness Benefits Act, be forced by the industrial insurance board to pay the wages not paid.

The act contains a clause enabling an allowance to be granted for adapting the workplace and corporate facilities in line with the possibilities of the disabled. In this context the package of measures provided for under the General Disablement Benefits Act (AAW) and under the laws on State pensions has been broadened.

## **Working time**

### **Netherlands: Reductions in working time**

A survey of Dutch enterprises shows that in about 40% of enterprises, covering some 70% of all persons employed, working time reductions were made in early 1985. It is mainly the small companies which have not yet introduced working time reductions.

The form most frequently used is the so-called 'roostervrij' (off-duty periods) which means a reduction in working time over two weeks, one month or over one year. The overall impression of the employers asked was that the average compensatory hiring for all enterprises amounted to 20% or 25% in early 1985.

The employment effects of working time reductions seem to increase with the size of the companies.

### **Netherlands: Educational leave in collective agreements (CAOs)**

A recently published report indicates that most collective agreements contain provisions on education/training leave for employees. Some provisions apply to all employees and others to specific groups of employees. In most of the collective agreements concerned the employer continues to pay the salary during the leave.

The report surveys the clauses on education and training. In virtually all cases the employees can have leave to participate in a vocational training course or to take a vocational exam.

Some collective agreements also contain clauses on general courses and/or exams. Many collective agreements include clauses on educating and training young persons. This mostly consists of one day's paid leave for taking part in schooling, mainly vocational training and in a number of cases general education.

## Placement

### Germany: Equality of treatment in the placement activities of the public employment service

BA, the Federal Employment Institute, has introduced some new regulations on equality of treatment for male and female applicants for jobs and training places. The original idea came from the Federal Ministry of Labour. This ministry welcomes the advances contained in the new regulation to pay still more attention than previously to the basic legislation on the equality of treatment between men and women in BA's placement activities.

BA's new circular lays down that job and training placement should be guided above all by the aptitudes of the job-seeker and should not take into consideration the person's sex. Even when an employer gives instructions to look for only a man or a woman, the placement officer is required to make suggestions for jobs and training places without reference to the sex of the person. The most appropriate candidate, irrespective of sex, should be given a chance.

This is for the benefit of both those seeking and offering jobs and training places. As regards placement for training in particular the range of occupations for young women can be broadened, for at present employers only offer them a part of the available training openings.

To achieve the aim of placement which takes no account of the sex of the

applicant, BA is stepping up its efforts to ensure that its officers are even more knowledgeable of the rules or equality of treatment laid down in the Civil Code. These rules prohibit sexual discrimination when hiring, promoting and dismissing employees. Vacancies will in future be publicized without reference to the sex of the person.

### France: Ulysse — A computerized service on specialized job offers

ANPE, the national employment agency, has started jointly with the Télé-système company a computerized service on specialized job offers: Ulysse. This is aimed at enhancing its service to key economic users and sectors.

Through a nationwide network, Ulysse will significantly contribute to fill highly qualified vacancies or those from specific industries, these at the moment being air transport, cultural jobs, the press, health care, agriculture and teaching as well as job offers for managers, engineers and technicians.

The aim of the scheme is two-fold to enable:

- (i) on the one hand, job-seekers to extend, rapidly and effectively, their search to the national level, both from their home (if they have a 'minitel' <sup>1</sup>) and from certain ANPE locations where they can use such terminals;
- (ii) and enterprises on the other to disseminate their job offers at the national level to give them the greatest possible catchment area.

By making use of this information technology, ANPE not only demonstrates its own innovative capacity but also shows its willingness to increase its part of the employment market and its concern for improving its image, both towards the general public and enterprises.

Furthermore, since the on-line data service will be fed with job offers from ANPE (drawing on SAGE, the computerized operational management system of

job offers — see iM No 9, and Licra, the linking between regional centres of ANPE) and its partners (Apecita for instance, the association for the employment of managers, engineers and technicians in agriculture), the success of Ulysse will to a great extent depend on the ability of ANPE's staff to back up this new system of matching labour supply and demand.

Thus, after the user chooses a job offer, he will apply by letter, enclosing his curriculum vitae, to the local employment agency which has registered the offer. The details of the offer and the agency in question are given after the wording of the offer as such. The employment officers will then short-list the candidates and submit their applications to the employer without delay. It is essential that applicants should be informed rapidly of the result of the short-listing and then of the employer's choice.

The system came into operation on 8 September 1986. In addition to job offers the new service is also providing general information on employment, such as job promotion schemes decided by public authorities. Furthermore, it will be the source of statistics on job offers and the use made of the on-line data service.

### Netherlands: 1977 relocation aid scheme

The 1977 relocation aid scheme (BVK) has been modified from the beginning of January 1986.

The BVK consisted of two parts: the one applying to individuals and the other to companies. The individual part provided for reimbursement of removal costs for an unemployed person who

<sup>1</sup> Minitel is a terminal made available by the Telecommunication's Directorate-General for receiving Teletel which itself is an interactive videotex system using normal telephone lines. Thus the subscriber, by means of a keyboard, calls up a telephone number of an on-line data service centre (information or service) and dialogues with it, hence the term 'interactive'.

could not be placed in his own region but could take up a vacancy in another region which could not be filled. This has now been dropped.

The collective part of the scheme will be maintained for the next four years in a somewhat modified form. It provides for relocation aid when a company moves to a priority area.

## **Miscellaneous**

### **Denmark: Nordic cooperation in the area of labour market policy**

On the basis of an agreement on a common Nordic labour market there has

traditionally been a very close cooperation on labour market policy questions among the five Nordic countries: Iceland, Finland, Sweden, Norway and Denmark.

This cooperation takes place within NAUT, the Nordic labour market policy committee. It comprises organized cooperation concerning labour market services/employment services, vocational training, etc., employment measures and labour market research.

In order to ensure the exchange of information between the national labour market administrations, an information service has been set up. This is integrated into the information activities of the Nordic Council of Ministers.

An annual catalogue is published of addresses and telephone numbers of Nordic labour market authorities. Furthermore, 'NAUT-information' is published three times a year. This publication provides information on national and Nordic pilot projects, research, proposed legislative reforms and changes in the practical administration of the labour market policy in the Nordic countries.

Furthermore, an annual survey, the 'NAUT-catalogue' is published with information on current projects, activities and cooperation bodies in the labour market policy field.

Since 1982 the publication and distribution of these labour market policy publications have been systematized in a special 'NAUT report series'.

# New technology and social change

## Overview of recent events in the Community countries \*

### Introduction

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## Introduction

Growing trade union concern about the employment effect of technological change is being more and more frequently taken up in collective 'technology agreements', signed at national or sectoral level in many countries. In this respect, the main event in the first months of 1986 has been the stipulation of a new intersectoral, cooperation agreement in *Denmark*, covering information and consultation rights as regards the introduction of technological innovation. Denmark was one of the first countries to have, since 1981, a technology agreement; over time, the unions came to judge its coverage unsatisfactory so that the new agreement, which should correct the shortcomings of the previous one, may be of interest to the two sides of industry in other countries only now embarking upon a negotiated approach to the problem.

