

Employability and adaptability of professionals and managerial staff

A report for UNI-Europa

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Note:

This report has been prepared as part of an initiative by UNI-Europa's Professional and Managerial Staff (P&MS) committee to explore ways of maintaining the employability and adaptability of professional workers in the new economy.

UNI-Europa defines professional and managerial staff as follows:

An employee:

- a) who has completed a higher level of education and vocational training or possesses recognised equivalent experience in a scientific, technical or administrative field; and
- b) who performs, as a salaried employee, functions of a predominantly intellectual character involving the exercise of a high degree of judgement and initiative and implying a relatively high level of responsibility.

The term should also cover any person who, in addition to possessing characteristics (a) and (b) above, has had delegated to him/her by and under the general direction of his/her employer responsibility for planning, managing, controlling and co-ordinating the activities of part of an undertaking or of an organisation, with the corresponding authority over other persons.

This report has been able to draw on the results of a questionnaire sent by UNI-Europa to its affiliates in the autumn of 2002. Replies were received from the following unions: CFDT- Cadres (France), Connect (UK), FABI (Italy), FIBA – CISL (Italy), Finansforbundet (Denmark), Fisascat – CISL (Italy), GPA (Austria), LBC – NVK (Belgium), PAM (Finland), PCS (UK), SBSI (Portugal), SIF (Sweden), SINDETELCO (Portugal), SUORA (Finland). Prospect (UK) has also provided helpful information. The author gratefully acknowledges the assistance received from these and other trade unions in the preparation of this report.

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Introduction: a time of change

The world of work is changing rapidly.

The comfortable assumptions which individuals, and societies, could hold about the nature of jobs and employment just a generation ago no longer seem to work today. Jobs are no longer necessarily for life. Careers do not always develop in a reassuringly linear progression upwards. Old hierarchical work structures, dating back to the 'scientific management' approaches of the early twentieth century, are being challenged and in some cases dismantled.

The way work is undertaken is also changing. The development of information and communication technologies has not only led to very rapid innovations in the tools available for work but has also changed profoundly the way in which business can operate. Work is no longer necessarily subject to clear spatial and temporal limits: the development of mobile working and teleworking demonstrates that work can take place away from the traditional office or workplace whilst the borders between work time and home time are increasingly becoming blurred.

Employment relationships are changing, too. New forms of contractual relationship are developing, outside the traditional employer/employee contract on which so much employment legislation and social insurance protection is based. This includes, for example, agency working and corporate outsourcing to nominally independent freelance contractors. And even where the legal employer/employee relationship remains unchanged, the *implicit* contract between company and worker – by which an individual could expect to be offered security and reward in exchange for his or her corporate loyalty – has certainly changed. Increasingly individuals are told to take responsibility for their own working lives and careers, including the responsibility for ensuring that they constantly update their skills.

This new approach to work is described in brutally stark fashion in a quote which the New York Times attributed to James Meadows, AT&T's vice president for human resources:

People need to look at themselves as self-employed, as vendors who come to this company to sell their skills. In AT&T we have to promote the concept of the whole work force being contingent, though most

of our contingent workers are inside our walls. 'Jobs' are being replaced by 'projects' and 'fields of work', giving rise to a society that is increasingly 'jobless but not workless'.¹

These trends are more marked in some areas than others. Nevertheless, the High Level Task Force on Skills and Mobility, in its 2001 report to the European Commission, asserts that "more and more people will have to adapt to a change of job or career – almost certainly involving different skills – during their working life." It goes on to warn:

80% of today's skills will become obsolete in 10 years. while over that time 80% of the labour force will possess outdated skills...²

Some suggest the speed of change is even faster. One recent academic essay quoted an HR director in the telecoms sector as estimating that 80% of current jobs would be obsolete in *five years'* time.³

Bringing all this together, we can perhaps summarise the key changes as follows:

- a) The convergence of **IT and telecommunications technologies** has created a world where enormous quantities of information of all kinds can be effortlessly stored, analysed and transmitted great distances.
- b) An increasingly **globalised** economy is seeing the rapid growth in international trade in services. Increasingly, major companies operate multinationally rather than in single countries.
- c) The recent hegemony of a neo-liberalist economic philosophy has been associated with an international agenda which stresses economic **liberalisation** and **privatisation**, which in turn has led to major changes in several important sectors of the economy.
- d) Increasingly, economic value resides in intangible capital, in particular in human capital, rather than in traditional physical capital. A **knowledge-based society** requires jobs which are more skilled, more independent and more creative.

¹ New York Times, 13 February 1996, quoted in Chris Benner, Shock Absorbers in the Flexible Economy, the Rise of contingent employment in Silicon Valley, Working Partnerships, San Jose, 1996

² High Level Task Force on Skills and Mobility, final report, 14 December 2001

³ Michael Kelleher and Peter Cressey, The Active Roles of Learning and Social Dialogue for Organisational Change, Vocational Training European Journal no 21 (Sep-Dec 2000), Cedefop

- e) This in turn renders traditional command-and-control approaches to management less appropriate. Hierarchies are becoming flatter. Companies are adopting **new management styles**. Some predict a significant increase in the number of new interlinked 'network companies'.
- f) The old paradigm of work, that of a full-time worker working under an employment contract for one employer and remaining with their company for many years or until the time came to draw the company pension, is increasingly inappropriate. New, **more flexible ways of working** include different types of contractual relationships.
- g) Traditional ideas of **career development** are therefore subject to radical change. Individual workers are expected to show **greater mobility** than in the past, both between companies and geographically. More people will work outside their own countries.
- h) The skills necessary in order to work effectively need constant renewal, through a process of **lifelong learning**. The emphasis is shifting from a focus on knowledge acquisition to competence development. Problem solving skills, social skills, team working, adaptability, creative thinking and flexibility of response are considered more valuable than factual knowledge or the ability to undertake repetitive skills.

Professionals, managers and senior staff are particularly affected by these developments. Indeed, in some respects the pressures are greatest for these workers, who are expected to take the lead in steering their organisations through times of rapid management and technological change whilst at the same time taking on new responsibilities towards nurturing their own careers.

Managerial staff are certainly not immune from suffering the downside of change. The process of restructuring, de-layering and downsizing which many companies adopted in the 1990s, for example, had the effect of removing swathes of middle management posts. Many older workers found themselves pushed prematurely into early retirement.

