European Skills Council
Commerce

Impact of change & new technologies on skills & occupations in the commerce sector

A report of consultingeuropa

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December 2012

I. Introduction

We have been assigned the task of carrying out a reflection on the development of skills and jobs in the trade sector in Europe by discussing in particular the impact of new information and communication technologies. The aim is therefore a long-term one - which future for jobs and skills - but can only be achieved from a comparative and Community analysis.

There are at least two difficulties in this task which should be immediately taken into account.

The first difficulty is that of the comparative and Community approach.

The question of the evolution of jobs and skills in the commerce sector refers to both a community approach encouraging a convergence between the initiatives of the European Commission and those of the European social partners in this field and a transnational approach that is the expression of differences or at least of sometimes significant national differences, in the use of the concepts of competences and skills. For example, the notion of competence has not the same meaning in France and in the UK, where the term competence is associated with the approach of the National Council for Vocational Qualifications (N.V.Q.) and of the Scottish Council for Vocational Qualifications . The NVQs offer a comprehensive approach to the management and certification of skills based on the activity of people in work situations (approach originated from a very pragmatic vision) and a quality assurance system of the skills assessment process. They are to some observers as "the most systematic attempt to introduce a method of national certification of professional skills, alternative to diplomas" [1] .There are different NVQs for different sectors and in particular for the commerce sector. In France, the term competence refers rather to the practices of human resource management in firms and it is generally put at the service of competitiveness and change.

This notion also knows a great flexibility and covers a wide variety of contents (core skills, basic skills, cross-sector skills, behavioural skills, essential skills, generic skills, non-technical skills, minimum skills, etc ...). Therefore any voluntary attempt to define this term could be reductive and we have decided to respect this diversity which is also the "social force" of this notion while distinguishing when necessary the so-called technical skills ("know-how") from the non-technical ones (“personal skills"). In addition, we rather preferred an approach to jobs generally well defined in this sector that we have considered as skill portfolios. This approach in terms of jobs has allowed us to relativize the impact of new technologies that rarely lead to the creation of new jobs, but generally involve new skills in jobs.

It also allows us to better understand the concept of employability of an individual that will not be discussed here only as a portfolio of validated skills and experiences in a specific context - specific business - but rather in a perspective of integrated skills with a cross-sector character, which may contribute to ease the learning of new dedicated skills.

Another difficulty of the transnational or comparative approach resulted in the fact that our expertise could not aim to take into account all the member countries of the European Union. Although it may be a limit to this report, we have chosen to favour an approach that takes into account the existence of observatories of skills and expertise in the countries concerned. But such observatories do not exist in all EU countries; only some have been identified as such and have become for us an essential source of information. Our goal, therefore, is not to be exhaustive in our comparative analysis but to use data from observatories to compare and if possible identify best practices. One objective of this report is to build on the work of these observatories to show the interest they have to learn from each other and give added value to the creation of a European skills and jobs observatory in the commerce sector. This report therefore aims in particular at mobilizing energies around the common challenges of the various observatories. It should therefore help to establish the link between the various stakeholders in the setting up of ESCs Commerce.

Beyond the differences, there is a concern for convergence that inspires the work of the social partners and the European Commission in the establishment of a European Commerce sector observatory. The European social partners have also developed a common experience in this field through several initiatives, including joint opinions and actions to promote the development of skills and the vocational training in particular for specific target groups (young people, unemployed people). Since 2009, they have been working together to create a European skills observatory with the support of the European Commission.

The European Commission is committed to support this activity of the social partners and pays great attention to the work in progress. It has also laid the basis for an overview of skills in several sectors (EU Skills Panorama) in particular by using the information available to national agencies and observatories that develop long-term analyses in this domain. This initiative is part of a broader policy aimed at promoting anticipation to avoid the phenomenon of labour shortage or the inadequacy of the supply and demand for skills required by market developments. Since the early 2000s, the European Commission has also helped to develop a system of skills recognition. This is one of the objectives that the European Union has set in what was referred to as the Lisbon Strategy. Since then, several initiatives have been developed to help strengthen appreciation and facilitate the recognition of qualifications, experiences and skills within the European Union.

The second difficulty lies in the long-term approach that requires a diachronic approach, and not a synchronic one, to the issues studied. It should, in short, deal with the current developments in the commerce sector and put changes in skills and jobs in their dynamic context by avoiding, as we said, an overestimation or underestimation of changes, in particular technological changes, and avoiding not to pay attention to current transformations that alter the perception of the sector and often challenge traditional knowledge and methods of acquiring skills. Another difficulty arises here as a result of the great diversity of this sector (wholesale, retail, small and medium enterprises (SMEs), large businesses, diversity of culture and of ownership between businesses, etc. ..).The impact of new technologies will not be the same in the retail and in wholesale commerce, for example.

To take into account all the characteristics of the commerce sector, we chose to study it starting from the concept of ecosystem used by some employment agencies in Belgium, especially Forem. We will therefore talk of the commerce ecosystem. Our ecosystem approach wants to be a pragmatic one, taking into account the realities, or rather the representation that sector stakeholders (social partners, public authorities, schools) make of this domain (changes in employment, macro-economic characteristics, percentages of diplomas etc. ..). This allows to identify the levels at which action must be taken on to implement adjustment tools, support tools or the safeguarding of career paths. The lack of attractiveness of this sector, for example in a particular region, can be problematic if not taken into consideration (shortage of workforce for example in the employment area).

This approach, therefore, aims at prioritizing the tools to detect, as the observatories do, the situations from where problems may arise in terms of changes in jobs and skills. It allows:

- focus on the needs of stakeholders to anticipate in an ecosystem such as the commerce sector.
- to better understand why and how skills change, for instance, relational social skills become a factor of employability and transition from one ecosystem to another (a good seller in the craft may very well be a former mason).
- to better assess the stakes of education and training against the realities of the territory: a shortage of training schools in a particular region leads to a lack of know-how which often gives rise to a discrepancy on the answers of the human resources management: the worker will be requested to work faster to compensate for his lack of know-how, and to be quickly operational and efficient. This may leads to the "turn over" which makes the situation even worse.

It is from this perspective - the commerce ecosystem - that this report has been prepared by using as a basis an important review of the work done and reliable statistical data (Cedefop, Eurostat, etc. ..) but also using the outcome of discussions with the stakeholders involved in the sector. It is them (companies, social partners, observatories, public authorities) who are involved and give their contribution to the development of this industry by their positioning, their innovation, their actions, and therefore it is not the experts who will provide answers to all issues raised by a sector today subject to structuring dynamics, among which the development of new information and communication technologies is one of the drivers of change.

The exchanges we had with members of observatories in regular contact with companies anchored on social partners and territories at different levels, have enabled us to benefit from local information sources. Some additional interviews were made in France and Germany at four multinationals:

- Company A includes an international network of supermarkets belonging to a large French distribution group
- Group B is also a French group which has been selling in its stores cosmetics that it manufactures all across the world.
- Group C specializes in the distribution of products on internet, on e-commerce sites, from catalogue or in store
- Group D is a German group that has developed a chain of well-known do-it-yourself stores.

Exchanges with observatories have not only led to a better understanding of their functioning but also put into perspective their work in order to provide them a common and European sense. Among the identified observatories, we have been led to share with those that are located in the following countries:

In Ireland, Forfás was established in 1994 as an agency with an advisory role to the Ministry of Industry, Trade and Employment. Its main tasks are the production of independent and rigorous advice and the provision of support in the areas of enterprise policy and science. Forfas contributes to the research carried out by other independent advisory bodies such as the Advisory Council for Science, Technology and Innovation (ACSTI), the Expert Group on Future Skills Needs (EGFSN) and the National Council for Competitiveness (NCC).

The Expert Group on Future Skills Needs (EGFSN) was established in 1997; it advises the Irish Government on the needs for current and future skills of the economy and on other issues related to the labour market and having an impact on employment. It ensures that the needs for skilled workers of the labour market are anticipated and met. This group produces long-term analyzes, provides strategic advice on strengthening skills through education and training

In the Netherlands, Kenniscentrum Handel (KCH) is involved in the field of vocational training in retail, wholesale as well as international commerce. This training centre works in cooperation with companies and training organizations and ensures that the training delivered meets the skills needs of the sector. As such, KCH produces studies on the evolution of the labour market and long-term analyses of the commerce sector.

In Belgium, the Forem, that is the public service for employment and vocational training in Wallonia, organises the service " Analysis of Employment and Training Market". It gathers, generates and disseminates knowledge relating to employment and training markets. It develops its activity for the benefit of all: Individuals, companies, Forem advisors or partners and public bodies. The VDAB for the Flemish Region and Actiris for the Brussels region also provide such services.

In Portugal, the CECOA (Vocational Training Centre for Commerce) is the result of a protocol between the IEFP (Employment and Training) and the Confederation of Trade and Services of Portugal (CCP). The CECOA headquartered in Lisbon and has offices in Porto and Coimbra. It implements and develops training modules for active people, especially young people and trainers. It has 26 years of experience in the devising, planning, organization, development and evaluation of training activities. It also produces analyses on employment and training issues and provides guidance related to the future of the sector.

In Spain, the Tripartite Foundation for Training is a platform for exchange of information, guidance, and knowledge and dissemination of good practice. The foundation produces studies on the labour market and skills and training issues in various areas, particularly commerce.

In France, Forco manages the training contributions of commerce and distribution companies and finances or co-finances training activities. It has an observatory for long-term analyses on jobs and skills of retail commerce that develops tools and studies for the retail sector. For the wholesale commerce, Intergros, that is also a Co-management Certified Collector Organization also has an observatory for long-term analyses on jobs and skills of Intercompany Commerce (OIC). It has as its mission the production of qualitative and quantitative studies on jobs, careers and training in professional sectors and to ensure long-term monitoring to anticipate the evolution of careers and jobs

In Germany, the Federal Institute for Vocational Education and Training (BIBB) created in 1970 develops vocational training activities (VET) and regularly produces long-term studies on the development of training in terms of skill requirements.

Using the work of observatories and having collected the views of some human resource managers in multinational companies, our thinking was organized around three main themes which are repeated in different sections of this report

The first part, which frames the industry in its European environment.

We can hardly deal with the evolution of the commerce ecosystem without knowing the size and diversity of situations. Beyond diversity, this area deserves indeed to be considered in the context of an environment of which it is the expression but that in which it also determines the changes to come.

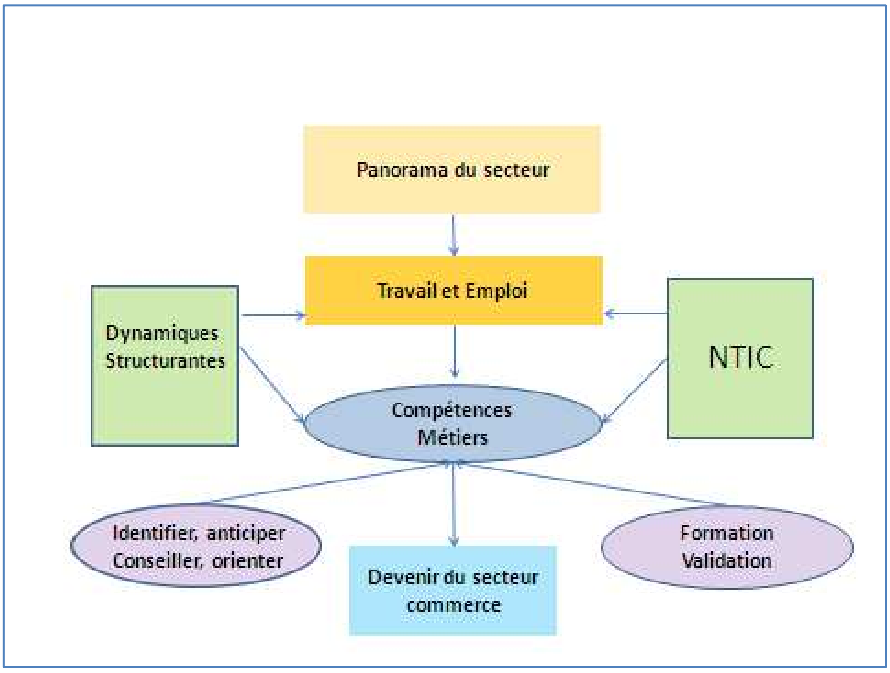
The second part deals with the drives of change with emphasis on new information and consultation technologies.

The aim here is to give the relevant characteristics to the various factors that lead to changes in this sector. The arrival of new technologies is often considered one of the main factors. Changes under way and their real impact on the development of skills and jobs should be examined through the interviews we were able to carry out.

The third part deals with job families in this sector and how to access them from training and skills development.

Faced with the transformation of work in the sector, stakeholders organise themselves to build future tools of action (training, certification, etc. ..) from the observation and long-term analysis to develop paths to new skills in order to overcome the deficits in this area and support people in their career path. From the interviews we collected, we will analyze and try to identify concerns, issues as well as answers or solutions proposed

The diagram below gives an idea of the architecture on which this report has been built.



II. Framework, changes, challenges

1. The Commerce sector: what do we talk about?

Leading sector of the economic activity in its broadest sense, *Commerce* as activity sector and in its general definition includes **two different realities** that can in turn be segmented into several sub-sectors *[depending on the nature of goods traded or the size and / or specialization of companies]:*

- **Retail commerce**
- **Wholesale trade**

Definitions:

***Retail commerce* includes all firms whose main activity is the resale (without processing) of new and used goods to be used by individuals or households.**

Retail commerce includes store sale, predominantly specialised food stores (retail fruit and vegetables, meat ...) and non-specialised ones (hypermarkets, supermarkets, grocery stores ...). It also includes in-store sale, without specialized food sale (retail sale of furniture, clothing ...) and non-specialised shops (Bazars, department stores ...). Finally, the business of repairing goods for personal use and non-store retail sale (street markets ...) are included in this sector.

Wholesale trade ***is the activity of buying, storing and selling goods generally to retailers, professional users (industrial or commercial) or communities, or to other wholesalers or business representatives****, regardless of the quantities sold.*

Business representatives *of the wholesale trade are, in turn, related to buyers and sellers (or execute business transactions on behalf of a third party), without being themselves owners of the goods (they are sales representatives, brokers, sales agents, self-employed representatives, ...).*

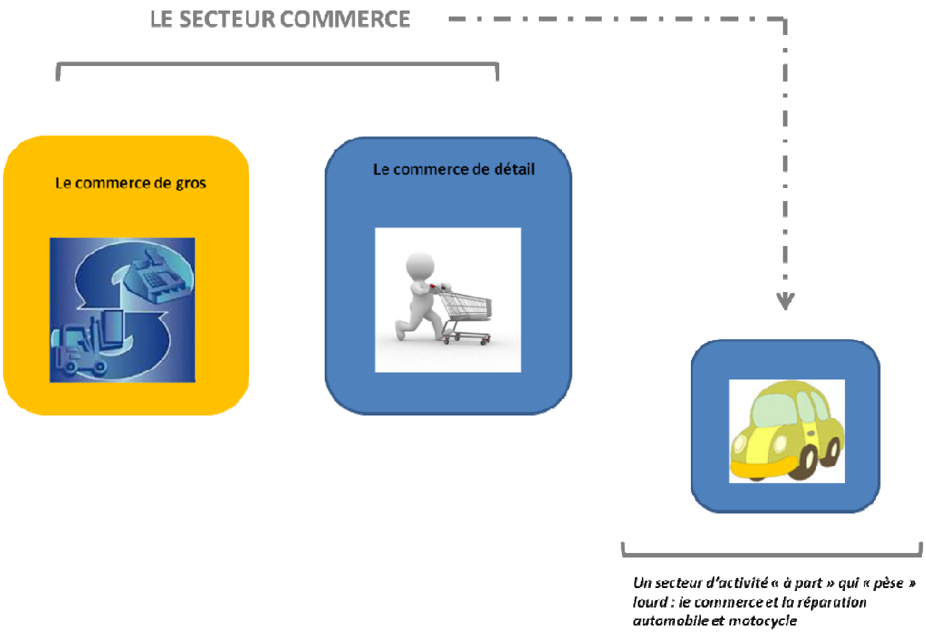
Purchase centres*, other trade brokers, may, in turn, be owners of the goods that they then give to their members and their affiliates at a very low business margin .*

Almost ***all goods*** *can lead to a wholesale trade but only some of them are sold at retail.*

For each of these two segments, the NACE nomenclature *(NAF for the French statistics)* differentiates between trade activities according to their belonging to **wholesale or retail commerce**.

For the latter, NACE codes differentiate **the retail of food or non-food products, the specialised trade** ....

(See appendix for complete nomenclature)

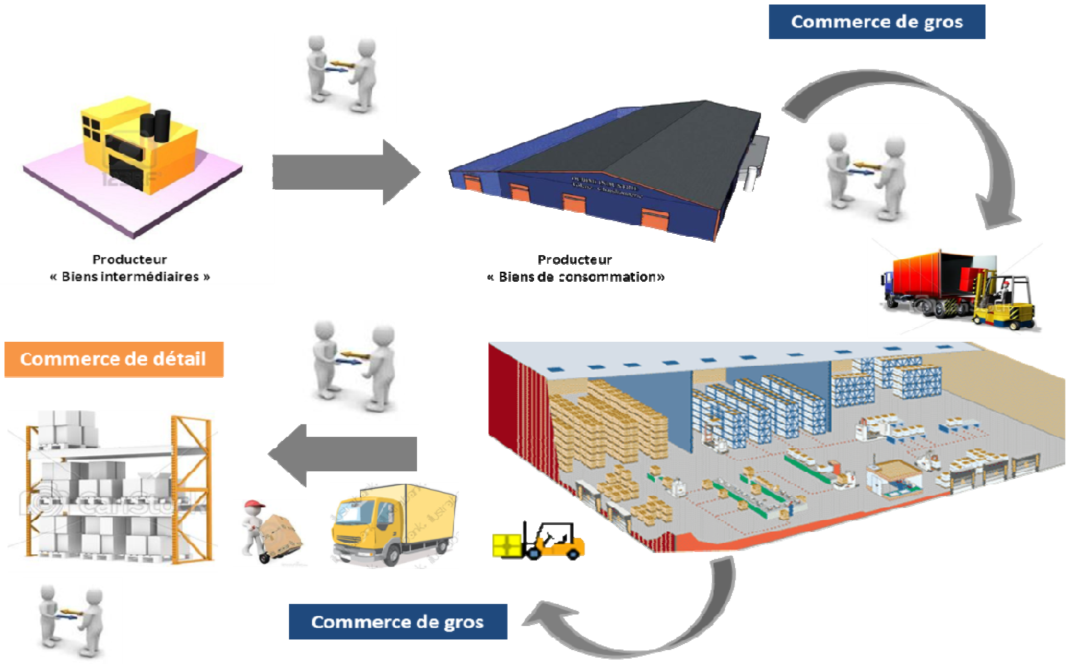


(*) Heavy goods vehicles of statistic, the sectors "Trade and repair of motor vehicles and motorcycles" is often presented "separately" and as a specific industry.

Basically, the **whole Commerce sector** covers all activities that *ultimately* allow consumers to purchase a good or service to satisfy their needs. In this perspective, **Commerce** involves **a significant number of companies and a significant amount of jobs involving a particularly wide range of professions .**

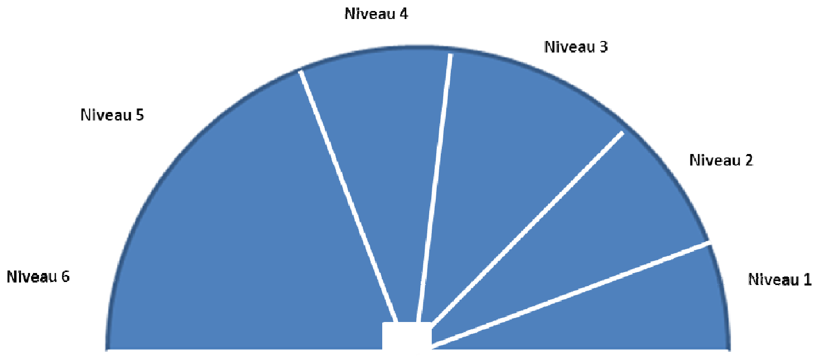
1.1. The weight of the Commerce sector in Europe

From producer to consumer**, commerce** covers a whole set of steps that **create activities, value added and jobs** *(direct, indirect and induced)* that weigh heavily in the overall economic activity of the European space.



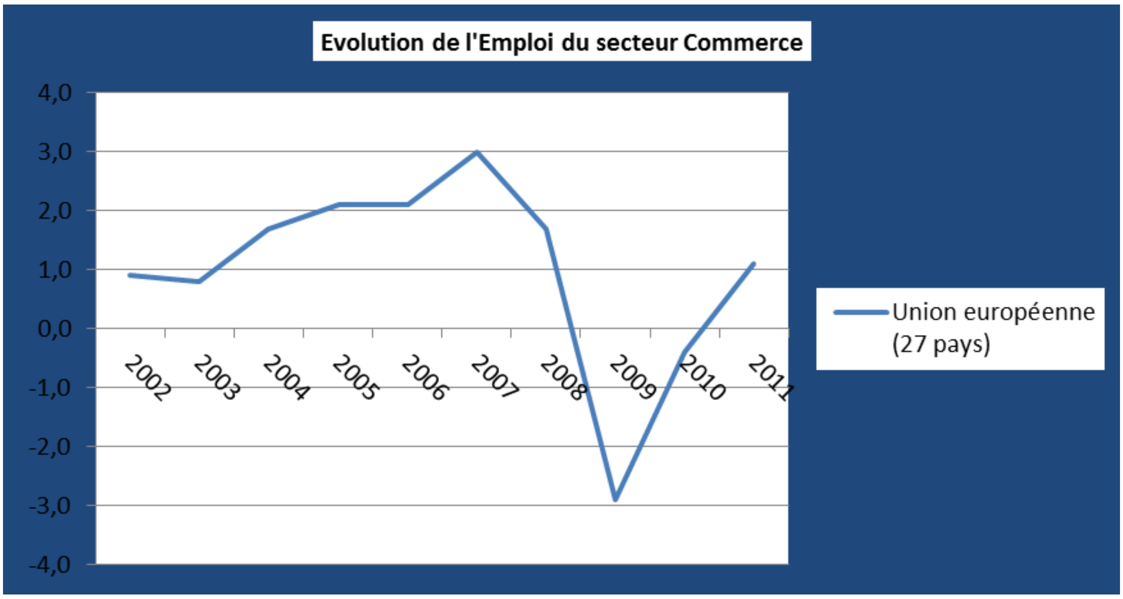
Employment

On this vast chain of value creation, all skill levels are represented, from Engineer (Level 1) to the employee without qualification (level 6).



In terms of volume of employment, the sector has experienced a continuous growth of jobs in recent years.

And although the crisis of 2008 has marked a sharp break in this progression, the number of jobs in this sector is now again on the rise despite the persistent high unemployment rates:



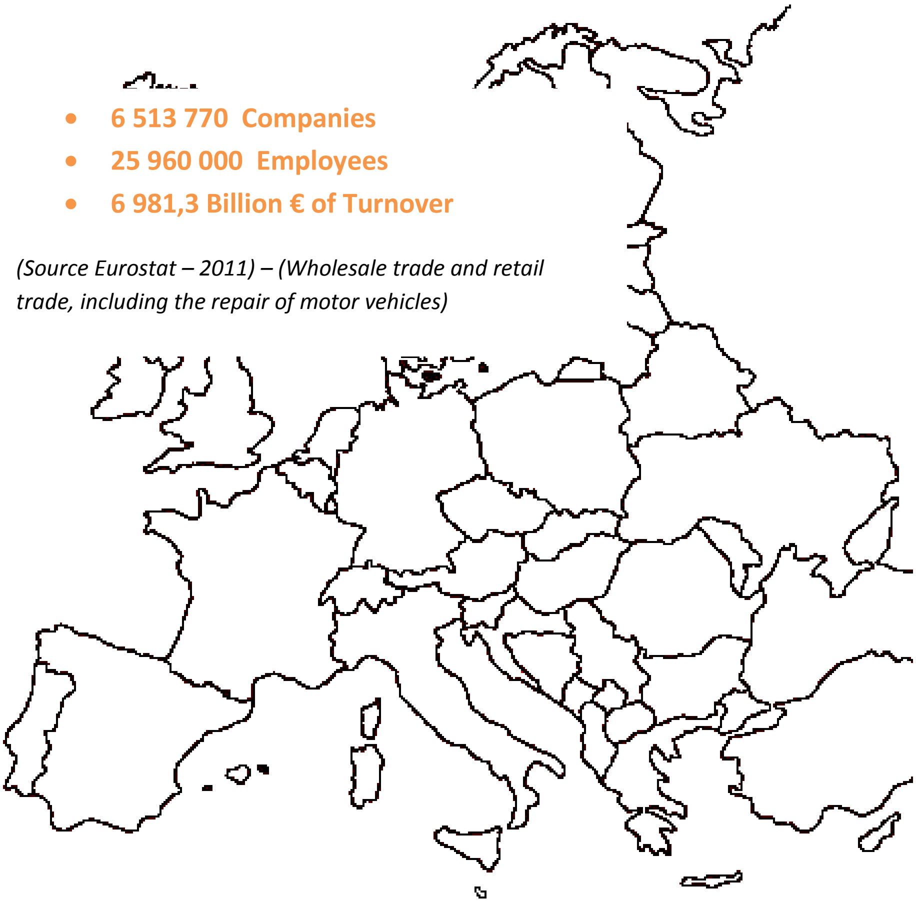
Change in percentage compared to the corresponding period of previous year

(Source: Eurostat)

THE COMMERCE SECTOR IN EUROPE

- **6 513 770 Companies**
- **25 960 000 Employees**
- **6 981,3 Billion € of Turnover**

(Source Eurostat – 2011) – (Wholesale trade and retail trade, including the repair of motor vehicles)



1.2 The Commerce sector in Europe: different realities in different States

There are several ways to approach a comparative study of the trade sector in Europe:

- The economic and social weight of this sector according to the turnover generated and the number of jobs
- The organization of the sector by size (sales area, effective ..)
- The nationality of the main actors involved in the markets that reveals gross organizational trends and the economic models pursued

- The quantitative developments in international exchanges and the integration of States in the movements of international trade

- The regulations (laws) that govern the evolution of organizational models

- …

The purpose of this overview is to give some points of reference more than to develop a thorough analysis of the sector. Therefore we have chosen to put together a number of studies and complement them with the available existing information and statistics, and use all this to clarify the rest of this report.

Documentary sources: *INSEE Studies* *Eurostat (data processing and analysis ALPHA Group)* *Study Ministry*

For reasons of "easy reading and presentation" we will successively and specifically present data relating retail commerce and wholesale commerce

1.3. Retail Commerce

1.3.1. The evolution of socio-economic models of distribution

"Today the standard of living, consumption patterns and cultural, economic and legislative difference shape opposed business environments within the European Union and model the different expectations of customers.

In the South*, markets are more fragmented and specialized food trade is still very present.*
In the East, the turnover grew faster then elsewhere [between 2000 and 2006].
But this growth is more moderate in ***the five major markets: UK, Germany, France, Italy and Spain.***

The commercial structure of Eastern European markets tends to get gradually closer to that of Northern or Southern countries."

(From *"The retail sector in Europe"* - INSEE Study – n.1268 INSEE PREMIERE)

1.3.2. Framing Data

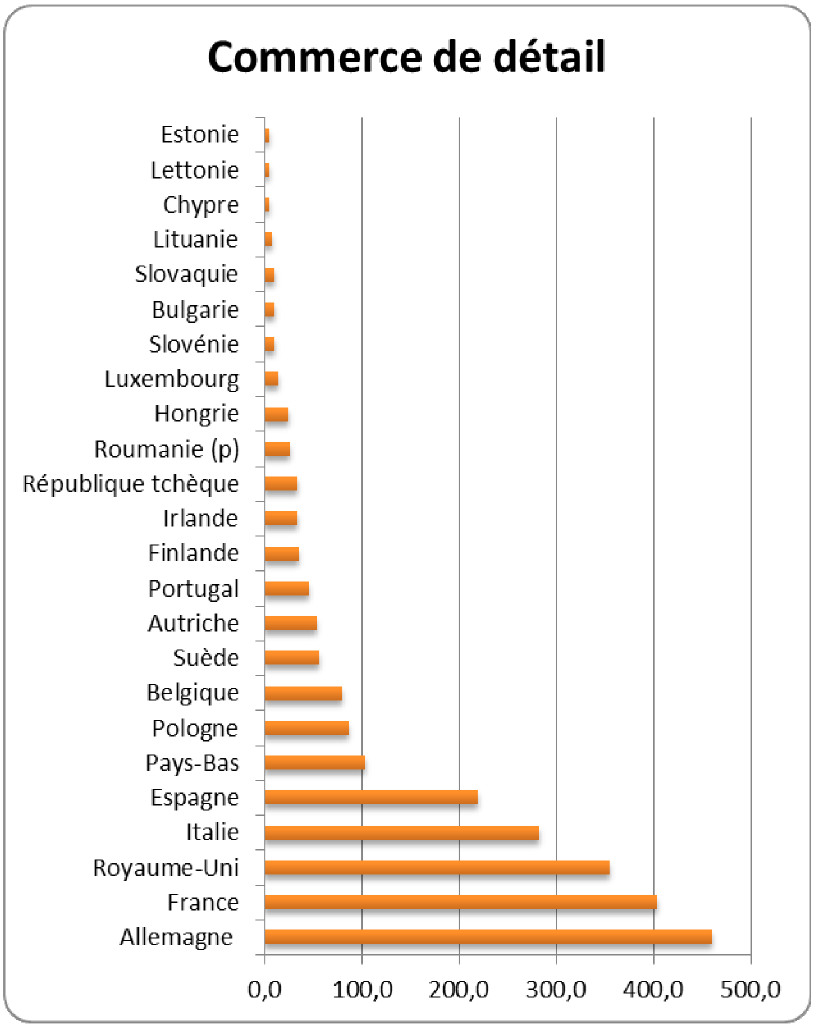
In 2006, within the European Union, **3.8 million enterprises were** active in the retail sector.

They employ **17.4 million** people

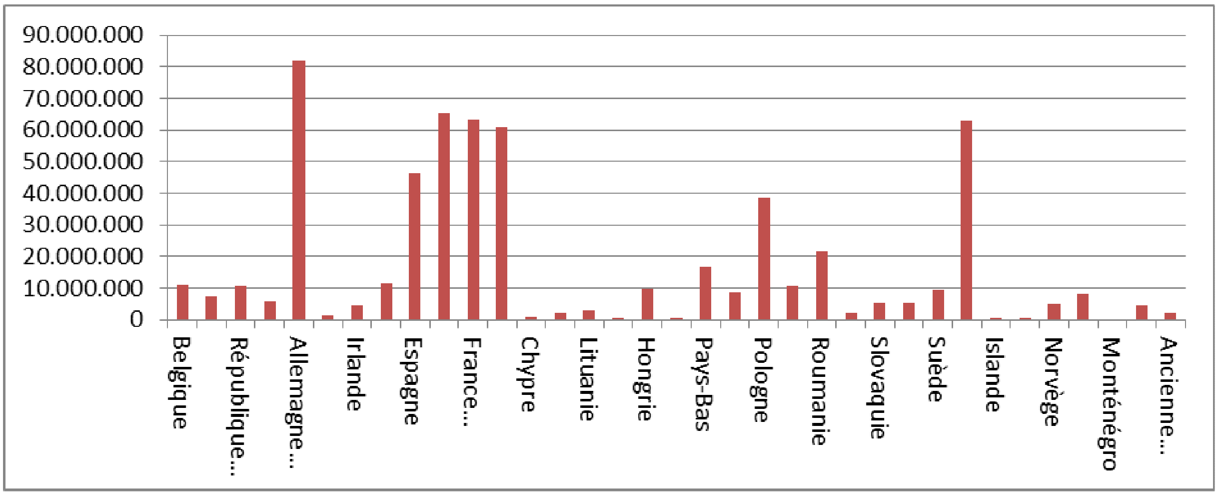
And achieve a turnover of **2,271 billion Euros.**

They contribute for **7.4% to the value added of non-financial commercial activities,** this share being between 5% and 9% for most countries

In fact according to the states, the weight of **Retail commerce** varies**:**



Source: Eurostat – Turnover of the Retail commerce in Billion € in 2009 (excluding trade and repair of motor vehicles and motorcycles)



Source: Eurostat - Population by country (2012)

Which remains "consistent" with the level of development of states and their population

1.3.3. Urbanization and large sales areas, or predominance of retail sales by small businesses

In 2006, within the European Union, 3.8 million enterprises were active in
Retail commerce.
They employed 17.4 million people and generated a turnover of 2,271 billion Euros and contributed for 7.4% to the value added of non-financial commercial activities,

This part ranging between 5% and 9% for most countries.

The share of retail commerce in employment is the highest: 13% on average,

But on this indicator alone, the differences between States are significant: ***more than 16% in the UK and over 20% in Cyprus and Greece.***

The differences in the European trading landscape are due to multiple factors, such as size and market dynamics, but also socio-demographic factors that may act in opposite directions:
Some, such as urban concentration or population density tend to increase the commercial density;
Others, such as automobile equipment rate of households, favour a lower commercial density.

1.3.4. The organization of Retail Commerce by State

Today the standard of living, consumption patterns and cultural, economic and legislative difference shape **opposed business environments within the European Union** and model the different expectations of customers.

In the South, markets are more fragmented and specialized food trade is still very present.

In the East, the turnover grew faster then elsewhere.

But this growth is more moderate in **the five major markets**: UK, Germany, France, Italy and Spain.