Negotiation on the introduction of new technology is sometimes linked to negotiations on working time reorganization and flexibility. As a matter of fact, information technology may offer the possibility of a more flexible organization of production, making compatible a better utilization of equipment and reduced and more flexible schedules of individual working time. This may also have positive effects on employment, as shown by some studies on the implications of planned or achieved working time reductions in different countries. These are reported in the second section of this survey, together with some studies on employment, on working conditions and industrial relations, and the recent surveys of the diffusion of information technology. The first section deals with the positions of the two sides of industry, and gives some information on technology agreements recently signed, and on some industrial conflicts on new technology, whether eventually settled by an agreement or still open. The third section reports about recent experiences in some sectors: much is happening in all countries in the field of telecommunications services, and in the automation of banking and retail trade, while the introduction of computers in

the education system continues with some new developments.

## I. Social groups

### 1. Positions of the two sides of industry

In *France*, the Anact carried out an enquiry with the two sides of industry on their expectations concerning new technology agreements.<sup>1</sup> J. P. Jacquier, national secretary of CFDT, believes that, despite the difficulties of negotiating investment choices having uncertain consequences, it is important to set up negotiating procedures enabling the parties to take all necessary measures for a positive implementation of the technology. These measures include a joint evaluation of the effects, and the preparation of the employees. On the employers' side, P. Guillen of the Union des Industries Métallurgiques et Minières, though stating the need for negotiation, particularly of training, qualifications and job changes, believes that this negotiation should take place at enterprise, rather than at branch, level. This opinion is not shared by the Metalworkers trade unions FMT/CGT, which believe that both the workers directly concerned and the trade union should be involved in the design and introduction of new technologies in the enterprises.

In the *Federal Republic of Germany*, while the President of the employers' association Bundesverband der Deutschen Industrie (BDI) stated his opposition to an expansion of the co-determination rights in the context of technological change, by insisting that the

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<sup>1</sup> Anact, *Lettre d'information*, No 107, April 1986.



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independence of entrepreneurial decision-making is an essential requirement for the prosperity of enterprises and the national economy,<sup>1</sup> the trade unions adopted a softer position at a conference on technology policy held in September 1985. The attitude emerging from the conference was to reject both demagogic optimism on new technology and the approach of considering technology as a catastrophe. It was clearly stated that union opposition is not against technology, but rather against a policy at enterprise and societal levels which only favours the interests of the employers. The leader of the DGB (Deutscher Gewerkschaftsbund) concluded that co-determination is the most important guarantee of a human development and use of new technology. He put forward the demand for an R&D policy which focuses on technology assessment and

on the use of all alternatives for a human and social design of technology.<sup>2</sup>

## 2. Trade unions

On another occasion, namely the 11th Federal Conference of DGB women (Bundesfrauenkonferenz), the *German* union discussed telework and its consequences for women and for the employment contracts. In contrast with the moderate policy line expressed by union leaders, the majority of women put forward a hard line against telework, and launched an appeal not to use services like videotex, electronic credit cards, homebanking, cable TV, and computer-assisted instruction at school. They voted for a legal ban on telework.<sup>3</sup>

A hard line against distance work has also been expressed in *Denmark*

by the Salaried Employees Federation, HK. At its last congress, the Federation decided to collect local, national and international experiences about telework, in order to develop a trade union strategy on how to stop the spread of distance work. The reason why the Federation is strongly against distance work is mainly to be found in the lack of regulation of this type of work. According to the trade union, the clauses concerning working conditions, health and safety etc. in existing laws and collective

<sup>1</sup> *Frankfurter Rundschau*, 17 October 1985.

<sup>2</sup> *Frankfurter Rundschau*, 13, 14, 16 September 1985.

<sup>3</sup> *Frankfurter Rundschau*, 18 November 1985. See also *Teleheimarbeit — Elektronische Heimarbeit, Gefahr oder Chance?* DGB-Landesbezirk Baden-Württemberg, Stuttgart, September 1985.

agreements do not sufficiently protect distance workers. Until a collective agreement regulates distance work, the Federation refuses to accept even experiments in the field.

In June 1986, the *Dutch* Trade Union Federation FNV published an action programme 'Labour and technology', which systematizes the positions developed in the past few years and translates them into demands to the government and to the employers.<sup>1</sup> The document remarks that the Netherlands is not in the front line of technological development, and does not use its economic potential as much as it should, due among other reasons, to the lack of coordination and coherence of technological and innovation policies. It stresses the central importance of human factors in technological innovation, and puts forward a strategy of influencing decisions beforehand, rather than regulating the negative consequences afterwards. The objectives of the action programme include: economic growth stimulated by product innovation; an active government policy with the participation of the FNV; an increase in R&D funds to reach 2.5% of GNP; the creation of a system of technology assessment in which the two sides of industry would participate; the acceleration of the process of European unity in the economic, technological and social fields, in cooperation with the social partners; a model of shorter working time, technological innovation and increased vocational training; more active participation of the employees to renew firms' strategies and closer cooperation between trade unions and works councils; and finally, positive actions in favour of women.

In the *United Kingdom*, the TUC is setting up a strategy group, consisting of officials from various unions and the TUC, to coordinate the application of computer technology in the trade union movement. The group will examine the possibilities of common approaches to major computer suppliers and will discuss with British Telecom the concept of inter-union communication. As yet, the TUC does not have its own system but 21 of its largest affiliates have al-

ready installed systems and the TUC has plans to do so soon.

### 3. Collective agreements

A new cooperation agreement concerning the whole of the private sector has been signed in *Denmark* by the Confederation of Trade Unions LO and the Employers' Organization DA. The agreement replaces both the the Cooperation Agreement of 1971 and the Technology Agreement of 1981; both had been denounced by the trade unions in December 1984, since many provisions were considered outdated and the implementation of the information rights included in the technology agreement was judged ineffective.

The main provisions of the new agreement are the following:

- (i) Cooperation committees (Samarbejdsudvalg) will be set up, at the request of one of the parties, in all companies having more than 35 employees (the lower limit in the previous agreement was 50 employees). If neither party requests that a committee be set up, the agreement explicitly suggests that at least a technology working group should be set up when major technological changes or reorganizations are taking place. The committees will be made up of an equal number of representatives of management and of employees, the latter elected from among the shop stewards.
- (ii) The main aim of the cooperation committees is to develop the daily participation of the employees. The agreement stresses the importance of applying the employees' knowledge, competence and experience to the daily planning and organization, so that work can be carried out in a rational and efficient way.
- (iii) The cooperation committees have the following functions: to set principles on working conditions, social welfare, personnel policy, education and training in new technology, the collection and use of personal data; to exchange viewpoints and discuss

proposals concerning the organization of production and of work and concerning major changes in the company; to assess the impact of technological change on the employees, on education and on working conditions.