For those remaining in post, work-related stress has become a significant issue in the workplace.

Nevertheless, it would be wrong to suggest that the outlook is entirely gloomy. If increasingly the production of goods and services is to rely less on the exploitation of physical capital and more on the use which is made of human capital, then there are obvious opportunities in the information and knowledge

society for highly-educated professional workers. We are increasingly aware that it is to human knowledge and skill which we must look in order to drive forward economic growth.

Professionals and managers find themselves in many ways better placed than others in the workforce to reap the benefits of the knowledge society. But we must add an important caveat: this is conditional on them being sufficiently able to adapt in time to the changes.

This report examines in detail steps which are being taken in Europe and indeed in other parts of the world to promote the employability and adaptability of professional and managerial staff. We shall begin by locating this work within the overall context of recent strategic developments at European Union level (and within international bodies such as the International Labour Organization). We shall then turn the focus on initiatives taken by the social partners in this area, and in particular by trade unions. As will be seen, the evidence is compelling that many unions are actively engaged in valuable pioneering work designed to support their professional and managerial members. We shall consider in turn a number of these areas of work: needs analysis, career development, employment agency functions, training and course provision, support for freelance and independent workers, support for staff working abroad, and the use being made of new technology in relations between unions and their members. Finally we shall broaden the focus, to consider briefly the implications which these initiatives could have more generally on how trade unions operate and organise themselves in the workplaces of the twenty-first century.

The European context

The European Union has for several years been concerned to put in place an appropriate strategic framework to oversee the changes to work, employment and the economy which are taking place and are affecting us all.

The necessity for Europe to have a coordinated employment strategy was a key conclusion of the Amsterdam summit of 1997. The *European Employment Strategy*, defined by the Treaty of Amsterdam, calls on member

states to develop their own employment policies around four common priority areas or 'pillars'. The extraordinary jobs summit held in Luxembourg in 1998 set out to translate the Amsterdam concerns into practice and approved the first European employment policy guidelines. Two of the four 'pillars' of employment policy directly relate to the themes of this report:

- Employability: making sure people can develop the right skills to take up job opportunities in a fast-changing world
- Adaptability: developing new flexible ways of working to reconcile security and flexibility

Another pillar is also relevant, given the trend for some professionals to develop their careers as independent workers :

- Entrepreneurship: making it easier to start and run a business and to employ people in it

Finally, the fourth pillar is one which has long been of particular concern to trade unions:

- Equal opportunities: equal access to jobs for women and men, equal treatment at work

Following the 1998 summit, as part of the 'Luxembourg process', member states produce annual national Employment Action Plans. The European Social Fund is the principal European financial instrument for supporting the implementation of national action plans.

The European Union has developed a strategic approach to Europe's path towards the information society since at least the publication of the 1994 White Paper on Growth, Competitiveness and Employment and the 'Bangemann report' Europe and the Global Information Society a year later. The landmark *Lisbon summit* in 2000 adopted the strategic goal for Europe to become "the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion". The Lisbon summit conclusions include the following points: "Giving higher priority to lifelong learning as a basic component of the European social model, including by encouraging agreements between the social partners on innovation and lifelong learning;

by exploiting complementarity between lifelong learning and adaptability through flexible management of working time and job rotation...”⁴

The *eEurope* plan, which was adopted at Lisbon as a major part of this strategy, has since been followed by a range of significant initiatives. The *High Level Task Force on Skills and Mobility* was established in 2001 and issued its final report in December that year. Its findings strongly influenced the European Commission’s own Action Plan for skills and mobility, published in February 2002. This talks of the need for “a labour force which has the necessary skills as well as the capacity to adapt and acquire new knowledge throughout their working life. Strategies for lifelong learning and mobility are essential...”⁵

The Commission has also established the High Level Group ‘*Employment and Social Dimension of the Information Society*’ (ESDIS). This group has identified a number of key challenges in the area of learning and training, some of which are particularly relevant to the theme of this report:

- to provide all workers with the appropriate training to effectively benefit from Information Society workplaces
- to facilitate the retraining to high-quality ICT and e-business expert jobs, with the dual objective of enhancing the adaptability and employability of workers and reducing skills shortages
- to integrate the development of ICT at workplaces into an holistic approach to changes in work organisation
- to exploit the benefits of flexible forms of work provided by ICT and their positive impact on the work-life balance
- to stimulate new forms of e-dialogue and governance in industrial relations⁶

In a related initiative the *ICT Skills Monitoring Group*, established in late 2001, researched the demand for ICT and e-business skills in Europe, across all industries. The group issued a detailed report in the summer of 2002, and followed this with its final report in October 2002.⁷ This was released to

⁴ Presidency conclusions, Lisbon European Council, 23-24 March 2000

⁵ Commission’s Action Plan for skills and mobility COM (2002) 72, published 8 February 2002

⁶ Key challenges identified by ESDIS, annex to European Commission Staff Working Paper, Information society jobs – quality for change SEC (2002) 372, published 3 April 2002.

⁷ ICT Skills Monitoring Group: Synthesis report – E-business and ICT skills in Europe (June 2002); E-business and ICT skills in Europe, benchmarking member state policy initiatives (October 2002)

coincide with an important landmark conference, the *European eSkills Summit*, held in Copenhagen.

Among their other applications, information and communication technologies offer new opportunities for delivering training. Following the Lisbon adoption of the eEurope strategy, a specific *eLearning initiative* was launched by the European Commission in May 2000 and an eLearning action plan published in March 2001 in the run-up to a European eLearning Summit held in May 2001. More recently the Commission has produced an interim report, *eLearning: Designing Tomorrow's Education*⁸.

The European Union has been addressing more general issues of *lifelong learning* and training, again as a further response to the Lisbon strategy. The Feira European Council in June 2000 called on member states, the Council of Ministers and the Commission to “identify coherent strategies and practical measures with a view to fostering lifelong learning for all”. Lifelong learning is seen to be embedded as a key part of the overall Lisbon strategy.

The Commission report *Making a European Area of Lifelong Learning a Reality*⁹, published in November 2001, suggests that there should be a number of principles underlying lifelong learning: “the centrality of the learner, the importance of equal opportunities and the quality and relevance of learning opportunities”. The report calls for the social partners to be actively involved in the development, promotion and use of learning. Trade unions are identified, along with public service providers, voluntary and community groups and employers, as having a role to play in delivering and/or promoting learning opportunities to their own members.