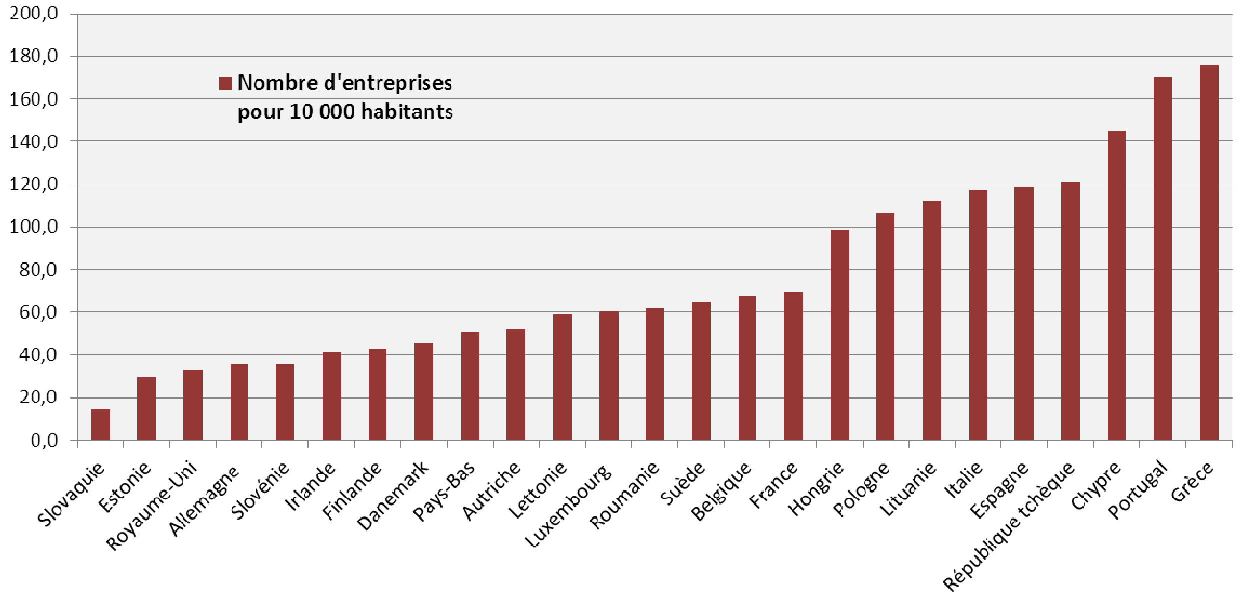
The commercial structure of Eastern European markets tends to get gradually closer to that of Northern or Southern countries.

A more fragmented commerce in southern Europe

In Germany and in the United Kingdom, the average number of retail businesses per 10,000 inhabitants is relatively low, a little over 30 against 75 on average in the European Union.
These companies, however, are large enough: they provide employment to an average of 15 people in the UK, against a little more than 6 people for the whole of Europe.

In contrast, Spain and Italy, with a relatively well developed commercial network, have about 120 enterprises per 10,000 inhabitants but their size is smaller (three people on average).
France is in an intermediate situation, with nearly 70 companies per 10,000 people, these companies employing an average of four people

Number of enterprises per 10,000 inhabitants

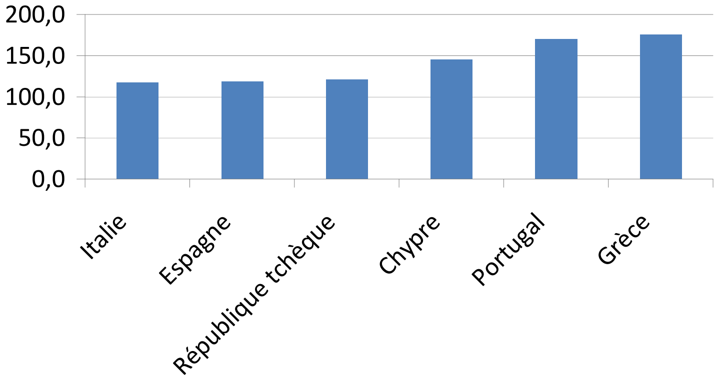


More generally, small structures predominate in the south of Europe (Cyprus, Italy, Greece, Portugal).
These differences are found in greater or lesser establishment of small specialty food shops, such as butchers, fish or vegetables shops, which are opposed to larger businesses such as non-specialised food shops such as supermarkets or hypermarkets.

In countries where markets are more concentrated, the number of specialty food shops is relatively low:
4 to 5 companies per 10,000 inhabitants in the United Kingdom and Germany, and two companies per 10,000 inhabitants in Finland.

In contrast, this rate reaches 27 specialty food shops per 10,000 inhabitants in Greece and Spain and 29 in Portugal, where the situation is more fragmented.

The 6 leading countries of the European Union in terms of density of specialized food shops.



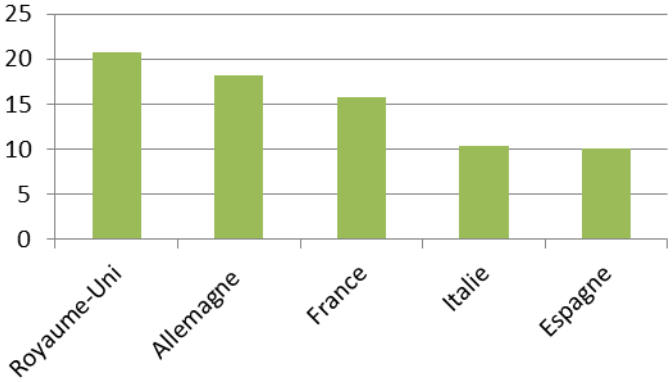
United Kingdom, Germany, France, Italy and Spain: 75% of the added value

In five countries, the United Kingdom, Germany, France, Italy and Spain, markets have an important size.
Each of them contributes **more than 10% of the added value of retail commerce in the EU**

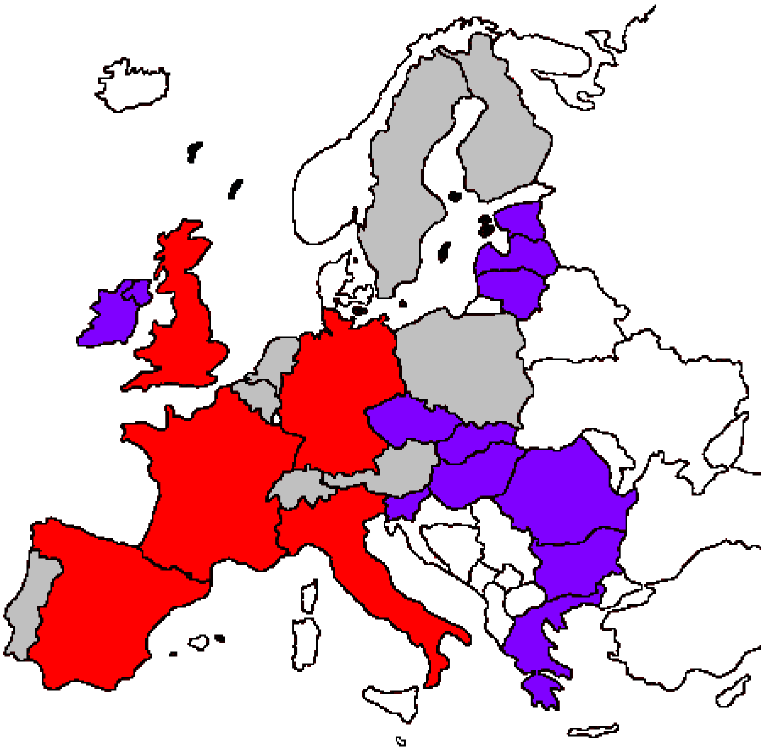
Together, they account for 75% of this value and account for two thirds of the European population in employment.
The average growth rate of the turnover of their retailers is lower than the one of the EU *(around 4% per year between 2000 and 2006).*

Intermediate markets have a moderate growth and are smaller. They realise 18% of the added value of the European retail commerce.
In these countries, the average annual growth of the turnover of the retail commerce in the 2000-2006 period does not exceed 7%.

The first five contributions to the value added and the number of persons employed in retail commerce in the European Union



A breakdown of the European markets into three groups based on their size and dynamics



large markets

The high growth markets

The intermediate markets

High-growth markets in Eastern Europe

European countries in which the turnover of retailers grows most strongly are mainly located in the East.
Most of them have recently joined the European Union, in 2004 or 2007: Hungary, Slovakia, Romania, Estonia, Lithuania, Latvia, Slovenia, Czech Republic and Bulgaria.
These high-growth countries, where more than 20% of the European population lives, account for nearly 8% of the value of retail commerce in the European Union.
Markets are small, but the growth of retail turnover is very high: 11.7% per year on average, and even close to 16% for Slovakia.
In these countries, 12.4% of the employed persons in all non-financial commercial activities work in the retail sector, that is, the average of the European Union.

1.3.5. Measuring the convergence of different markets

a) Ascending hierarchical classifications

Classification methods allow the grouping of observations (here, of countries) that have similar characteristics.
In this study, several ascending hierarchical classifications were performed in order to determine the similarities between the different European countries, and this over several years.
We must analyse towards which models the commercial situation of the countries of Eastern Europe tends:

- Fragmented trade
- Concentrated trade
- Another model ...

In the classifications, the Ward criterion was used, which means that the ascending hierarchical classification maximizes the interclass variance and minimizes the intra-class variance.
These classifications were carried out for the years 2000 and 2006 and cover all the countries of the European Union, with the exception of Belgium, Bulgaria, Greece and Malta whose data are missing.
Seven discriminating variables were used for the classifications:

- The average turnover of retail businesses by company;
- The average turnover of retail businesses per capita;
- The average value added of retail business per capita;
- The number of retail commerce companies per capita;
- The number of persons employed by retail companies;
- The number of specialty food shops per capita;
- The number of enterprises per capita in the retail commerce.

These variables reflect in particular the size of the commercial players (e.g. in terms of turnover or employment) and their concentration, while glossing over the effect of the size of countries.

The speed of convergence of the various markets of Eastern Europe towards the predominating European models is appreciated by the modification of their "distance" towards other countries.

For this, two groups were formed:

Northern countries: Austria, Germany, Ireland, Netherlands, Denmark, Finland, France, Sweden, Luxembourg and the United Kingdom;

Southern countries: Cyprus, Spain, Portugal and Italy.

Ascending hierarchical classifications provide a measure of the "distance" (Ward distance) between each of the markets in Eastern Europe and the centres of gravity of these two groups in 2000 and 2006.

The "distance" between the Eastern countries more similar to the northern countries (Slovenia, Estonia, Latvia, Slovakia) and the Northern countries has fallen sharply between 2000 and 2006 *(Table 1).*

It decreased by 24% for Slovenia.
Slovakia is among these four countries the one that is the farthest from the Northern countries. However, it is much closer to the Northern countries than to the Southern ones (3.1 versus 4.6).

The other Eastern European countries *(Table 2)* have get closer to the Southern ones.
The "distance" between Hungary and the countries of the South has significantly reduced: -58%.
Poland and the Czech Republic, already very close to the Southern countries in 2000, were a little closer in 2006.

Table 1: "Distance" between some countries of Eastern Europe and the countries of Northern and Southern Europe

Country	**"Distance" with the Northern countries in 2000**	**"Distance" with the Northern countries in 2006**	**Evolution of the "distance" with the Northern countries between 2000 and**	**"Distance" with the Southern countries in 2006**

			2006	
Slovenia	2.6	2.0	-24 %	3.5
Estonia	3.2.	2.8	-13 %	4.6
Latvia	3.4.	2.9	-15 %	3.7
Slovakia	3.8	3.1.	-19 %	4.6

Table 2: "distance" between other countries in Eastern Europe and the countries of the South and the North

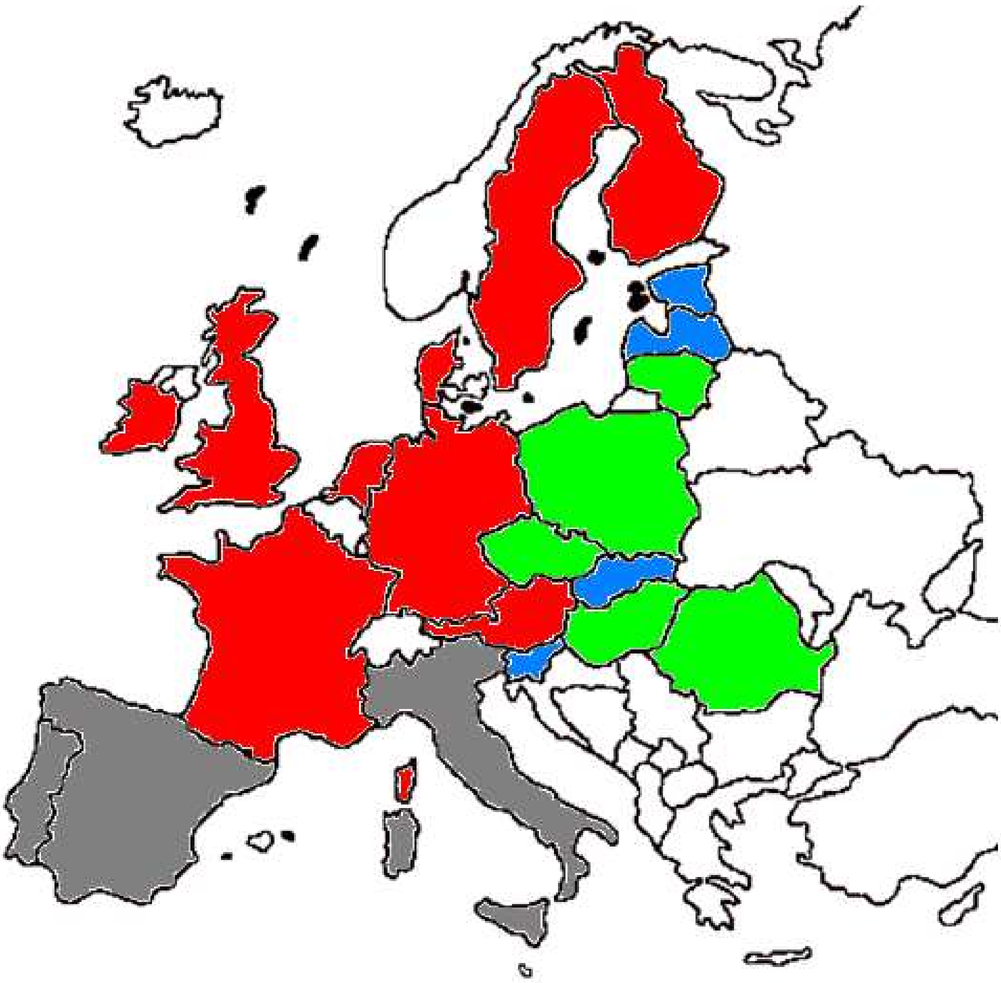
Country	**"Distance" with the Southern countries in 2000**	**"Distance" with the Southern countries in 2006**	**Evolution of the "distance" with the Southern countries between 2000 and 2006**	**"Distance" with the Northern countries in 2006**
Czech Republic	2,5	2,2	-10 %	4,0
Hungary	5,5	2,3	-58 %	3,6
Poland	2,5	2,4	-4 %	3,8
Lithuania	4.2	3,0	-28 %	4,1
Romania	*3.5*	3.2.	-9 %	3,7

b) Convergence of the commercial structure of eastern Europe towards that of other European countries

Over the last few years, the commercial structure in these countries was transformed and now tends to get closer to that of the rest of the European Union.
The internationalization of brand names contributes to this, as well as the evolution of consumption patterns.

In the early 2000s, the retailers in Eastern countries realized a relatively low turnover and the density of specialised food shops was low. In 2006, these countries did no longer form a group as homogeneous (Box 1). Estonia, Slovakia, Latvia and Slovenia have a business landscape that is similar to that of northern Europe, with a concentrated commerce (Box 2).

In contrast, Romania, Lithuania and Hungary have a greater proximity with the countries of southern Europe: a highly fragmented commerce, comprised of many companies with a small number of staff.



Northern Countries
Southern Countries

Eastern countries similar to the Northern countries
Eastern countries similar to the Southern countries

Undoubtedly, the retail sector is a major player in a balanced territorial management and sustainable development, and its expansion within States accompanies the more global development and growth of living standards of people.
In 2008, France (*that then held the Presidency of the EU*) launched an extensive survey in the 27 member states on this issue.

"THE RETAIL COMMERCE, ACTOR OF A BALANCED TERRITORIAL MANAGEMENT AND SUSTAINABLE DEVELOPMENT"

The overview of the retail commerce in the countries of the Union presented on this occasion has the great merit to show how important commerce is for the economies of all the countries of the Union.

It also highlights the universal nature of the social dimension of commerce, an essential activity for social bonds, the bustling daily life and local development, as well as the convergence of the issues encountered by commercial activity in member countries at the forefront of which is the **need to build the necessary coexistence between local shops, the large distribution industry and commerce activities in shopping centres.**

Finally, beyond these common features, beyond the understandable differences and disparities in an economic union of 27 states, we can see that **in many countries there are policies and administrations** that promote the development of commercial activities and their organization.

In fact the evolution of the "models" presented above and the convergences found are due both to the structural elements of the markets and to the result of policies pursued by the various states.

*[Extract from the report of the investigation **" THE RETAIL COMMERCE, ACTOR OF A BALANCED TERRITORIAL MANAGEMENT AND SUSTAINABLE DEVELOPMENT "]***

1.3.6. The institutional landscape of retail commerce

a) the Structures of the central administration in charge of retail commerce:

12 countries have administrations dedicated to commerce: Cyprus, Denmark, France, Greece, Ireland, Lithuania, Malta, Portugal, Czech Republic, Romania, Slovakia

• Five countries have a specific ministry (Cyprus, Ireland, Czech Republic, Romania), associated with either industry and / or tourism, or in Ireland, with the entrepreneurship and employment;

• Portugal has a Secretary of State for Commerce, Services and Consumer protection and France has a Secretary of State for Commerce, Crafts, SMEs, Tourism and Services .

• Five countries have a directorate or a dedicated department within the Ministry of Economy (France, Greece, Lithuania, Malta, Slovakia). Slovakia has a department of commerce and domestic market.

• Denmark has an agency dedicated to commerce and business, under the aegis of the Ministry of Economy, Commerce and Industry.

13 countries manage trade through nonspecific directorates and departments : Austria, Belgium, Bulgaria, Estonia, Finland, Hungary, Italy, Latvia, Luxembourg, Netherlands, Poland, Slovenia.

The areas of intervention of these structures are very diversified: economy, economic development, investment, domestic market, tax, competition and consumption, labour, food security, health and medicine, SMEs, middle class, energy, architecture and urban development, infrastructure .

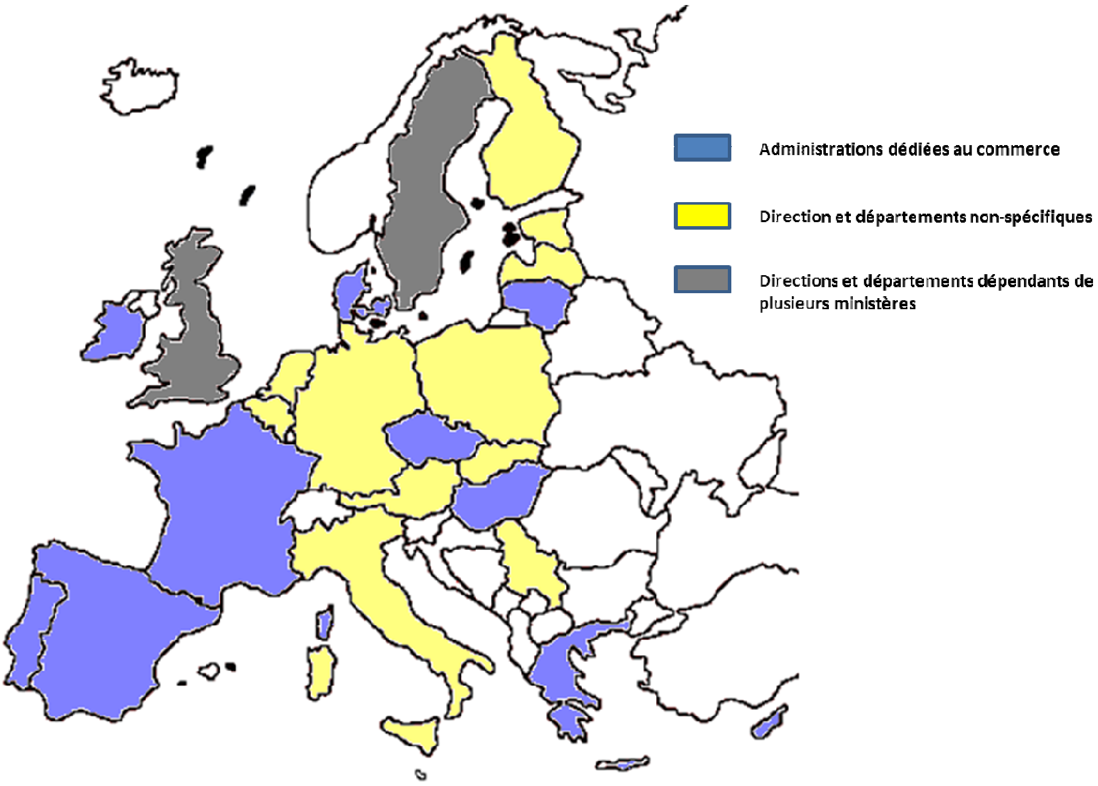
In Finland, commerce is supported by various divisions or departments of the Ministry of Employment and the Economy, that recently integrated the Ministry of Commerce and Industry, the Ministry of Social Affairs and Health and the Ministry of Environment, Agriculture and Food Security.

In the United Kingdom and Sweden, commerce is supported by several directorates and departments under several ministries.

• Sweden mentions the Ministries of Foreign Affairs, Integration and Gender Equality (for policy towards the consumer), Environment (for the allocation of land for economic activities) Agriculture, Enterprises (for the economic environment), Energy and Communications. The directorates and departments dealing with commerce also covers innovation and regional development.

• In addition, in the United Kingdom, the Department for Business, Enterprise and Regulatory Reform (BERR) coordinates relations between the government and the commercial sector and there are also specific regulations in Scotland and Wales.

Structures of central administration in charge of Retail Commerce in Europe



b) Local levels supporting retail commerce

The role of local institutions is particularly prominent in eight countries:

Austria, Finland, France, Italy, Portugal, United Kingdom, Slovakia

- **Germany** mentions the presence of dedicated ministries in each German Land (16).

- **Austria** mentions support by nine federal regions.

- **France** indicates regional delegations of commerce and crafts.

- **Finland** mentions the 15 regional centres for employment and economic development and the 13 centres for regional development.

- **Italy** stresses that since 2001 the policy of commercial support is entrusted to the regions.

- **Portugal** evokes the intervention of five regional directorates for economy.

• **The UK** mentions the Department for "Enterprise, Commerce and Investment" in Northern Ireland and the department for "Economy and Transport" in Wales and Scotland, as well as the Office of Fair Trading of Northern Ireland.

• **Slovakia** indicates the role of the eight regions.

The role of municipalities is highlighted by six countries:

Austria, Bulgaria, Lithuania, Netherlands, Poland, Slovakia.

Bulgaria mentions their role in the issuing of trade licences, Lithuania on local commerce issues and Poland for land use and planning permissions.

The importance of local levels is highlighted by five countries:

Spain, Ireland, Latvia, Netherlands, Poland.

• **Spain** mentions dedicated structures in both the autonomous communities and municipalities.

• **Ireland** emphasizes that the commercial activity has a local monitoring.

• **Latvia** evokes decentralization at the local level of the regulation of business practices.

• **The Netherlands** indicate that provinces and municipalities are involved, but without having structures dedicated to commerce.

• **Poland** mentions the role of regions and departments for the control of legality of the urban district.

c) The weights and components of the retail commerce in the European countries

In the EU, retail commerce represents about **3.8 million companies, that is, 60% of all commercial enterprises. It represents 55% of jobs in commerce, and provides 28% of its turnover and 38% of its value.**

In each country, the retail commerce has a specific profile, linked first to the market size and its recent developments (mature market, growing or new market), and it counts for a more or less important weight in the economy. The needs and habits of consumers, the topology of the regions and the strategies of the players have established some commercial landscapes suited to each country, but which may have similarities.

For example, the retail food commerce is carried out in non-specialized stores with food predominance (hypermarkets, supermarkets ...) or in specialty stores, and a greater proportion of specialty stores reflects the influence of a more traditional commerce. Across the European Union, the retail food commerce is carried out for 86% in non-specialized stores. In France, the share of non-specialized stores is relatively more important (93%), but it is even higher in Slovenia, Estonia, Latvia and Lithuania (over 95%). Conversely, the share is lower in Greece, Spain, Poland and Cyprus (80% less).

From the disparity in the size of markets and recent dynamics, the survey examines the weight of the retail commerce in the market sectors and discuss some elements of differentiation in terms of formats, *[in a not exhaustive way due to the lack of precise comparable data].*

1.3.7. Markets of different sizes ....

Of the 25 countries for which comparable data on commerce activities are available for 2005, **four groups of countries emerge in terms of turnover**:

- **Five countries where the commerce activity in 2005 had a turnover of over 100 billion Euros**

Germany, Spain, France, Italy, United Kingdom.

These countries have more than 200,000 businesses and over 500,000 businesses in the case of Italy and Spain, where the share of traditional commerce is still important.

Each contributes for over 10% to the value of retail commerce in the EU and they together generate more than three quarters of this value.

- **Six countries where the turnover of the commerce activity in 2005 was between 40 and 100 billion Euros** :

Austria, Belgium, Greece, Netherlands, Poland, Sweden.

These countries have different commercial structures:

Poland has nearly 400,000 businesses and Greece nearly 200,000 businesses, while the other countries in this group have less than 100,000. The contribution of each of these countries to the value of retail commerce in the EU varies between 2% and 10% and all together they account for 15% of this value.

- **Six countries where commerce activity in 2005 had a turnover between 10 and 40 billion Euros:**

Denmark, Finland, Hungary, Ireland, Portugal and Romania.

Within this group, Hungary, Portugal and Romania are characterized by a large number of businesses (100,000-200,000 businesses), the other countries have less than 30,000.The contribution of each of these countries to the added value of retail commerce in the EU is between 0.4% and 2%, this group totalling nearly 9% of this added value.

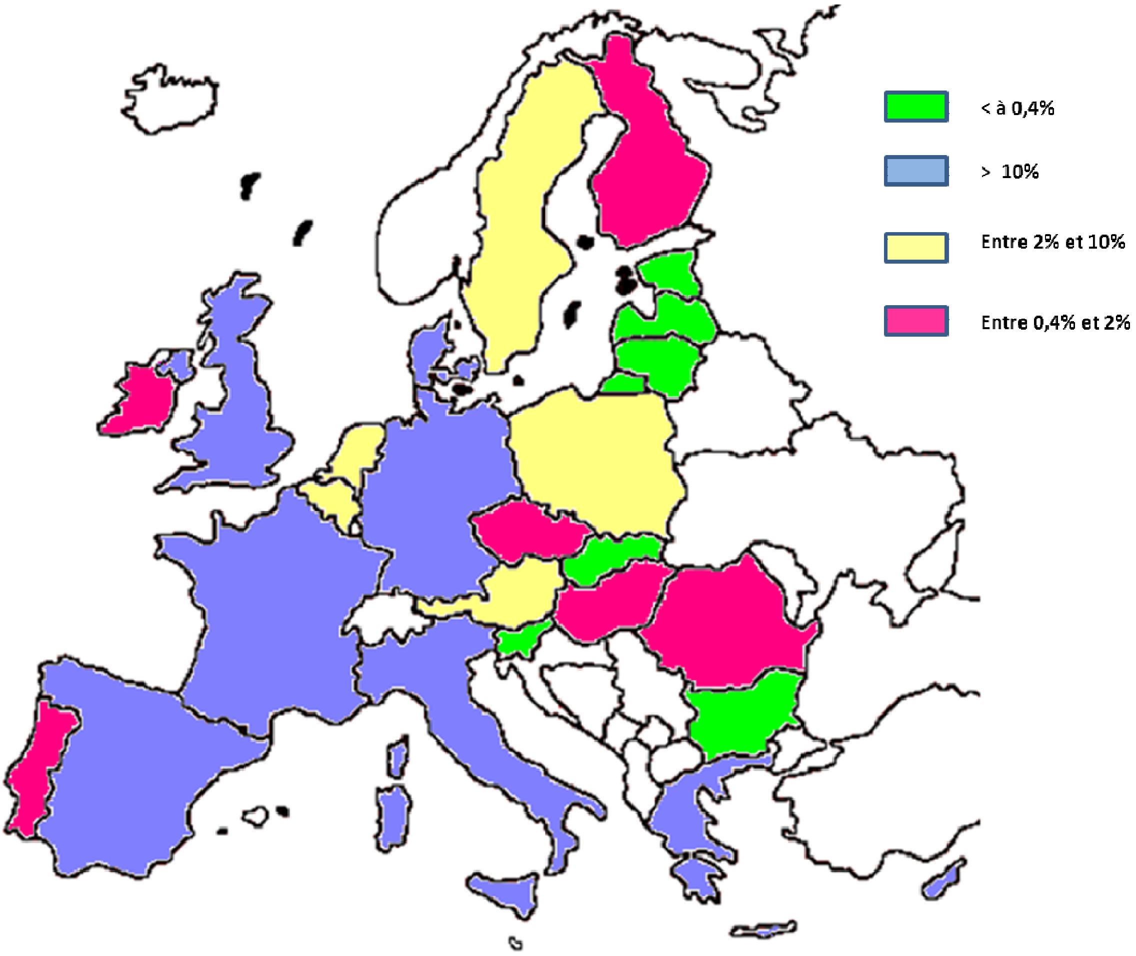
❖ **Eight countries where the turnover of the commerce activity in 2005 was less than 10 billion Euros:**

Bulgaria, Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Slovakia, Slovenia.

These countries have sometimes relatively fragmented commerce structures:

Bulgaria has over 90,000 business and Lithuania over 30,000, while the other countries have between 3000 and 15 000 businesses. These countries account for just over 1% of the added value of retail commerce in the European Union.

The contribution of each member country to the total added value of retail commerce in the EU



... WITH DIFFERENT GROWTH DYNAMICS

In terms of jobs, the weight of these four groups is slightly different:

Returning to the above classification according to the turnover, we can assess the role of each of the four groups of countries in terms of total employment in the retail commerce in the European Union and compare it with the share of added value.

- **The first group (75% of added value) employs 65% of the total people working for the European retailers;**
- **The second group (15% of added value) employs 20% ;**
- **The third group (9% of added value) employs 11%;**
- **The fourth group (1% of added value) employs 4%.**

The slight difference among these contributions can be explained by the more or less traditional character of retail commerce: thus, the retail commerce in Romania employs about 3% of the employed people and contributes for less than 0.5% to the total added value.

The evolution of turnover between 2000 and 2005 provides evidence on the dynamics of retail commerce in the 25 countries for which we have this information:

The development of commerce is relatively in line with the growth of the economy and the countries in which the retail commerce has grown strongly between 2000 and 2005 recorded a relatively strong GDP growth. In contrast, the situation is different in countries where retail commerce is growing slightly.

We identify three areas of differentiated growth:

- ❖ **Countries that have experienced very strong growth in the turnover of retail commerce between 2000 and 2005**

It's basically the small size markets that are growing very strongly and the number of employed persons has increased sharply. They are, for the most part, markets of countries of recent accession to the European Union: Bulgaria, Estonia, Latvia, Lithuania, Romania, Slovakia and Slovenia.

• Some countries reported 12% to 15% average annual increase in turnover between 2000 and 2005: Bulgaria reported a very strong development of the durable goods sector, noted a sharp acceleration since 2005 and recorded an average annual growth in employment of around 4% in retail commerce between 2000 and 2005; Slovakia, that had known a boom in the 1990s, reported a strong growth of commerce in non-food goods, equipment and construction and renovation products, and an average increase in employment of about 5% per year; the turnover also increased sharply in Romania, Estonia and Latvia, the latter two showed a strong employment growth in the 2000s; Latvia had also a very strong growth since 2005. Greece would fall also in this group, emphasizing a particularly strong growth for food supermarkets and multi shops.

• Other countries recorded a strong annual average growth in their turnover from 8% to 9%: Lithuania reported that the turnover has more than doubled in the non-food segment, with strong growth in sales vehicles, fuels and non-food items. Slovenia also highlighted a strong growth in non-food commerce. Ireland and Hungary also belong to this group, indicating that the Hungarian food industry contributes more than a third to the growth in sales.

In addition, only Bulgaria, Romania and Slovenia declare an increasing in the number of shops, while Hungary suggests a stabilization occurring after a period of increase combined with a continuing decline in the number of businesses and Lithuania refers to a decrease in the number of shops since 2003.

❖ **Countries showing a more moderate growth in their turnover of retail commerce,** between 3% and 7% of average annual growth

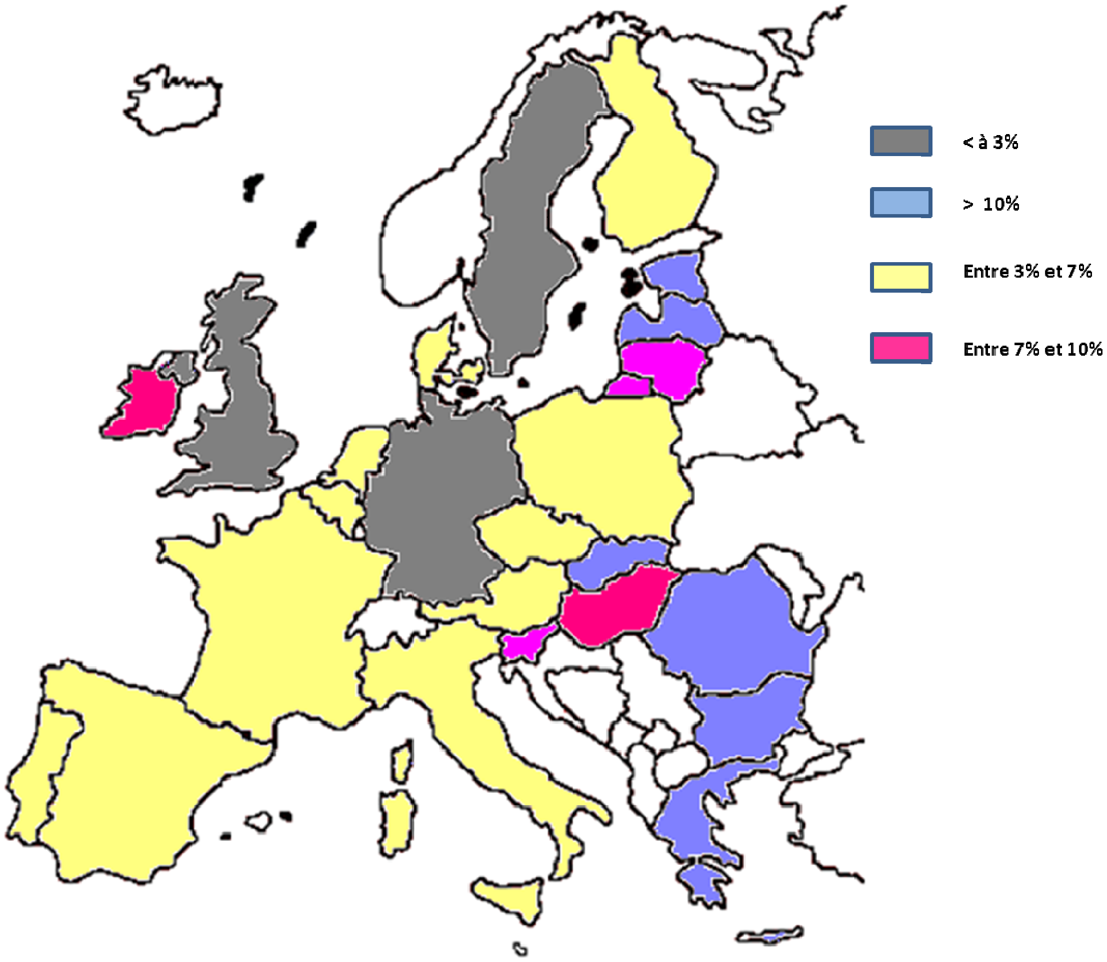
These countries are generally characterized by more "mature" markets (Austria, Belgium, Denmark, Finland, France, Italy, Luxembourg, Portugal) and many reported a stagnation or decline in the number of outlets. Portugal only highlights a sharp rise in the number of businesses in the retail sector.