- (iv) Management shall provide the cooperation committee with information concerning the economic situation of the company, employment, important changes and restructuring including those linked to the use of new technology in production and administration. The information shall be given at an early stage, so that employees' ideas and proposals can be taken into account in the decision-making process. The information will not include facts that can harm the interests of the parties.
- (v) If a reduction in the number of jobs is foreseen as a consequence of the introduction of new technology, the company shall first try to transfer the employees concerned to a different workplace, and retrain them for the new tasks. Workers who are about to be dismissed shall be entitled to periods of leave to participate in training courses relevant to a new job and the training costs shall be paid by the company, unless they are covered by public funds.
- (vi) The agreement fixes the procedures in cases of grievances, and sanctions for breach of agreement. The introduction of sanctions responds to a trade union demand, being one of the reasons why the previous agreement has been denounced.<sup>2</sup>

Information rights are an important part of the trade union platform for the national collective agreement for the engineering sector in *Italy*. Being the largest industrial sector in the country, its

<sup>1</sup> Federatie Nederlandse Vakbeweging, *Aktieprogramma 'Arbeid en Technologie'*, Amsterdam, FNV, June 1986.

<sup>2</sup> Landsorganisationen/Arbejdsgiverforeningen, *Samarbejdsaftalen*, 1986.

collective agreement, which will cover the next three years, is expected to become a reference for trade union federations in other sectors. The platform was submitted to a referendum in June 1986, which is an unusual practice in the Italian trade union movement, and obtained the approval of 60% of the workers (whether or not unionized). Preliminary information and consultation on all innovations concerning technology, work organization or the production mix, are demanded for all firms employing more than 150 operatives. The agreement should define a fixed term for the period of consultation, during which the union would refrain from any industrial action, while management should avoid a unilateral implementation of the innovation. A joint committee should be appointed during this period, the unions having the right to appoint experts external to the firm; the committee will examine all the implications of the innovation for manning levels, work loads and organization, and initiate negotiations on the adjustment of working hours, the use of solidarity contracts, part-time and early retirement schemes, and training requirements. The platform also includes clauses on the reduction of working time and the introduction of flexible schedules.

A framework agreement on flexibility was stipulated in *Belgium* by the Conseil National du Travail (National Labour Council) in April 1986. The agreement opens the way to acceptance of continuous work when it is introduced for economic reasons, including investment in new technologies. It stresses the need for negotiation and for the agreement of all trade unions on all changes concerning working time flexibility in enterprises. It applies to all sectors except commerce. The agreement innovates in relations to Royal Decree No 179, which introduced the so-called 'Hansenne experiments' of night and weekend shifts. Like these experiments, the agreement fixes a number of conditions for introducing new working time patterns, namely: that they have a positive effect on employment, that the workers concerned have an indefinite time contract and volunteer for the change. In addition

to what was required under the 'Hansenne experiments', however, a collective agreement at firm or at sectoral level, signed by all trade unions concerned, is necessary before any change in working time is implemented.

The *German* trade union economics research institute (WSI, Düsseldorf) published two reports on collective agreements containing specific clauses on the impacts of computers on the workplace and on employment. Two types of agreements were analysed:

- (i) the 'Tarifvertraglicher Rationalisierungsschutz', i.e. the agreements meant to protect employees from the loss of their jobs and earnings in the case of technological rationalization. These agreements usually state the priority to be given to the economic aspects of the rationalization; however, they also declare the common obligation to cope with its social consequences. Consequently, they include clauses on information and consultation in the case of intended technical innovation. The most comprehensive agreement of this type is that of the printing industry: signed in 1978, it fixed the rules for the introduction of computer systems in the industry, and job and wage guarantees for the typesetters;
- (ii) the 'Arbeitsplatzgestaltung' are agreements on the organization of the workplace, which include rules on ergonomics, working time arrangements, and clauses concerning the possibility of controlling employees by electronic means. Most of the recent agreements contain regulations on the use of VDUs, breaks (15 minutes every second hour of work) and maximum working time at the screen (4 or 6 hours a day).<sup>1</sup>

A sectoral agreement in the *French* dairy industry was signed in January 1986 by the Fédération Nationale de l'Industrie Laitière (Dairy Employers Federation) and the sectoral federations of the trade unions CFDT and CNSF (CFTC and CGT-FO have not signed). The agreement concerns working time and

technological change, besides some other issues. On working time, it regulates the forms of non-standard working time, including intermittent work, fixing an annual minimum and guaranteeing the workers concerned the same rights as those of other workers. As far as new technologies are concerned, the firms shall provide the Works Council (Comité d'entreprise) and the Health, Safety and Working Conditions Committee (Comité d'Hygiène, Sécurité et Conditions de Travail) with information on the type, amount and aim of planned investment, expected productivity gains and production and marketing objectives, and the expected consequences of new investment. The Works Council may set up an *ad-hoc* committee, with the participation of an external expert. The training plan of the firm shall also include measures aimed at the adaptation and retraining of the workers concerned.

An agreement reached at the *Italian* firm FIAT concluded the long-lasting controversy on a large group of workers made redundant in December 1980 and paid since then by the 'Cassa Integrazione' (Wage Supplement) Fund. The firm agreed, within the framework of its 1986-89 investment plan, to reabsorb into production some 5 500 laid-off workers; trade unions, on their part, agreed not to oppose innovations such as night shifts in the automated departments, and other measures allowing greater flexibility and productivity. It may be noted that total employment at FIAT-auto declined to 99 000 from the peak 1979 level of 164 000.

An agreement was reached, in January 1986, in *Denmark*, to conclude the conflict initiated in summer 1985 at the United Breweries (De Forenede Bryggerier).<sup>2</sup> The brewery workers accepted a cut in employment levels of 850 workers in three years, to take place through

<sup>1</sup> I. Kurz-Scherf, 'Ansätze zur sozialen Kontrolle des technologischen Wandels in Rationalisierungsschutz-Tarifverträgen', in *WSI-Mitteilungen*, 9/1985; and 'Tarifverträge zur Bildschirmarbeit', in *WSI-Mitteilungen*, 1/1986.

<sup>2</sup> See *Social Europe*, No 2/1986.

natural wastage and through subsidies for the early retirement of workers having more than 10 years of service. During the coming three years, the company will invest DKR 600 million in new production systems.

In the *United Kingdom*, the Civil and Public Services Association (CPSA), the largest union of civil servants, signed an agreement in May 1986 on full cooperation in the introduction of new technology in return for special pay rises. Under the deal, some 150 000 clerical and data-processing workers will get rises of between 1.8% and 19.3% in return for working with computers.