The Commission report also calls for a much more significant investment of time and money in learning. It suggests that “35 hours of learning per year for every employee might be an attainable benchmark” – a target which demonstrates among other things how little training is currently taking place in the workplaces of Europe.

⁸ European Commission, *eLearning: Designing Tomorrow's Education*, an interim report SEC(2001)236, published 28 February 2002

⁹ European Commission, *Making a European Area of Lifelong Learning a Reality* COM (2001) 678, 21 November 2001

These, then, are some of the current European initiatives which provide the broader context to the themes of this report. But these are issues not simply of concern to the European Union. The International Labour Organization, for example, has decided that the 2003 session of the International Labour Conference will include a first discussion of human resources development and training, with the view to adopting a revised standard in 2004.

The decision follows a discussion on the subject held during the 2000 International Labour Conference. This ended with the adoption of a set of twenty-one recommendations, several of which are concerned with developing social partnership in the area of training. For example:

The social partners should strengthen social dialogue on training, share responsibility in formulating education and training policies, and engage in partnerships with each other or with governments for investing in, planning and implementing training.

The Conclusions also offered a broad definition of employability:

It is a key outcome of education and training of high quality, as well as a range of other policies. It encompasses the skills, knowledge and competencies that enhance a worker's ability to secure and retain a job, progress at work and cope with change, secure another job if she/he wishes or has been laid off, and enter more readily into the labour market at different periods of the life cycle. Individuals are most employable when they have broad-based education and training, basic and portable high-level skills, including teamwork, problem solving, information and communication technology (ICT) and communication and language skills, learning to learn skills, and competencies to protect themselves and their colleagues against occupational hazards and diseases. This combination of skills enables them to adapt to changes in the world of work. Employability also covers multiple skills that are essential to secure and retain decent work¹⁰....

As part of the preparatory work for the 2003 Conference, the ILO has elaborated on these and other issues in a report *Learning and Training for Work in the Knowledge Society*.

Finally, it is worth noting the Cologne charter on lifelong learning adopted at the G8 summit in June 1999. This also stressed the need to ensure that individuals are equipped with the knowledge, skills and qualifications they

¹⁰ Resolution concerning human resources training and development (conclusions of the International Labour Conference, meeting in its 88th session, 2000)

need: “The rewards for investing in people have never been greater, and the need for it has never been more pressing. It is the key to employment, economic growth, and the reduction of social and regional inequality.”¹¹

Social partnership in Europe

We now move on to consider the extent to which these issues have been addressed by the social partners, firstly at European level.

Social dialogue between employers’ representatives and trade unions was incorporated in 1988 into the Single European Act, as Article 118b. Since then, issues of vocational training and employability have been the focus of frequent discussions within the social dialogue process between UNICE, the public enterprise association CEEP and the European Trade Union Confederation. For example, in 1991 in their Joint Statement on Access to Vocational Further Training, the social partners expressed the view that all employees should have access to further training during their entire working lives. The statement underlined the need to identify individual training needs, and for appropriate certification and recognition of training undertaken.¹²

A new joint text on lifelong learning, Framework of Actions for the Lifelong Development of Competencies and Qualifications, was signed between the European social partners in February 2002. Among other things this statement makes the following observation:

To promote a lifelong learning culture, both trade union and employer organisations have a key role to play in informing, supporting and advising their members and need to develop in-house expertise to perform this role.¹³

The European Commission has also formally asked the social partners to negotiate and implement agreements to modernise the organisation of work. This is a theme which the Commission has been developing since the

¹¹ The Cologne Charter: Aims and Ambitions for Lifelong Learning, adopted by the G8, June 1999

¹² For more information on the history of social partnership in this area see Winfried Heidemann, Lifelong Learning and Employability – is the European Model of Vocational Training in Crisis?, Hans Böckler Stiftung, Düsseldorf.

¹³ ETUC, UNICE/UEAPME, CEEP: Framework of Actions for the Lifelong Development of Competencies and Qualifications

publication of the 1997 Green Paper, Partnership for a New Organisation of Work, followed a year later by the communication Modernising the Organisation of Work – a positive approach to change. One concrete example of the social partners' deliberations on new ways of working was the adoption in 2002 of the European Framework Agreement on telework.

The particular needs of professional and managerial staff

We can summarise, therefore, by restating that the themes of employability, adaptability and lifelong learning are high on the political agenda within Europe. Equally, however, it will be clear by now that – with the exception, perhaps, of the issue of the shortage of IT specialists in Europe, where the focus has been very much on highly-educated technology professionals - many of these initiatives are concerned with the general position of all members of the workforce.

We need to focus in more clearly on the particular needs of professionals and managerial workers. But this immediately raises a question: what are those particular needs? What do these workers themselves consider to be their needs: what, for example, would they consider to be the most useful services that could be made available to them, to enable them to adapt to the changing world of work?

It makes sense to try to find out. A number of trade unions have chosen to undertake detailed studies, which in many cases aim to go beyond a simple needs analysis exercise.

One of the most ambitious such studies has been the survey organised recently by the French union CFDT-Cadres. The survey, *Travail en question Cadres*, involved the distribution of 30,000 questionnaires between February and June 2002, 7,000 of which were returned completed. The aim, according to the union, was to gain a deeper understanding of the working conditions and concerns of professionals, to get away from the stereotype that all cadres necessarily had the same work experience, and - as CFDT-Cadres put it - to let professionals and managers speak for themselves.

Interestingly, CFDT-Cadres' study reached out beyond the ranks of the unionised: seven out of every ten questionnaires returned came from non-union members.

The first results of the survey¹⁴ were presented to a conference of professional workers held in Paris in October 2002, and this is followed by a series of nine regional meetings in the country. CFDT-Cadres is also producing an accompanying CD-ROM. Four key issues have already emerged – those surveyed wanted their contribution at work to be better recognised, they wanted the opportunity to improve their professional skills and qualifications and progress their careers, they argued for a more professional approach by employers to the annual appraisal mechanism, and they wanted the right to participate fully in strategic management decisions affecting their areas of responsibility. The role of the union was seen as protection against arbitrary management power and blunders, and as providing an arena for information dissemination and exchange.