Cyprus, Poland and the Czech Republic, where employment growth remains moderate in retail commerce, also belong to this group, as well as Malta, which indicates growth in all sectors of retail commerce, except in the sales of second-hand goods and repair services.

❖ **Some countries with a limited increase in retail commerce turnover between 2000 and 2005**

In these countries, commerce may have reached an equilibrium phase. In Germany, the Netherlands, the United Kingdom and Sweden, turnover increases by about 2% on average. This slow growth is associated with a stabilization or even a decline, in employment.

The average annual growth of retail commerce in the countries of the European Union



1.3.8. The different forms of marketing

Within each country, the allocation of market shares of different forms of marketing depends on many factors related to market size, demographics, conditions and lifestyles ... as well as regulations.

This context of forms of marketing, including the participation rates of women, the rates of car ownership, the rate of urbanization, lifestyles, population density, the price of land ... is evoked by some countries when talking of policies affecting commerce. Few data are available at retail outlets, but we can however discuss the following:

Approach by the average size of firms

Firm size in retail commerce varies widely by country. Across the European Union, the average number of persons employed per enterprise is 5 people, but this varies from 2 to 3 people in Greece and Italy, 16 people in the UK, which indicates, however, a predominance of small businesses and single shop locations.

In addition, the average size of firms depends on the level of establishment of large areas in each country and especially in the food sector, of the respective shares of hypermarkets and supermarkets.

• The importance of employment in small structures is emphasized by Belgium, with 50% of jobs in SMEs, and Greece, with one-third of self-employment. In addition, Portugal states that the majority of firms employ only one person, and Germany says that the share of SMEs with fewer than 10 employees remains important, despite the process of concentration of the industry and the strength of "discounters".

• The importance of employment in large structures is suggested by Poland, with over one-third of jobs in major retail chains; by Austria, which highlights the growth in the share of employment in large groups, and by Lithuania, which states that the most dynamic sales points had more than 50 employees in 2006. Latvia also reports that the number of small shops fell slightly, while the number of supermarkets is increasing.

Approach by the distribution of sales spaces depending on the activity

The distribution of sales spaces reflects particularly the share of predominantly food commerce.

Among the countries for which information was available in 2004, three groups can be distinguished:

• Countries with predominantly retail food stores occupy more than half of sales areas: Bulgaria, Finland, Lithuania, Romania, Slovakia. The share of specialised stores is quite low, except in Finland and, to a lesser extent in Bulgaria.

• Countries whose predominantly retail food stores occupy 40% to 50% of sales areas: Estonia, Hungary, Czech Republic, Sweden. The share of specialised stores is quite low, except in Sweden.

• Countries whose predominantly retail food stores occupy 25 to 35% of sales areas: Austria, France, Greece, Portugal, United Kingdom. The share of specialised stores is quite low, except in Greece, Spain and Portugal.

Additions are made to this plan by:

• Poland, which notes the explosive growth of hypermarkets and supermarkets in 2007 in anticipation of the entry into force of the Regulation Act.

• The Czech Republic, which highlights consumers' preference for hypermarkets rather than supermarkets.

• Slovenia, which highlights a decrease of food outlets and small shops in downtown areas and a growth of non-food outlets and supermarkets.

Moreover, the importance of the food sector is mentioned in particular by Bulgaria, France, Hungary, Italy, Poland and Portugal.

In contrast, its relative weakness is highlighted by Austria and Finland.

Approach by various forms of organization

Some countries - Austria, Bulgaria, Finland, Slovakia - cited the particular development and vitality of malls or independent networks.

• Austria indicates a strong growth in the turnover of its 170 malls, 47 of which are specialized shops, and a higher productivity than that of the traditional sales points.

• Bulgaria indicates that 20% of the market is made by the major supermarket chains.

• Latvia has observed an increase in medium and large surfaces mainly through chains.

• Lithuania also mentioned the importance of four main chains.

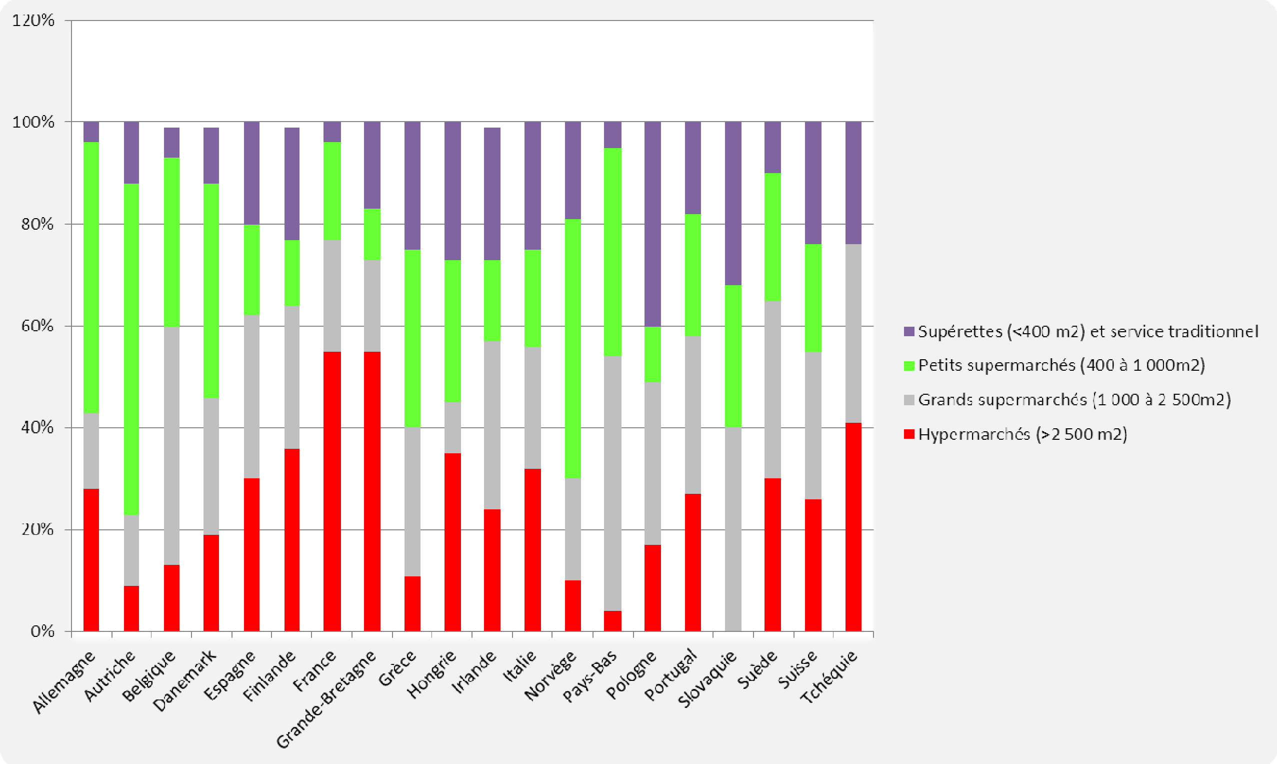
• The Czech Republic noted the strong expansion of foreign chains.

• Slovakia noted that the dominance of large retail chains since 1989 and the development of self-service commerce have severely limited the share of small shops. It also emphasized the high density of large shopping centres and those offering a large variety of services.

The problem of *discount* stores has also been put forward, notably in Germany and Belgium, the latter observing, for example, a continuous regression of small independent businesses, while supermarkets and *discounters* continue to grow in all sectors.

These strong trends "of changing business models" and commercial structures in member states are also visualized first according to the distribution of businesses / sales areas,

Distribution of food retailers by sales area and country



and secondly by considering the **presence of significant European groups of large distribution** in the world ranking of the largest companies in the sector:

Brands	**Country of Origin**	**Turnover (2008 in € bn)**	**Number of countries of establishment**
Wal-Mart	USA	317	15
Crossroads	**France**	97.6	25
Metro	**Germany.**	68	3 2
Tesco	**Britain**	59	13
Auchan	**France**	48.3	12
Aldi	**Germany.**	48	1
Rewes	**Germany.**	47	6
Lidl	**Germany.**	35.4	22
Intermarché	**France**	34.8	7
Leclerc	**France**	34.7	7
Casino	**France**	34.2	12
Ahold	**The Netherlands**	25.7	10
Delhaize le Lion	**Belgium**	19	6
Système U	**France**	17.9	
Mercadona	**Spain**	15.4	

1.4. Wholesale Trade

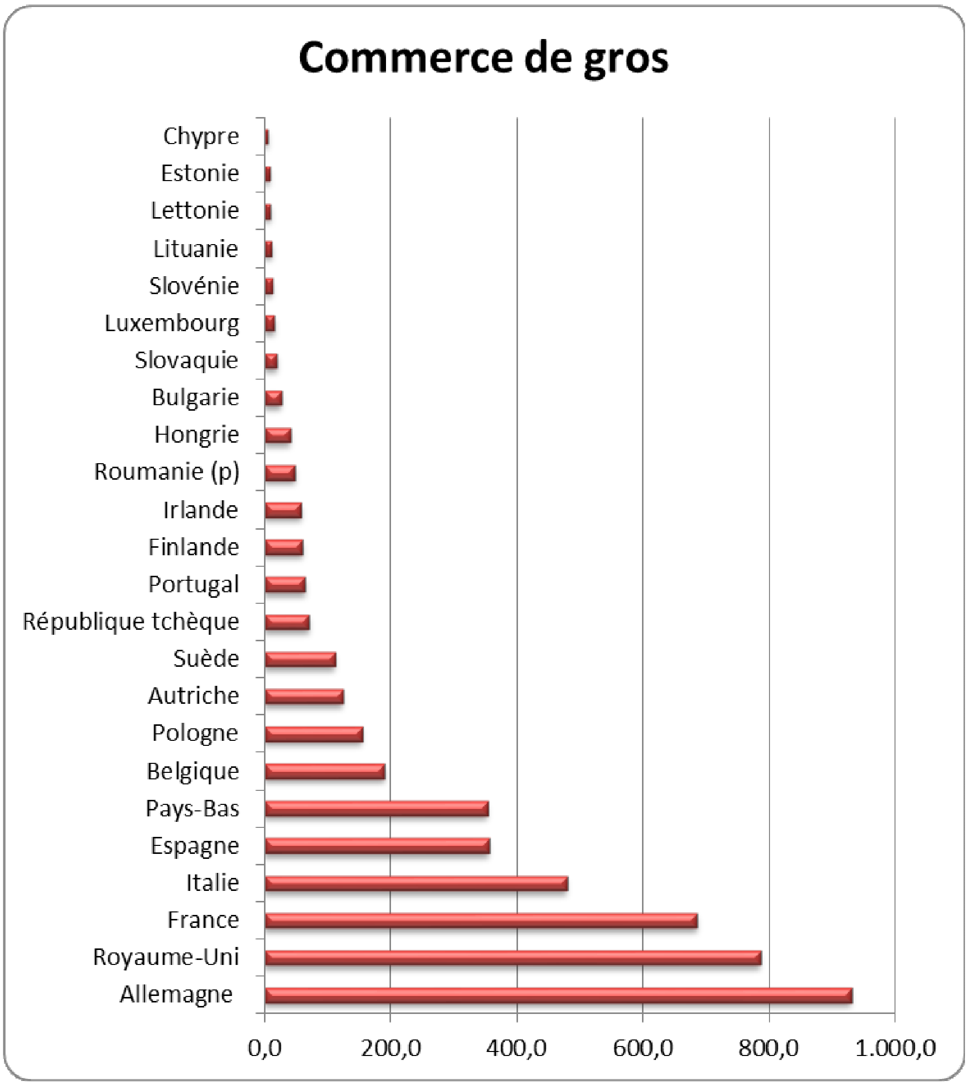
The ability of tertiary activities to create jobs is a necessary condition for the performance of most European economies characterized by an erosion of manufacturing employment and, for France and some others, for the maintenance of a significant rate of development in the working population.

The analysis of the determinants of employment in wholesale trade has an exemplary dimension, not because the firms in this sector show a particular advance or modernity in their modes of operation, but because these retailers have a role of link between the different activities and as such are particularly vulnerable to changes in the economic environment (globalization, regulatory developments, changes in final demand of households, changing patterns of business operations ...).

The enterprises of this sector are therefore facing most of the issues which apply to all enterprises in the service industry as concerns their main levers of action: business strategy (customer loyalty programmes, building global solutions, efforts to export ...) procurement policy (optimizing the number of suppliers, supply expertise, imports ...), the options for externalizing or internalizing certain functions (cross-functions, administrative functions, transport ...), the investment policy (management of physical flows and information flows ...) or the place given to certain functions (market research, staff training ...). Their strategic flexibility, that is to say their ability to quickly modify their business portfolio is further facilitated by the often limited nature of their fixed capital.

The composition of the sector may appear quite heterogeneous because it includes some extremely different structures (marketing subsidiaries of multinational industries, traditional wholesalers, distributors with intensive services ...). However, the companies of the business-to-business trade have a real communality of fate and the competitive constraints imposed on different categories of professional distributors are quite similar.

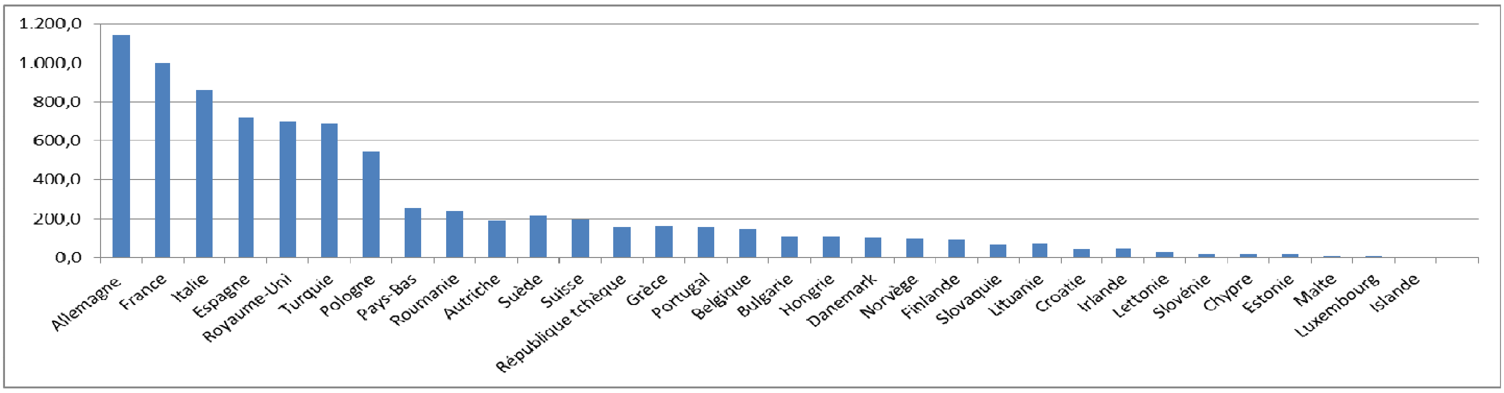
1.4.1. Framing Data



Turnover of the Wholesale industry by State of the European Union

Source: Eurostat

7,195,300 employees work in the sector of wholesale trade in Europe



The dominating role of the market areas on the labour demand

The dynamism of wholesale commerce businesses depends primarily on exogenous factors such as the demand addressed to this sector and the environment variables (concentration of customers, regulatory changes ...).

The demand addressed to traders is the first of these determinants: this aggregate is divided in proportions that can be roughly estimated from 55% to 60% of intermediate goods (construction materials, fuels, chemicals ...) and equipment goods (industrial supplies and equipment, computers, electronics ...) and from 40% to 45% of food products (fruits and vegetables, drinks ...) and non-food products (clothing, medicine ...). The first category of sales is mainly driven by the GFCF of corporate clients while the second depends on the purchases of goods for household consumption and made by retailers (as well as by restaurant owners ...).

The econometric analysis of the factors explaining the increase in staff numbers in the wholesale commerce **emphasizes the essential contribution of this first exogenous factor.** In fact, 80% of the employment growth recorded between 1993 and 2006 on a large subset of sector 1 is attributable to the growth opportunities in the market areas. One example is the strong growth of the medicine market (+5.1% of average and annual volume growth over the period 1993-2006), which accounts for most of the significant increase in the numbers of pharmaceutical distributors (+16,200 over the same period) or the favourable orientation of the GFCF of construction companies (+4.3% in Euros constant over the same period), which was beneficial to the employment in the commerce of construction materials and sanitary equipment (+19,600 between 1993 and 2006).If the review of the annual developments logically reveals a strong correlation between the employment in each commerce sector and an indicator reflecting changes in its markets, it also highlights the relatively short adjustment periods, which tend to reflect quantitatively the effects of firms' strategies to increase their flexibility and responsiveness.

The consequences of the concentration of market areas

The empirical analysis shows that the variation of the sector workforce also depends on other environmental variables outside of the control of the operators, such as the dynamics of concentration of client sectors and the evolution of regulatory changes affecting commercial establishments .

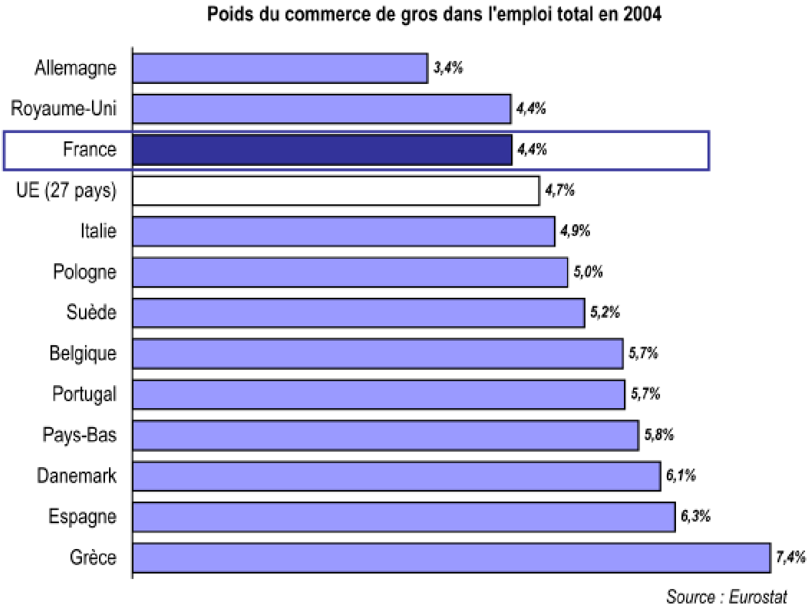
The concentration of retail commerce has limited the growth of employment in the wholesale commerce, particularly in the areas of food products where the rise of organized retail commerce is accompanied by the transfer of the supply function towards the purchasing centres of large distribution. More generally, the way in which the customers of wholesalers are structured constitutes also an exogenous variable which, except for traders who have a secondary activity downstream in their supply chain (some wholesalers have indeed built their own retail network) , is beyond the control of wholesales businesses.

The effects of concentration strategies undertaken by wholesalers

The dynamics of employment in the business-to-business trade also depends on the microeconomic behaviours of firms and in particular on their ability to implement strategies that affect the employment of this sector, albeit in an induced way, because the initial objectives of companies are rather market profit shares or the improvement of their profitability more than a growth in their workforce.

The strategies implemented by wholesale companies in recent years have first sought to optimize the function of commercial intermediation. This policy option is justified by the fact that wholesalers are likely to be challenged by upstream actors (manufacturers can make the commercial distribution of their products) or downstream actors (retail operators can manage their supplies through a purchasing centre). The pursuit of this objective has encouraged companies in this sector to seek their optimal size by carrying our mergers and acquisitions according to growth patterns quite different from one sector to another (external growth, the development of independent networks ...).

However, the concentration of the professional distribution remained in reality a limited and inconspicuous phenomenon. Inconspicuous because, for commercial reasons, the local stores have often kept their name even after being taken over by a national or international group. Limited because the average size of firms in wholesale trade (5.8 persons employed per enterprise on average) remained significantly lower than the value observed in the European leaders.



Quelques indicateurs relatifs au commerce de gros dans les principaux pays de l'Union Européenne (2004)

	Productivité apparente du travail (en k€ par employé)	Nombre de personnes occupées par entreprise	Poids du commerce de gros dans l'emploi total
Allemagne	65,0	12,9	3,4%
Royaume-Uni	* 60,5	10,8	4,4%
France	**59,1**	**5,8**	**4,4%**
Italie	45,1	2,6	4,9%
Pologne	16,9	5,5	5,0%
Suède	64,4	5,1	5,2%
Belgique	69,6	5,4	5,7%
Portugal	28,0	4,6	5,7%
Pays-Bas	65,2	8,1	5,8%
Danemark	69,6	10,2	6,1%
Espagne	39,4	5,5	6,3%
Grèce	37,9	4,1	7,4%
UE (27 pays)	**48,4**	**5,7**	**4,7%**

** en 2003*

Source : Eurostat

1.4.2. An industry sensitive to economic fluctuations

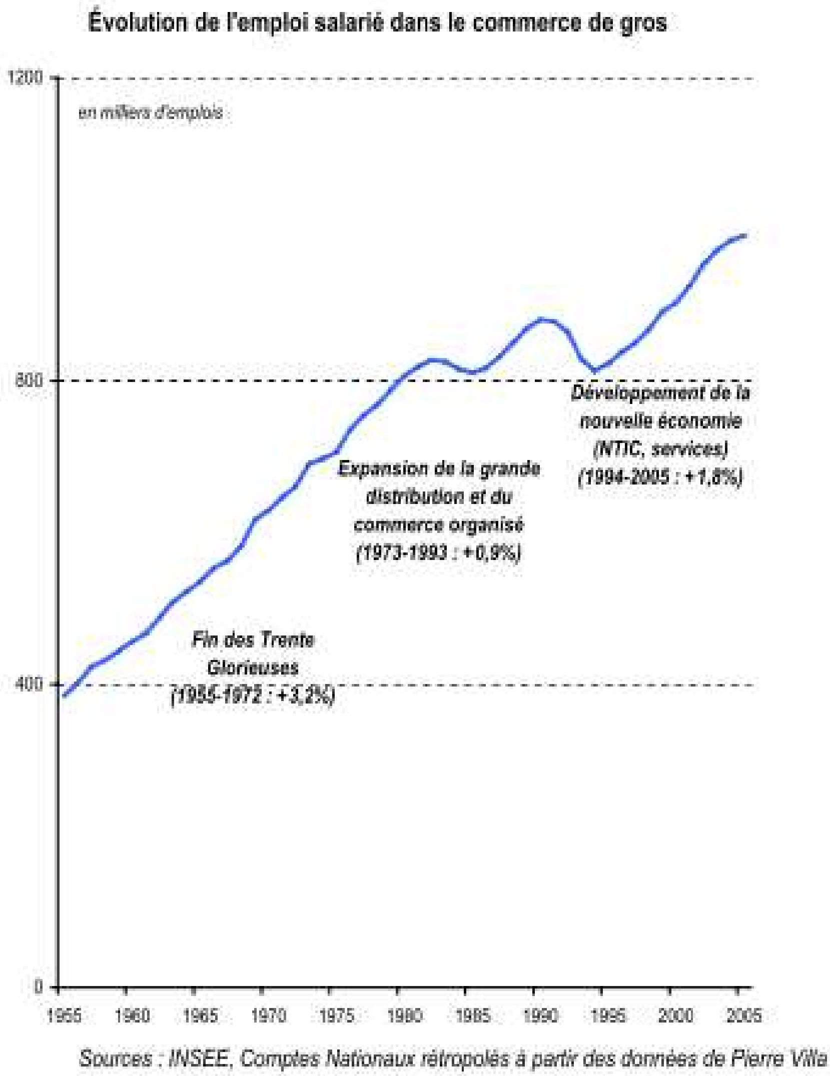
A high propensity to create jobs

A significant part of the variations in employment in this sector is attributable to wholesale trade. Indeed, the wholesale sector was responsible for 185,000 additional jobs between 1980 and 2005 in France (about 88,000 between 2000 and 2005), representing 43% of all jobs created in the whole commerce sector although wholesale commerce accounts only for 32% of the workforce.

The ability of the business to business to create jobs is a strong reality

If the news on business-to-business workforce admits a spectacular growth during the upward phase of the business cycles, its evolution also recorded significant reductions in employment during less favourable periods. In comparison, more activities

Determinants of employment in wholesale commerce related to household consumption as retail commerce present more consistent developments. The magnitude of the changes in employment in wholesale commerce is a second reason for attention.

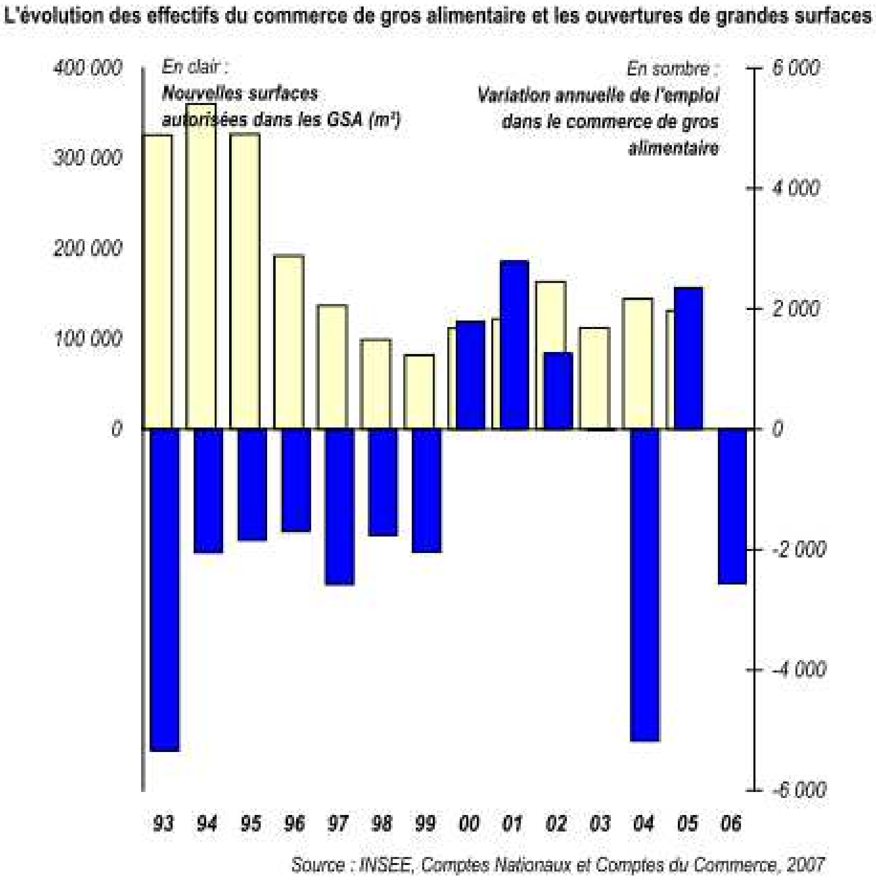


Links between Retail and Wholesale are more complex

Example: The influence of regulatory framework in France and the effects on Wholesale commerce

Since the late 1960s, the rapid rise of supermarkets on the outskirts of cities and the concomitant disappearance of small shops downtown have created **the need to regulate the development of commercial equipment. The government then introduced a number of regulations designed to protect the small business in France:** the Royer law that limits the creation and expansion of supermarkets; the Raffarin law which hardens the mechanism to grant authorizations (employment and environment criteria, lowering the threshold of retail space to 300 m² ...); the Galland law which aims at strengthening the protection of suppliers towards major distributors and at ensuring fairer competition in the retail (against the practice of low prices and selling at a loss).

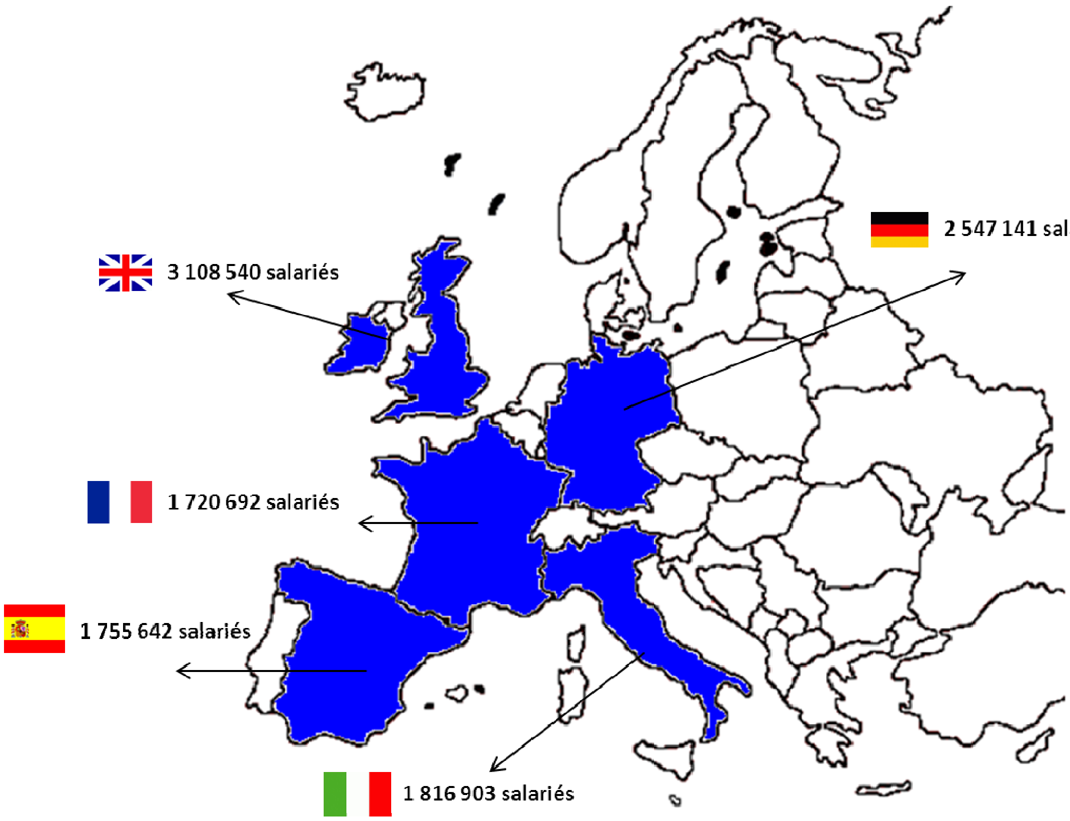
The net slowdown in the openings of large supermarkets in the late 1990s coincided with the resumption of employment growth in the food trade. Thus, the activity of wholesale food commerce is negatively related to the growth of supermarkets in France.



2. Characteristics of employment and working conditions

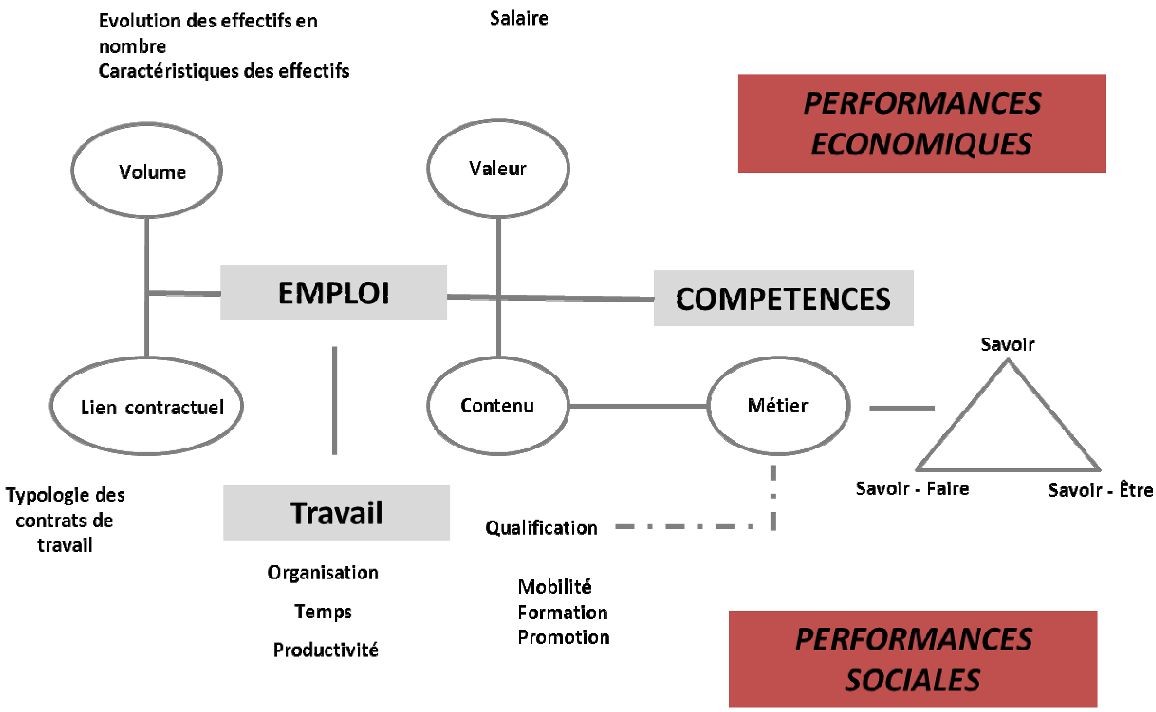
In this same logic of the respective weight of retail commerce in the countries of the European Union, the distribution of workers is correlated with the size of markets:

The most value-adding "market" is the one that employs the most people and those on which the mass distribution (mass market) is the most developed and where the standard of living / per capita is the highest.