The long-lasting dispute in the *British* press, on the other hand, continued throughout 1986, without any satisfactory solution for the over 5 000 workers sacked at News International.<sup>1</sup> Other newspapers, however, reached negotiated solutions to the same problem, i.e. the introduction of computer-based technology in the composing room. At News International, the trade unions continued to picket the new-technology-based Wapping plant, with occasional clashes and eruptions of violence, while talks concerning union representation at the plant were inconclusive. The final offer of the company to conclude the dispute, put forward in May, included the offer of one of the old printing sites of News International to the unions provided it was not used to produce existing newspapers; on the issue of dismissals, the company offered some redundancy payment to the sacked workers and a commitment not to exclude any sacked worker from the chance of being employed by the company in the future. The issue of union recognition would be reviewed next year, while News International would withdraw all outstanding legal actions against the unions. Following a ballot of their members, the trade unions rejected the offer; the dispute is at a standstill.

The hard line initiated by News International is however being followed by another national newspaper, namely the *Daily Telegraph*, which has put forward proposals for labour relations at its new printing plant similar to those that pro-

voked the dispute at Wapping, including a legally-binding no-strike agreement and changes in working practices. The *Financial Times* and the *Guardian*, however, adopted a negotiating approach to the introduction of direct inputting. The *Financial Times* announced a series of agreements with the print unions covering, among other things, direct inputting of all regular FT statistics. At the *Guardian*, the unions agreed in principle to accept direct inputting, job reductions averaging 20%, compulsory retirement at 65, and a pay increase of 3.5% this year.

## II. Studies

### 1. Diffusion of information technology

The annual report of the Association of *Italian* firms operating in information technologies (Assinform), published in May 1986, outlines the main market trends in 1985. The growth, in money terms, of the market for computer hardware and software was 25.3%, slightly lower than the corresponding figure in 1984; software grew more than hardware, to reach one third of the total value of the computer business. Investment in computer hardware accounted for 16.7% of total investment in machinery and equipment in the national economy; the trade balance was in a deficit, although it showed a slight improvement with respect to 1984. Computer-related business employed, at the end of 1985, 49 500 persons, with an increase of 2 500 over the previous year. As far as specific segments of the market are concerned, some 150 000 personal computers were sold in 1985 (as against 92 000 units in 1984). Upper segments of the market, comprising 'super-personals' for the business sector, had higher growth than lower segments, such as home computers. In the field of big mainframe computers, large users appear to have accelerated their rate of substitution of older equipment: the average length of use of a computer is now estimated at less than four years. The demand for general purpose computers is concentrated in industrial en-

terprises and banks (70% of the total), while the public sector accounts for only 15%.<sup>2</sup>

The *Irish* National Software Centre, the IDA subsidiary founded in 1984 to help promote the software industry, published a comprehensive survey of computer usage in Ireland in December 1985. The main findings of the survey, which was based on a poll of 2 120 computer users in both private and public sectors, are the following: IBM dominates the mainframe market and holds 40% of the microcomputer market; data-processing departments of most organizations are mainly equipped with mini and supermicro computers; traditional accounting applications were computerized in 60% of cases studied, while larger organizations are planning inventory control, purchasing, and personnel management systems over the next year; in office automation, financial modelling and word processing dominate; computerized manufacturing systems, on the other hand, show a very low ratio of penetration; companies of less than 50 employees have virtually no computerized manufacturing systems. The survey also suggests that the semi-State sector compares favourably with the private sector in terms of installed computers.<sup>3</sup>

On the supply side, a recent quarterly report from the *Irish* Productivity Centre shows that output in the Irish electronics industry has risen from just over 5% of total manufacturing in 1980 to over 15% in 1985, although both output and employment had a slight decline in 1985 due to the world slump. As a result, Irish output of computer systems accounted for nearly 6% of total European computer system production in 1985, up from 4% in 1982. Moreover, productivity in the electronics sector has

<sup>1</sup> See *Social Europe*, No 3/1986.

<sup>2</sup> *Rapporto Assinform sulla situazione dell' informatica in Italia*, Milan, May 1985.

<sup>3</sup> 'Survey of computer usage is published by NSC', *Irish Times*, 19 December 1985; 'MRP systems a top computer option for manufacturers', *Technology Ireland*, October 1985.

risen by 21% per annum since 1980, compared to 5% in all manufacturing industry. While employment grew much less rapidly than output, the electronics industry now represents over 4% of manufacturing employment. However, the traditional weaknesses of Irish industry remain the short product life cycles and the fact that local operations are manufacturing only with no local R&D or design input.<sup>1</sup>

In the UK, the National Economic Development Office (NEDO) has produced a number of reports and press statements about the diffusion and use of new technology in UK industry. In February 1986, a press release revealed that the trade deficit in IT had grown from about UKL 189 million in 1978 to UKL 1 170 million in 1984. The figures show that the UK has the largest trade gap of all OECD nations.

In March, NEDO published a report on advanced handling systems — mechanical handling hardware controlled by computer. The report warns that UK manufacturing industry is in danger of being left behind by foreign competitors in its use of advanced handling systems, and suggests that more technical specialists are required at board level.<sup>2</sup>

In another report, NEDO suggests best practices for the successful introduction of new technology, including: developing long-term training programmes rather than training for immediate needs; developing pay structures to reward workers taking on extra responsibilities and skills; discussing with workers and unions future changes in products, processes, equipment and investment plans; reducing demarcations and distinctions between groups of workers.<sup>3</sup>

In the *Netherlands*, a study by Heliview shows that almost all of the 1 000 largest firms in the country have invested in automation. Only 1% had made no investment by the beginning of 1986. Non-automated firms are mostly to be found in the construction industry (2%) and in transport (6%). Most automation projects have been carried out in-house. Only 30% of these firms have mainframe computers, and less than

12% have more than one mainframe; 78% of the firms indicated that they had some investment in automation planned for 1986.<sup>4</sup>

Another Heliview study examines the diffusion of automation in wholesale trade. Most firms with 10 employees or more were found to have some form of automation, while in the smaller firms 65% have not yet introduced automation at all. Most firms use in-house computer equipment, and about half use only standard software packages.<sup>5</sup>

One study, carried out by the Netherlands Foundation for Psychotechnique (Nederlandse Stichting voor Psychotechniek), examined the use of computers in personnel management divisions in firms having between 300 and 1 000 employees. By dividing the tasks of the personnel management divisions into three groups, namely personnel administration, recruitment, and policy development, the study found that computers are mainly used in personnel administration and are almost completely unused in policy development. The procedure is in fact first to computerize simple tasks, in which input, processing and output can be determined accurately beforehand. In the majority of surveyed companies, almost the whole of the computerization projects had been carried out by the employees of the personnel division itself, using microcomputers.<sup>6</sup>

## 2. Studies on employment

In the UK, a study from the Institute of Manpower Studies suggests that demand for information technology workers could grow by 25% by the end of the decade. Among other findings, the report discloses that only public sector employers and service companies such as computer bureaus and software consultancies tended to recruit school-leavers and retrain other workers for information technology jobs. Most employers tried to recruit ready-trained workers and this was contributing to the skill shortage problem — about half the companies surveyed suffered skill shortages.<sup>7</sup>