The Italian banking and insurance union FIBA-CISL investigated the attitudes and expectations of professional and managerial workers in a survey undertaken in 1999. This took the form of a questionnaire with 35 questions and a total of 1596 people were interviewed (approximately half were FIBA members). The survey found that many staff were confused by the speed of change in the finance sector. Professional workers wanted work which was satisfying, they wanted their contribution to be recognised and appreciated, and they also wanted the opportunity to develop professionally.

Another Italian finance union, FABI, commissioned two research organisations in 1999 to undertake a detailed survey of managers and executives in the finance sector. The survey included a phone-based questionnaire undertaken by the consultancy company C&R, which involved 493 interviews (about half of whom were FABI members), and a second paper-based questionnaire which went only to union members (670 were returned). The results show a somewhat mixed response to the transformation of the banking sector: “On the one hand people fear that the concentration happening can threaten employment; on the other they recognise that it will produce better services for customers, will contribute to the modernisation of the Italian banking system and will lead to an increase in specialisation of cadres and

¹⁴ Travail en Questions: Cadres, Parlons-en! Report, published CFDT-Cadres, 2002

executives”.¹⁵ The importance of a contractual right to professional training was highlighted in many responses.

The Portuguese bank union SBSI also has surveyed its managerial and technical members for their views on training and career development needs, whilst the Danish banking union Finansforbundet began conducting a similar exercise, in partnership with other organisations, in the Autumn of 2002.

Career development

If, as has been suggested above, the familiar linear career path forward is no longer necessarily applicable to the changing realities of work, what can be done to assist professional and managerial staff to manage their own career development?

A number of trade unions have introduced innovative services for members. The British telecom managers' union Connect, for example, launched its Opus² Careers Advice counselling service in January 2002. Opus² makes use of qualified and experienced counsellors, and two programmes are currently offered, one on career assessment and the other on getting interviews. Each programme takes about four to six weeks to work through, and is based on a set of five 40 minute counselling sessions which take place either by phone or face-to-face. The cost of the programme is lower than equivalent commercial services, and it is preceded by a free half-hour session, to allow the individual to assess its suitability for their needs.

Connect originally introduced Opus² for its own members, but now makes it available more generally, “to managers and professionals who are members or potential members of a trade union”.

The Belgian union for professionals LBC-NVK has for several years offered its members career management workshops. These originally were three evening sessions, run by two specialist trainers. In 2002, however, the NVK obtained government and European funding which is enabling it to extend this service. After the three workshop sessions, members can enrol for a programme of individual coaching, taking place in five 90 minute sessions.

¹⁵ Survey of Cadres and Executives of Italian Credit Institutions, Coordinamento Nazionale Quadri Direttivi FABI, 1999

This programme is open to unemployed members, and to members looking to change their work.

Finansforbundet in Denmark also offers help in career development and in personal and professional development for managers. These are based on whole day or after-work sessions, and the union plans to arrange special weekend sessions next year on the same topics. This has proved a popular initiative, with approximately 15% of the union's members in professional and managerial posts having participated during 2002.

SIF (Sweden) has chosen to use the internet to deliver its Career coach (Karriärcoach) service to members. This is a web-based tool designed to help individuals analyse their working life prospects. SIF members receive a password from the union and can then work their way in their own time through the programme. Afterwards, SIF has trained advisers available who can discuss the findings and offer personal advice.

SIF has also developed a web-based tool for members who are engineers. Members can access on-line 'the competence compass', a database of courses and training opportunities for engineers. The service operates by enabling individuals to compare their current skills with those on offer, and to assess for themselves their further education needs.

A number of unions have chosen to develop career advisory services in partnership with other organisations. GPA (Austria), for example, works closely with the Österreichische Vereinigung für Supervision to offer members a coaching service. FIBA (Italy) works with an outplacement agency to enable members to check current changes in the labour market.

Finally, CFDT-Cadres (France) operates an innovative networking service for young people with professional qualifications seeking to enter the job market. *L'Ouvre-boîte* service puts them in touch with managers at companies they may have identified as potential employers, who undertake to keep them informed of developments at the company.

Employment agencies

In any historical account of trade union development, a chapter would need to be devoted to the important role played in the past by unions in directly finding work for members, by providing them with information about and access to vacant jobs.

This tradition was associated particularly with craft-based unions, as part of the mechanisms used to control access to particular professions and to prevent dilution of professional skills. It is perhaps not surprising, therefore, if some unions are now looking to recreate a similar service for their own professional and technical staff members.

The Association of Professional Engineers, Scientists and Managers Australia (APESMA), the product of a series of recent union mergers, has set out consciously to overhaul all aspects of its internal management and operations in order to ensure that its members' needs are adequately serviced. One of these perceived needs is to help members gain employment. APESMA began by establishing its own successful recruitment agency, Engineering Placements. More recently, the scope of this service has been extended beyond engineering posts to include technology and management positions. These new areas are reflected in the agency's new name, ETM Recruitment.

Connect (UK) decided to set up its own employment agency in the early 1990s, at a time when large numbers of Connect's members were being offered voluntary redundancy by British Telecom. The vast majority had only ever worked for BT, and found the prospect of looking for work elsewhere daunting.

As with the career coaching service, Connect uses the name Opus² for this service. Opus² operates in a very similar way to commercial employment agencies. Candidates provide it with a completed registration form, CV etc, and this information is held on database to be matched against future vacancies. Advice is offered on how to produce an effective professional CV. One-to-one discussions are held with candidates, which provide an opportunity to discuss the range of options available; this could include, for example, moving to working on a freelance contractor basis. If so, legal advice on establishing a limited company is available.

Vacancies are advertised on the Opus² website, and also from time to time in Connect's members magazine. One advantage of the employment agency is

that encourages members who are leaving their employment to maintain their loyalty to the union. Opus² also charges employers when posts are filled, at the standard rate of 20% of first year's annual salary.

Connect says that Opus² enjoys good relationships with many telecoms companies and other consultancies and employment agencies.

Provision of training courses and lifelong learning

A constant theme of European employment initiatives and of social partnership discussions has been the importance of ensuring that workers have learning opportunities to develop and broaden their skills throughout their working lives.