An analysis of the relationships and characteristics of the Employment (whatever the scope of the analysis) leads to identify organizational relationships that govern the social relationships between the actors as well as the characteristics of the individuals who make up the staff dedicated to this activity.

The pattern of the "ideal" analytical framework could be:



The sector accounts for a large percentage of jobs in Europe. According to Eurocommerce, 33 millions of European citizens worked in 2007 in the commerce sector, which also supports millions of jobs from one end to the other of the distribution chain, from small local suppliers to multinationals. The retail sector is a key sector for the European economy: it accounts for 4.2% of the European added value and employs about 17.4 million citizens [2] .

These workers are employed in approximately 6 million businesses in the commerce sector, of which 99% are small businesses.

In most countries of the European Union, employment in the retail and wholesale commerce is between 12% and 16% of all jobs (13.6% according to data from the EU) .

2.1. Labour, Employment and Status of workers in the sector by country

Although a comparison of national statistics allows to identify trends or commonalities between countries (feminization of employment in the sector, use of youth employment in retail commerce, decline in overall employment in the sector , low participation in training, time flexibility (use of part-time work, for example) and the organization of work, wage levels and relatively low qualification), however, significant differences exist between small and large companies, between those involved in wholesale or retail commerce, or according to a particular region of the country or type of employment considered.

According to several observers, many are the people who, regardless of the country concerned, use employment in the retail sector as a springboard to another sector in order to better integrate themselves into the labour market; these may be students or people who had to leave temporarily the world of work, for example, to raise children until they reach school age. Which is often the case in the retail sector where general or cross-sector skills (ability to work in a team, good communication skills) can be transferred to other sectors.

The concept of precariousness in this sector therefore deserves a much more thorough look in terms of comparative examination since in countries like France the open-ended contract is the preferred form of access to employment whereas other countries have a lower use of this type of employment contract.

Whatever the country examined, the commercial sector and more specifically the mass distribution sector has a bad image which is often criticized by the press. Job precariousness in this sector is often invoked to explain this bad reputation. Precariousness is thus one of the main explanations in Ireland. In France, according to a recent study and according to the professionals of this sector, the main explanation for the altered image of the large distribution lies in its great reputation to kill the small businesses, family farms, small industry and SMEs while being considered over-paid compared to other parts of the value chain; Insecurity ranks seventh. (Survey Eurogroup Consulting)

It seems with regard to information collected below that the precariousness in this sector is less related to the type of contract than to a reduced working time and to working conditions and wages in the contract.

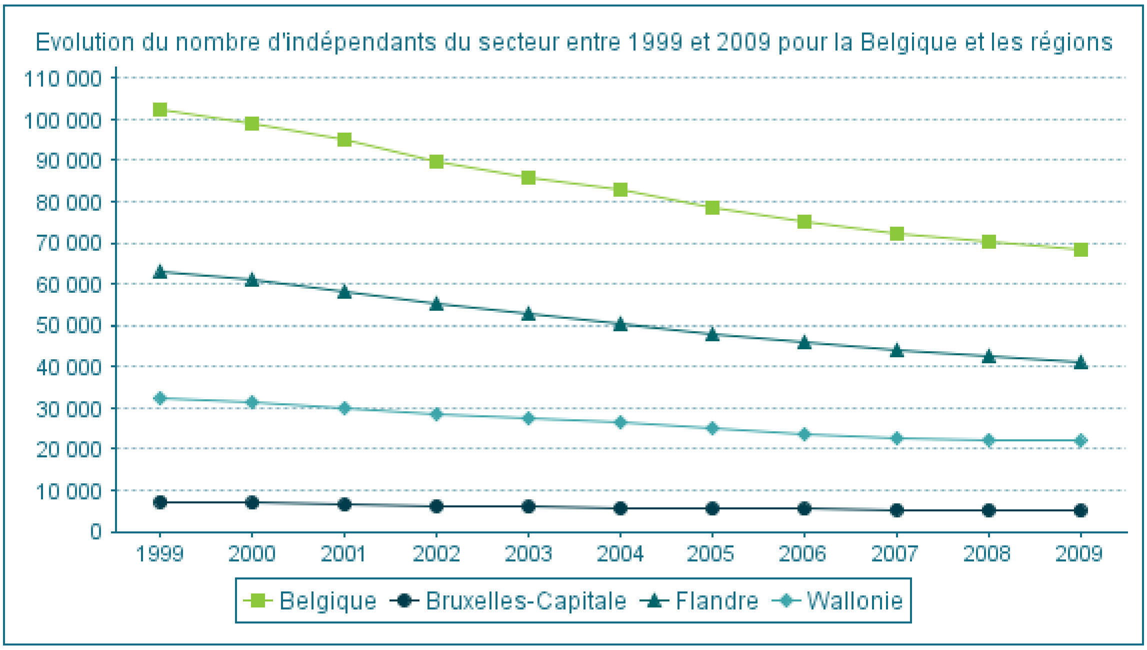
It is clear in any case that the information conveyed in relation to working conditions and wages in the sector has some consequences for the image of the sector as shown in the surveys conducted in several countries in this regard.

Methods of collecting statistics can also vary from one country to another, some of them, for example, make a the distinction between hired employment and self employment in the sector, unlike other countries that include without distinction both types of employment in the category of workers.

In Belgium, between December 2011 and December 2010, employment rose by 3,600 units in the retail commerce. Between March 2011 and March 2012, by 2,850 units

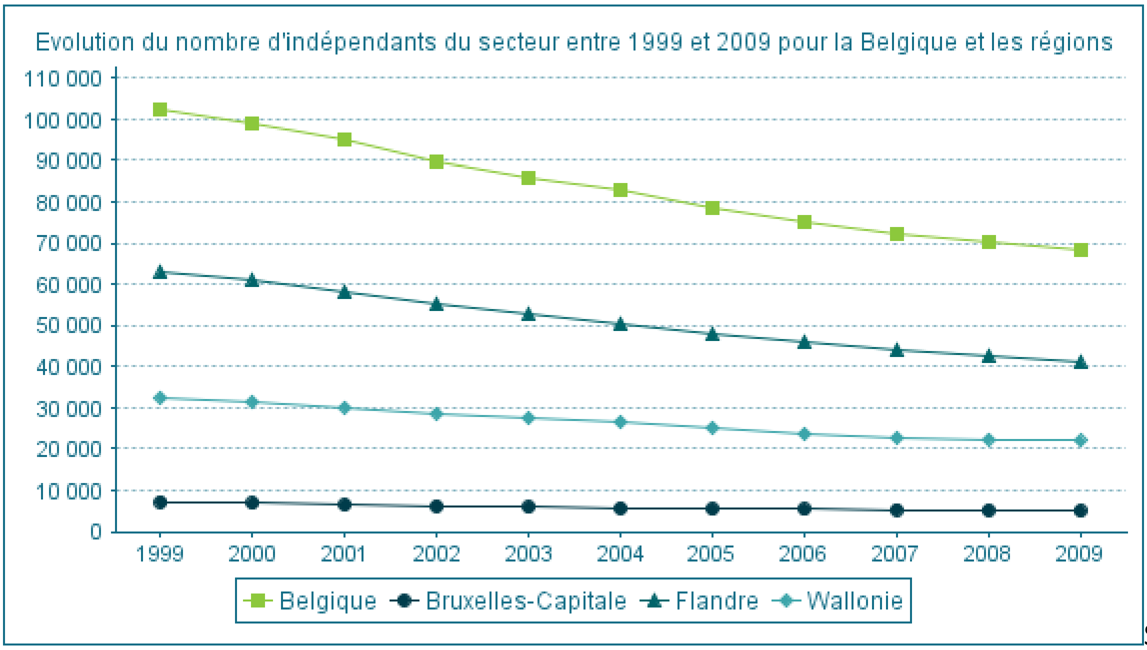
With 244,564 hired jobs (NSSO statistics count the jobs in terms of full time jobs equivalent and not in terms of workers) in 2010 (of which 84% of employees and 16% of workers), the retail commerce represents 6.5% of total hired employment in the country. The distribution of hired jobs in the retail commerce among the three regions indicates that Flanders has

57% of these jobs, against 31% in Wallonia and 12% for Brussels. The wholesale trade sector comprised 19,989 companies representing 7.3% of total domestic companies in all sectors. Over two thirds of businesses in the wholesale commerce are located in Flanders, nearly a fifth in Wallonia and 13% in Brussels. In the retail sector in Belgium, about three quarters of workers are hired workers and a quarter are self-employed [3] .This is also the case in Flanders and Wallonia. In Brussels, the proportion of hired workers reaches 85%, only 15% of workers in this sector are self-employed.



Source: ICN - Regional Accounts 1999 - 2009 (calculated by Forem).

In the wholesale sector, 20,596 self-employed workers were active in 2010.The number of self-employed workers has therefore diminished by 30.5% compared to 1999. In Wallonia, there are 7401 self-employed workers in the wholesale commerce, that is, 36% of self-employed workers in this sector in Belgium. Compared to 1999, the number of self-employed workers in this sector declined by 21.7%, a relatively lower decrease than for the whole country.



Source: ICN - Regional Accounts 1999 - 2009, calculations Forem

A special feature of the wholesale sector is the regular use of subcontracting: companies in this sector outsource activities such as social security services, accounting, information technology, delivery to customers, transportation of goods to stores. Everything related to computers and management is generally much more subcontracted for wholesalers than for retailers.

This sector has the particularity of being very independent from distribution networks. According to a study by Forem: "one business out of five in this ecosystem is franchised" and "the current trend of large conventional chains is to turn their managers into franchisees'

In France, in 2010, the retail commerce accounted for 1.7 million jobs or 6.3% of total employment. The distribution of predominantly food products represents more than 630,000 jobs, of which 500,000 just for the Top 6 distribution companies.

In 2010, the development of the number of staff showed a decline in employment up to 3500 jobs. Some food retailers have announced new jobs in 2012:

• E. Leclerc announced the net creation of 3,000 jobs in 2012.

• Système U assured they would create at least 2,000 jobs in 2012.

• Between 2012 and 2014, the Auchan Group foresees the creation of 3800 jobs in its reorganisation plan

According to 2011 data from INSEE, the year 2010 was marked by a moderate recovery in sales after the slowdown of 2009. Restart is clear in the wholesale sector (+2.8% in volume), without erasing the sharp downturn of 2009. Recovery is more feeble in the retail commerce and in the trade and repair of motor vehicles (+1.6% and +1.2%).

In 2008 [4] , nearly one in five people working in the retail commerce or craft was self-employed (19%), that is, much more than in all other commercial activity sectors (11%).

Among these 400,000 non-hired workers, 50 000 practice a profession or are entrepreneurs, 90,000 are artisans and 240,000 traders (of which 52,000 are small and medium retailers specialised in food products, and 56,000 are retailers in clothing and sporting goods).

All wholesale trade in 2010 amounted to approximately 465,000 employees and more than 38000 companies [5] . Between 2008 and 2010, the wholesale trade sector recorded a decline of employment in several sectors (loss of 15,000 jobs for instance in Import and export and in the wood sector) and, conversely, an increase of 25,000 jobs in the hardware industry.

98% of businesses in the wholesale sector were estimated to employ less than 50 employees in 2010 (75% had fewer than 10 employees, 50% less than 5 employees) [6]

In Germany, in 2010 the retail sector regrouped 2,7 million employees and about 380,000 companies ranging from small local to global companies (Aldi, Lidl, Karstadt, Otto or Edeka). SMEs with 10 or fewer employees accounted for 94% of the sector.

A significant number of large companies are still family groups such as Aldi, Schwarz, Otto. Of the 10 richest people in Germany, five are in the management of these large companies. [7]

Wholesale trade accounted for 132,000 employees in 2011-1; the sector has also experienced a decline in employment between 2007 and 2009 from 1.142.000 jobs in 2007 to 1.120.000 jobs in 2009.

In Ireland, according to studies by statistical institutes, the wholesale and retail commerce sectors accounted for 261,000 jobs in 2010 after a loss of 53,000 jobs between 2008 and 2010. These institutes foresee a resumption of activities with some 289,000 jobs in 2016.

2.2. The legal form of employment

In 2002, in Belgium part-time employment took over full-time employment, but both continue to grow. Since 2010, the two are again in balance and since beginning of 2011, there is a little more full-time employment than part-time employment (51% of full-time workers).

In 2010, according to information by Comeos, 55,000 people were employed full time in the retail sector, against 44,000 in the wholesale sector.

In France,

In the retail trade, permanent contracts relate to almost all (96%) of managers and store managers; this percentage is 10% higher than the one of shop cashiers and check-out operators (85%) and sellers (84%) .The share of open-ended contracts therefore is barely lower than that of the overall market sector. In the retail trade and commercial crafts, the share of open-ended contracts varies little from one sector to the other. It varies with age and occupation. Only 70% of those under the age of 30 have a permanent contract. Overall, men and women do not differ in terms of frequency of short-term contracts.

Type of contract of hired workers in the retail and commercial crafts

Type of contract	Retail and commercial crafts	Mainly market sectors
Permanent Contract	86.4	87.2
Fixed-term Contract	8.8	7.0
Apprenticeship	3.7	2.1.
Interim	1.1	3.7
Total Workforce	1719500	14994100

Source: INSEE (Labour Force Survey 2008)

In 2009, in the food distribution, a majority (85%) of jobs were under permanent contracts. The proportion of permanent contracts is slightly higher than the national average (87%).

Across the wholesale sector, where the proportion of hired workers in 2009 was close to 68%, against 20% for the executives. The permanent contracts represent 94.6% of all employment contracts. The full-time represents 92.9% of all contracts.

However, it is necessary to consider these figures in the context of the characteristics of the sector. The fruit and vegetable industry in 2009 showed a share of seasonal contracts of about 29%, and therefore a proportion of permanent contracts about 30 points lower than that of other branches. Trading in building materials and timber trading showed less than 3% of fixed-term contracts, whereas fixed-term contracts reached 7% in commerce.

Also in 2009, in the wholesale trade, the Import export recorded a high proportion of employment with fixed-term contracts (36%) and a heavy reliance on part-time workers.

In Germany, in 2010, unlike what happened in France, the retail sector had 931,000 employees among the 2.7 millions who had a so-called atypical contract and 160,000 apprentices.

Structure of employment – retail commerce in Germany

Type of Employment	Overall Economy	Retail Sector
Fulltime	64%	43%
Part-Time	15%	25%
Marginal employment	14%	24%
Side Job	7%	8%

Source: Voss-Dahm/Wabe

The number of employees in the retail sector tends to decrease, as well as that of workers with permanent contracts, to the benefit of atypical contracts.

In Ireland, the number of part-time workers is particularly important in the retail sector, which illustrates that:

The use of part-time work is more important in the retail sector than elsewhere: in 2006 those who worked in a non-specialized sector (food sector, but also in department stores) worked part-time. The part-time jobs in the sector of retail fuel was 42% at the same time of the hired workforce, this rate was 40% in other sectors such as clothing, jewelery or bookselling.

The need for flexibility for the companies to adapt to consumer demand, according to the different periods of the year. This would also meet the needs for flexibility of employees to balance their family life and their professional life.

The part-time work is done rather by women who often work in low-skilled positions.

According to a survey by the Dublin Foundation [8], the working week of one third of part-time workers is less than 19 hours, and on average part-time workers only work 22 hours a week.
Part-time workers work four days on average, 11% of them work three days or less. A majority of these workers would like to work more to earn more.

2.3. Characteristics of the workforce

2.3.1. The seniority of workers

In Belgium, in 2007, a worker had stayed an average of 9.8 years in the same food distribution company. If the trend in recent years is quite mixed, it shows however a slight increase, which highlights the need for the worker to have a greater job security.

In France, in the distribution sector, the percentage of employees with more than 5 years of seniority was 61.5% (in 2010), which is higher than the national average (55.7%) and the average of the service sector (52.7%) Excluding State & Local authorities, higher wages than the Smig (minimum guaranteed interprofessional wages). The average seniority has increased between 2003 and 2009: from 7.5 years in 2003 to 9.5 years in 2010.

In the business to business sector, seniority has also increased since the proportion of people with more than 10 years of seniority increased from 32.6% to 38.9% between the early 2000s and 2010, and now it is very close for all sectors. However, the distributions by seniority according to sectors has two typical profiles:

- more than 45% of employees under 5 years of seniority in the import-export and BLC
- between 30 and 39% of employees with less than 5 years of seniority in other branches
- (Wholesale, materials and hardware)

In Ireland, workers in the retail commerce sector have a quite important experience in their business, since 69% have at least a 5 year seniority, according to data from the European Foundation in Dublin on the improvement of living and working conditions.

2.3.2. The use of a young workforce

In Belgium, according to studies by Comeos, the representative of Belgian businesses and services, many workers are relatively old and therefore have seniority bonuses (see below - wages). In Belgium, only 13% of workers in the trade sector are aged less than 25 years, while in the Netherlands they are 49% (data of 2010).

In France, food distribution has a young workforce:

• The average age of employees in this industry was 38.3 years in 2010, that is, more than a year younger than the average age of the working population (39.6 years in 2010).

• 26% of employees are under 30 against 22.2% for the entire working population.

• The share of over 50 is only 18% against 25% for the entire working population.

• Many young people are recruited: in apprenticeship contracts (1% of employees), under student contracts (5.3% of employees) or training contracts (1.5% of employees).

In the wholesale commerce, youth were the most affected by the crisis: those under 26 years accounted for 11% of employees in 2008 but in 2010 they were only 7%. The average age is 40 years, and has increased by 1 year compared to 2008. Employees with a seniority of less than 5 years who accounted for 43% of the workforce in the wholesale commerce, in 2010 accounted for only 33% of the workforce.

In Ireland, the commerce sector employs people of different ages (mostly between 25 and 34 years) with a significant number of young people between 15 and 19 years.

2.3.3. A female workforce

In Belgium (Wallonia) 66% of the workforce in the retail sector was made up by women in 2010. This percentage was 71% for employees, against only 33% for workers. The proportions differ with regard to the wholesale commerce in Wallonia as the proportion of employees in this sector is predominantly male: in the same period, men accounted for 67% of the total workforce in the sector, 86% for workers and 57% for employees.

In France, women's employment is a characteristic of the food distribution: the proportion of women is 60.5% against 47% in the general working population.

A distinction, however, must be done, according to occupational categories, the branches concerned or the size of firms:

the presence of women in supermarkets is higher in supervisors and employees / workers positions but lower in managerial positions.

As for the wholesale trade, there are branches that employ a majority of male staff, which are mainly concentrated in large enterprises. The trading of construction materials is characterized by a high proportion of men (76%) and a concentration of workforce in firms with 50 or more employees (67%).

In Germany, In Germany, in 2010, 73% of the employees (2.7 millions) in the retail sector were women. Source: Glaubitz 2011

2.3.4. Disabled people

Although the information is difficult to collect in this area, most retailers seem to have policies of "voluntary" employment of people with disabilities or coming from disadvantaged urban areas.

2.4. Salaries

Whatever the country, the salary is a competitive factor for the companies of this industry and especially for the retail sector.

In Belgium, , in retail commerce, a worker with two years of seniority earns on average € 508 less than the minimum wage. This difference amounts to € 810 for a worker with 20 years seniority. In wholesale commerce, throughout his career, he earns about € 166 more than the average Belgian employee. This difference is higher at 10 years of seniority (272 €). [9]

In France [10] , in the retail sector, the average gross annual salary of all categories of employees is higher than the minimum wage (€ 16,125 gross per year in 2010). The lowest average wage is that of the shelf stockers in supermarkets (€ 19,700 gross). The cashiers earn on average € 20,600 gross per year.

The highest average salary is that of store managers. It amounts to € 52,800 gross per year. The average increase rates of wages are relatively low and vary from year to year between 1.5 and 3%. In 2008, before the crisis, the average increase rate of wages was one point higher than the increase in the minimum wage (3.2% against 2.1%). In 2009, in the pick of the crisis, the average increase rate of wages was one point below the minimum wage (2.1% against 3.2%).

In 2010, the average increase rate of wages was relatively comparable to the increase rate of the minimum wage.

In terms of career, at the level of seniority and status, an employee in the business to business sector receives a salary 10% higher than that of an employee of the retail trade or distribution industry. In addition, jobs are stable: 93% of employees in the industry have a permanent contract.

In Germany, according to a recent survey [11] , there are approximately 1.2 million employees whose salary is below the national average, 12% of them earn less than € 5 per hour.

In Ireland, although the sector of retail or wholesale commerce is often described as offering relatively low wages, the reality is more complex: the average and weekly wage of people in managerial positions is quite similar to what exists in other sectors in terms of gross salary.

Net pay have fallen since 2008, according to the analysis made by the Dublin Foundation: there is a loss on average of 109 Euros per week. CSO (Statistical Office) statistics show that the percentage of “forced” part-time workers has increased during the first four months of 2012, there were 135,000 part-time workers, that is 46% of part-time workers more than in 2008.

2.5 Qualification and training dynamics

In France, the rate of access to training was 19% for all wholesale commerce in 2008. In 2010, this rate exceeded 28%. Between 2008 and 2010, the rate of access to training got 10 points for all branches except land, fertilizer (3165) Fabrics (3147) Fruits and vegetables (3233) where the increase was from much smaller to non-existent. For most industries, the rate increases with firm size.

Although the level of education in this sector is lower than in other sectors of the economy, this level has increased. The number employees with a higher education increased by 12% in 1999. In the retail commerce, the number of qualified persons with a qualification below the level of diploma has dropped from 37% to 22% during this period.

In Ireland, the average education level in the commerce sector is the senior secondary education. The qualifications of individuals rose dramatically in recent years with a rate of persons with a higher education qualification that increased from 12% in 1999 to 21% in 2009.

In Germany, the level of participation in training courses appears to be relatively low compared to other sectors of the economy, as shown by the results of a survey conducted in Berlin in 2008.

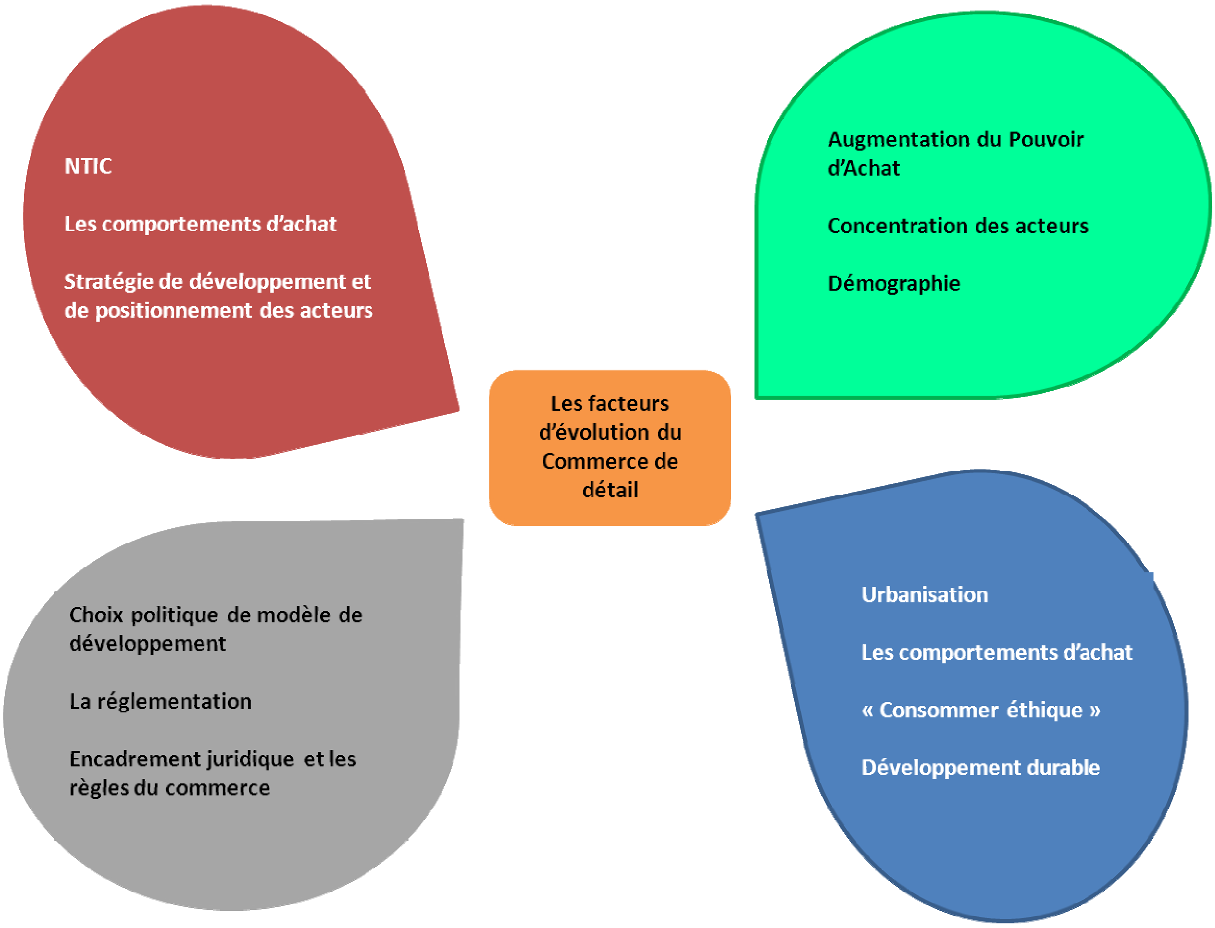
Employees in the retail sector in Berlin and their participation in training courses in the last 12 months (2008)

		Yes (%)	No (%)
Retail	Male	1.10	89.9
	Female	9.10	89.1
Other Sectors	Male	19.0	81.0
	Female	4.25	74.6

"Ermittlung von Qualifizierungsbedarfen und der Kriterien betrieblichen Weiterbildung im Handel Berlin" - supported by European Social Funds

3. Evolution and structural dynamics

As a summary, we can draw up a typology of the factors leading to a sure evolution of organizational determinants of Commerce within the European Union.



It is not for this report to develop a comprehensive vision of them or to produce a long-term analysis of the expected (predictable) effects of all these developments, but the report would target those elements that appear in the eyes of stakeholders as the most essential ones and to trace, on the one hand, the consequences in terms of jobs and skills and then to illustrate "the answers" they have deployed to cope with these changes.

Among these elements we sought to measure the technological changes and examine their effect on patterns of work organization and skill requirements. More important developments shall in this way focus on the consequences of the introduction of new information and communication technologies in the commerce ecosystem.

3.1. Chain management and the best answers to consumers' expectations [12]

3.1.1. The arrival of new technologies contributes to changes in the sector

The quest for efficiency in the responses to consumer needs must be improved in terms of management of the entire industry.
New technologies here play an important role when it comes to responding to the concern for efficiency, which requires the use of workers having the necessary skills in order to improve business performance.
These developments impact the jobs at all levels of the value chain, those that must monitor and manage the inventory, as well as those of marketing.
With regard to issues of marketing, to build a brand and maintain the brand name, some increased skills are needed, particularly in the use of advanced technologies. New information and communications technologies have become essential key tools for marketing departments: without becoming an expert, it is essential to any marketing professional to know how to integrate them into a customer relationship marketing strategy and to know the objectives that they allow to achieve.
The brand image is also shaped by the history of the company, its managers, its know-how, its communication and services offered (in terms of innovation, information and after-sales) but also the expertise and knowledge of its employees, which requires the implementation of specific training by the human resources management.

3.1.2. A move towards vertical integration: companies become increasingly osmotic.

Vertical integration appears as a new organizational form, which has some impact on employment and the traditional role of wholesale companies: this organization of the industry makes it possible for other operators, in particular companies specializing in logistics services and retailers and manufacturers to perform the distribution functions traditionally performed by wholesalers.

This evolution is well characterized in the food industry where many retailers have integrated distribution centres mainly provided by manufacturers. Ireland food wholesalers have established groups (symbol groups) responsible for the monitoring of retail brands as of the distribution chain

This vertical integration has advantages for retailers who can benefit from:

- a supply chain efficient in responding to consumers
- a centralized management of the retail brand
- integrated technologies
- joint training for staff.

In the fashion industry, the most advanced firms in control of the entire supply chain were first Benetton and more recently brands like Zara, Decathlon, Picard, Ikea and H & M. These brands have integrated all aspects of the value chain, from design to distribution through production, and more generally, the running of the industry.

According to many observers, these brands are presently those that are best able to offer differentiating functional and emotional added value while practicing competitive an even very low prices. These are performance models, while many multi-brand firms struggle to renew themselves.

This phenomenon, of course, upsets manufacturer brands, but also highlights radically new ways to conceive the organisation of the supply chains and the role of traders

These changes in the management of the distribution chain are based on new skills. Jobs are more and more involved in automation and simplification and process consistency. Developments in versatility, teamwork, communication skills and the use of basic technologies have become important and call for improvements in education and training.
"Future Skills Needs of the Wholesale and Retail sector" April 2010

Wholesalers had to adapt to these changes by providing additional services and focusing on new skills in marketing, procurement and sales

3.2. The economic crisis and the decline of the purchasing power

No Member State is truly safe from the impact of the economic and financial crisis. As one French government report stressed in 2009, household budgets are lower than in periods of growth or are urged by other spending items that cannot be cut down (rent, energy ...) or having an increased value (health, communication, internet mobile telephony). "The result is, the report says, a gap between the" purchasing power "and "the purchasing desire" that is greater than at any other time in modern history"; the consumer nowadays tends to "sacrifice certain expenses" to be able to afford other expenses. He seeks to maximize its Budget equation = Price x Consumption by consuming in a better way (less quantity, more quality) which means that he pays more. An illustration of this phenomenon is the development that local shops are currently experiencing.

Faced with these new choices, the development of this industry can no longer rely on mass consumption and must strive to appear more exciting, more innovative and provide integrated solutions and services to consumers.

"The coming years will thus see the development of discount “formulas" that are less children of the crisis than solutions to the needs of choices (Electro-Deposit, Leader Price ...); formulas with high emotional or functional value (Apple Store, Chronodrive ...); and, ideally, formulas balancing low prices and at least emotional benefits (Ikea, H&M ...). On the contrary, the "tepid" formulas, those that do not help to solve the budget equation and that cannot invent new added values, will wane, regardless of their professionalism or their will to serve well their customers. This is a model of deep break: the "heart of the market" brands, based on countersegmentation, are the basis of modern commerce in France. It is they who are threatened by the use of arbitrations. In the past, the formulas that disappeared where the victims of change " "Trade of the Future", 2009

III. New technologies and new skills needs

The information and communication technology plays a central role in developing innovative experiences that today stimulate new skills needs.

Technological developments often have a different impact on the retail and on the wholesale sectors where the stakes in terms of logistics are more important. They are central to the innovation challenges facing these sectors and in particular allow a better inventory management (avoiding stockouts), a better organization of space, improved techniques in procurement and orders.

Many national and European studies have been conducted in this area; in general, these studies have identified several areas where technological breakthroughs have (or may have) an impact on the activities of the sector.

1. Innovation and payment for purchases

Regarding the payment of purchases by the customer, technologies emerge and allow customers to pay by using innovative methods: the "pay by touch" allowing a payment by recognition of the customer’s fingerprint has either been abandoned or has a low development. The electronic payment is still not widespread although the Near Field Communication (NFC) techniques are bringing along the equipment of a new generation of smartphones, which would allow to pay for purchases by using one's mobile phone as long as stores have compatible terminals.

Moreover, the self-checkout system has not had the success expected.

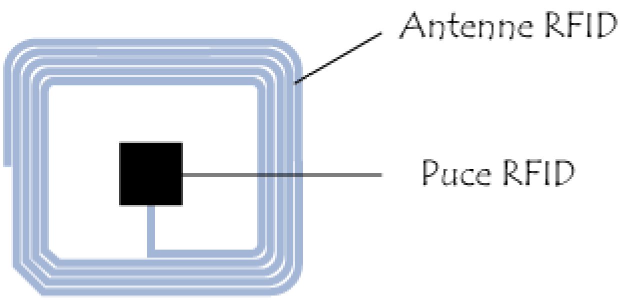
"We are no longer trying to install new self-checkout systems in our stores: the experience shows that customers for many reasons (especially when they have a full trolley) prefer to go to traditional tills, the example of the "fully automatic" implemented by Intermarché in Rennes in 2009 did not work." Interview with a person in charge of the Management of Company A

(In 2009 Intermarché had almost entirely equipped one of its stores in Rennes with this technology developed in partnership with IBM and allowing consumers to scan themselves the contents of their carts. Many newspapers reported this experience, as automation had never been pushed so far in France.)

2. Significant technological advances in retail sales

Electronic tags and RFID (Radio Frequency IDentification) technology seem to have mostly grown in France. RFID technology enables the identification and management of products by conveying information (using integrated sensors) about them.

The Radio Frequency tag: it is read by a reader that captures and transmits information.



The two main families of RFID tags

- Active tags, connected to a power source board (battery, etc.). Active tags have a better range but at a higher cost and with a limited life,
- Passive tags, that use the energy propagated at short distance by a radio signal

from a transmitter. These low cost tags are generally smaller and have a virtually unlimited life. In return, they require a significant amount of energy from the reader to work.

These labels allow in particular to meet the regulatory requirements for traceability of products or to improve the management and control of logistics flows (control of the automatic reception of pallets and cartons; tracking the movement of products within the deposits; tracking inter-deposits movements, a better parcel tracking, an improved inventory management) .

Although it is a major innovation, it has difficulties in finding a real development across the sector.