The problem of skill shortage, however, does not concern only information technology jobs. A survey from the Association of British Chambers of Commerce found a chronic shortage of skilled workers in some parts of the country. For example, 79% of companies in the Thames Valley area reported difficulty in finding skilled manual staff, 57% reported difficulty in finding office staff and 50% found it difficult to recruit other manual workers. The survey covered some 3 000 companies in manufacturing, services and distribution.<sup>8</sup>

On the other hand, workers in the information technology sector are not necessarily protected from unemployment. A *French* study carried out by the 'Agence Nationale pour l'Emploi' throws some light on this little known aspect of the labour market.<sup>9</sup> In September 1985, there were in France 22 479 job seekers in information technology, i.e. 9% of the working population in the sector; moreover, unemployment increased more for this occupational group (+ 30% in 1984; + 10% in 1985) than for all occupations. Keyboard staff, programmers and machine operators rank high among the job seekers. The unemployed informatician is young (41% are less than 25 years old), and has an above-average education level. Two types of unemployment are identified by the study: as far

<sup>1</sup> Irish Productivity Centre, Business Bulletin 'Productivity-competitiveness', 1 Quarter 1986.

<sup>2</sup> *Advanced handling systems — exploiting the opportunities*, NEDO, 1986.

<sup>3</sup> *Working with Technology*, NEDO, 1986.

<sup>4</sup> 'Service-verwerking komt weinig voor', *AG-Report*, May 1986.

<sup>5</sup> J. W. Brogt, 'Grote bedrijven vaak geautomatiseerd', *AG-Report*, January 1986.

<sup>6</sup> A. M. Bunjes, G. J. A. Visser, *Automatisering binnen personeelszaken*, Assen/Maastricht, 1985.

<sup>7</sup> H. Connor and R. Pearson, *Information Technology Manpower into the 1990s*, Brighton, IMS, 1986.

<sup>8</sup> *Chambers' Regional Business Survey, first quarter 1986*, Association of British Chambers of Commerce, 1986.

<sup>9</sup> The study is part of a set of research projects coordinated by Cereq-Dossier professionnel sur l'informatique to be published by the Documentation Française in September 1986.

as analysts and analyst-programmers are concerned, it is a problem of first job search, made more difficult by the rejection of geographical mobility and by the high degree of availability demanded by the employers. On the other hand, in the case of programmers and keyboard operators, unemployment can be defined as structural: they are older, have lost their job, and have been registered as job seekers for a long time. The changes in skill requirements and their relatively low level of training are the main reasons for their difficulty in finding a job.

Two Dutch studies on different industrial branches conclude that new technology affect employment levels through a change in required qualifications. A study from the Department of Sociology of the Erasmus University in Rotterdam<sup>1</sup> came to this conclusion by interviewing personnel managers in 13 firms in 8 industrial sectors. A slightly lower volume of employment is expected, and the decrease will mainly occur in the administrative tasks and in low-grade, unskilled jobs. The rise in the level of qualifications is thus mainly caused by the disappearance of lower functions.

A similar study carried out by the Foundation for Economic Research of the University of Amsterdam (SEO) and TNO for the Ministry of Social Affairs, focused on the chemical and construction industries. One of the most important qualifications demanded by the firms is the ability to adapt quickly to new production processes. Specific skills are not demanded by firms at recruitment, but can be acquired through training courses provided by the firms themselves. A significant decrease in employment can be expected in smaller firms, while larger firms have already cut the number of employees in earlier automation projects. In these latter firms, innovations are more likely to lead to new employment.<sup>2</sup>

In Greece, a study carried out by a private consultancy firm estimated that 3 000 people are employed in the area of information technology. Of these, more than half are in manufacturing, and

16% in public administration, the other being found in education, telecommunications and computer trade.

### 3. Work organization and working time

A report prepared by D. Taddei for the French Ministry of Industrial Redevelopment and Foreign Trade on work organization and the utilization of equipment has recently been published.<sup>3</sup> The report points to the continuous decline since 1974 in equipment utilization, accentuated in the most recent period by the decrease in working time. Thereafter, it proposes a better utilization of existing equipment, via a reorganization of production accompanied by a flexible and reduced pattern of working time. It draws from a number of experiments recently agreed on at enterprise level (20% of collective agreements at firm level in 1983 and 1984 concerned a reorganization and reduction of working time), such as individual working time schedules, different patterns of shift-work, 4 days/3 shifts working weeks, variable working time on an annual basis. The report concludes, on the basis of a statistical simulation, that one extra hour of machine time and a reduction of one hour in working time, with full compensation, would create 100 000 additional jobs in the first year and 365 000 new jobs after five years. It stresses, however, that the implementation must be based on negotiation between the two sides of industry, at branch and at firm level.

The first reports about the impact of flexible working time in the *Federal Republic of Germany*, introduced in April 1985 on the basis of the collective agreement for the metal industry, point to favourable effects on employment. The collective agreement limited working time to 38.5 hours per week, with the possibility of arranging individual working time at between 37 and 40 hours per week. An inquiry carried out in 5 000 enterprises in the metal industry, representing about one fifth of all employed in the sector, found that 64% of the enterprises have used the right to stipulate

contracts with flexible individual working time. 18% of the enterprises using flexible working time reported an increase in employment, whereas only 7% of the other enterprises created new jobs.<sup>4</sup>

The Belgian Stichting Technologie-Vlaanderen (STV — Flemish Technology Foundation) published in March 1986 a survey of social research linked to new technology and the process of social change. Some 600 research institutes have been surveyed, linked both to universities, and to the two sides of industry and public administration. The survey shows that most research on economic development carried out in the Flemish part of the country concerns microeconomic studies on investment, innovation and market changes. Few studies were found at macroeconomic level, and the employment aspects are not systematically covered. On the other hand, many studies deal with work organization in specific sectors using specific techniques. In these studies, the issue of industrial relations when new technologies are introduced is extensively covered, as well as the relationship between training and the labour market.<sup>5</sup>

An inventory of research on the social aspects of office automation was carried out in the Netherlands by the Institute of Social and Business Psychology (ISBP) of the University of Amsterdam.<sup>6</sup> The survey concludes that current research in the Netherlands is mainly of

<sup>1</sup> A. J. Stein, M. C. De Witte, 'Technologie en arbeid', *ESB*, No 3530, November 1985.

<sup>2</sup> H. Vrolijk *et al.*, *Technologie en werkgelegenheid op sectorniveau*, STB-TNO and SEO, 1986.

<sup>3</sup> D. Taddei, *Des machines et des hommes pour créer des emplois*, Rapport officiel, Documentation Française, 1986.

<sup>4</sup> *IWD-Nachrichten*, No 44, 31 October 1985.

<sup>5</sup> E. Eysackers, P. Roelandt, K. Vandermassen, *Inventaris van het sociaal-wetenschappelijk onderzoek in Vlaanderen*, met betrekking tot nieuwe technologieën en maatschappelijke veranderingsprocessen, STV, March 1986.