Despite this, the actual level of take-up of training across European Union member states is still disappointingly low. According to the European Commission's Action Plan for skills and mobility (2002), there was a total participation rate of just 8% in the year 2000 in the fifteen member states. The participation rate was admittedly somewhat greater, at 15%, for workers with higher education qualifications, with some countries (notably Denmark, Finland and the United Kingdom) recording figures of over 30%.¹⁶

Nevertheless, this should still be cause for concern. One problem, perhaps, is the management thinking which continues to view vocational training as a business cost. But this not necessarily appropriate: as the International Labour Conference 2000 in its Conclusions on human resources training pointed out, "The cost of education and training should be seen as an investment".

Whilst there is still a long way to go, there are also a number of examples of good practice where social partners are together developing initiatives in lifelong learning. In the United States, for example – not necessarily the first country one considers in the context of social partnership – there is a long history of joint employer-trade union training initiatives for the telecoms sector. The Alliance for Employee Growth and Development ('the Alliance') was established in 1986, and is a partnership between AT&T, Lucent, the

¹⁶ European Commission, Action Plan for skills and mobility COM (2002) 72, 8 February 2002, Annex II (Statistical annex)

Communications Workers of America (CWA) and the International Brotherhood of Electrical Workers (IBEW). The Alliance aims to improve the career and personal development of union members in the two participating companies, and currently about 23,000 people take part each year. Courses range from basic skills to computer applications and college degree programmes, and are chosen and organised by a network of locally based labour/management workplace committees.

A similar scheme, Pathways, operates for CWA members in the regional telecoms company Qwest and helps fund the cost of active employees undertaking degree courses.

Also in the United States, the National Advisory Coalition for Telecommunications Education (NACTEL) brings together employer representatives from several leading telecoms companies with CWA and IBEW union representatives. One of NACTEL's most innovative initiatives has been the launch in 1999 of an internet-based distance learning degree course, which leads to an Associate of Science degree in Applied Information Technology. As well as the on-line teaching resources, the course benefits from a link with Pace University, New York, and students have access both to a Pace University tutor and a NACTEL mentor. The course began as a pilot with 100 students, and has since expanded significantly.

In Australia, APESMA has worked with a number of universities (most recently La Trobe) to establish an MBA (Technology Management) degree course for its members. This course is also delivered on a distance-learning basis, and currently has about 23% of the total MBA market in Australia. The union says that the MBA programme has not only had a positive impact on the career opportunities of its members but has raised APESMA's image as a highly professional organisation.

APESMA's MBA (Technology Management) is being followed by students in about forty countries outside Australia. The union has gone a step further and has entered into a direct partnership with the Norwegian managers and technicians union FLT, which now offers the MBA under its own name and adapted for the needs of Norwegian students. FLT has also developed the Addisco website, which can be accessed by members seeking further professional training.

The engineers' and managers' association Prospect (UK) has also made use of materials originally produced by APESMA. Prospect is the major shareholder of WayAhead Training, a trade union training initiative in which a total of six unions work together. WayAhead (in conjunction with a Scottish university) offers a Certificate in Front Line Management, delivered either in-house or by distance learning. WayAhead also currently offers a series of one-day basic management courses.

The telecom managers' union Connect (UK), as well as being part of the WayAhead partnership, has also worked to provide its members working for British Telecom with the chance to take a BSc (Honours) degree in Computer Science. The course is delivered via a mixture of distance learning and one-week residential sessions. Students have mentor and tutor support, and study part-time both at home and at work. The union aims to ensure that all its members have their fees paid in full and are given paid study leave by the company to attend the residential sessions.

CFDT-Cadres (France) offers a 'TempoCadres' facility on its website which enables members to monitor and analyse the use they are making of work time, whilst on a related theme SIF (Sweden) offers its members an interactive CD-ROM "There is a time for everything" which aims to raise issues of time management and work/life balance. This is the latest of a number of multimedia training tools devised by SIF for its members, which have included a competency analysis CD-ROM "Put Your house in Order" and a similar interactive programme designed to help members communicate and negotiate better "Plead your own cause". Tens of thousands of these CD-ROMs have been distributed to members.

The services union PAM (Finland) arranges two-day courses in management and leadership skills. The courses run over two days and include free board and travelling costs. Typically about 25 members attend each course, which run three times a year.

During 2002, the courses for managers included the following themes and issues:

- how to achieve one's goals, how to organise work, how to share responsibility
- management, leadership, how to encourage and motivate staff and gain commitment
- how to give and receive feedback

- interaction and cooperation skills
- how to influence the work atmosphere
- how to evaluate one's own managerial and professional skills
- manager's rights and duties

Other unions also structure training provision for professional and managerial staff. The UK union PCS provides on-line training facilities for members in its open learning centre, and is currently working on a deal to offer members the chance to study for a Postgraduate Certificate in Professional Development. FISASCAT-CISL (Italy) works with employers and trade bodies in a partnership body Quadrifor, who offers special low-cost training programmes for staff during work time.

SBSI (Portugal) offers residential, weekend and evening courses designed for professional staff and managers. The courses are focused on the current changes in the banking sector and take place in all parts of the country, including the islands of the Azores and Madeira. Another Portuguese union SINDETELCO has worked with vocational training advisory committees in developing training programmes for professional staff in the telecoms and the postal sector. The union, as an affiliate of the UGT, also participates in UGT's specialist section for managers and professionals.

Before we leave the topic of training, it is also worth mentioning the Career-Space consortium initiative. This was initially established in 1998/9 by seven major IT and telecoms companies partly in response to concerns about the apparent IT skills shortage within Europe. It now links eleven companies, together with the trade association EICTA.

Career-Space has developed eighteen generic job profiles for the ICT sector, and is now working with over twenty universities to undertake appropriate curriculum development to equip future ICT graduates for their working lives. The chairman of Career-Space Dr Richard Straub of IBM introduced the aims of the project to a trade union audience at UNI's ICT Forum in 2000. UNI is now a participating member of the Career-Space 3 phase of the project.

Freelance and autonomous workers

If the age of e-commerce is to be a time for the 'e-lance' worker, as Tom Malone of MIT has suggested, organisations which claim to be agents of industrial relations may need to address this constituency. It is particularly an issue for unions organising professional staff, where numbers of formerly employed staff have chosen to set themselves up as independent contractors, sometimes delivering services back to their former employer.