"If one third of distributors have made progress in terms of RFID, less than 15% of the manufacturers of this sector have launched some studies. Tests made by Metro in Germany and Auchan and Carrefour in France have hardly involved any food product (in 2007) "

Study conducted by ALCOM Consulting and Newton. Vaureal Consulting for the Ministry of Economy, Finance and Industry, Directorate General for Enterprises, Study on electronic tags and product traceability in 2007

Developments occurs rather on a case by case basis and not in a systemic way; it's in this way that Marks & Spencer, after a test period (1 store in 2003 and 6 in 2004) extended the deployment of RFID to 53 stores in 2006 for six clothing departments; and this to improve inventory management in an environment composed of a large number of references (sizes, colours etc.). The American large distribution company Wal Mart is recognized as a pioneer in the use of these labels for the advanced management of its supply chain, which is considered as one of its key competitive advantages.

Professionals consider what is happening in Japan in the field of footwear: the labelling became widespread (to control the supply chain); in publishing and stationery, RFID tags are largely used in all covers of books and notebooks.

We must put in perspective the impact of electronic labelling especially in the field of large distribution.

We expected a lot a few years ago from the RFID and we thought it could advantageously replace the bar - code to increase competitiveness and improve the traceability of food products, but the reality is different and expectations have not really turned into reality; the impact on the work and skills of employees is not the one we expected. The mass entry of this new technology would have called for new skills to support the customer (interview with an official of Company A)

There are still many uncertainties, mainly related to physical and technological limitations; to the poor maturity of the actors and of the supply as well as to a scarcity of skilled actors to support customers.

These obstacles are both technical, economic, or psychological (difficult to formulate).

Other techniques have emerged, as the "voice picking" which enables guided orders using a voice recognition system. The trainer is equipped with a single-ear headset to receive information about the order to perform (sampling area, number of items to collect). A microphone allows him to confirm vocally that he has taken the product.

A survey conducted in Ireland in the distribution sector has shown that in some centres the number of orders could climbs to 180 per hour, which of course is not without risks in terms of health – safety on the workplace (especially psycho-social risks).

New technologies also facilitate the development of online sales or e-commerce and show the exchange of goods and services between two entities on a computer network, i.e. the Internet.

Selling is not limited to the retail sector but extends to the B to B (business to business) where networks such as (EDI) [13]have been used for many years. Electronic transactions are carried out also on mobile networks. We talk about m-commerce (mobile commerce).

The percentage of enterprises using the Internet or another technology for their purchases or sales vary according to the Member State. Some countries such as Sweden, Denmark, Germany, the Netherlands, Finland have higher percentages than others.

Electronic commerce in the European Union *via* websites or other electronic systems (EDI) in 2008

Country	Electronic purchases as % of companies	Electronic sales	
		As % of companies	As % of turnover
EU-15	37	14	12
EU-27	3 2	13	12
France	26'	13	13
Germany.	*59*	1	15
UK	34	1	15
Italy.	3 2		
Spain	20	11	9
The Netherlands	41	26	12
Denmark	64	23	
Sweden	62	22	1
Finland	41	17	1
Austria	37	10	11
Poland	12	5	7

Field: Companies with 10 employees or more , non-agricultural market, excluding the financial sector.

Source: Eurostat - Community survey on ICT in 2009.

The use of online sales also varies depending on the type of products involved. In France, the most involved sectors in online sales are chemicals, pharmaceuticals, electrical equipment, automotive, wholesale commerce, telecommunications and the publishing industry, the audiovisual and broadcast industry. 20% of companies integrated to ETI (Intermediate Size Enterprises) or to large companies sell electronically, whereas this percentage is 10% for small businesses.

3. The use of new software for online shopping

3.1. New software

The introduction of IP (Internet Protocol) cameras or new augmented reality software offers some innovations. With their advanced features it is now possible to offer the consumer a sort of trying before buying, which could have an impact in some commerce sectors (furniture decoration, but also clothing). Such software can allow for example to change the colours and the various accessories of a car and even see how to drive it.

3.2. The exploitation of data available at the sales point

With the introduction of digitalisation (scanner) at the sales point(POS) retailers can gather a lot of information that they can use in the management of their activities (in particular by adapting their production to products that sell, as Benetton or Zaza do), the organization of their supply chain or the management of their working capital.

3.3 Data on customer behaviour

One of the main objectives of loyalty programmes is to provide information to capture customer information in exchange for benefits (mainly economic).

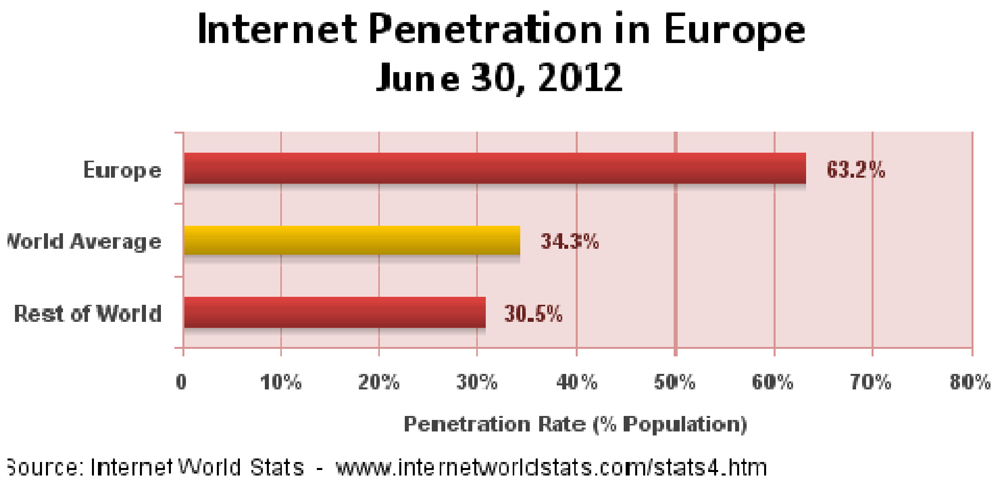
While many retailers have launched or relaunched loyalty cards, relatively few of them were able to use the huge amount of information they captured to be really and economically effective, with exceptions such as TESCO, the British supermarket chain, which analyzes the behaviour of its customers by combining data from its loyalty programme. Tesco is said to have tripled its sales in 10 years thanks to these loyalty programmes.

> "By multiplying promotions, this system does not reward the best customers, but the most zappers, says Sylvie Joseph. One can even say that retailers encourage consumers to hunt for promotion". Stéphane Marchet. Former Marketing Director Conforama. (interview lehub)

3.4. **Web presence and sales on the web**

The Internet is growing in importance for the retail sector as both a marketing tool and a sales platform.

The increased Internet penetration rate in the world and particularly in Europe is of course a factor influencing consumer behaviours and the number of cybershoppers grows more rapidly than that of Internet users (according to FEVAD European statistics) while the number of e-business sites also tends to increase (about 100,00 sites in France, in 2012). There were 38.6 million Internet users in 2011.



The e-commerce development leads to build new skills or new jobs: Buyer, E Merchant, Developer, Graphic Designer, Integrator, Traffic manager, Webanalyst, CRM Manager, Technical Project and functional Manager, e-shop Manager, Technical Manager, e-commerce Director

It is appropriate to put into perspective these developments

- There are sociological obstacles to development as shown by a recent Belgian study by Comeos:

Among the main obstacles -Because I want to see / try before buying and this is not possible in the context of the e-commerce (37%) -Because I have serious doubts about the level of security of purchases / orders online (36%) -Because I do not like to transmit personal information over the Internet (31%)

-Because I do not have a credit card / I do not want to use a credit card (27% -Because I can talk to a salesperson when I want more information (23%) about a product or service Responses to Comeos questionnaires in 2011

- On the one hand, the weight of online sales varies depending on the sector

Weight of Internet sales by sector in France

Industry	Internet sales in billion euros (estimate)	Market share (estimate)
Clothing, shoes, accessories, linens *	3.8	9%
Technical products (appliances, telecom, electronics, large consumer, photo, micro-computer) **	3.2.	15%
furniture, lighting, tableware, decoration ***	1/9	9%
physical and dematerialized cultural products, music, video, online gaming, digital book **	1,5	18%

Source: Fevad with IFM * GfK **, *** Precepta

- Most retailers in the different countries examined, use an online presence to complement their physical stores. When there is a space devoted in the store for online purchase and delivery, this also serves to attract customers who can visit the physical store

- The development of retail sites (marketplaces) is still done in an frenzied way and thousands of different and varied references can be found in it thanks to computer potentialities. Consumers should return to some rationalization in this area-

"We're going back to the fundamentals of consumer behaviour, which tends to associate a brand with a category of products or services. There are very few brands that can do everything", Denis Terrien, 3 Swiss International JDN , Tomorrow's Economy 2011

- Difficulties for "marketplaces" to release margins and find the right business model also leads to rationalization. Insofar as the sales are mostly on food products, with low value added, it is becoming difficult, especially in a period of crisis to generate margins in e-commerce transactions.

The director of a large French distribution group present in Belgium to the award of the Mercury prize 2012 by Comeos shared his vision of e-commerce and highlighted the problems of margins to be managed, distinguishing the e-commerce of food products and

that of equipment products:

"The e-commerce of daily consumables:

- Mainly food
- Low density, high volume
- Additional cost of home delivery
- The Drive, an intermediate solution, a new format and a new location

The E-commerce of equipment products:

- Essentially non-food
- Medium to dense, low volume
- Low overhead on delivery
- The point of withdrawal, a practical solution
- Impact on specialist and generalist commerce "

The interviews carried out in company B and C show how these must respond quickly to technological developments if they want to remain competitive

Web order cycles are getting faster; there are jobs that are faced with different realities with respect to customer needs. This has some impacts on industrial tools (automated production tool while the environment is still very manual). The skill level is alarming, some workers have no mastery over the management of these tools
There is a corporate responsibility; the skills of employees can be increase, professional chains can be set up, job maps are prepared, posts are weighted and house training modules are set up. We structure and make the workforce more qualified, and to do this we work with the OPCA of this sector.
But all this is not enough and in terms of professional approach the best equipped actors on the market are temporary employment agencies that are "Multi hats" actors; they are often more responsive, and deliver a training on basic skills.
Actors on which we rely are the OPCA, TT schools and businesses; but unfortunately schools are still too much detached from the reality. In France, in the faculty board there are no representatives of private companies, there is a need to build bridges".
Interview with some company officials of Bet C company

With the strong growth in online shopping, consumer expectations assert themselves. Brands must innovate by introducing a transparent dialogue with their customers, by diversifying their supply and rethinking the format of their stores. However, one should not overestimate these changes and the KCH observatory in the Netherlands is there to remind us of this.

Consumers are reluctant to buy, for example, a birthday or a wedding anniversary gift or a car on the internet. The choice of the online purchase depends on the emotional, affective, or subjective value that consumers put in a product.

Moreover, the relationship with the seller becomes reassuring for the consumer when the product price is high. The social bond is reassuring and internet has not the warmth of human relations (the example of buying a mobile phone is enlightening about the important role of the seller in the purchase).

According to investigations conducted by KCH, "The physical store is not required to give way to the selling via the internet. It appears in fact that the latter shall never replace the human contact or the experience at the heart of the act of purchase. The store will be transformed, will evolve, but it will never die .....For quality and at least financially important products, the consumer needs to feel, touch, watch ...

What becomes crucial is the presence of multiple sales channels, it is the surplus value offered by different channels (or cross channels) that can give the client the want to buy, to provide him with information and lead to the purchase. The aim is to ensure that the purchase is the most secure, the most enjoyable and easy as possible. To rely on the physical channel can increase sales. To use the *click to call* offers customers the opportunity to begin buying online, then to finalize the sale by telephone.

Payment through internet seems to have trouble getting a place in the consumer use. People do not really feel the need yet. In France, almost everyone uses a credit card, which is not so restrictive and it is rooted in consumers' habits. So the advantage of moving to contactless payment seems not obvious.

Finally, we must say that the *cross channel* commerce involves a reorganization of the value chain, processes and flows.: sets, stocks, inventories, prices, promotions, restocking, must be designed differently. Customers' relationships must also be harmonized and thought globally to achieve the greatest possible efficiency.

This idea of the "cross channel" or "multi-channel" is generally shared by those we interviewed. In France it has been developed in Interdepartmental report by PIPAM (see below)

"Soon, 100% of customers entering a store will also navigate the brand's website. To buy sometimes, but mostly to see the offer, find prices, plan a visit to the store.
The commerce of the future must provide the customer with total fluidity (the possibility to combine all channels without losing information or convenience), a good consistency of mix (supply, prices and services consistent between sites and stores) and commercial rebounds providing a synergy between channels.
If few concepts are actually "brick and click" (business models combining a merchant site and sales outlets in an integrated manner in the same service as Chronodrive), traders should find there new possibilities for added values.
"The commerce of the future" 2009 Report of the Inter-ministerial long-term and anticipation analysis of economic changes (PIPAME)

3.5. Technologies and skills

The arrival and growth of new technologies in the field of retail and wholesale commerce have several implications regarding the development of skills in the sector

These trends lead Managements to integrate these new technologies into their strategy to develop their activities and anticipate more and more skills needs if they want to remain competitive

They require the presence of specialists with the necessary skills to integrate these technologies into the existing systems, customize them, master the software tools, manage the operations and optimize them.

The retail and wholesale commerce employ more and more people who need to use these new IT tools or technological innovations. In particular the people involved in the management of purchases, in the supply chain, in the management of shelves (management category) or in the process of retaining customers, need to acquire these technological skills and the development of their skills this area is also an issue for the development and sustainability of activities.

More generally, the need to acquire basic technological knowledge is extended to all functions and all jobs of this industry.

Expertise in these areas is sometimes not enough because these new technologies also lead people to adopt a particular way of being especially in their relationships with consumers; the difficulty is to pass from the know-how to the know-how-to-be, that is, the behaviour to keep in practical situations.

In France, a recent study identifies businesses that may be impacted by new technologies in the area of wholesale commerce.

The following wholesale commerce jobs are impacted by new technologies:

- Commercial jobs: buyer, sales manager, sedentary and itinerant, technical-commercial

- Careers in Logistics: logistics manager, storekeepers, unpacker, delivery-driver, maintenance technician, specialised worker

- support jobs: administrative and financial / HR, assistant accountant / HR, specialised worker in information systems (IS) and Internet, marketing, quality / sustainable development, R & D.

For buyers: the requested skills focus on the ability to negotiate in order to buy at the best price => expand the function to the purchase of services and to meet the expectations of new markets.

For sales representatives:

Scenario 1: segmentation approaches (salespeople, telemarketers, sedentary sellers) to optimize sales channels;

Scenario 2: Identification of high value-added services to complement product offering;

Scenario 3: lead a project to develop new markets.

For technical-commercial jobs:

Scenario 1: refocused on the sales,

Scenario 2: development of related services;

Scenario 3: meet the needs of new markets.

Logistics:

Scenario 1: skills needed aim at optimizing the process.

Scenario 2: storage and delivery (if necessary, develop a computerized management)

Scenario 3: implementation of solutions to meet the needs of new markets.

Drivers / deliverers:

Companies want to better empower the deliveryman on the consequences of incorrect delivery, enhance the role of business intelligence, diversify profiles of deliverers relative to types of markets.

Field of finance:

Develop management control and monitoring of costs / margins, offer new financial services and develop a financial strategy (dynamic and innovative HR) to allow for scenarios 2 and 3.

HR function: the need of professionalization is increasing in three scenarios.

Marketing jobs will be developed:

Goal = give value to the competitive advantage price / product to develop sales points/leaflets on associated services (Scenario 2).

Develop and supply the sales points/leaflets towards new markets (Scenario 3)

Field of quality:

Scenario 1: use specialized skills to aim for a higher level of quality to avoid hidden costs.

Scenario 2: develop a new type of offer through high quality products and services.

Scenario 3: meet the needs of new markets.

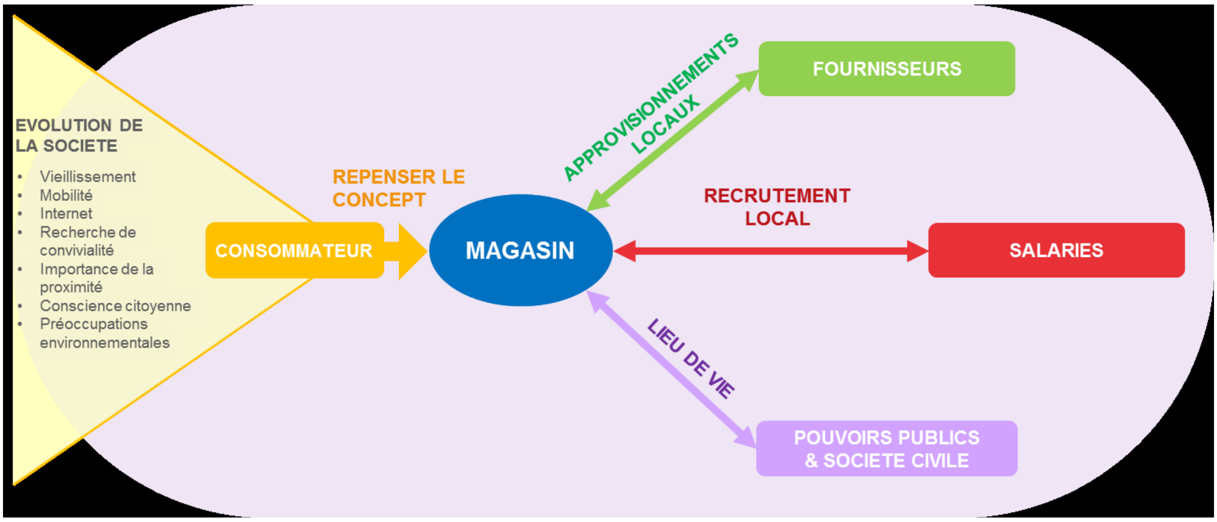
4. Challenges in terms of skills, qualifications and training

Drivers of change in the business world and in particular the introduction of new technologies foster the emergence of new skill needs; commerce jobs that could be defined as skills portfolios are impacted by them, and sometimes this leads to the emergence of new professions.

The insertion itself of the stores in the society is under transformation; to some observers, the store could in the future become a vibrant place that would transform the territory into an asset and where the relationship with the customer would go out of its "transactional" logic to move towards a more "relational" one.

1950-80: We consume what plants produce; 1980-2010: We produce what consumers want; 2010-2050: Shall we consume what will be advised to us?
How will the distribution meet a society of recommendations?

Source: Eurogroup



Source: Eurogroup

In this context, the difficulties of finding qualified candidates, experienced and having the required personal qualities, may lead to situations of labour shortages. The little awareness of the wholesale sector is sometimes detrimental also to recruitment, as it is the case of wholesale commerce in France where there are recruitment difficulties especially in the field of logistics (truck drivers) [14] .

These B to B companies, that are "not intended for the general public since their clients are professionals" have a lack of awareness. "Students, their parents, job seekers are not necessarily aware of this type of hiring»
Mr. Mahnes. President of the French Confederation of Business-to-Business commerce (CGI)- interview Libération

While many companies announce new skills needs and a workforce growth in the future, professionals are concerned about the shortage of qualified personnel affecting the sector.

Although some of these issues must be put in their right perspective, the matching of skills and new needs represents a significant economic and social stake and raises important questions about the adaptation of training systems.

As stressed by an OECD report of 2011, "In recent years, the jobs based on routine cognitive tasks are affected primarily by computerization and outsourcing – as it has already happened to the demand for manual skills. In contrast, there have been little significant increases in demand for complex communication skills and non-routine analytical skills. These developments pose a significant challenge to education systems: the easiest skills to teach and validate are those that are disappearing faster from the labour markets of advanced economies".

Already in 2003 in Belgium [15] , recruitment difficulties appeared in the retail commerce for some jobs such as mechanics, electro-mechanics, car body repairer, or " catering" or "niche jobs" such as fishmonger, baker, butcher, etc. .In the wholesale sector, we list in particular positions such as technical sales representatives that are most difficult to fill. Moreover, it now appears that a major training effort is needed in the retail sector which includes most employment opportunities, since the wholesale sector is benefiting today from a paradoxically more important number of training courses.

In Ireland, it is often pointed out that large companies in the retail or wholesale commerce which are leaders in Europe have an arsenal of training tools and know very well how to recruit. Large companies in the wholesale or retail sectors most often train their employees within the company, "on the workplace" and there are many good practices in this area.
In contrast, SMEs in the wholesale or retail sectors do not have the same logistical and financial means to attract skills or train their employees. This, and the mobilization of human resources and their ability to meet diversified requests from consumers, becomes one of the main keys to success and sustainability of activities in the industry.
Following our interviews with different company managers, the key skills identified as important by employers are:

- Interpersonal and good communication skills
- A good level of computer literacy
- Negotiation and persuasion skills
- Leadership and management skills
- Show enthusiasm
- Good risk management
- Awareness of commerce issues
- Intuition for creativity
- The ability to work under pressure and with tight deadlines

In the Netherlands, the results of thirteen interviews conducted by KCH in the Netherlands can pretty much summarize the debates around these issues in other countries:
a) We often underestimate the importance of current trends (technological, economic, demographic development, internationalization) even if most of the times it is just worth to put things in the right perspective: technological changes do not necessarily upset jobs but

rather skills. Training is essential to adapt to new skills requirements, to reconsider one's choice in case of failure.

b) Technological innovation creates and destroys jobs. Indeed, the influence of technological developments leads us to consider that this trend creates jobs, as increased services to customers require increased training. The fall in the demand is nevertheless followed by the disappearance of shops and jobs. The future belongs to the cross channel. Indeed, the web needs bricks, but bricks need the web, too. People employed in these new networks need training. And the number of jobs is expected to increase significantly in the coming years.

c) The vendors need to be more customer-oriented, flexible with an emphasis increasingly placed on high versatility. Customer reception and care become increasingly demanded skills. The worker must acquire a wide range of knowledge because the goals are oriented towards the search for greater productivity.

d) With the help of smartphones we will manage working hours, offers, wages, the search for information in almost real time, the understanding of how the channels will work. The ecosystem will have to master new demands, new requirements for new skills.

e) The pressure on margins is a risk. If we want to reduce costs, the salaries of employees will be affected;

f) The mismatch between the skills needed and those available on the market requires to make jobs more attractive. Skills are needed mainly in welcoming services, services to customers and customer orientation (non-technical skills).Training should be more practical and be more and more organised in the enterprise.

g) The economic crisis increases the pressure on retailers, some are destined to disappear. This requires some support in career continuity.

In England, according to the recent report by FORFAS (2010) [16] the issues raised today on employment in commerce are related to the bad image of commerce and to the hiring difficulties in SMEs and all that concerns the barriers to training.

According to an enquiry conducted with 12 employers in the retail sector in the UK, to gather their perceptions of the need for competence, the main conclusions are:

- The retail sector does not have an attractive image, and this makes it difficult to hire in this sector where there is not also a high rate of unemployment (in the UK): the retail commerce sector is still understood as being a sector with low-status, low-paid and with work hours socially unacceptable.

- Employers stress the lack of basic skills in the service provided to the customer (communication and client relationship).Many are the employers in this sectors that are part of the need for skills in teamwork and collective labour relations.
- For the majority of the employers interviewed, there is a delay in the training provided in the retail sector compared to other sectors. Training is generally delivered at the enterprise level. SMEs experiencing barriers to information are discriminated against.
- The report also shows that the proliferation of qualifications offered also creates confusion in the labour market

In Ireland, according to projections made by analysts in Ireland [17] , the commercial sector would find it difficult to get back to full employment in 2016: apart from a few exceptions in specialized jobs, retail and wholesale commerce generally hire low skilled people. Since there are a large number of workers likely to fill the jobs of this nature in an unfavourable context to full employment, it is unlikely that companies are facing a real shortage of labour.

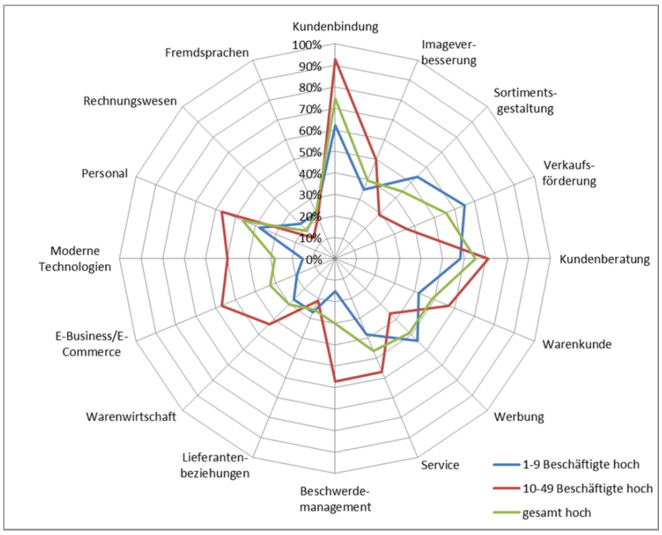
It is inevitable, however, the report says, that the changes that invest this sector and especially technological changes, management of the supply chain and new consumer services would generate new skills.

Whether retail or wholesale, the results of our interviews with the observatory representatives identified and some business leaders in the sector generally show that jobs are not going to really know a major transformation but new skills will nevertheless add to previous ones, particularly in the field of new technologies. It is however difficult to generalize, our interlocutors are mainly large companies and things may be different for SMEs which are often first faced with shortages of ways to anticipate and accompany change.

"Changes, especially technological developments, lead to add new skills to the job. Observation shows that they are not large additional difficulties for employees: if it is sometimes difficult to acquire appropriate knowledge in computer science, the fact that this machine can be used regularly allows to control its functioning while making the job easier".
A representative of one of the employment agencies in Belgium

In Germany, the results of a survey of 280 commerce companies located in Berlin shows also that the future of commerce is characterized by the addition of new skills in different jobs and at different degrees.

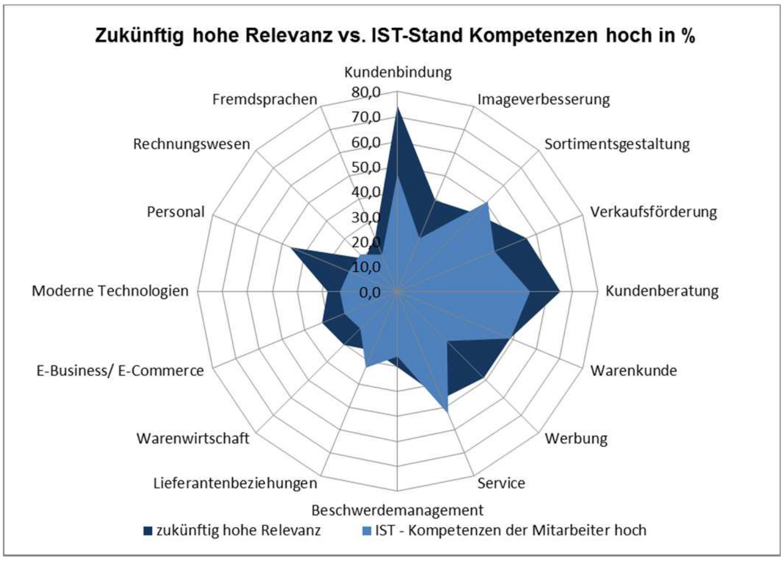
Estimation on importance for the prospective company development



Source: Weiter bilden - Projektdokumentation-Weiterbildung im Handel in Berlin (EQQHB) 2010

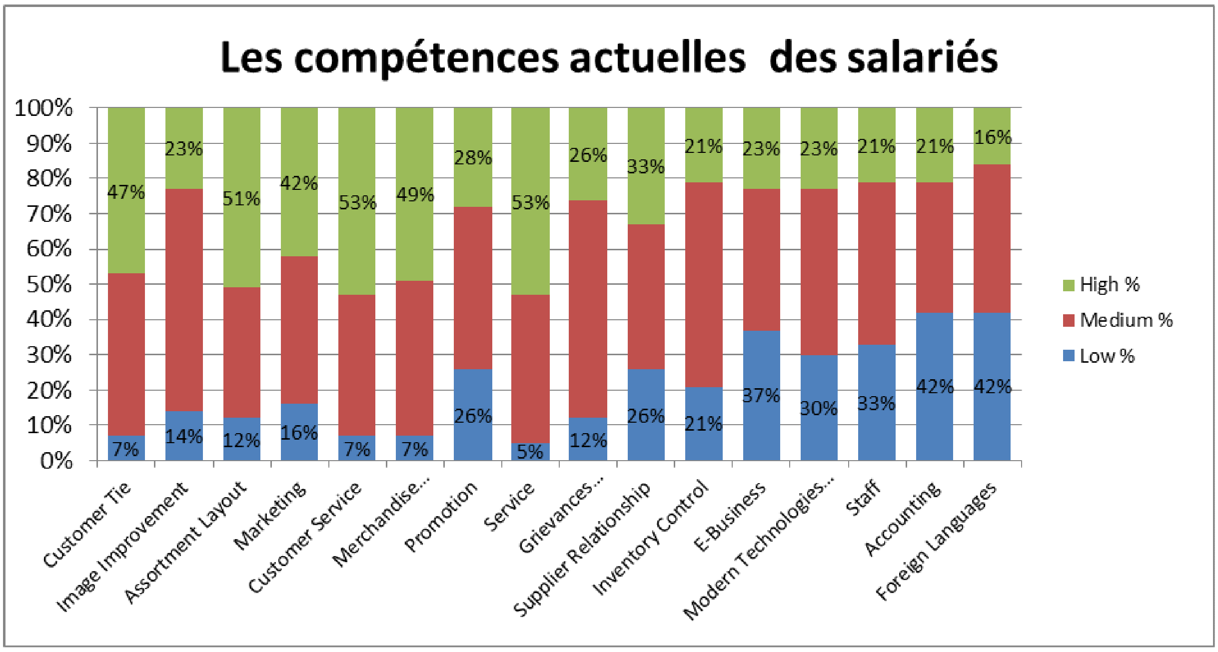
This graph clearly shows the skills that are added (in blue)

Prospective relevance and current skills/competences on company level (in %)

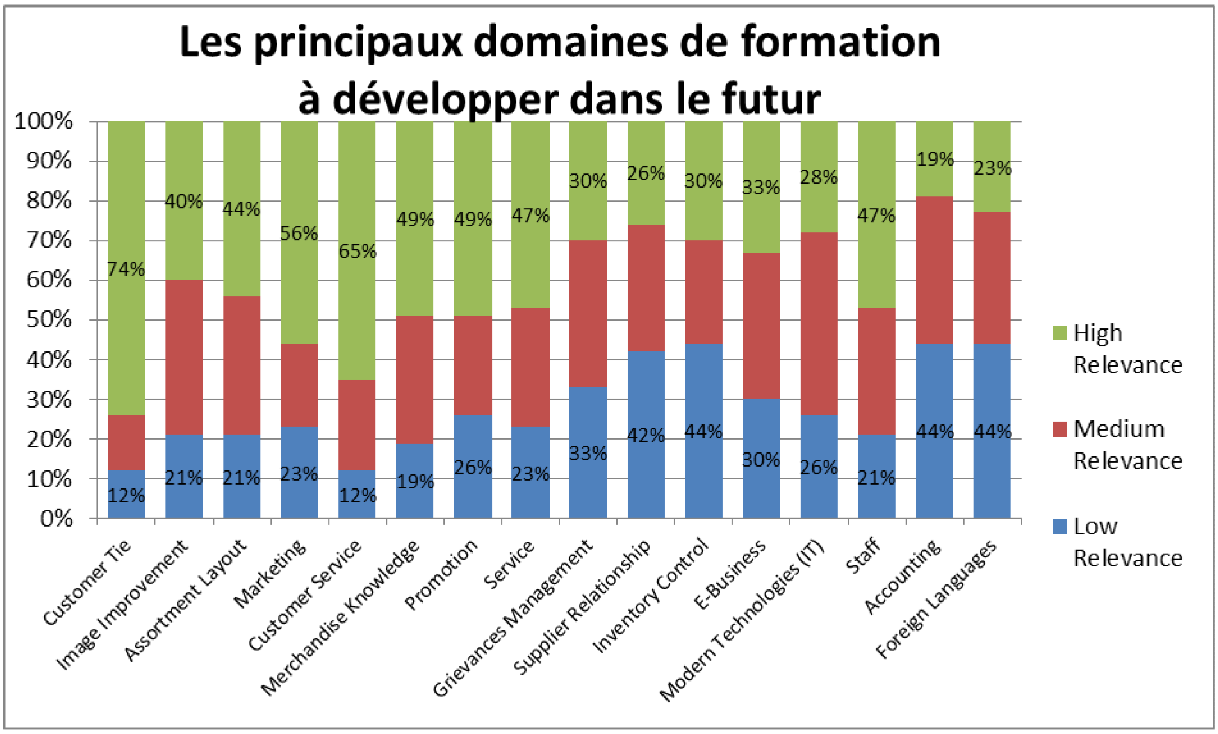


Source: Weiter bilden - Projektdokumentation-Weiterbildung im Handel in Berlin (EQQHB) 2010

The following graphs illustrate the areas of training that must be the object of investments in the coming years.



Glaubitz, Jürgen 2011: Handel 2020 - Fakten, Trends, Potenziale. Düsseldorf.



Glaubitz, Jürgen 2011: Handel 2020 - Fakten, Trends, Potenziale. Düsseldorf.

It is clear that all the fields related more precisely to consumer services (see the text in green) will be subject to further support in training.

For some professionals, changes are upsets that lead not only to new skills but to new jobs:

"Jobs chance fast; technological changes are significant and will affect all jobs. The emergence of new tools helps develop the skills towards new jobs.
Such as the job of "community manager", that is to say the management of customer rumours (initially it was a job for network facilitators).
These developments call for training on a daily basis: from the date of implementation of a training plan and its implementation (6 months) these needs may have changed.
These technological changes impact therefore on jobs, skills, but also on the HR functions that manage these changes; they nourish the whole body of the company by calling for new challenges, level requirements, and adaptability".
Interview with an official of the company C

It is difficult for observers to tell with sufficient accuracy if the match between skills needs and skills supply will be assured; however it is necessary that training organizations remain in close contact with companies to identify emerging demands for skills and offer training tailored to these needs and accompany job creation and mobility in employment.

The next chapter is precisely focused on the identification of best practices in the management and anticipation of skill needs on the one hand, and the need to secure career paths for employees of different jobs of this sector on the other.