<sup>6</sup> A. H. Barkema, S. Dijkstra *et al.*, *Sociale aspecten van kantoorautomatisering*, The Hague, Distributiecentrum Overheidspublikaties DOP, 1985.

a descriptive character, is directed to the quality of work and the decision-making process, often follows the case study method, and uses many different methods of data collection. It often lacks a sound theoretical basis; moreover, the case study methodology creates problems of comparability. Research is mainly carried out by labour psychologists and sociologists, and in any case the amount of research on the social effects is very small, compared with the amount of investment in software and equipment.

#### 4. Working conditions, health and safety

The problem of working condition in the information technology sector is analysed in a publication of the Université Libre de Bruxelles, which contains the proceedings of a seminar held in Nivelles in 1984.<sup>1</sup> The publication is based on the results of research and experiences carried out at enterprise level, and deals not only with traditional ergonomic problems, but more broadly with ergonomic issues in system design and in software.

The health and safety aspects of VDUs continue to be the object of studies and surveys. A *British* report claims that most of the problems associated with VDUs stem from misuse of the equipment rather than through any inherent problems with the technology. The report says that causal links between health problems and VDUs are rarely proven although some symptoms such as epilepsy and dermatitis do affect some people and appear to be caused by VDUs. The report recommends far greater attention to job design for workers including joint planning by management and workers on the introduction of VDUs.<sup>2</sup>

In the *Federal Republic of Germany*, the State Minister for Social Affairs in Hessen presented a study on 2 344 workplaces equipped with computer terminals. Almost 20% of these workplaces were found to be equipped with noisy printers and other noisy peripheral equipment, and 80% were classi-

fied as badly organized from an ergonomic point of view. The producers of technical equipment and office furniture, however, stated that many users nullify the ergonomic design, by locating and arranging the equipment inefficiently.<sup>3</sup>

#### 5. Industrial relations

The automation policy of the *Dutch* trade unions is the subject of a study of the first graduate engineer in Technology and Society (Tema) of the TH Eindhoven.<sup>4</sup> The main conclusion of the study is that trade unions are rather active in developing policy in the field of automation, but that their coherent policy at central level is not reproduced consistently at branch and enterprise level, nor in collective bargaining. Thus actual policy options at local level may differ from the central policy, and between one region and another. Of the three union organizations, the policy of the FNV (Federal Trade Union) and of the CNV (Christian Trade Union), are basically in agreement with each other at central level; for the FNV, the aims are more efficient procedures and participation in the works councils, and a greater right of initiative for the works councils themselves; the CNV is more radical and demands the right for the works councils to give their agreement on all automation projects. On the other hand, the MHP (Trade union for higher-grade personnel) rejects the right of employees to participate in the automation policy of the companies. The study concludes that a more coordinated policy at all levels and among all organizations is necessary in order to turn information technology into a positive challenge for the trade union movement.

At sectoral level, a *German* study which compares industrial relations' issues on the introduction of automated equipment in the automobile industry in three countries (Federal Republic of Germany, Italy, UK) concludes that the level of conflict in regard to new technologies is rather low. In spite of their different political stands, the shop stewards have never adopted an inflexible stance against technical change, nor have they demanded general technology agree-

ments, or delayed the technological change for the sake of job protection. In only one German case was the introduction of robots opposed by the shop steward, due to the lack of timely information.<sup>5</sup>

In the *Netherlands*, the Foundation Big Brother (Stichting Grote Broer) published a book *Automation on a human scale*, describing 10 successful cases of automation processes in the private sector. In all cases described the end-users had participated in the project and the personnel representatives had influenced firms' policy. Although jobs had been lost in the process, the experiences are considered successful in so far as work organization has improved and the participation of employees has increased.<sup>6</sup>

### III. Experiences in specific sectors

#### 1. Telecommunication services

The spread of Minitel in *France* has induced a differentiated marketing strategy: telephone subscribers located in certain areas (called 'Emeraude') receive it in replacement of the telephone directory; those in other areas (called 'Rubis') have to hire it. The former are

<sup>1</sup> R. Patesson (ed.), *Ergonomie et conditions de travail en informatique*, Brussels, Editions de l'U.L.B., 1986.

<sup>2</sup> C. Angell, *The health and safety effects of visual display units*, The Technical Change Centre, 1986.

<sup>3</sup> 'Computerarbeitsplätze', in *Produktivität und Wirtschaft*, 3/1985.

<sup>4</sup> W. Meulensteen, *Informatiotechnologie: bedreiging of uitdaging voor de vakbeweging*, afstudeerscriptie van de vakgroep Tema van de TH-Eindhoven, Eindhoven, 1985.

<sup>5</sup> W. Streek (ed.), *Industrial Relations and Technical Change in the British, Italian and German Automobile Industry*, Berlin, Wissenschaftszentrum, IIM/LMP 85—5.

<sup>6</sup> Stichting Grote Broer, *Automatiseren op menselijke maat*, Amersfoort, Stichting Grote Broer, 1986.

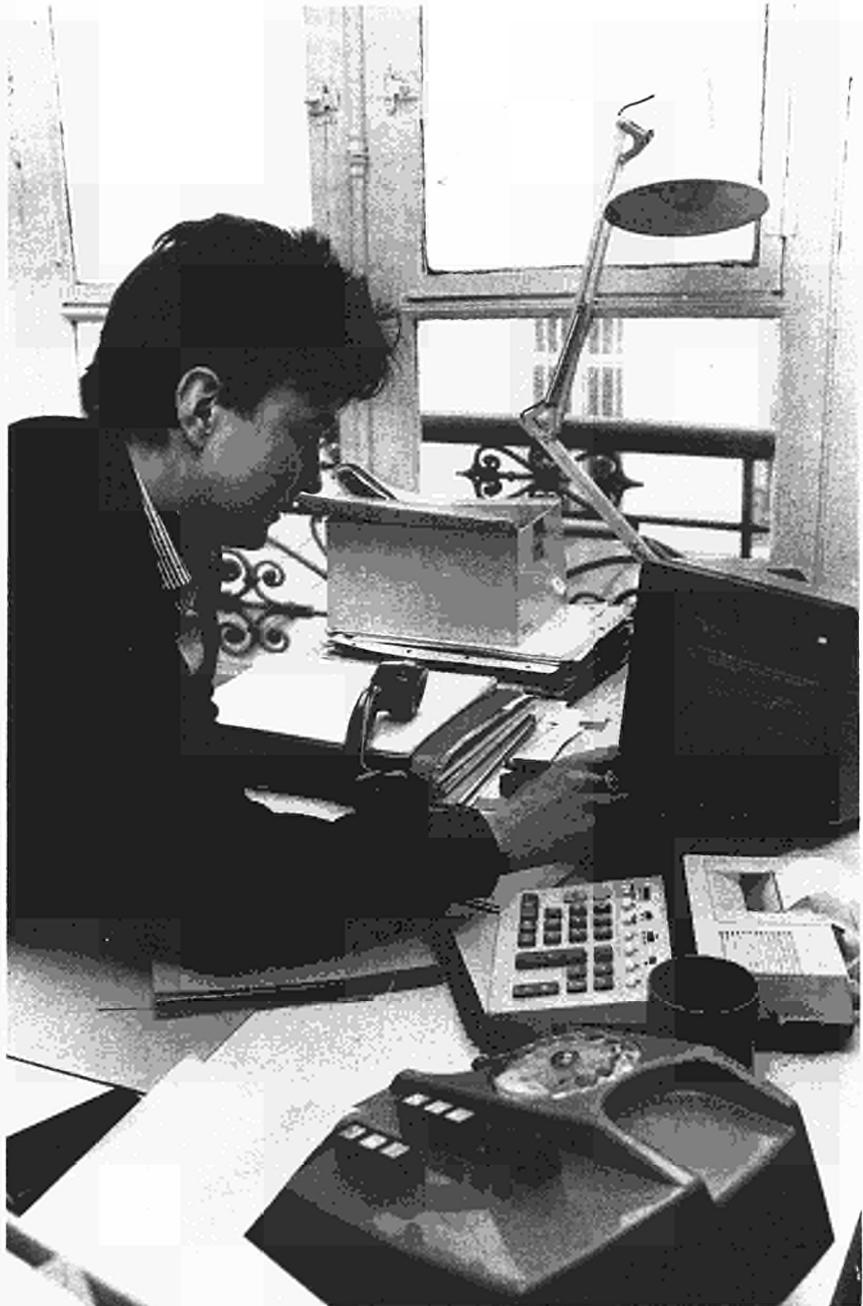
rapidly increasing, the number of Minitels in use being expected to reach 2.5-3 million by the end of 1986.