Unions are naturally concerned to ensure that companies do not attempt to shed their social and legal obligations towards employees by encouraging forms of pseudo-self-employment, where the individuals affected are in reality still in a quasi-employee relationship to the business. The Belgian union for professional workers NVK, for example, warns that the issue of 'faux independents' is a matter of considerable importance to it at the moment for it.

But there are also many workers who are operating at professional level who are choosing voluntarily to work on a genuinely self-employed basis. Many of them will have been trade union members previously – the question is to what extent are unions adapting to be able to service the needs of workers who are, after all, effectively running their own small businesses.

A number of trade union bodies are already actively engaged in this issue. Indeed, UNI's General Secretary Philip Jennings has identified the organising of freelance workers as a priority area for the organisation.¹⁷ UNI-Europa, in conjunction with SIF, has arranged a seminar on the issue in Luxembourg in December 2002.

In the Netherlands, FNV-Bondgenoten has chosen to create a new union specifically for self-employed people. This union was established in 2000, had a thousand members enrolled by the end of 2001 and currently has about 200 new members joining each month.¹⁸ The decision was taken partly because of the numbers of FNV Bondgenoten members who were currently employees but who wanted to become self-employed and who asked to maintain their union membership.

¹⁷ Philip Jennings, General Secretary UNI, speech at Organising in the network economy conference, Edinburgh, 18 July 2000

¹⁸ Information from a presentation by Dick Hamaker at the ILO tripartite conference Information and Communication Technologies and Decent Work: Finding Solutions in the Information Society, held in Tallinn April 2002

The number of self-employed people in the Netherlands has increased strongly in the past two decades, and in the IT sector, for example, there are currently about 20,000 self-employed workers out of a total workforce of 150,000. Well educated young people have been particularly attracted to work in this way. The new union aims to help its self-employed members by servicing their particular needs, including tax matters, social security, business insurance, accounting and finance and networking.

The decision to organise the self-employed was initially not without opposition within the union, with some members arguing that self-employed workers took over existing jobs and undermined collective agreements. In practice, however, there have been a number of benefits, not least that the union is now better informed through its network of self-employed workers of developments within companies, and is better able to monitor the establishment of new companies.

SIF (Sweden) has a similar story to tell. SIF debated the issue of self-employed members in 1996 and after what was described as a lively debate agreed to admit them to the union. According to a report, “those in SIF who were in favour of admitting the self-employed stated that this was just a natural response to labour market developments. An increasing amount of work in industry is performed by consultants, subcontractors and one-person companies”.¹⁹ The new arrangement began in 1998.

SIF ran a telemarketing recruitment campaign aimed at, among others, the self-employed during 2002. The union says that of 4500 people called, approximately 10% agreed to join as members. The main attractions of union membership are a good-value insurance package and a legal advice service which can assist in areas such as drawing up contracts or taking court action. SIF points out, though, that self-employed members require individual servicing, which may lead to an individualisation of trade union service provision. This can have implications for trade union resources and internal organisation.

CFDT-Cadres (France) now operates its *Réseau Professionnels autonomes (RPO)* (network for independent professionals), a three-year pilot which the union launched in September 2002. The network (initially focused on Paris

¹⁹ EIRO, Trade unions open doors to the self-employed, EIRO Observer, issue 5/99, Dublin, 1999 p13

and its region) aims to offer members access to professional information and legal assistance as part of their membership subscription, and will also make additional services (such as social insurance and pensions) available at additional cost. The website, www.professionnels-autonomes.net is seen as an important channel for service delivery to members.

CFDT-Cadres says that the RPO initiative aims to demonstrate that unions have a role in the whole world of work, and can represent individuals working in new ways. Among the target professions for the RPO are independent consultants, graphical designers, software engineers and freelance journalists. These are well educated and qualified people which the union says exist at the margins of the employed workforce and whose rights need to be better protected. The RPO has already got off to a strong start, with a good response from a first presentation to micro-businesses held in Paris in the autumn of 2002.

Amicus-MSF (UK/Ireland) has organised self-employed IT consultants in its Information Technology Professionals Association since 1995, an autonomous section of the union with several thousand members. The ITPA provides specialist advice and the opportunity for networking by IT professionals. It has also helped the union break into and organise companies where this had previously been difficult or impossible.²⁰ Another UK union Connect also aims to recruit self-employed contractors. This has been done, among other things, by setting up a dedicated branch and allocating full-time organising resources, and mailing contractors directly using lists obtained from employers. Among services offered is a special package of income replacement insurance to cover periods of sickness.

FABI (Italy) is another union which has set up a specialist organisation *Sindacato Nazionale Autonomo dei Promotori Finanziari (SNAProFin)* for freelance professionals in the banking and finance sector. The union says the numbers of independent consultants within the sector are continually growing. SNAProFin has its own website, www.snaprofin.it.

The Australian professionals union APESMA sees the organising of self-employed professionals as an important feature of its future strategy for

²⁰ Case study: MSF Information Technology Professionals Association, in Andrew Bibby (ed), *Information and Communication Technologies in Europe: the Trade Union perspective*, published UNI 2002

growth. According to its executive director John Vines, “At present approximately 10% of the APESMA membership are in this category, however it is expected that the proportion of membership in this category could increase to 25% over the next 5-10 years and ultimately may reach 50%”²¹. APESMA plans to focus its services around the union’s recruitment agency ETM Recruitment, supported by a range of other services including professional indemnity insurance, income replacement insurance, legal and financial services as well as advice on employment contracts and remuneration.

It is the media and entertainments industries that trade unions have most experience of organising the self-employed, including performers, actors, musicians and writers. For example, most journalists’ unions accept self-employed freelance journalists as members, and for many unions they comprise a substantial percentage of the total membership. According to a study of 98 countries conducted by the International Federation of Journalists, about 80,000 of the 336,000 journalists organised in unions are freelance, representing about 23% of the membership. In the 28 European countries (whose unions represent the majority of IFJ’s membership) about one in five organised journalists are self-employed%.²²

International mobility

As the European Commission’s Action plan for skills and mobility makes clear, a European knowledge-based economy is likely to be built increasingly on a mobile labour force, with increasing worker mobility between member states.

Since trade unions have developed as organisations based in nation states, with their structures and service delivery mechanisms focused on addressing a membership within their own country, the growth in the number of workers working across national boundaries clearly poses new challenges. Professional staff, in particular, are increasingly likely to find themselves working abroad for part of their working life.