IV. Skills needs and safeguarding of career paths

1. Presentation of jobs

More than 25.96 million people in Europe work in the commercial sector according to Eurostat Statistics 2011.

Among the shelves of a supermarket, in a shop, in a business ... but also in markets, for wholesalers, and now on the internet.

This profession requires a well-tempered personality where smile and a sense of customer service are essential.

The objective of the marketing function is to make known that the products exist, to make customers understand the interest of the product and to make them buy it.

Sales methods vary depending on the product (we do not sell a pen or a plane in the same way), on customers (we do not sell to a multinational company and to an individual using the same approach) and on the size of the company where one works (the methods used depend on the financial resources of the company).

The sale may be conducted face to face in a store or at the customer's, by phone or by internet (e-commerce). Commerce jobs are therefore numerous and diversified. The retail and distribution industry offers many opportunities.

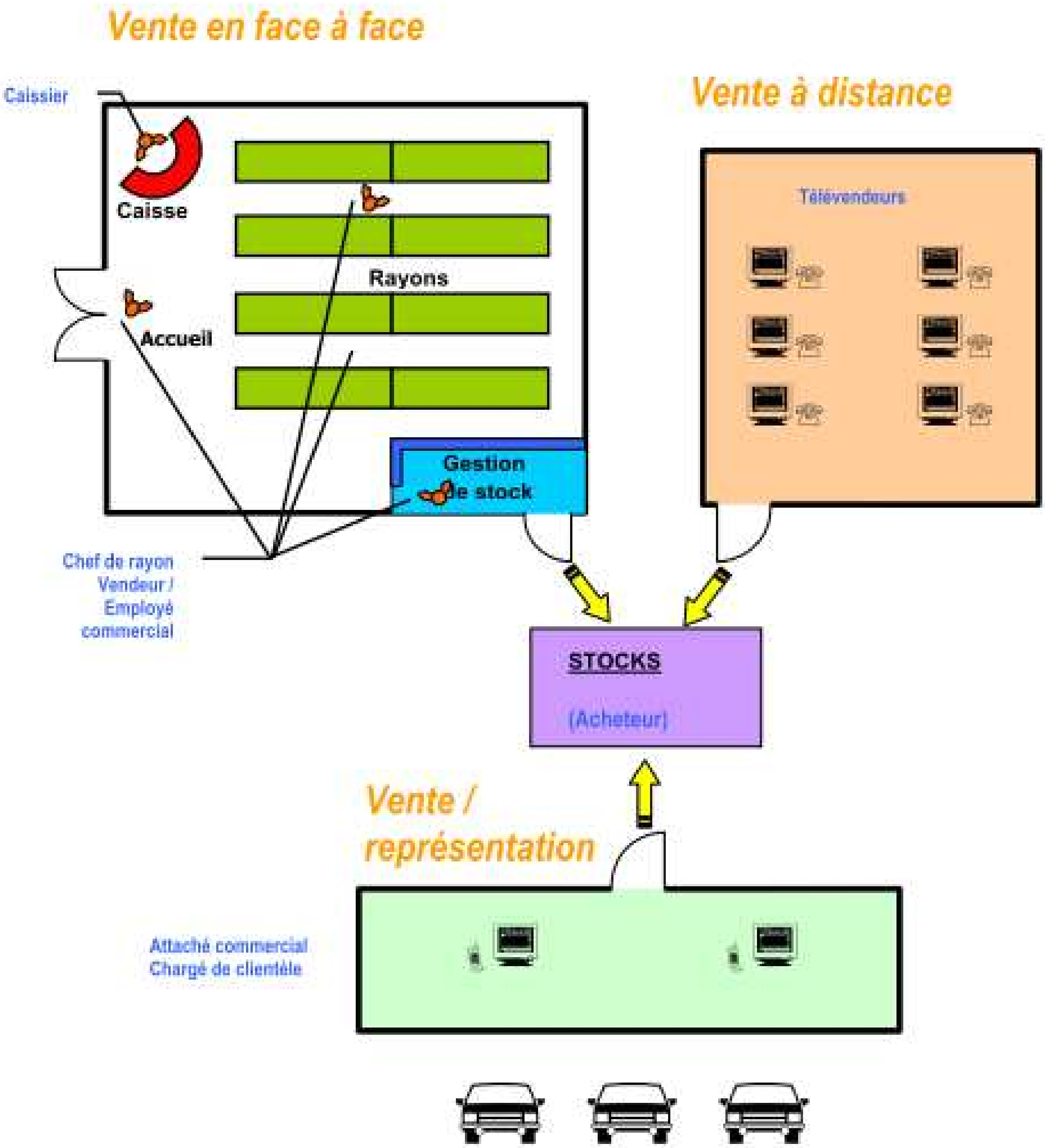
The sales function can be organised in three groups: retail commerce, retail and distribution industry, sales representation.

The seller is constantly in direct contact with customers, and therefore this function requires qualities such as attention, openness and patience. Kindness, listening and service skills are necessary and essential.

In the store: skills in this case depend on the type of business and the importance of the store, and irregular activity experiencing strong peak periods. Working hours may vary: full-time or part-time, and often require working late at night, on Saturdays and sometimes on Sundays and overtime during holidays.

As sales representative: the pace of work and the many trips require a good physical and nervous strength.

La vente sous toutes ses formes …



1.1. Careers in Retail Distributions

Les métiers du commerce de détail

Grande surface *(Hypermarché)*

L'équipe de Direction

Directeur

Directeur Adjoint

Responsable RH

Responsable Financier (DAF)

Acheteur

Les fonctions Administratives

Employé de Secrétariat commercial Achat

Employé de Secrétariat Gestion des données

Employé de Secrétariat commercial

Comptabilité

L'équipe d'exploitation

Responsable de secteur

Chef de département

Chef de produit

Gestionnaire d'approvisionnement

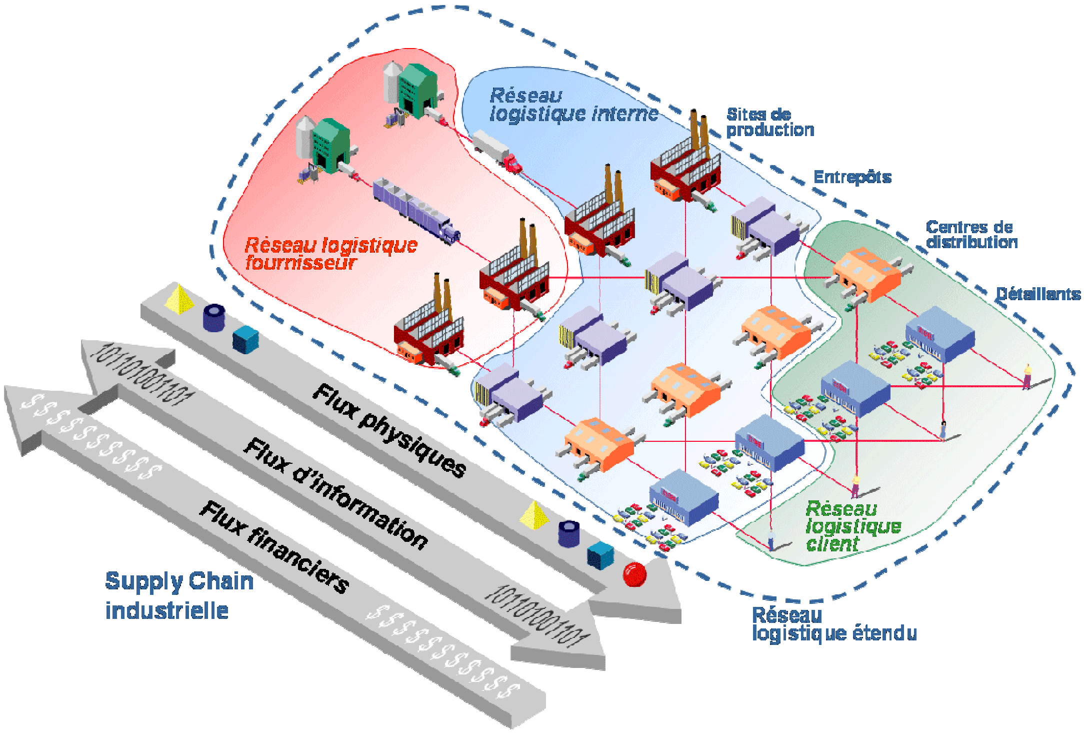
Assistant d'approvisionnement

L'équipe d'exploitation

Responsable du secteur caisse

Chef de zone de caisse

Caissier


Réseau logistique interne
Sites de production
Entrepôts
Centres de distribution
Détaillants
Réseau logistique fournisseur
Flux physiques
Flux d'information
Flux financiers
Réseau logistique client
Supply Chain industrielle
Réseau logistique étendu

1.2 **Jobs in Wholesale Commerce**

Famille de métiers
commerce

// Responsable de magasin en commerces de gros

// Chef de projet et gestionnaire du commerce électronique

// Commercial(e) itinérant(e) en commerces de gros

// Acheteur(euse) - Vendeur(euse) en produits frais

// Vendeur(euse) sur site en commerces de gros

// Télévendeur(euse) en commerces de gros

Famille de métiers
logistique

// Opérateur(trice) logistique en commerces de gros

// Agréeur secteur alimentaire

// Chauffeur(euse) livreur(euse) en commerces de gros

Famille de métiers
technique

// Responsable d'atelier en commerces de gros

2. The access paths to skills

These paths are not innate, they must be built in both directions: from the individual, regardless of his/her status (student, unemployed, worker, retiree) to the company that may use these skills, and from the company that wants to acquire these skills to the individual who has them.

The comparative and Community study of the literature on issues related to the development of skills and expertise in a particular sector of the economy is destined to prevent and manage future challenges, and leads to focus on the following four areas of strategic action:

- To identify and anticipate skills and competences
- To inform, advice and guide
- To develop access to learning and training
- To recognize and validate competences and skills

These four strategic areas are also those usually identified and developed by institutional and social partners at European level, where the European Social Fund (ESF) constitutes the main financial instrument to support the effort of training.

2.1 To identify and anticipate competences and skills

How to identify and anticipate skills needs, qualification and training in the Commerce sector? The resurgence of recruitment difficulties and the magnitude of the demographic changes that lie ahead make more necessary the establishment of national long-term observatories. This represents a significant cost for some States.

This need for a long-term analysis is mirrored at Community level in the work carried out by CEDEFOP which makes forecasts of supply and demand for skills in different sectors and tries to anticipate future scenarios. The prospects for 2020 in terms of retail and wholesale commerce show [18] some stability, or even a slight increase in employment in 2020 due mainly to the retiring of persons and their replacement in the coming years with an increasingly important demand of higher level or intermediary skills.

It is also the task of the branches, observatories or similar entities created in the different countries and responsible in particular for studies and long-term analyses of trades and skills. These predictions are used to orientate future training policies.

The strategies developed by companies to solve this shortage of skills and competences are more and more built in a time perspective.

The need to anticipate future changes sometimes takes the focus of advertising slogans: “Which manager would not say that the jobs of tomorrow must be imagined today? The companies that succeed in anticipating tomorrow's skills will obtain sustainable competitive advantages”.

While large companies have most of the time set up systems to anticipate and accompany change on which they have based their development strategies, SMEs generally do not have the means nor the time to build anticipation. The setting up of observatories at branch level can therefore counterbalance this deficit in anticipation.

The recently released report prepared by CEDEFOP confirms the results of the questionnaire that we sent to various observatories or similar entities identified in several countries, to better understand their role in the long-term analysis of jobs and skills. They work. Many of them provide more or less long-term national forecasts on the evolution of the labour market, skills needs and training needs. This is the case of Germany, France, Cyprus, Spain, Poland, United Kingdom. In three Member States (France, Germany and Spain), these observatories have been established by law on the basis of a social dialogue or a national collective agreement (France in 2004).

Short-term forecasts are usually made at local or regional level by organizations that are most often public employment agencies [2] According to the Irish report, other countries such as Romania and Slovakia are about to set up such entities and develop methods of collecting and processing information.

Most of these observatories are oriented towards the analysis and anticipation of skills needs. In all countries identified (Cyprus, Italy, Portugal, Spain, Netherlands, France, Belgium, Germany, Ireland, UK) observatories carry out studies and sectoral analyses.

In Germany, the BIBB Observatory conducts research on skills needs upon request of the social partners, of the Ministry or on its own initiative

"In the commercial sector we changed our approach to conduct some assessments of the changing patterns of work and jobs, we must be attentive to how the training will take place since jobs do not require only technical skills but also soft skills, that is to say, the "know-how-to-be". We must therefore bring us closer to working practices."
Interview with an official of the BIBB German observatory

In Ireland, agreements have been concluded between employers, sector councils and organizations in charge of training in order to adapt training to the needs of future skills.

The agreement concluded in Northern Ireland in the retail sector has four main objectives:

1. To improve the skills of management in the retail and distribution industry

2. To strengthen the skills of managers who are owners of independent stores

3. To improve the sales skills of all employees regardless of the type of store

4. To ensure that a sufficient number of people with the right profile be attracted by the sector.

Existing or future observatories generally recognize the interest they have to share their knowledge with other observatories in Europe to develop some methodological tools.

Observatories certainly have a lot to learn from each other. An overview of the existing observatories in the trade sector shows very quickly the diversity in the role of each of them, the methods used, the way in which they are used by the sector stakeholders.

In France, for example, observatories have been created for each sector and in particular for the Trade sector: there is an observatory for wholesale trade and an observatory for retail trade which regularly produce information on the changes in the labour market, future trends and needs in jobs, skills and qualifications.

Moreover, always in France, the Council of strategic analysis created in 2006, and placed under the responsibility of the Prime Minister has the mission to enlighten the Government in the formulation and implementation of strategies for the economic, social, environmental or technological sectors. This institution plays an important role in anticipating future policies and produces long-term analyses, regardless of the sector concerned.

Different levels of anticipation in France

LEVEL	Initiator	Main Focus	Example of initiative
National	Prime Minister, Ministry of employment, Ministry of Education	Recruitment, sector development	Prospective studies contracts (CEP); State of Sectors; Actions to be taken
Regional	Employment and training observatory (tripartite, funded within 2007-13 State-Regional Councils Contracts)	Analysis, forecast for training school, training and CVET within companies	Regional employment and training observatories (OREF); studies
Sectoral	Industry branch joint observatory; set up of professions and qualifications forecast observatory (OPMQ) in 2004	development of branch professions at regional, national level	Publication of key studies / industry built on diagnosis and forecasting approach

In the Czech Republic, sectoral studies have been conducted on the future of jobs and skills in various sectors and have been integrated into a web portal ("Czech future skills") that could be used as a model at a European level. For some observers [3] , these sectoral data could be put in a perspective with the forecasts and quantitative data of CEDEFOP.

The role of social partners in anticipating skills needs is also important, as shown by a recent study carried out in the retail sector by a consortium of European partners [4] Although these agreements are primarily intended to develop training tools, these latter are designed to anticipate skills needs, as it is the case for the agreements negotiated between the social partners in Flanders with the cooperation of the VDAB employment agency and aimed very pragmatically at the development of training programs to "anticipate the needs of the sector by increasing the business skills of employees and empowering them to betdo their jobs."(See Appendix of this paper). In this context, anticipation means first of all to increase the skills of people.

Among the countries examined, it seems that France is one of those that pushed further the development of tools to anticipate needs and job skills through initiatives called GPEC (forward-looking management of employment and competences).

Employers and all employees included in the scope of application of the national collective agreement for the retail and wholesale commerce with food predominance dated 12 July 2001, are to receive the benefit of the provisions of the 2008 amendment on the provisional management of jobs and skills, of this collective agreement (see section 2.2).

Moreover, in France, the Actions de Développement de l'Emploi et des Compétences (ADEC) have as their goal the anticipation of the consequences - in terms of jobs and skills - of economic, social and demographic changes, and carry out actions on the concerted territories. The realisation of an ADEC presumes the signing of a framework agreement by the government and professional organizations.

An ADEC for Distance Selling, for example, was signed in the Nord Pas de Calais region by the State and industry partners. It involves 8,500 employees and its implementation was entrusted to Forco for the period 2009-2012. Its objectives are:

- To anticipate and deploy a forward-looking management of jobs and skills (GPEC) on the territory.
- To support employees, and especially the most vulnerable ones, to develop their employability.
- To improve the acquisition of skills encouraging versatility and mobility.

The social partners at company level can play a key role in the long-term analysis of jobs and skills. In France, the interview to a manager of a large retail chain that signed a forward-looking jobs and skills management agreement in 2009 has turned to be indicative:

> "Every year as provided in the GPEC Agreement we do a mapping of jobs and we present it to the EAC. We also identify the jobs that disappear: it is mainly site jobs. But overall, we have a workforce stability among cashiers, sales officers ..."
> Said by a manager of a large retail distribution chain A

It is well understood in this context that this type of negotiation both anticipates future needs and identifies the so-called sensitive jobs , that is to say, those jobs ultimately threatened by the reorganization.

> "In 2006, we had a workforce reduction to be carried out in our office, so we wanted to conclude a method agreement. It is the unions who said: if you want a method agreement, we want a GPEC. So anyway as we would be obliged to negotiate, we launched ourselves into a first GPEC agreement. So we had at that time a very restrictive vision of a GPEC, that is only on how to process sensitive jobs and internal mobility. In 2009, there were still problems of reorganization, so we wanted to renew our method agreement, and so we renewed the GPEC agreement by enriching it with a component of external mobility. So it is always under the restrictive view of sensitive jobs "(Director of Social Policy France).
> Said by a manager of a large retail distribution chain A

The integration of the territorial dimension in the anticipation strategies of companies and, more generally, of the social partners has also become a challenge for the companies of this sector.

"A company that today is not interested in the forces to take into account in its territory will not have skills tomorrow. We must act on the territory. It's better to get skills in an environment that we can control "
A senior Human Resource officer in Group B

2.2 Information, advice and guidance: promoting employability

Knowledge of employment opportunities in the commerce sector is an essential condition to enable people to build career developments.
Information channels and their dissemination too often depend on the status itself of the person, employed, unemployed, student.

Each of these statuses generally refers to different agencies the task of informing and guiding the people involved in their professional careers: the education system for students, the employment system for the unemployed, the public policy system, social relations system and human resources systems for the employees.
Attempts to overcome these different forms of compartmentalization exist in some countries in the framework of the cooperation agreements between observatories on prospective jobs and skills (Forco or Interfros in France, BIBB in Germany, Forem, VDAB in Belgium) and National Education systems. In most countries where the identified observatories are registered, the question is also to promote and strengthen the link between education, training and business. This articulation is very advanced in Germany, where the system provides for the youth in school education to make visits and internships in companies. The State has set up special services to provide orientation to target groups such as young people or migrants.

For employees, the stakes of lifelong training are becoming increasingly important and the trend driven by European initiatives is to make them agents of their own career by developing their employability, that is their capacity to appear desirable or "employable" in the company and on the labour market. ..

It is of course difficult and sometimes complicated for a person individually to seize the new employability paradigm although many writings in this area tend to show that these approaches are obvious:

"We must remain employable throughout our life to ensure ourselves against unemployment or downgrading. And to be and remain competitive in the labour market, and, what is more, in a negative balance of power, the employee must be proactive and adapt, get training, fit into a diversified and continuous learning process".

If it is clear that the development of a particular skill or talent depends on the individuals themselves and their freedom to innovate and create, they most often need to be guided in this choice, particularly when they live the experience of reorganizations that impact on employment;

Here the social partners play an important role of watch and counselling; they are a sort of "compass" in the field of orientation and construction of employability. Collective agreements or collective practices generally promote talks between management and employees on possible directions of career paths.

In France, the collective agreement of retail and wholesale commerce predominantly in the food sector (addendum dated November 13, 2008) promotes mobility and access to new based, for example, on:

- Individual discussions aimed at developing proposals for professional action and training (for all employees with more than two years of seniority), information on lifelong training schemes, the exchange on employees' projects on their career development,
- the promotion of a training passport inspired to the European CV.
- Skills assessment, especially for those aged 45 years and who have more than 20 years of employment and a minimum of one year of seniority in the company. This immersion in skill training could be made in accordance with the management during working hours.

The Convention also contains specific provisions for SMEs.

In Denmark, large companies have joint committees composed, in equal numbers, by representatives of management and employees. These committees receive financial and social information, in particular on the evolution of employment, professions, skills or the development of new technologies. These committees may enter cooperation agreements guiding employees in the development of their professional careers.

In Germany an interview with an official of Company C shows that this type of skills assessment can also ensure that the employee can effectively respond to changing skills.

"The current system allows to make the point (assessment) about the level of skill and training of the employee and to suggest him the training to attend so he could be part of a process of formation and development of skills; Tune "learning story" that allows the employee to achieve the skills requirements necessary for the proper functioning of the company.
For each position in the company there are training plans to enable employees to adapt to the skills needs, it is a form of learning by doing. Ideally, this skills assessment allows:

- To develop curricula and training modules for employees
- To assess the needs of individuals
- To encourage training on the workplace
- To assess and develop training contents, discussions with the management on the future of jobs and skills.

The company in this way becomes a place of experience where skills are developed and with the means provided by the laws and practices.

Many organizations involved in the commerce labour market and often managed by employers' organizations inform about and guide the students and job seekers towards careers in the industry.

The Chambers of commerce or trade associations play an integrative role but they sometimes focus only on certain categories of people like the chambers of commerce in Cyprus involved primarily to enhance the employability of employees and not that of the unemployed or students.

In Belgium, every year, 130,000 students work in this industry during for their holidays. Comeos, the Federation of Trade and Services in Belgium, helps many young and low-skilled workers to access the labour market. It stresses that the flexibility, proximity (eight kilometres away from the home on average) and training opportunities offered by the commercial sector are poles of attraction [22] .

In the UK, in 2008, *Skillsmart Retail* launched the National Academy of Skills for Retail, whose objective is to be the place where everyone can go to learn about careers in the retail sector and the necessary skills to succeed. The Academy, in cooperation with the network of retail stores, has thirty centres (skill shop) across the whole country that advise and guide people on courses and careers in commerce. Each "Skills Shop" is operated by the local training partners, local agencies, developers and retailers.

In France, facing recruitment difficulties in the wholesale commerce, the French Confederation of Business to Business trade (CGI) "is ready to embark on 15,000 POE" announced its president Bernard Mahnes to AFP, especially in the logistics sectors, such as "jobs as forklift truck operator."

At the end of January 2012, the CGI, which groups companies such as Point P (building materials), Rexel (electricity) and Pomona (Agribusiness) launched a campaign to raise awareness about this business and wholesale commerce and the fact this sector offers “120,000 jobs per year in the "BtoB" (business to business)”, " of which 95% with a permanent contract."

"Nearly a job in two does not find someone willing to do it", this is mainly due to the size of enterprises, that are SMEs that will not use billboards, and on the other hand these enterprises do not aim at the general public since their customers are professionals, they lack public awareness. "Students, their parents, job seekers are not necessarily aware of this type of job, the reputation of this industry, compared to its economic weight, is insufficient towards public authorities or even as a job attraction centre."
Bernard Mahnes, interview reported by Libération, January 2012

If the tools for vocational guidance generally exist in companies to facilitate the guidance of professional careers or to assess the capabilities of a particular person at the moment of recruitment to determine if he has the sum of indispensable prerequisites to get the mastery of his trade, the development of these tools in the territories is rare and deserves to be developed.

To this end, we include in this report an overview of a tool (the Capacity tool) developed by the Alpha Group, which in many respects is an innovative way to understand and guide people as well as businesses in paths for skills and jobs. Its use as an interactive database is thus one of a dynamic approach to the use of the concept of employability.

The implementation of the capAcity tool:

The ALPHA group has developed a method for assessing the economic and RH potentialities of a territory in order to allow actors to consolidate and share information that is often scattered within it.
The final realization of this approach is an interactive website dedicated to the Territory (that is to say all the actors who are simultaneously contributors and users of the Internet space)
The site presents three key input:

- A Company space
- A Personal space (workforce)
- A Territorial space

-**For the Individual:** It is a tool for career guidance and construction of one’s career path.
-**For the Territory:** It is a tool for mapping economic and HR potentialities of a specific area
-**For Companies:** This is a search tool to find individual profiles who could meet the companies’ skills needs through appropriate training

capAcity is an interactive database available online (web) that allows to map a territory in its economic dimension (Enterprises) and HR with a usage mode based on triple entries: Individuals, Businesses and Territory.

By its design and its destination, it is also a tool which argues working on a territorial and business-to-business dimension and can be used to support a dynamic multi-stakeholder cooperation in the process of Territorial GPEC.
This Business-to-Business/Territorial dimension collected on the same tool resulting from a joint approach allows the construction of a proactive push of the "territory and its actors" to include the FPSPP and facilitate joint action plans designed for the "economic development" with action plans focused more on the social dimension of the GTEC (Securing career paths, active management and early career transitions).

2.3 Making training and learning a valuable tool for the development of skills

Several country experiences show that the main challenges for enterprises and more generally for the social partners to reconcile the search for flexibility expressed by the enterprises (see in particular the section of this report on employment and working conditions in the sector) with the development of vocational training and the development of individual career paths.

The Forfas report for example shows some good practices for instance in the JUMBO company in Ireland where employee representatives have agreed to the implementation of a working time flexibility in exchange for a real investment in training by the company . No formal agreement has been signed but the commitments were taken.

Several barriers are still an obstacle to these good practices. Thus, several studies attest to the fact that in Belgium the too wide separation between the world of school education and that of the enterprise is an obstacle to career development of individuals and business demands in terms of skills needed:

"In commerce and retail: unlike other regions, there is no school to train to the different commerce jobs in Wallonia. The result is a strong culture of pragmatism that will have consequences in terms of inefficient management, including HRM. For example: there is a need for flexibility and versatility in supermarkets, but the management response to this requirement is given only in quantitative terms: "work faster", and not in terms of know-how and work organization. The consequence is a high turnover, which only accentuates the need for flexibility. It’s a vicious circle.”

The interviews we conducted with business leaders show how important it is for them that the skills be acquired on the job in the company.

It is important for this reason to dwell a little on the German training system that combines theoretical training in schools and some practice in companies.

The 1969 Law on Vocational Training is the result of a compromise between German trade unions and businesses. The first wanted a dual training system providing a true financing of such training (compulsory withdrawal) and companies would have preferred to focus on a training that could meet immediate and focused needs. This law governs all apprenticeships, that is to say, training for skills in crafts and commerce and administration, agriculture and home economics. The public service is nevertheless excluded.

The organization of the dual system of vocational training follows a regulation of a "neo-corporatist" type based on the combined action of employers, trade unions and chambers of commerce and industry to which the State delegates the management of this public good. Coordination between the public and private sectors gives consistency to the system: the costs of school-based training are provided by the government and those of the practical training are borne by the firms that offer apprenticeships.

The German "dual system" of vocational training is based on three main principles:

- The principle of duality;
- The principle of the primacy of trade;
- The principle of consensus.

The principle of duality

This is an essential feature of the system that combines training in vocational schools and training in the firms.

Training in the company is regulated at the federal level while the curricula issued by the vocational school are under the jurisdiction of the Länders. Mechanisms for coordination and harmonization of programmes and negotiations among the partners had to be implemented to make the system work properly.

Young apprentices who complete their training in SMEs learn their craft by participating directly in the production business, while those who complete an apprenticeship in a large enterprise will benefit from a professional training in the training centre of the company .

The principle of primacy of business

The goal is to be formed on the basis of professional references. Under the federal law, vocational training must be "on broad basic professional knowledge and the know-how and technical skills necessary to perform a skilled activity."

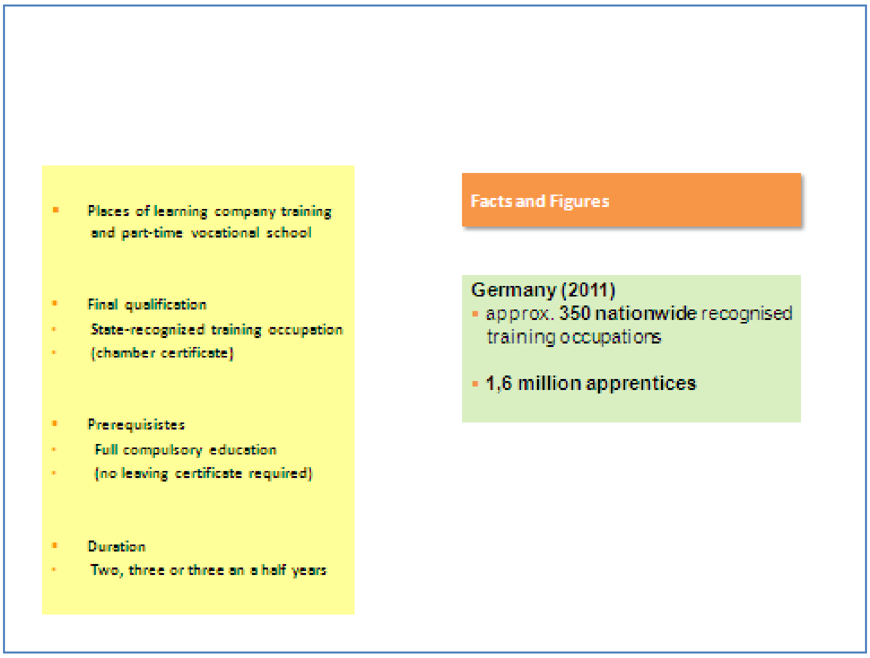
It is on this basis that the training standards involving the social partners (trade unions and employers' federations) are developed. It is on a consensus basis that standards are adopted by the relevant federal minister.

Learning at the workplace is the fundamental principle of vocational training in Germany, it is destined to the development of technical and non-technical skills. These skills must be combined with knowledge and skills related to the job and must be acquired during a reasonable period (not immediately): the duration of the training is 3 years in the dual system.

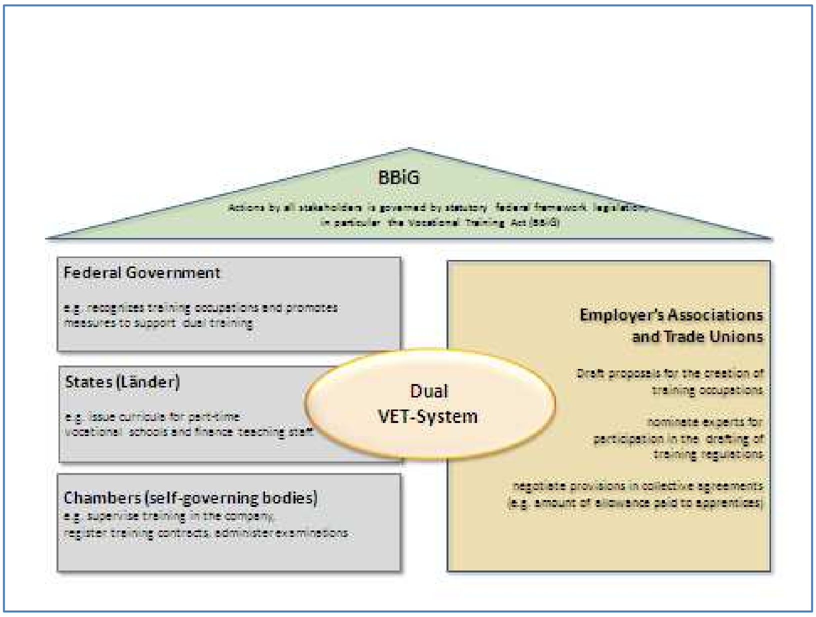
The principle of consensus

The dual system is based on the partnership between the school system and businesses.
There is no obligation other than a moral and community one that has an impact on businesses to offer apprenticeships. However, those willing to offer training places must comply with the regulations that determine the procedures for professional training.

Stakeholders and responsibilities in a dual system



The dual system in Germany



In Ireland, too, training occurs very often in the company without the intervention or participation of external trainers. Training activities are primarily a combination of practice in business and mentoring that allows to accompany the rising skill requirements and make them closer to the needs of the industry, and help people to integrate into the company.

There are some exceptions to these practices such as the education delivered by higher education institutions or lifelong training organizations in retail commerce. These institutions develop full-time training programmes that interested in particular people in higher education wishing to enter a qualified or highly qualified post in the field of retail sales, among which:

Dublin Institute of Technology School of Retail and Services

Galway-Mayo Institute of Technology (GMIT)

Waterford Institutes of Technology (WIT)

University College Cork (UCC)

Dublin Business School (DBS)

IBEC Retail Skillnet provides training to executive managers in retail management.

Similarly, FAS and training organizations of the Skillnets network (Training Networks Programme (TNP) provide training to many companies

Since 1999 Skillnets intervened in 60,000 Irish companies and trained more than 275,000 employees to acquire skills in line with the needs the companies in all sectors.

The "Retail Excellence Skillnet" and the "Irish Hardware Skillnet Association" also offer training in response to needs identified by their members. The learning modules are designed to adapt to the economic realities and foresee also transnational exchanges of best practices, conferences and awards.

The report of Forfas in Ireland gives the point of view of employers on the practices of professional training.

According to them, training efforts are more important in large companies where training is usually delivered in the company. Most courses do not have an accreditation or certification at the national level. "While companies recognize the benefits of accreditation, they feel they can benefit from the skills of workers while avoiding the administrative burden and cost of accreditation."

Wholesale and retail companies indicate some obstacles to training in the company. These barriers are related to:

- Cost pressure on margins
- Downsizing, making it more difficult to make staff available for training.
- The turnover in the sector which often deters companies from investing in human resources, especially in times of downturn, the staff turnover is not seen as a problem (but often as a solution).
- The poor image of the sector can not make posts attractive to the right candidates. This problem is shared by all employers.

Towards the implementation of a skills framework in the commerce sector (wholesale and retail)

One of the main recommendations provided in the Fas report is the implementation and institutionalization of a skills framework for the sector to develop consistent strategies for the development of training.

The skills framework would identify all the skills required to perform a job in the commerce sector, each skill area would be described and regulated in detail, and this would allow to have common standards and benchmarks for the sector skills giving lead to a certification by the competent bodies (FETAC, HETAC, Dublin Institute of Technology (DIT), the Universities).

Training would be provided for each area of expertise. This institutional skills framework would also provide information on career opportunities in the commerce sector. The diplomas given in the skills framework should facilitate the mobility of workers across the industry and are expected to attract talents.