Minitel is also used to circulate information on job vacancies in the firm Saint-Gobain-Pont-à-Mousson. The firm plans to eliminate some 16 000 jobs in the next four years but, at the same time, cannot fill more than 5% of vacant posts though internal mobility. By using Minitel, the personnel department of each establishment circulates information on its vacancies to the other establishments of the group. Vacant posts are reserved for internal transfers for a period ranging from a month in the case of workers to three months in the case of executives. The firm expects to be able thus to fill 40% of the vacancies through internal mobility.

In March 1986, the videotex service of the *Belgian* RTT was inaugurated. It is a Prestel-type videotex, accessible to telephone subscribers through a terminal or an interfaced microcomputer. In the first stage, this new service is meant to be only for professional users.

In *Italy*, the Itapac network (a specialized public network for data transmission based on package-switching) will be extended by the end of 1986 to all large towns in the country. Data files already available for consultation include reports on 700 business areas, the employers' association Confindustria's information system (available to its members), and balance sheet data on 500 000 Italian firms. Istat, the Central Statistical Office, is setting up terminals available for the general public to request current statistical information. The Itapac network may be interconnected with similar networks in other European countries and in the USA.

*Ireland's* packet-switching network — Eirpac — inaugurated in 1985, was quickly taken up by large-scale users, such as multinationals, banks, universities and computer companies, but Telecom Eireann is trying to expand the number of customers in order better to exploit Eirpac's capacity. It launched an international electronic mail service known as Eirmail, which gives access to 150 000 other users in 12 countries. In-



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tended for mass consumption, it will open the way to many proposed new services which will include specialized credit card transactions, videotext access, teletext, and high speed facsimile services.

The first *Greek* public network, called DATA, will be installed by the Hellenic Telecommunications Organization in 1987. It will support a series of services, such as videotex and facsimile.

In *Germany* a broader debate is taking place on telecommunications services, following the recommendation from a board of counsellors that postal and telecommunications services should be separated and competition should be introduced in the telecommunications market. At present, the two services are organized together as a monopolistic public enterprise, employing 461 000 persons. This allows funds to be transferred from the profitable telephone service to the non-profitable postal service. Those who support the separation of the two services argue in favour of the reinvestment of profits in the telecommunications sector; moreover, a number of economic groups are interested in entering the telecommunications market. The opponents insist on the public use and interdependence of the two services. Whatever the institu-

tional pattern, the rationalization of the postal services, and the increased use of computers may have considerable effects on employment. The trade union (Deutsche Postgewerkschaft) calculated that some 30 000 jobs will be lost in the next few years, due to the rationalization of delivery services, the introduction of desk terminals, the automation of the postal bank services, and the automation of telephone information.<sup>1</sup>