²¹ John Vines, From Trade Union to 21st Century Organisation, presentation at FIET IBITS conference, Düsseldorf, 1998

²² International Federation of Journalists, Freelance Futures: World survey on the social and economic status of freelance journalists, Brussels, December 1999

UNI's Passport scheme has been described as "key in the solidarity strategy aimed at helping unionised mobile workers to face the challenges of the 21st century." The idea is that members of one union can apply for a UNI Passport which will enable them to call on the services of a UNI-affiliated union in the country where they will be working.

The degree of support available varies between individual unions, who can choose to what extent they are able participate in the scheme. According to UNI, the assistance offered may include the following :

- be welcomed by a local organisation affiliated to UNI
- be offered a familiarisation programme, for example, an introduction to the local community, being included on mailing lists for information, invitations to cultural and political events, and so on
- be involved in local activities, for example, working groups dealing with professional issues, training courses, and so on
- be offered general information on working conditions, banking, tax regulations, housing, schooling, health care, pensions, and so on
- be offered advice on aspects related to employment, such as evaluation of contracts with a view to hidden clauses, compliance with labour laws and collective agreements, and so on
- be offered legal support in certain cases²³

UNI is currently inviting affiliates to create a special 'Passport' page on their own website, to help potential users of the scheme know the level of assistance available. One pioneering example of a union 'Passport' webpage is that produced by FABI (Italy), available at www.fabi.it/passport/inglese/index.htm

Eurocadres has also produced an on-line guide for mobile workers in Europe, accessible through its website as www.eurocadres.org/mobilnet/spladef.html

Communicating with professional workers: maximising the opportunities of new technology

²³ Working Abroad : UNI Guidelines, published by UNI 2000

Much has already been said in this report about initiatives which make use of new technology, including innovative uses of websites and of multimedia technology tools such as interactive CD-ROMs.

Some trade unions are choosing to use new technology at a more profound, strategic, level as a way of improving the service they offer professionals and managerial workers.

The Austrian services union GPA has recently developed a set of new interest groups within the union, using the facilities of the www.interesse.at website. Professional workers, for example, have access via the website to the work@professional interest group. There are also similar special interest groups for flexible workers, including the self-employed (work@flex), for social service staff (work@social), for workers in IT (work@IT), for education workers (work@education), for mobile workers operating away from their office base (work@external) and for migrant workers (work@migration). Each interest group has its own website section, offering access to information, news and on-line discussion forums.

GPA sees these interest groups as a new, third, dimension in the internal democratic life of the union, complementing the traditional regional and sectoral structures. Members can self-select the interest group they feel is appropriate to their work. The interest groups are recognised in the GPA constitution and are autonomous; each group has the right to have delegate representation on the GPA Executive Committee and the GPA Forum.

Work@professional was one of the first interest groups to be established. GPA points out that Austria has about 150,000 professional and managerial workers in the private sector, of whom about 30,000 are GPA members. These are people who hold key positions in business and in society, and the union sees them as also playing an important role in the union's development.

Other unions are also increasingly centring their work on websites. FABI (Italy), for example, has launched a communication project aimed at managerial workers at Findomestic banca. Through a dedicated website www.findofabi.it, the union hopes to achieve three aims:

- reach the managers throughout the national territory, who for reasons of workload are not in the position to participate in trade union assemblies
- spread the news regarding trade union topics

- obtain the interactive participation in debates and in the elections/voting of all managers who are union members.²⁴

The website includes a private area for union members only. FABI is also aiming to use personal email and SMS text messaging to mobile phones to communicate with its managers at the bank.

Another finance union, Finansforbundet (Denmark), has also developed the capability to send direct email to particular groups within the union. Members can access their own membership records via the union home page, in order to update or correct the data held. PCS (UK) uses almost entirely electronic means to communicate with those members who have joined its Professional and Managers Association (PMA), established by the union in 2001. PCS says that, since PMA members are likely to be very busy people, using electronic means of communication was seen as the most non-intrusive and cost-effective way of maintaining contact.

The resources available on websites can also be complemented by a call centre operation, The German post and telecoms union Deutsche Postgewerkschaft (DPG), now part of ver.di, was responsible for establishing an innovative telework helpline service, OnForTe (Online Forum Telearbeit). OnForTe, funded from the German federal government, Deutsche Telekom and the union itself, began operating in December 1997 from a small call centre in Regensburg. Two other unions HBV and IG Medien (also now merged into ver.di) also became involved.

OnForTe aimed to offer the public, including non union members, the self-employed and works council members, an access point for information about all aspects of telework. Simple queries were dealt with by the call centre agents, with more specialist enquiries passed to a second tier of advisers who could assist on issues such as legal rights, telework contractual agreements and problems of self-employment.²⁵ The UK professional union for nurses, the Royal College of Nursing, has also developed a call centre operation, designed to answer both professional and employment-based questions from its membership. The RCN Direct operation opened in 1998.

²⁴ FABI, Findomestic banca communication project, slide presentation

²⁵ Information taken from www.onforte.de website, and personal communications

If numerous unions are using the web to complement its existing work, other trade union organisations are making the web the central focus of their work, and indeed of their existence. The Swiss 'virtual' trade union //syndikat, founded in January 2002, describes itself as the first such organisation for employees and freelances working on-line, in areas such as new technology, IT, finance and the service sector. It aims to obtain for its members proper work conditions, better protection against workplace stress, professional and personal development and, for freelances, the fees due to them for their work.

A similar use of the internet is being used in Washington State, USA, to organise IT professionals, primarily those working for Microsoft. The Washington Alliance of Technology Workers (WashTech) appropriately enough uses its web site as its main way of reaching members and potential members. Although part of the CWA, WashTech does not stress this link. Its web site comments: "Because traditional labor organizations have been slow to adapt to the changing nature of the American workforce, we are building a new type of organization. We are committed to being democratic and worker-driven, and to addressing the unique challenges faced by high-tech workers."²⁶

WashTech attempts to address concerns both of agency staff and directly employed staff at Microsoft. Members can join WashTech via the website, completing their membership form online and paying membership subscriptions by credit card. A similar arrangement applies at Alliance@IBM, another initiative undertaken by the Communications Workers of America.