In Cyprus, the key training body is HRDA (The Human Resource Development Authority of Cyprus) established at national level and whose composition is tripartite (13 individuals representing the social partners and the government). The companies pay a tax of 0.5% of their payroll to this body and in exchange receive training services throughout the country. The training therefore takes place under the auspices of HRDA that approves the training 2 times per year.

SME training is supported by 80%, for large companies the support is 50%. The chambers of commerce submit applications for training to the HRDA in July and September and each semester a training catalogue is proposed, published and disseminated by the HRDA. These courses are delivered by instructors who belong to a network active throughout the country.

Two types of training are offered:

- The usual training programmes: one or two days, leading to a certificate at the end of training.
- The annual training programmes of the so-called essential training that leads to the publication of a Green Paper.

The social partners are those who will decide what training is essential or non-essential: from what is considered essential for 2012, we find "Innovative E-Commerce, or public policy making solutions for small business in Cyprus.

In France, a large number of training courses are assured thanks to the OPCA. And The OPCA of retail commerce has allowed in 2010 to devote € 337 million to the training of personnel in the commerce and distribution sectors, that means that despite the crisis there has been an increase of 3% compared to 2009 and of above 18% compared to 2008.This training effort was made possible thanks to the mobilization of additional funding to the 285 million euros already paid by the member companies.

Among the services provided by the OPCAs, it should be noted:

- Anticipating needs in employment, skills and training through the studies of the prospective commerce Observatory
- Accompanying the deployment of projects in the regions
- Promoting training priorities of the branches
- The expertise of the regulation of life-long professional training to secure projects
- Mobilization of additional funding from the State, the ESF, the Joint Fund for career security FPSPP, the regional councils, the employment centres
- Referencing the training offer in response to the challenges of employee qualifications.

Generally the site of the OPCAs Intergros or Forco provide numerous training information (tips, steps to follow, conditions of access, financing, certificates, etc ...)

Companies have several training possibilities they can use according to their needs. Like Company A (below). Two types of courses alternating with one another under " work contract " are accessible.

- learning that was originally designed as a training device and as an alternative to training school status, mainly for young people who were destined to exercise a profession of first qualification in craft or industry. As training in the school education system, apprenticeship training prepare for diplomas or certificates recorded in the national directory of professional certifications.

- Contracts of training (qualification contracts processed in 2004 training contracts), designed in the early '80s to enable young people leaving the education system without qualifications. Statutorily, these contracts are therefore part of the training. They can lead to a diploma or a title, they can also prepare a Certificate of Qualification (CQP) jointly established within a branch or "a recognized qualification in a collective agreement."

"We have apprentices (300-400), but for 2014 we will not only go towards professionalisation contracts but also apprenticeship contracts. We will not use the apprenticeship contract in the fish and meat commerce since with the new hygiene standards in force in the butcher’s sector, for example, we need real butchers; the carcass is delivered pre-cut and the butcher no longer cut the carcass, which was a real know-how acquired through learning. On the contrary, we now need to learn green skills, we will work with CFA schools to be ready for next March " Interview with an official of Company A

In Belgium, in the retail sector, the IFAPME (Institut wallon de Formation en Alternance et des indépendants et Petites et Moyennes Entreprises) offers training alternately in several commerce sectors: ready-to-wear, books, jewelry , ... These courses are aimed at young people aged 15 years or more. During the training period (maximum 3 years), students get an exemption from the Forem for the obligations linked to their status as job seekers (e.g. appointments with their advisor, training in job seeking, ...). According to Forem statistics, at the end of their path in the IFAPME, 70% of applicants get a job in their field. The remaining 30%, having failed their course, return by law to the status of unemployment, while retaining their rights.

IFAPME has surrounded itself with European partners. The goal is to share innovative tools and teaching methods. In addition, IFAPME is an experienced European training operator: among the priorities of the Structural Funds of the European Commission (ESF and ERDF), in the Community Initiatives (ADAPT, EMPLOYMENT, EQUAL, INTERREG ...), in training programmes under different Directorates General of the European Commission, including DG Education, DG Enterprise (Leonardo ... CEDEFOP).

With the support of the European Social Fund, IFAPME has developed numerous actions, notably in the field of guidance and supervision of young trainees (remedial actions and tutoring in businesses) but also in the field of the pedagogical training of trainers.

With the support of the ESF, IFAPME has been able to initiate specific training for information technology and communication, and partnerships with operators of training sector, particularly in the sectors of construction, automotive, food jobs ...

IFAPME has also significant international collaborations within the framework of Community Initiatives, the Leonardo da Vinci programme and the Association des Compagnons du Devoir du Tour de France (AOCDTF) whose objectives are: the exchange, adaptation or transfer of methodologies and tools on the theme of alternance; the creation of a European network to develop apprenticeship in the construction sector; the establishment of a European mobility network of young apprentices in particular in skilled crafts and food sector; cross-border collaboration; mobility of apprentices and trainees; the establishment of a partnership agreement with the Association des Compagnons du Devoir du Tour de France on the mobility of apprentices.

IFAPME also participates in two pilot projects of the European Commission to facilitate the recognition of training courses at European level through the development of ECVET (European Credit System for Vocational Education and Training) tools:

- VALoGReG (VAlue the Learning Outcomes in the Grande REGion)

This project aims at transfering, recognition and accumulation of learning outcomes within the Greater Region (Wallonia, DG, Luxembourg, Rhineland-Palatinate, Saarland and Lorraine). VALoGReG relies on the development of a relationship of mutual trust and a partnership agreement among the countries concerned. An ECVET users' guide is set up for the Greater Region. The IFAPME is project coordinator for the French-speaking Belgium;

- OPIR (Useful Tools for the Development of Interregional ECVET)

This project aims at the development of regional and international mobility, the creation of a common language, the development of ECVET tools and the definition of parameters of mutual trust. This project resulted in the issuance of the first ECVET certificates for Belgian and Spanish apprentices.

2.4 Recognition and Certification

Recognition and certification of skills are part of the areas in which the European Commission will continue to develop key initiatives in the future. The ambitions of the Commission have been clearly identified in several institutional documents and in particular in the Commission Communication of 23 November 2010, to the European Parliament, the Council, the Economic and Social Committee and the Regions Committee, entitled **"A strategy for new skills and jobs: A European contribution towards full employment. This strategy reinforces the logic of transparency and reference that prevailed since the 1990s**.

The European logics implemented in the certification and qualification in Europe

- The logic of equivalence that fits into the objectives of the free movement of workers is enshrined in the Resolution of 6 June 1974 on the mutual recognition of diplomas, certificates and other degrees" "possible equivalence between qualifications"

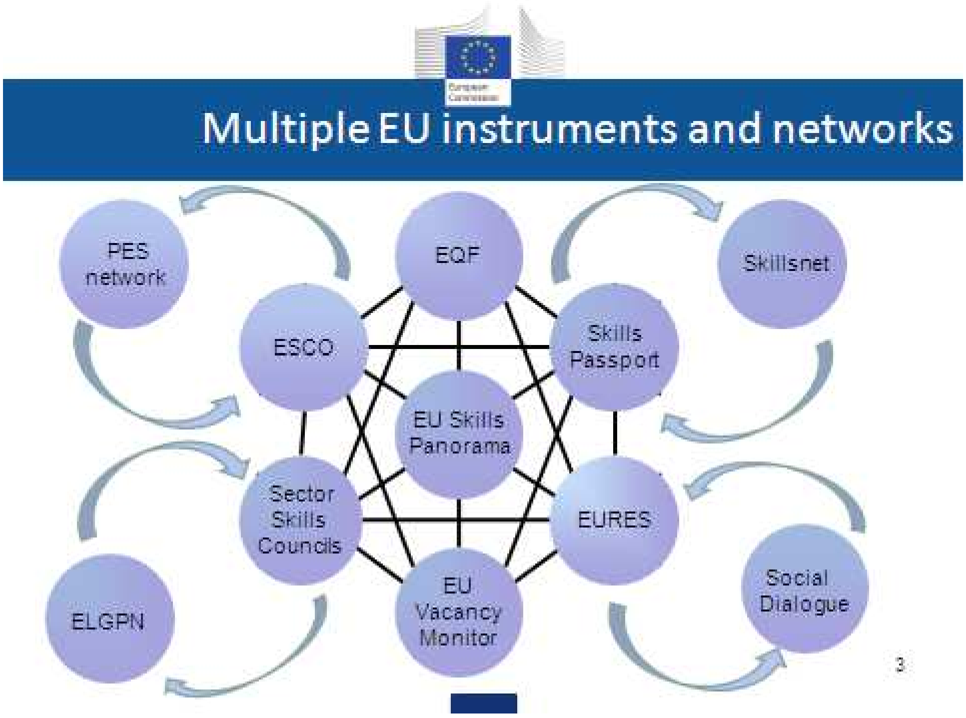
- the logic of equivalence formalized by a decision of the Council of 1985 on the equivalence of vocational training qualifications between the Member States; it is the first step towards the mutual recognition of diplomas and certifications: a nomenclature with 5 levels of training elaborated by the European Commission. At the same time the CEDEFOP produced a study to establish an equivalence between training courses and professional degrees;

- The logic of transparency that emerged in the early 1990s.This logic is the conceptual basis for a better communication on skills between countries; it marks the failure of the previous logics of equivalence and correspondence between certification and / or qualifications. The European single framework for the transparency of qualifications and competences was issued in 2008.

- The logic of reference developed from the 2000s thanks to the initiatives taken by the Member States in the field of higher education (Bologna process) and the adoption of the open method of coordination (OMC) and the strengthening of a European cooperation in education and vocational training (Copenhagen process). Since then, there emerges a strong trend in the design and use of common references

This strategy for new skills is part of the 2020 European strategy for employment and growth and is the target set by the 27 Member States to achieve in ten years an employment rate of 75% among men and women between 20 and 64 years.

To reach a better balance between the demand and supply of skills, the new strategy proposes the creation of an EU Skills Panorama, "the skills panorama”. It complements other important tools or programmes as shown in the diagram below.



Source: European Commission

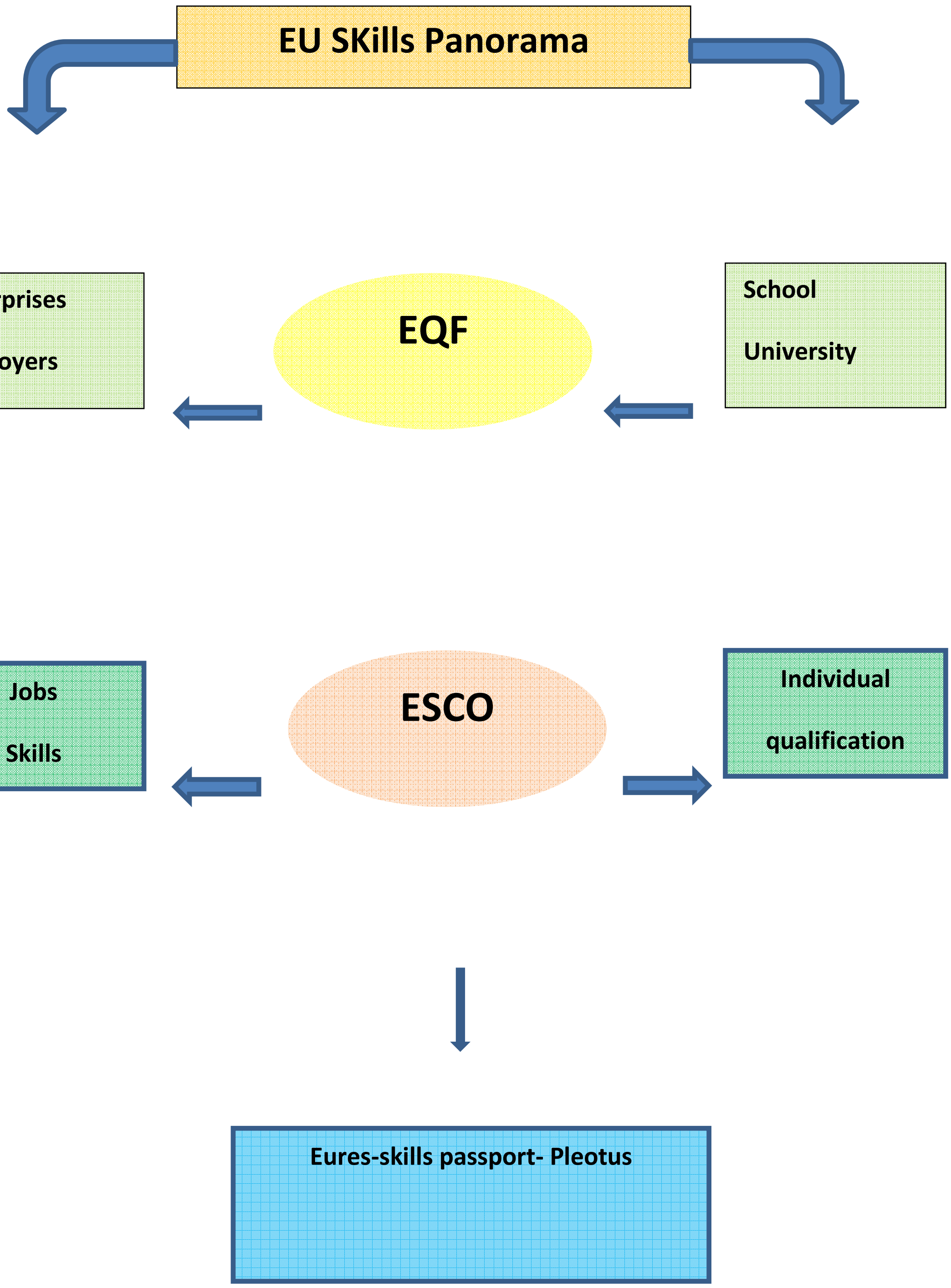
The "skills panorama "
The Commission proposes to introduce from 2012 a "EU Skills Panorama". The idea is to view online the forecasts in terms of supply and need of skills until 2020.The overview will provide information on the 25 most prominent professions and the 5 most requested jobs in each Member State. He will be based in particular on the work of the Observatory of vacancies within the EU and on surveys carried out with employers, training people and

graduates. The skills panorama shall finally provide a long-term analysis by sector and for this it will build on the work of the European sector councils on employment and skills about to be created. Areas such as science, technology, engineering and mathematics will receive special attention.
Source Europa

Among these important tools and programmes to balance the supply and demand for skills, and improve transitions between "school" and the labour market, two community initiatives are presented as specifically aimed at facilitating the reconciliation of demand and supply of skills in Europe: the EQF and the ESCO

- The European Qualifications Framework (EQF) facilitates the recognition and comparison of qualifications, aims at establishing correspondences between the certification systems of the different countries in relation to a common European reference framework. Individuals and employers can use the EQF to better understand and compare the qualifications levels of different countries and systems of education and training

- The ESCO is a taxonomy of skills, abilities, qualifications and professions at European level; this tool is intended to provide a description of the skills and qualifications required for a wide range of occupations and should facilitate the uploading on job portals of different countries that now do not easily exchange data between them. The ESCO system is multilingual and should allow the exchange of CV and job offers stored in different computer systems. The ESCO would thus allow online job portals such as EURES to propose jobs to citizens in all Member States of the EU.



Source: graph constructed following the intervention of representatives of the European Commission - conference in Brussels on 7 December 2012.

A major advantage of this approach in terms of "skills panorama” is the focus, in the two areas of the labour market and education, on the individual profiles of skills and abilities. Instead of describing qualifications through production factors (e.g., time spent in apprenticeship), it focuses on the knowledge, abilities and skills acquired, which should reduce the gap between the world of education and training and that of employment. The ESCO will be their common language, which should make qualifications more transparent between the different Member States (exchange of CV and job vacancies stored in different systems)

Although we should welcome the actions and efforts of the European Commission to bring together the systems, it is clear that the heterogeneity persists between Member States in terms of certification; "Singularity, specific features, compartmentalization, scattered state and fragmentation of the certification systems in Europe are often the source of difficulties against productive efforts" said a European Commission representative[23]

The convergence process is initiated at European level in an area where many important differences exist between Member States. The following comments are not intended to analyse the different systems, but to point the main characteristics inherent to these systems.

In Germany, the dual system (see above) are several methods of certification. The assessment of apprentices under this system is based on a triple certification. Each apprentice must get, at the end of his apprenticeship, a certificate granted upon a national final exam that all trainees, regardless of the sector, must pass, a certificate issued by the trainer of the company and an assessment of the vocational school.

In the commerce sector and in order to facilitate the mobility of workers, a project called KODE was launched with the objective to create a tool for measuring and validating skills and knowledge acquired in a non-formal way.

The DQR (Qualifications Framework for Lifelong Learning) is a German national transposition of the European Qualifications Framework. The aim is to ensure that the differences between qualifications are more transparent in order to promote mobility, emphasizing the need to base the qualification process on the results of the experience and learning, the "learning outcomes" or "outcome orientation". Skills are at the heart of the package that distinguishes between professional skills (skills and knowledge) and personal skills (social competence and self competence)

In France, the socio-economic and political stakes of safeguarding career paths gave way to the adoption of legislative measures in the forward-looking management of jobs and skills (GPEC), individual right to training (DIF), or validation of knowledge and experience acquired (VAE) These developments have led to rethink the issue of career paths to enhance skills, experience and knowledge of people involved; any experience being considered as educational.

The CQP (Certificate of Professional Qualification) is also part of these packages, is a certification created and delivered in a professional sector and is designed to validate the professional skills of a job. It is issued by a professional jury.

This device is fully inserted within the framework of support for training policies defined by the branches of the commerce sector, especially retail commerce that has 34 CQP. To date, the CQP are operative in several branches: the trading of building materials, timber trading and wholesale commerce.

The CQP serves as a repository of expertise, it demonstrates the skills acquired by the advice seller for instance; the question is to define what the branches have in common (core competencies) and what are their characteristics (specific skills)

The CQP can better balance the supply and demand for skills in building bridges between sectors based on employment flows, on the basis of cross-sector qualifications that also allow the safeguarding of employment.

Some branches are undergoing profound changes, which raises the question of their future, their survival. Employees in these industries should benefit from conversion to another branch, which requires to promote mobility between sectors, geographical mobility, linkages among enterprises. In this regard, the CQP are levers for the anticipation of skills and expertise and an instrument of forward-looking management planning and business skills.

This is also valid for the VAE (Validation of Acquired Experience) which is a necessary tool to recognize one's skills, to aim at a qualification or to safeguard one's employment. VAE may allow to achieve all or part of a degree on the basis of experience. The candidate to a VAE must demonstrate that his professional experience and personal knowledge and skills match the requirements for obtaining a partial or complete diploma. It is therefore appropriate to reflect upstream on o one's professional and extra professional experience, to clarify one's professional project in order to choose the right industry and the right degree.

For commerce professionals, to take action on the VAE of large companies is to focus training on real needs, identify and share useful actions for employees; it is a tool of the GPEC that allows also to streamline training costs. A VAE action can be accessed in the framework of the training plan, of the DIF or a period of professionalization. The Forco supports certain costs

Source: FORCO

According to Intergros, the Licenced Joint Collector Agency of the wholesale commerce and the international commerce, the reasons and objectives to consider a VAE project are many:

- To recognize and develop your skills
- To move towards new responsibilities
- To prepare a career development
- To be recognized at a fair value by the people around you, your family
- To organize your conversion and promote your employability
- To develop yourself in your business
- To create or acquire a business ...

In the wholesale trade, training during professional contract lead to a degree or a professional certificate in 60-80% of cases, except for the Export of fruits and vegetables where graduation rates are low.

Numerous information on the VAE or CQP are provided on the sites of the OPCA Forco or Intergros.

To be noted also the existence of general orientation education passport that can be delivered by Pole Emploi in France. This is a **valuation tool** of skills, knowledge and competencies: it allows everyone to get to know himself better, to formalize his experience and retrace the steps of his professional life. Specifically, it is a tool that can be used to identify one's training needs, develop a VAE project, facilitate professional development, write one's CV, identify one's strengths and weaknesses, prepare a job interview, etc..

In Belgium, employment agencies such as Forem, Actiris or VDAB in the Flanders propose stages of professional role-playing in firms (MISIP).These agencies have set up procedures for validating skills. Training in the commerce sector, but also in other sectors, increasingly takes place outside of the school and in the company. Skill validation procedures have been put in place for all jobs (not just the profiles for which shortage is known as it was the case at the beginning); they are the work of skill validation centres that address both employees and jobseekers.

From the outset, the skill validation centre and the social partners wanted it for both job seekers and employed workers but in the spirit of the validation, work experience and mastery of skills acquired during several years remain essential.

The 2008 statistics show that 51% of workers are active with more than one candidate on two holding a CESS (certificate of secondary education) or equivalent. Of the 985 entries, there were 8.5% drops and 67.5% successes.

Procedures differ somewhat between the Flemish and Walloon communities since in the French one the validation concerns one aspect of the job while in Flanders the validation is on the trade. In the French community, in fact, a job is "cut" by a minimum of two and a maximum of five units of competence, each unit of competence is subject to a validation test and results in a skill certificate.

In the French-speaking Belgium there is also a VAE which aims at promoting the experience acquired. But, while in France this VAE establishes a procedure for skill recognition of a candidate by a jury, allowing him access to a diploma, in the French Community of Belgium, the VAE provides access to university and does not get a degree on the basis of experience only.

In the UK, Skillsmart Retail launched a number of initiatives to promote and recognize the skills, in particular the "skills passport" for the retail sector. This passport is designed to keep track of employee skills and allows for a complete reporting of training and skills acquired by individuals throughout their careers. This passport was tested in early 2006 and implemented at industrial level in September of the same year. The passport costs £ 10 / year / person and is transferable between employers. Its cost can be paid by the employer or by the individual.

In addition, a certification system has been in place for a long time in the United Kingdom: the NVQ (National Vocational Qualifications) that reward in England, Wales and Northern Ireland the people who have completed a training with a final evaluation. In Scotland there is the Scottish Vocational Qualifications (SVQ). To achieve an NVQ, candidates must prove that they have the necessary competence to carry out their duties in accordance with the National Occupational Standards that describe the skills expected whatever the profession concerned. *Skillsmart Retail* has established a framework of eight levels of qualifications relating to retail sales operations, progressing from entry level (level 1), to the mastery level and PhD (level 8).

In Cyprus, the HRDA institution does not directly provide training (see above) but it is able to carry out the certification. Language skills in retail commerce are highly demanded, English language, of course, but also Russian in the south (Limassol) ..

V. Conclusions

We tried to conduct an exercise in understanding the changes that mark and cause developments in the ecosystem of trade as well as the impacts on employment, occupations and skills.

The analysis of the drivers of change and more specifically the impact of new information and communications technologies has led us to not overestimate this impact insofar as the arrival of new technologies is not itself a transformation of business and to not underestimate the consequences of change whether they are in the retail or wholesale trade, which lead to creating new skill requirements.

The need, on the one hand, to balance the supply and demand for skills, and on the other hand to secure career paths for people, requires a treatment of these issues in advance, that is to say, in time, using structures that encourage a prospective analysis of jobs and skills.

Observatories or similar organizations established in member states meet this need and their networking will certainly contribute, through the exchange of best practices, to promote the employment mobility of workers at national or European level. They should therefore provide strong pillars to help anticipate skill needs in the commerce sector. Our interviews with these observatories have nevertheless shown their fragility as some are subject to austerity measures in a crisis situation, and are driven either to disappear or to be reorganised.

At European level, the Commission has invested for many years in the field of skill needs using different approaches and going often from an approach based on the free movement of people and workers to initiatives in terms of mobility.

The creation of a European Qualifications Framework is a European initiative which should certainly be welcomed since it must allow for convergence between national qualifications systems. In addition, the European ESCO tool in the future should provide a description of the skills and qualifications required for a wide range of occupations and should facilitate the uploading with job portals.

These European initiatives, however, find themselves faced in their implementation with efficiency issues that focus at least on three important factors.

The first is related to the diversity and heterogeneity of systems and tools in place at national level. Whether for training, certification or recognition of skills, the gap is huge sometimes between the different structures implemented in the Member States. The analysis of practical training and skill certifications in the commerce sector shows that the company is the most appropriate level to receive qualifications and that the experience gained is a guarantee of authentic "know-how" and "skills". When listening to the professionals, the gap between the school and the company seems to be too often present. School education is primarily aimed at the general labour market while training on the workplace provides skills appropriate to a business or businesses of the same nature. Several Member States have taken initiatives to bridge this gap, but one thing seems clear and simple: it is not only on the school desk that one acquires the skills needed to develop one's professional career, particularly in the commerce sector.

But to appeal to and especially to meet the skills needs of this sector, we must change the negative image of the sector, which refers to that of a precarious instability in employment. Although the majority of employment contracts in France are open-ended contracts, working conditions and wages in the contract are generally below the standards in force in other sectors of the economy and do not invite people, especially young people, to show their employability on the labour market. Although wages are higher in the wholesale sector, this sector is often too far away from the individuals to accommodate the steps of jobseekers.

Add to that now that the boundaries between professional groups are increasingly blurred and less standardized and uniform than in the past. The skills required for a specific job differ widely, even for the same profession. The same profession is often associated with jobs that differ in terms of work environment, size of workplace, tools and resources used and the finished product. This is why the European ESCO tool focuses on the classification of individual skills and abilities. The goal is to understand all the individual skills of each person and the skills required for each job.

The second factor is related to the involvement of the stakeholders in the implementation of community initiatives. The Commission initiatives are numerous and the synergy between them largely determines their effectiveness. However, these synergies will have a real impact only if the different stakeholders (companies, employee representatives, employees and persons seeking employment, public authorities, etc. ..) are mobilized in this direction. This effort requires a significant investment which is not the responsibility of the stakeholders. It is necessary to examine the conditions of appropriation by the people in the field of the work done at European level. More than ever, the European Commission and the key stakeholders in the various sectors must work together constructively to reach agreement on employment and skills issues and on how to proceed.

But this is not to be taken for granted, as shown by a statement of the Commission on the ESCO project in November 2012, which shows little enthusiasm in this field:

“At first, a classification system may not seem useful in the daily lives of citizens. While it is true that normally the ESCO classification will not be accessed directly by citizens, it will be nevertheless useful”.

Yet it is the proactive actions of the actors who promote synergies between the various European initiatives and will meet the skill needs in particular by improving linkages and bridges between school, vocational training and the labour market.

The third factor is related to the effective ability of the Community institutions to support national initiatives in anticipation of skills needs in the different sectors and social innovation in the face of national measures of austerity that are not all in favour of the implementation of forward-looking measures or devices.

This is even more so as the businesses in this sector are not all on the same footing. While large companies have the means to observe and anticipate job needs, SMEs often lack the means and often need to rely on territorial or sectoral observatories to take strategic decisions. The territorial dimension should not be ignored in this regard in the forward-looking management of skills.

That said, Member States need more than ever to exchange information and good practices in particular to facilitate the transition between school and the world of work and business. For example, the French education system has little connection with the employment system. When comparing the education and training systems of France and Germany, for example, it appears that the German dual system, due to a better match with the employment system and the use of decentralized mechanisms of self-management of the apprenticeship market, provides better prerequisites for effective coordination of training places and short-term needs of labour force than the French system.

It seems that national initiatives go towards this direction under the influence of community dynamics, but it will probably take some time for all countries to follow the same route.

In conclusion, we must say that all possible efforts should be done to avoid future labour shortages, on the one hand, and, on the other hand, to allow everyone to realize what he is in what he does.

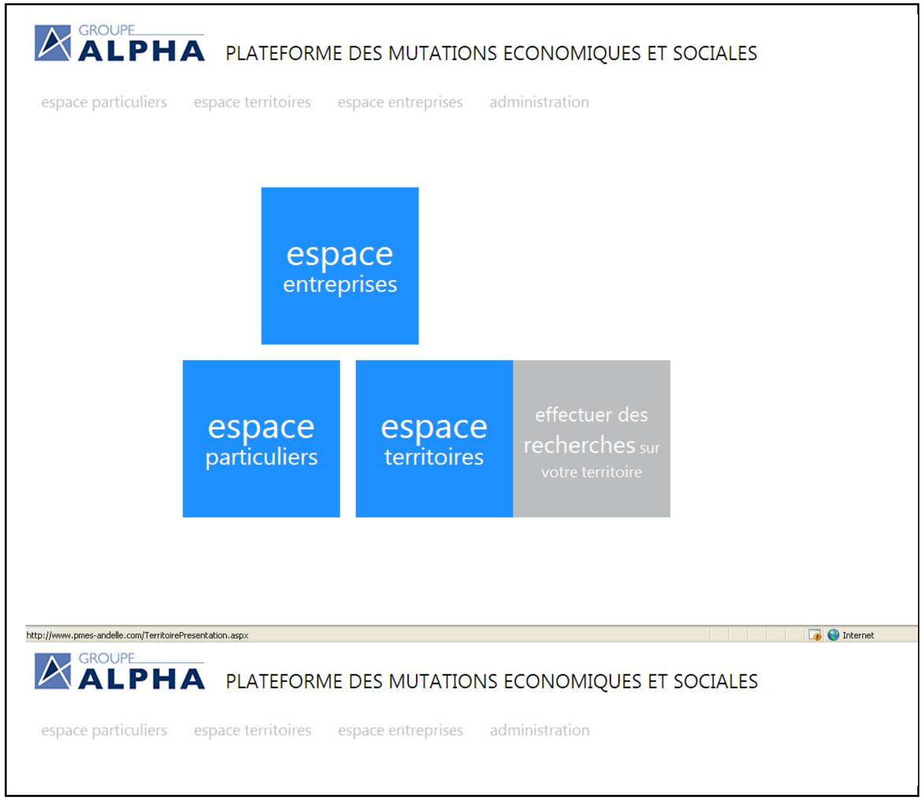
VI. ANNEX

1. The "capacity" tool

Focus on a territorial action

How to anticipate and accompany workers in an environment exposed to occupational transitions?

How to accompany Businesses in the recruitment for jobs in tension?



The ALPHA group has developed a method for assessing the potential economic and RH territory in order to allow players to consolidate and share information that is often scattered within it. The final realization of this approach is an interactive website dedicated to the Territory (that is to say all the actors who are simultaneously contributors and users of the Internet space)
The site presents three key input:

- Space Company
- Individual space (workforce)
- Space Territory

- **For the Individual space**: It is a tool for career guidance and construction of one’s path.
-**For the Territory**: It is a tool for mapping economic and HR potentialities of a specific area
-**For Companies**: it is a search tool for individual profiles that could meet their skills through appropriate training

capAcité is an interactive database available online (**web**) that allows to map a territory in its economic dimension (Enterprises) and HR with a usage mode based on triple entries: Individuals, Businesses and Territory.

By its design and its destination, it is also a tool which **argues working on a territorial and business-to-business dimension** and can be used to support a dynamic multi-stakeholder cooperation in the process of Territorial GPEC.
This Business-to-Business/Territorial dimension collected on the same tool resulting from a joint approach allows the construction of a proactive push of the "territory and its actors" to include the FPSPP and facilitate joint action plans designed for the "economic development" with action plans focused more on the social dimension of the GTEC (Securing career paths, active management and early career transitions).

The driving principles of the tool capAcité

The principle consists in mapping the potential occupational mobility in a territory, through the implementation of an approach centered on the dynamic use of the concept of employability at the heart of the actions involved in the process of changes in jobs and professional retraining.

We propose a dynamic approach to the use of the concept of employability that we have developed and which consists in projecting the result of the combination of its three components Skills, Habits, Attitudes, relative to areas of knowledge that constitute the exercise of a profession, which allows to "measure" the ability of individuals to transfer these items to another industry, another job, a structure of different size.

The general concept :

Everyone reaches a level of competence / performance in a job, or a level of know-how (technical), because he knows (or can) use and develop some type of skills he has, or of which he has a predisposition.

Conversely, any type of job consists of a sum of skills, considered as essential pre-requisites to hold and develop in order to have the mastery of that job. access to it.

Thus, the concept of employability of an individual can be understood not only in terms of a portfolio of skills and experiences validated in a context - specific job, but more in a perspective of integrated skills with a cross-character, which may contribute to ease the learning of new dedicated skills.

This approach is particularly interesting to implement in the context of the retraining of employees (orientation) and / or in recruitment by companies on jobs in tension

The key innovation brought by our approach is the idea of translating on the same reading grid the individual profiles and the typical profiles of jobs.'

The use of the tool capAcité

For the Territory, the search space allows to identify and locate companies by type of activity. The initial database "reconstructs" in a theoretical (statistical) way the staff of companies by type of activity

A zoom function allows to focus on a target scope and get a more detailed view of the territory

Several search queries are possible
Ex: age pyramid by sector and occupation, with the display of "companies that have these jobs in their workforce"

Beyond business location, a second search space allows:

- **to select a job (job sought, job in tension, or vice versa weakened by economic developments and changes)**
- **to search for "jobs" that have a Skills - Habits - Attitudes / Knowledge profile compatible with X% (variable)**
- **to search and see companies of the territory that have these jobs in their staff**

Shared by all the actors of a territory, this database can be used to anticipate the actions to be implemented to ease, on the one hand, the professional mobility of individuals weakened in thei job, but also the future recruitment of companies that these latter are developing.