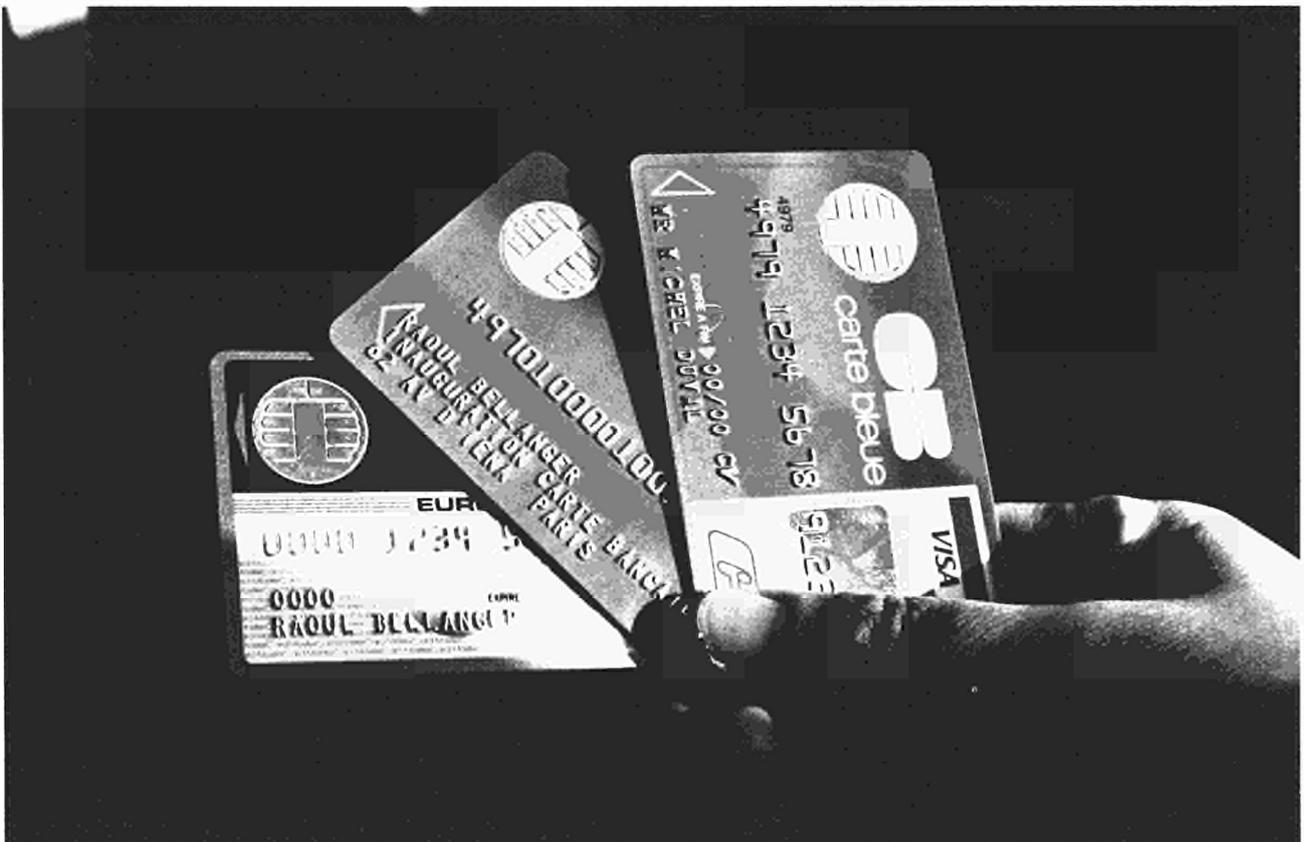
### Education and training

After the programme 'Informatics for everybody', the French authorities have launched a new programme called 'Telematics for everybody'. More limited than the former, it concerns some 700 schools, equipped to different degrees of sophistication. Some schools will

only be able to access external networks, by using their school computer; others will be able to produce information and documents. Moreover, telematics is going to be used in the administration of the schools: information on the school and the pupils will be accessible through telematics to the other schools and to the families.

In the vocational training field, the Neuilly centre of the association for vocational training of adults (AFPA) has started a course to train technicians in office automation and informatics for management, specifically addressed to small and medium-sized enterprises. Young persons with high-school certificates and no professional experience

<sup>1</sup> *Frankfurter Rundschau*, 14 December 1985.



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will attend courses both on the applications of information technology, and on the specific problems of computerization of small enterprises. At the end of the five-month course, the trainees are expected to be suitable for employment in small software and consulting firms, or in small manufacturing firms.

The introduction of computers in schools continues in all countries, but some problems are emerging. As an example, in *Denmark*, where decisions about computer purchasing are decentralized, between 10 000 and 20 000 computers have been bought, representing at least 20 different types running on not less than five different operating systems, with all the related problems of lack of compatibility.<sup>1</sup>

There are also some other problems, which make the introduction of computers in education less successful than generally expected. A study of the Institute for Research on School Development of the University of Dortmund (*FRG*) found that the students who own a programmable computer for educational purposes perform less well than the other students. They also watch much more TV. Computer freaks sit at the screen up to eight hours per day, half of the time at the computer, the other half watching TV.<sup>2</sup>

### 3. Banking and retail trade

The first on-line shared automatic teller machine network for *British* building societies went live in February 1986. The Anglia, Bradford & Bingley and Leeds Permanent were the first three to join and four others will join the network over the next few months.

Still in the UK, the first phase of Barclaycard's electronic shopping system, designed to cut costs and deter fraud, got underway in March 1986. The scheme, called Darts — data capture and authorization retail transaction service — is in operation in a shopping complex in North London; it eliminates much of the paperwork usually involved in the credit card business and eventually will accept other credit cards in addition to Barclaycard.

The National Westminster Eftpos scheme, based on Texaco service stations, also got off the ground in the same period. The scheme accepts payment by Access via a personal identification number, but will also take other credit cards provided a voucher is signed in the normal way.

In *Denmark*, the Dan card, i.e. the national payment and credit card system, introduced in 1983 with the expectation of a wide diffusion, is only slowly taking off due to a number of problems. It first raised many criticisms on the ground of a possible threat to civil liberties, until the Government passed some regulatory measures in 1984; it was then rejected by the retail sector, which did not want to bear the costs of the system. An agreement has only recently been signed by the Banks' Payment and Credit Card Limited Company (Pengeinstituternes Koebe og Kreditkort Aktieselskab, PKK), which manages the system, a major supermarket chain and the professional organization of grocers; according to the agreement, the shops will have to finance the purchase of POS-terminals, but neither the shop nor the cardholder will be charged for each transaction. On the contrary, retailers will receive until 1989 a special marketing subsidy to promote the system.

Two big *Irish* banks, Allied Irish Bank and Bank of Ireland, launched a pilot scheme based on a new type of automated teller machine located inside retail outlets and which issues vouchers for presentation to a cashier instead of supplying banknotes. This system is believed to be much cheaper than conventional ATMs; the latter require at least 1 500 transactions per week per machine to break even. The pilot study will evaluate the business implications and customer response to this payment facility.

The *Belgian* credit institutions which run the two systems of ATMs and electronic-point-of-sales cards, 'Bancontact' and 'Mister cash', have signed an agreement to make the two systems compatible, so that cardholders will be able to use both. Compatibility will first concern points of sale at petrol stations and

supermarkets; automatic tellers will be made compatible in the first half of 1987.

Home banking is being introduced on an experimental basis in the *Netherlands*. The Postbank started in February 1986 an experiment called 'Girotel', whereby small businesses and individuals can contact the Postbank and give orders for transactions through their computer from the office or from home. 1 000 bank account holders participate in the experiment, but people interested were much more numerous: only one out of ten applicants was accepted. Other banks are trying different electronic services. Since the beginning of 1986 AMRO Bank and NMB have introduced a system whereby customers can use a floppy disc to instruct the bank for payment transactions. Clients use a special software package, and the disc is then delivered to the bank for automatic clearing. The service is intended for medium and small-sized businesses and organizations. These developments induce banks to increase their training efforts: AMRO Bank plans to train all its employees, i.e. some 23 000 people, in the coming years, and other banks are starting, or planning, similar in-house training programmes.

As far as the effects on employment are concerned, the *German* trade union in the banking sector (DAG) states that one bankomat replaces 4 employees; overall, 10% of the jobs will be lost by 1993.<sup>3</sup>

The employers, on the contrary, point out that in the past few years employment increased by about 3% p.a. For the near future they forecast an annual growth of over 1%. The increase in productivity had no negative effect on employment, in their opinion, because banking activities expanded more rapidly. Moreover, they point out that both qualifications and wages have risen alongside with productivity.<sup>4</sup>

<sup>1</sup> *Weekendavisen*, 14-20 March 1986.

<sup>2</sup> *Frankfurter Rundschau*, 14 November 1985.

<sup>3</sup> *Frankfurter Rundschau*, 3 September 1985.

<sup>4</sup> Raban Freiherr Von Spiegel, 'Personalpolitik in Banken unter dem Einfluß der neuen Technologien', *Die Bank*, 1/1986.



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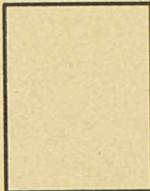
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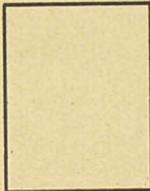
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