Concluding remarks: broader issues for trade union organisation

To organise professional workers successfully and appropriately, unions need to understand their needs and concerns. The sense of collective solidarity is likely to be weaker than for other groups of workers, and there may be less of a tradition of union organisation on which unions can build. Professionals expect unions themselves to be professional, and to deliver the services members need in an efficient way.

²⁶ See: www.washtech.org/about/join/jointext.html

The point to understand is that there is competition for the services unions can offer. The table below²⁷ seeks to identify the likely work-related needs which a professional worker - perhaps working on a contract basis rather than in a traditional employment relationship, perhaps working away from a central workplace, perhaps working for a number of different clients - could be expected to have. Whilst in many ways these needs resemble those which are currently met through the familiar industrial relations structures, other agencies could (and do) step in to service them: a problem at work could be guarded against in the same way, say, as a motorist arranges vehicle breakdown protection or a householder organises a service contract for domestic appliances.

Negotiation on pay or contract fee	<ul style="list-style-type: none"> • Agents • Commercial training courses in negotiating skills/assertiveness for individuals negotiating for themselves
Health and safety advice	<ul style="list-style-type: none"> • Commercial telephone helplines • Web based advice services • Specialist consultants • Doctors
Employment rights	<ul style="list-style-type: none"> • Attorneys/lawyers • Specialist consultants • Commercial telephone helplines
Disciplinary representation	<ul style="list-style-type: none"> • Attorneys/lawyers • Specialist consultants
Taxation advice	<ul style="list-style-type: none"> • Accountants • Commercial helplines • Specialist tax advisory services
Social activities	<ul style="list-style-type: none"> • Web-based associations • Informal networks • More focus on neighbourhood rather than workplace socialising
Legal advice	<ul style="list-style-type: none"> • Attorneys/lawyers • Legal insurance (perhaps as add-on to other insurance)
Psychological and physical health	<ul style="list-style-type: none"> • Doctors/health services • Private practice therapists
Pensions/social protection	<ul style="list-style-type: none"> • Private insurance companies • Private financial advisers/brokers
Equal opportunities	<ul style="list-style-type: none"> • Specialist consultants • Commercial telephone helplines
Finding work	<ul style="list-style-type: none"> • Informal networks • Web based services (monster.com

²⁷ From work by Andrew Bibby for the World Employment Report 2001 (International Labour Organization)

	etc) <ul style="list-style-type: none"> • Professional associations/member co-operatives
Providing access to training	<ul style="list-style-type: none"> • Educational institutions • Commercial training providers

These service providers may operate as commercial ventures, or as non-profit professional mutual associations or societies. In each case, however, they are effectively competing with trade unions' own services, and as a consequence threaten membership income and organising muscle.

Trade unions, therefore, do not have a 'divine right' to exist. Nevertheless unions can benefit if they seek to maximise the opportunities which come from the established representational functions they undertake in many sectors and companies, and from the access they already enjoy in many workplaces as a recognised social partner.

As we saw when discussing the work being undertaken with the self-employed, unions which aim to meet these new challenges may need to reconsider the way in which they are internally organised. Instead of servicing a group of workers collectively through, for example, the collective bargaining process, individual professional and managerial workers are more likely to require individual attention – and this of course can be expensive in terms of staffing and other resources. A union attempting to adequately serve the needs of professional workers is likely to have to undertake a significant review of its own staffing and operating structures.

Ulrich Klotz in his stimulating essay on the new economy explores this point:

“Owing to the origins of the unions, their internal organisation corresponds to that of a classical Taylorist factory for mass production: control is exercised from the top to the bottom of the power pyramid... As long as markets and membership structures remained stable and easy to manage, it was possible to operate successfully on this principle. Since then, however, the environment has changed radically. Unions are increasingly seen by (potential) members as service providers. But service providers require a completely different structure to succeed...”²⁸

²⁸ Ulrich Klotz, Die Neue Ökonomie, in Arbeiten in der Informationsgesellschaft, DGB, Berlin, n.d. (2000), p25

This is an issue which, in the Australian context, APESMA has already confronted. John Vines, APESMA's executive director, has put it like this:

APESMA saw the need for the organisation to look more like a law firm in terms of the provision of individual assistance to its members, an increasing number of whom were being employed on individual employment contracts, and also in terms of the professionalism with which such advice, support and representation would be dispensed. As a result, APESMA put into place a program to encourage its industrial negotiators to acquire legal training and set about remodelling its membership administration system to enable it to establish case histories for each of its members so that it could be more responsive in handling inquires from specific members.

APESMA also saw the need to ensure that its internal procedures and processes were delivering a consistently high level of service and was the first trade union in Australia, and possibly the world, to attain quality certification under ISO 9002. Other trade unions concerned to ensure that the services they offer members are demonstrably of high quality may wish to consider whether there are advantages in following APESMA's lead in seeking formal quality certification.

There are implications, too, for the democratic structures of trade unions. In the same way that traditional hierarchical structures may prove less appropriate for companies than in the past, so unions too may find that their traditional hierarchical structures come under pressure. (This is, of course, not necessarily a development which all within the union hierarchies will welcome!)

The assumption must be, at least as far as professional and managerial workers are concerned, that traditional union structures based around meetings of branches or locals will tend increasingly to appear less satisfactory as mechanisms for democratic life, not least because mobile working and teleworking is likely to mean that workers are physically together much less frequently than in the past.

We have already seen, in the example of the role given to interest groups within the structure of the GPA in Austria, how one union is beginning to tackle this issue. It should also be noted that new forms of electronic communication permit networking between individual union members,

wherever they may live, much more easier than in the past and therefore offer new possibilities for the internal democratic life of a union.

Finally, unions are likely to find themselves increasingly needing to overcome the limitations which they have as organisations based within single nation states²⁹. Multinational companies already operate effortlessly beyond national boundaries, and – partly as a consequence - professional workers are increasingly geographically mobile, across frontiers. Unions in the twenty-first century will have to demonstrate a new-found practical, as well as ideological, commitment to internationalism.

There are, then, some significant challenges facing trade unions, particularly those looking to organise professional workers. Nevertheless, at a time when work experiences are changing rapidly, trade unions continue to have a potentially significant role to play in helping meet the employability and adaptability needs of these workers. This report has attempted to demonstrate that many unions are already many steps down the road to achieving this objective.

²⁹ It may be noted that a number of unions currently operate in both the United Kingdom and Republic of Ireland