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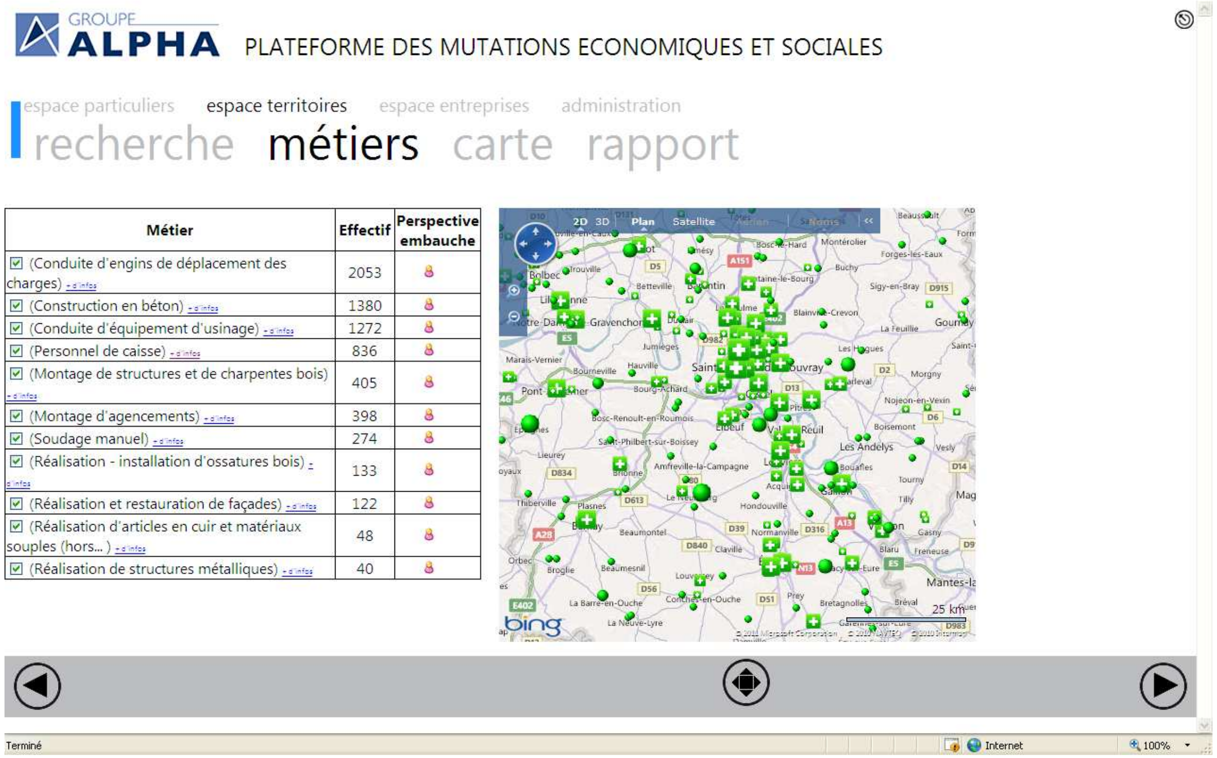
L'utilisation de l'outil capAcité



Métier	Effectif	Perspective embauche
(Conduite d'engins de déplacement des charges) + d'infos	2053	
(Construction en béton) + d'infos	1380	
(Conduite d'équipement d'usinage) + d'infos	1272	
(Personnel de caisse) + d'infos	836	
(Montage de structures et de charpentes bois) + d'infos	405	
(Montage d'agencements) + d'infos	398	
(Soudage manuel) + d'infos	274	
(Réalisation - installation d'ossatures bois) + d'infos	133	
(Réalisation et restauration de façades) + d'infos	122	
(Réalisation d'articles en cuir et matériaux souples (hors...) + d'infos	48	
(Réalisation de structures métalliques) + d'infos	40	

For companies looking to recruit without necessarily findining easily on the labor market the "ideal worker", the tool allows to extend the selection criteria not on aspects of proven technical skills (professional experience in the job concerned), but by identifying on the market those individuals who have HHAC profiles consistent with what expected for that job.

This implies that the company informs about its "ideal profile" by valuing criteria that seem to it as most essential for an individual to reach quickly the desired skills, after a period of training and practice.

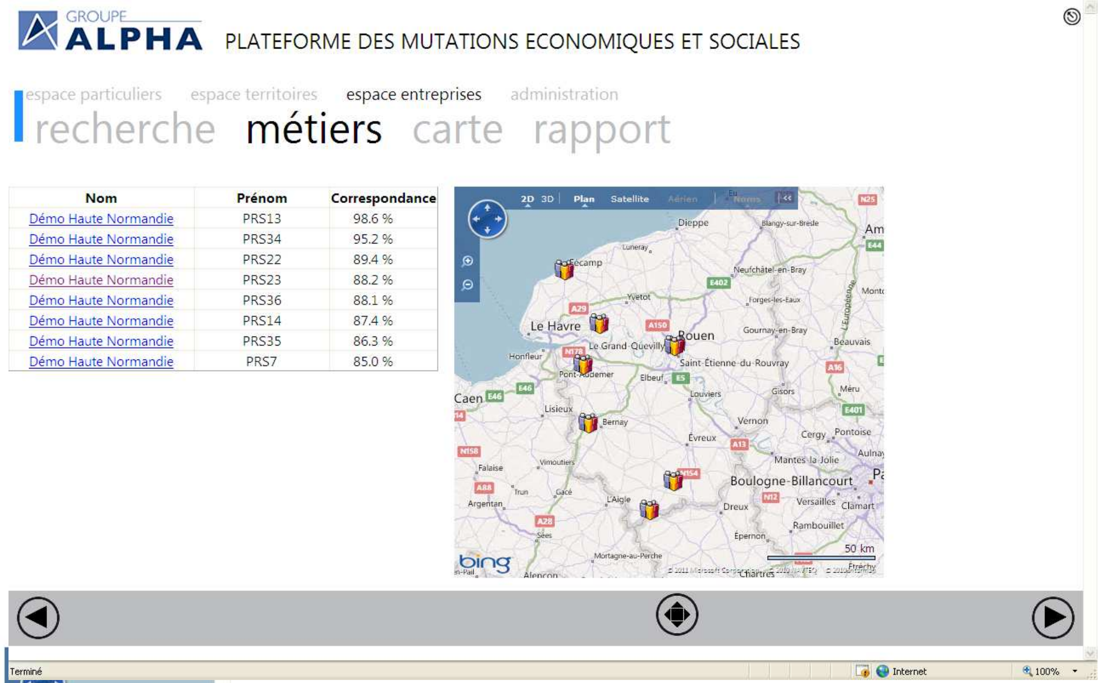
The system allows him to create in this way his "ideal profile" starting from an online HHAC grid

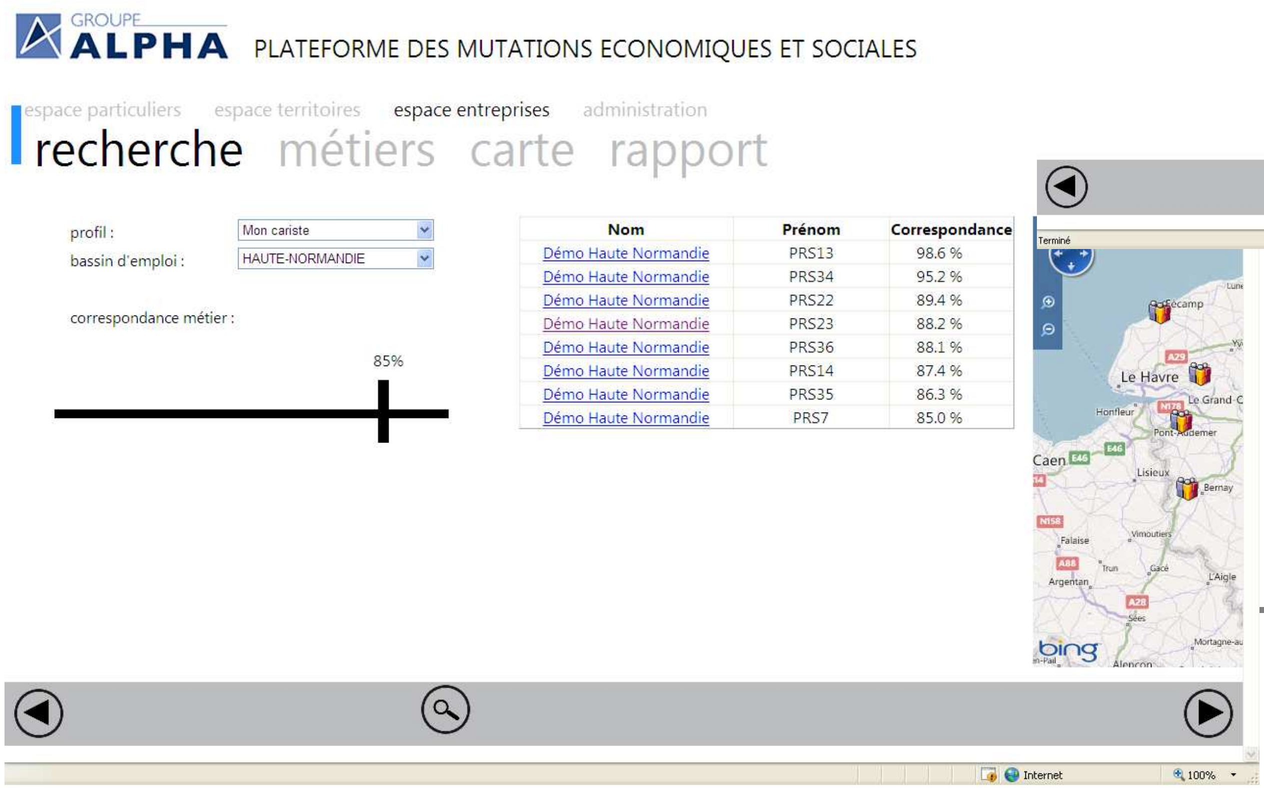
L'utilisation de l'outil capAcité

The results of his research will make it possible for him to visualize where the staff of the territory with profiles "consistent" with his research are located

The Company may vary the % of coverage to broaden or narrow the gap profiles

The use of the tool **capAcité**





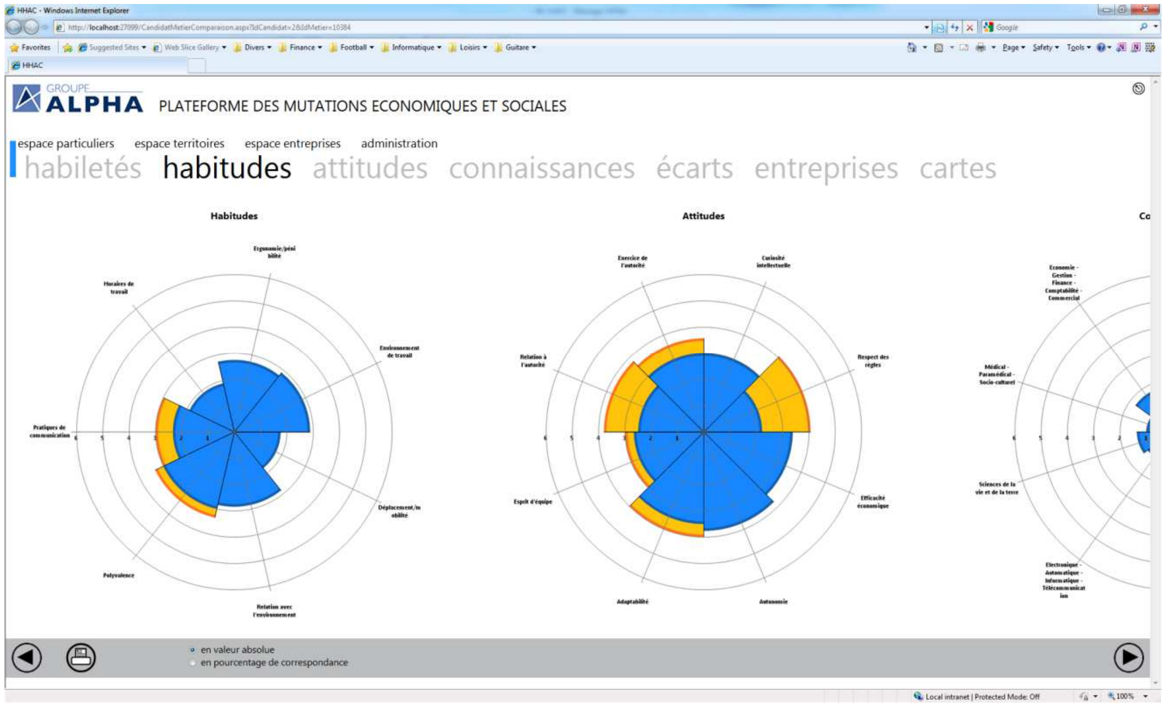
Les résultats de sa recherche lui permettent de visualiser où se trouvent les actifs du territoire qui présentent des profils « compatibles » avec sa recherche

L'entreprise peut faire varier le % de recouvrement pour élargir ou restreindre les écarts de profils

L'entreprise peut ensuite visualiser « les écarts » entre ses attendus et le profil du candidat et construire un plan de formation adapté pour optimiser l'intégration du futur salarié.

La même opération peut s'effectuer sur l'espace « recherche métier », où là l'entreprise visualisera les « métiers compatibles » avec sa recherche et les entreprises qui ont ses métiers dans leurs effectifs

L'utilisation de l'outil capAcité



For job seekers, the principle is the same:

They inform about their profiles

And launch a research on a dedicated space to view:

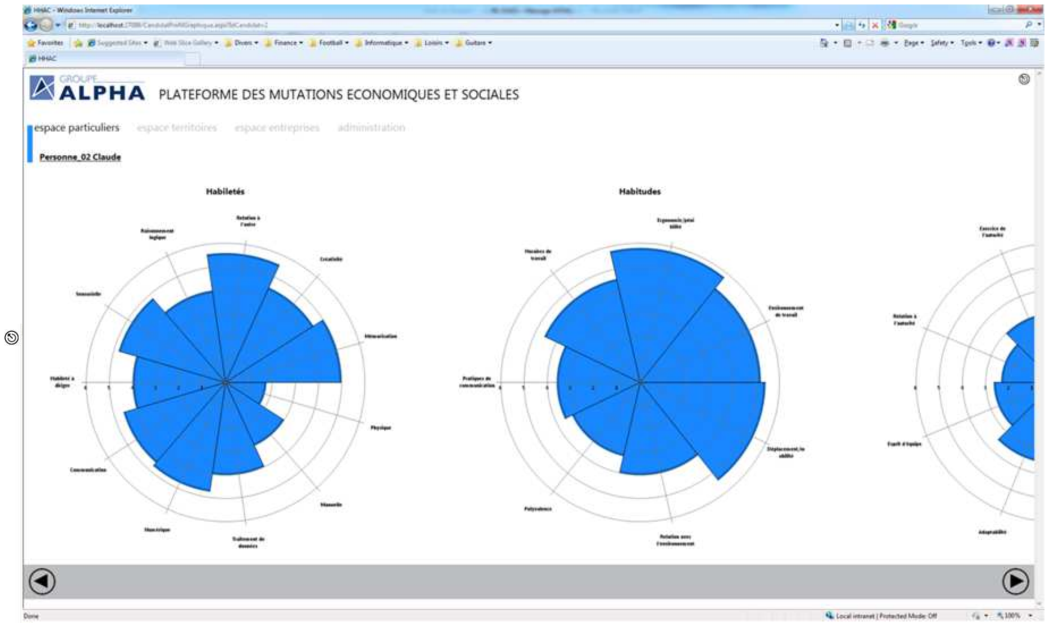
Jobs consistent with their profile with a X% (variable)

Companies that have their profiles in their workforce

The use of the tool capAcité

Job seekers can view their profile and access their search space

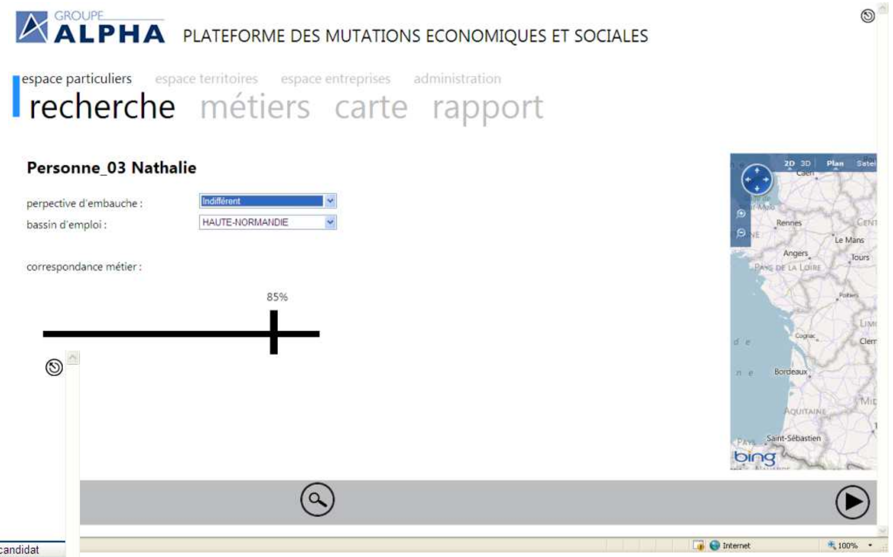
The use of the tool capAcité

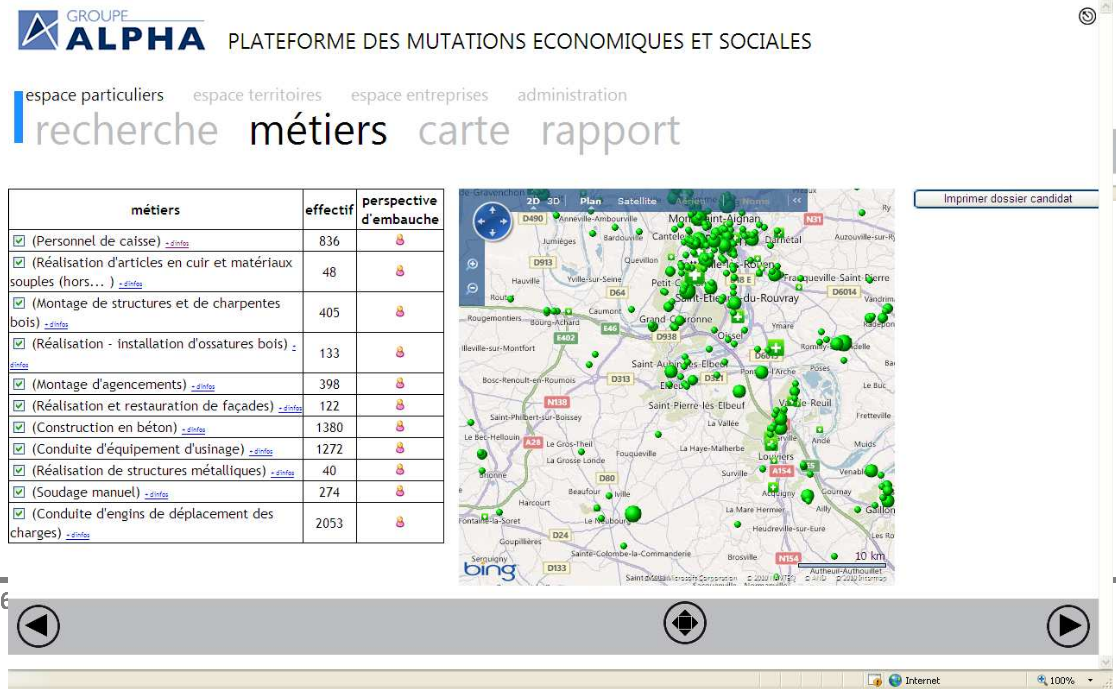


His research space allows him to select his "area" of research (employment area, department, region), the desired % coverage and the recruitment prospects in the territory

The system will provide him a list of jobs "compatible with his profile" as well as companies in the area that have these profiles in their workforce

The use of the tool capAcité





métiers	effectif	perspective d'embauche
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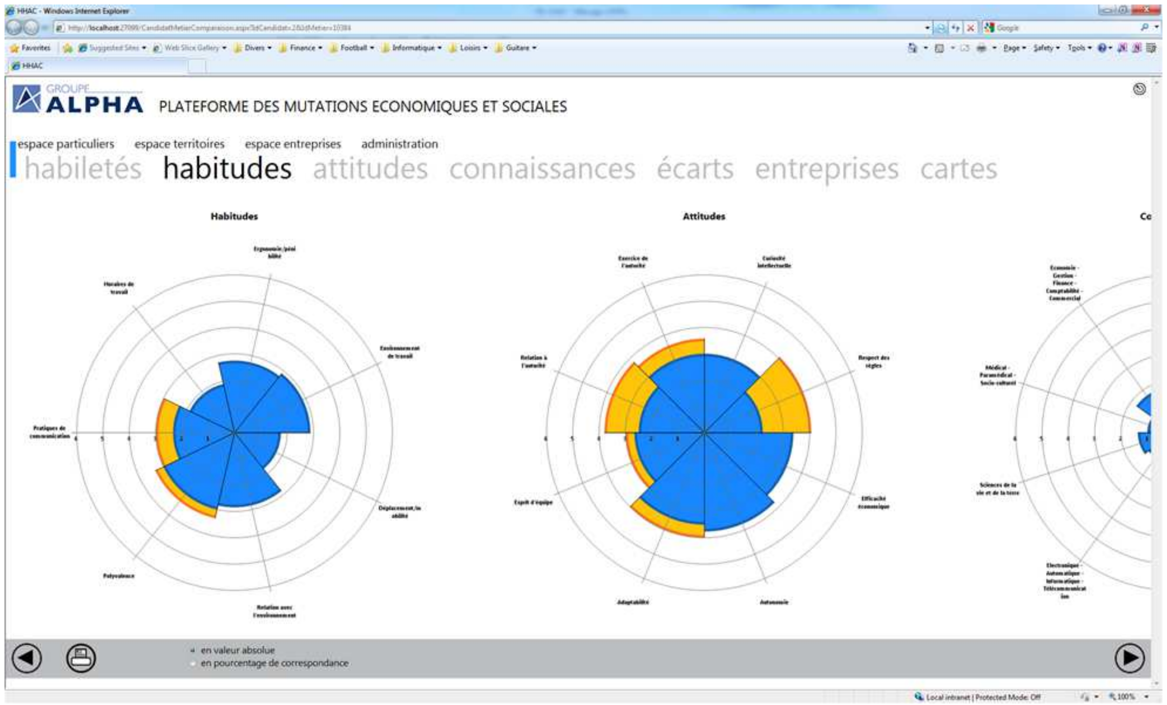
(Soudage manuel) + d'infos	274	
(Conduite d'engins de déplacement des charges) + d'infos	2053	

The use of the tool capAcité

The applicant and his referent can view the gaps between the candidate profile and the profile expected by the job.

The gaps identified will allow to measure and build the training needed to achieve the expected skills for that job.



Pour le Territoire, l’espace de recherche permet d’identifier et de localiser les entreprises selon la
In the Territory, the search space allows to identify and locate businesses according to the nature of their activity. The initial database "reconstructs" in a theoretical way (statistical) the number of staff in the companies by activity. A zoom function allows to focus on a target area and get a more detailed view of the territory

2. COLLECTIVE AGREEMENTS

SEE THE COLLECTIVE AGREEMENT for the Recycling sector (Wholesale commerce in France)

Belgium in Flanders: in the commerce sector, the social partners negotiate agreements for the vocational training (increase by 5 of participation in training per year) The Social Fund provides financial support (it is funded by contributions from directions of 0.10% of gross salary.
Among the commitments of the directions we list:
Increased training, increased resources to inform about the specialised journals in the field of training
a) Cooperation with the VDAB (employment agency) to train job seekers and orientate them in the retail sector (better equip people to perform their work pragmatically).
This approach is not academic but practical, concrete (visit to shops, teaching by people with a high degree of experience in the field and still active. The specific material is made available to those who completed the compulsory school education. Training is full-time (minimum 36 hours per week up to 40 hours / week) PMOvzw provides training in Flemish, 5 types of sales training:
General sales

- Store assistant store, multi-task assistant in food distribution;
- multi media sales;
- Junior consultant in the field of fashion (sale)

After the training, students receive a follow-up day with regard to their job, those who haven’t found a job are guided towards finding one, an assessment of their training is done and they are assisted in how to behave in interviews to facilitate their integration into employment. They receive support in their job search
There is a close cooperation with the National Education Network on how to train the trainers in this field.
b) Cooperation with temporary employment agencies in the distribution sector
Objectives:
To anticipate the needs of the sector by increasing the business skills of employees by giving them the means to do their jobs.
Duration 2 days
Contents:
A toolbox "Op weg naar een succesvolle winkelverkoop" (To successfully access the profession of store seller) with several modules:

- Welcoming
- Relationship with the consumer;
- The language of the seller;
- closing the sale;
- complaints.

Overview from the autumn of 2010 until the end of 2011:

Number of people trained 192;
number of hours of employment: 8,460 (1,007 days).
Beyond these initiatives, the social fund provides aid to particular risk groups, seniors, handicapped, etc. ..)
In Belgium, young recruits are paid less if they are under 21 years of age. The wages for younger workers younger then 21 years are:
80% (16 years)
84% (17 years)
88% (18 years)
92% (19 years)
96% (20 years)
0 = 100% (21 years)

Example Spain Catalonia Confederation of Trade

Employment contracts that facilitate access to the labour market and provide training to enhance the skills of employees
The agreement signed at the national level on 25 January 2012 between the employers (CEOE-CEPYME) and trade union organizations to facilitate and promote this type of contract.

Among the goals:
• The promotion of permanent contracts in the labour market by seeking to transform the temporary employment into permanent employment and maintain the level of employment, the promotion of opportunities for accessing employment.
• To encourage appropriate legal forms of employment by using fixed-term contracts in cases where companies have continuing needs and temporary contracts for temporary needs
• To analyze the need to identify (and identify) a volume of temporary contracts
• To encourage the hiring of young people by developing training for their integration into the labour market, improving skills in order to facilitate their employment in the company at the end of their training period
• To promote discontinuous permanent contracts in seasonal activities on discontinuous periods
• The partial retirement must remain a means of maintaining jobs and rejuvenate the age pyramid

• The early retirement measures related to the economic circumstances faced by companies are also means to complete these objectives in employment.

Regarding professional training, the agreement renews the commitments for training. The social partners have decided to extend by mutual agreement the duration of the national agreement on vocational training so as not to slow down the training of workers in businesses and formalize the agreement in six months time.

Another actor, the Tripartite Foundation: founded in 2007, the Tripartite Foundation for Training in Employment is the Spanish organization responsible for the coordination of policies on training and labour relations.
Its board of directors includes the main employers' organizations (CEOE, CEPYME) and trade unions (CCOO, UGT, IGC), as well as government officials through the National Employment Agency SEPE
This foundation promotes various areas of training: lifelong training, training programmes driven by businesses, individual training programmes without a financial burden for the company

ITALY - Distribution of services in the province of Perugia in Italy:

The new regulation (new decree No. 167/2011) defines the learning contract as a permanent contract to form and rejuvenate the age pyramid.
It responds to an expected reform which shows the involvement of social partners and regions in the preparation and design of the Institute, which makes it the main channel to boost access to employment for young people.

The first law on apprenticeship dates back to 1955. Due to the changes occurred in the economy and in many industries, many reforms took place, and among them the 2003 Decree. The use of apprenticeship as required by the 2003 Decree has not received a great interest in its application because of some overlapping with other regulations, which led to confusion about competences between the regions and the State and the different possible levels of negotiation among the social partners.
There was no clear responsibility, especially as a judgment of the Italian Constitutional Court in 2000 declared unconstitutional the exclusion of the regions in the field of skills training and apprenticeship. The risks of confusion and litigation were strong.
The new regulation has clarified everything:
The apprenticeship contract combines work and training for a specified period and is divided into 3 parts

- Apprenticeship to obtain qualifications and vocational diplomas for young people aged 15 to 25 years. The duration of these contracts that may extend up to 4 years is negotiated by the social partners at regional level
- Apprenticeships for young people aged 18 to 29 years whose duration is determined by the social partners (three years with a possible extension up to 5 years for specific skills.)
- Apprenticeship to acquire a high level of qualification for young people aged 18 to 29 years. The social partners are also responsible to define the duration of

the contracts in the plan.
Among the new elements of the law we find:

- The contract is written and so is the training plan
- The opportunity, through collective bargaining, to lower the classification in the category and set the rate of pay for apprentices.
- The presence of a tutor or representative of the company
- The possibility of financing apprenticeship through mutual interprofessional funds
- Possibility of obtaining recognition based on the results of the training and skills acquired to benefit from proposals of contracts or pursue further studies.
- Opportunity to complete one's training for potential contracts;
- Possibility for the parties to terminate the contract by serving a termination notice.

All apprentices to whom the employer can have access cannot exceed 100% of skilled workers and artisans. The employer that has no qualified workers or artisans or has less than 3 of them may be limited to three apprentices.

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On March 24, 2012 in Rome, Confcommercio, Filcams, CISL, UIL and UILTUCS signed an agreement on the reorganization of apprenticeship in the retail sector through the implementation of Law 167/2011 which gives responsibility to the social partners to address apprenticeship, skills, contracts to be established, their duration and the modality of training.
More generally, the parties have the option to set the duration of the training up to 36 months. The agreement provides for training programmes that can take place during working hours. The duration of the contract and of the training varies according to the types of classifications referred.

Classification level	Contract duration (in months)	Total hours of professional training
Level II	36	210
Level III	36	180
Level IV	36	180
Level V	36	160
Level VI	24	120

Training can be delivered in-house, externally, in traditional meetings or in e-learning.

Number:
The number of apprentices who may be employed can not exceed 100% of the number of skilled and specialized workers. Companies with fewer than three employees may hire three apprentices

Skill levels and wages

It is possible to categorize the apprentice taking into account two levels for the first half of the contract period and one level underneath for the rest of the contract by making a comparison with the level of qualification that he would or would have in the absence of learning.

Sickness

For the first three days of sickness absence, the apprentice is entitled to compensation equal to 60% of his normal salary.

Percentage of confirmation

Companies can not resort to apprenticeship if they have not kept in service 80% of workers whose apprenticeship contract has expired within the last 24 months.
Certain limited situations are excluded from apprenticeship, such as for instance those situations of workers who have been dismissed for just cause.

The case law of the Umbria region (Law No. 18 of May 30, 2007) on apprenticeship that aims at increasing the visibility on the labour market, the use of training materials and tools for teaching to encourage the integration of young people in employment, increase the professionalism of these young people and enhance their skills.

Training programme	The law defines the concept of training programme as representing a range of objectives to be acquired during the period covered by the contract of minimum knowledge and skills for professional groups, through an in-house company training or external formal or informal training.. THE Regional Council in consultation with employers' representatives and providers' associations the define training programs for apprentices at the regional level. The training programs that fall under the national collective bargaining and the regional questionnaires on training requirements developed by bilateral agencies are taken into account.
Formal training	The law defines the concept of in-house or external formal training that must: a) be issued in an organized and structured environment separate from production sites; b) be implemented through a specific

	design with analyzes of existing competencies, learning objectives, and explicit methods of training c) be developed and delivered by qualified professionals d) achieve a training certificate. e) produce real results in line with the terms and procedures produced by the Regional Council, employers' associations and temporary agencies at regional level. Formal training is delivered through a programme that focuses on the acquisition of professional skills and transferable skills in accordance to the objectives of the training programme
Who are the trainers?	The public and private organizations registered in the catalogue of trainers or companies themselves, if they have the capacity, may provide formal training. The region provides a catalogue of trainers to help meet the demands of training of apprentices.
Catalogue of regional trainers	The region provides a catalogue of trainers to help meet the demands of training of apprentices
Funding for training	Regional funds for formal training based on programs defined by the Regional Council, in agreement with those concerned, such as employers' associations and training providers at the regional level. This is done within the limits of available resources and to the extent that employers adhere to the national collective agreement signed by unions and employers' representatives at national level. Companies guarantee they will provide formal training also in the absence of public funds
The individual training plan	The individual training plan is a document attached to the labour contract that describes the training modules with

	reference to the training programme itself. Without this training plan the contract is null and void
Tutoring	The "tutor" company advices and guides the apprentice through the various steps identified in the individual training plan. Training for this task can not be shorter than 12 hours
Certification	The Region, in agreement with the employers' representatives and the associations of provision of labour at the regional level, supervises the process leading up to an assessment and certification of basic skills, cross training, and technical training that are validated in the training diploma

NOTES

[1] AUBRET J., GILBERT P., Pigeyre, F., Knowledge and power: the skills issues, Paris, Presses Universitaires de France, 1993

[2] See European Commission data:
http://ec.europa.eu/internal_market/retail/index_fr.htm

[3] Self-employed people are defined as "people who are sole owners or co-owners of unincorporated enterprises in which they work, excluding unincorporated enterprises classified as quasi-corporations. The following are considered as self-employed: the unpaid family workers, home workers whose income is based on the value of the products of the production process which they are responsible for and workers in both individual and collective production activities exclusively for final consumption or capital formation for their own account "(ICN, Regional accounts - conceptual and methodological elements, March 2008).

[4] Source: INSEE (2008 survey)

[5] Source: Wholesale trade in 2010 (BLSET 2011)

[6] Source: long-term "Business to Business" study - CREDOC - October 2011

[7] Source: Glaubitz 2011

[8] http://www.eurofound.europa.eu/pubdocs/2010/71/en/1/EF1071EN.pdf

[9] Data Comeos 2010

[10] Data Credoc 2010

[11] Source: Glaubitz 2011

[12] about the following developments, see "Future Skills Needs of the Wholesale and Retail sector" in 2010 and the French report "The Future of Trade," Interministerial pole for prospective studies and anticipation of economic change, 2009

[13] Electronic Data Interchange (EDI) "Electronic Data Interchange (EDI) between the company and other ICT systems outside the enterprise" means: exchange of messages (e.g.: orders, invoices, payment transactions, description of goods) via the Internet or other computer networks, in an agreed format which allows their automatic processing (e.g.: XML, EDIFACT etc..), excluding manually typed individual messages.

[14] See Libération, January 17, 2012 "The wholesale commerce in want of manpower"

[15] Forem publication 2003

[16] "Future Skills Needs of the Wholesale and Retail Sector", 2010

[17] See the above mentioned report Forfás 2010

[18] CEDEFOP, presentation at a seminar organized by the social partners of the commerce sector, October 13, 2012

[19] This is the case in Belgium, where the public agency of FOREM, in Walonia, VDAB in Flanders, Actiris in Brussels coexist.

[20] Anticipating changing skill needs: A Master Class R. Wilson, and A. Zukersteinova May 2011 Institute for Employment Research University of Warwick

[21] IN THE COMMERCE SECTOR: ANALYSIS OF ORGANIZATIONAL MODELS AND TOOLS DEVELOPED BY SOCIAL PARTNERS AT EUROPEAN AND NATIONAL MEMBER STATE LEVEL TO GUARANTEE MORE OPPORTUNITIES TO WORKERS AND COMPANIES

[22] COMEOS, COMEOS Magazine, Newsletter of the Belgian trade, November 2011).

[23] ARIBAUD **Michel, responsible ECVET European Commission, meeting AFAE, 2010**

[24] see document of the European Commission "European classification abilities / skills, certifications and Occupations (ESCO)» November 2012

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