



Editorial

in this issue

Editorial	1
Trends under the Lens	1
Commerce Changes	2
CECOA: A "Lisbon Story" of Success ...	2
An Interview With... ..	3
Surfing the Net	4
Impressum	4

Dear colleagues,
Our Skills Council was created with the aim of improving the level and quality of education, skills and employment in the Commerce-related industries by anticipating the future skills needs, while creating an effective networking of national and EU stakeholders of the Commerce sector.

In this context, we are actively working on a series of reports and studies, with the core objective of gathering and presenting consistent and reliable sectoral intelligence in the field of Employment and Training in the sector.

The research is currently being conducted, and the first two reports are now well underway. In this issue, we give you the opportunity of peeking into the backstage, to see the reports' structure and findings ahead of their release in our

final event later in the year. They are the product of an intense cooperation of the network of National ISPs set up at the beginning of the project, now fully operational.

We are strongly convinced that through the dissemination of quality information and the fruitful exchange of relevant tools, the attractiveness of the sector can be increased, and European companies and employees can be provided with the skills to tackle effectively the challenges ahead, paving the way for future concrete initiatives at European level.

Alongside this "sneak preview", this issue focuses on one of the countries represented on our Council: Portugal. Enjoy!

Ilaria Savoini & **Laila Castaldo**
Senior Adviser, Social Affairs, EuroCommerce *Policy Officer, UNI Europa*
Social Partners and Board Members of the ESC Commerce

Employment Trends under the Lens

In order to pursue its mission, the Commerce ESC includes in its Work Programme a range of activities aimed at drawing a picture as accurate as possible of the sector's workforce composition and trends in skills demand and offer, identify skills needs, indicate possible answers and, on the basis of this analysis, issue recommendations to stakeholders in order to more effectively address them.

Specifically, four reports are foreseen, tackling the above-mentioned themes, which have strong links to employment targets stipulated in the Europe 2020 Strategy, foreseeing a rate of 75% of people in employment aged between 20-64 by 2020. The reports will be finalised and presented at the end of the year: however, we give you a glimpse into preliminary findings, which are of certain interest for Commerce sector skills and VET stakeholders.

The first report, in particular, focuses on the Employment Situation of the Commerce Sector, Including Forecasts and Trends. It aims at depicting a clear image of the Commerce sector in the last few years, building on data made available by Eurostat and ESC members themselves, as well as national statistical agencies to which they have access.

The report addresses both sides of the Commerce sector, retail and wholesale. The two areas are analysed in turn: nevertheless, maintaining the two areas separated is increasingly difficult, considering that retailers and wholesalers tend to move up and down the supply chain - with the former producing and distributing their own products, and the latter on occasions moving closer to individual customers, particularly with the arrival of e-commerce.

For each area, a set of criteria are being considered for anal-

ysis, namely the number of persons employed; gender and age aspects; and the educational attainment of employees. In addition, a forecasting exercise attempts to draw a picture of the two areas in coming years.

Wholesale - broadly covering B2B commerce - accounts for over 10 million employees in the EU, as of 2010 (the Commerce sector as a whole still remains the second largest EU employer), with a higher employment rate in the Member States (MSs) with larger population (DE, FR, UK, IT and ES) and, more generally, with a significant share of people employed by SMEs.

Preliminary findings show that the employment trend in the MS belonging to the ESC are mixed: upwards in Denmark and the Netherlands, stable in Belgium, and downwards in Portugal, Spain and Croatia. In terms of gender and age, figures indicate that wholesale is a male-dominated sector (with an approximate proportion of 2 to 1), aged between 24 and 59.

Forecast scenarios depict a mottled picture. As an example, a study in France, based on hypothesis about economic recovery and changes in the sector (organisational, in

the economic models, in market penetration), expects either - inevitably - job losses of around 5 percent, or sharp increases up to over 10 percent, with additional mid-ranging options.

As for retail - broadly covering commerce to the final customer -, the results of the study show over 18.5 million employees in the EU in 2010, with particularly significant numbers in Germany and the UK. Like in wholesales, the majority of employees in retail work for SMEs. Gender and age profiles in retail, however, offer a mirror image of the situation in wholesales: there are significantly more women, with the same opposite proportion of 2 to 1, most of them aged 25 to 59.

In terms of forecast, retail's future prospects appear positive. For instance, according to an EU Skills Panorama study, employment levels in retailing in the EU are expected to rise, from just over 18 million in 2013 to 19 million in 2025.



Commerce Changes

The second report looks at the Evolution of the Commerce Sector's Occupations and Associated Skills, aimed at understanding the new needs for old occupations, and the new ones that are emerging.

Eight different representative occupations have been identified as focus of interest, with related knowledge, skills and competences. They are: warehouse operator, store manager, shop assistant, call centre agent, supply chain professional, checkout manager, retail entrepreneur and specialist seller.

The report analyses how the profiles for these occupation are evolving and which elements are affecting these changes. According to the Final Report from the Expert Group on Retail Sector Innovation of the European Commission, they are influenced by external and internal drivers - consumer, economic, technological, organisational and regulatory.

Each driver is detailed and defined, providing the benchmark to review the skills needs for the representative occupations selected by the ESC experts and identify the necessary changes. For instance, shop assistants will be called increasingly to contribute to a positive consumer experience, as well as getting better versed in using ICT tools.

ESC partners also identified emerging occupations for the sector, which relate to three-macro trends: increasing internationalisation; ever-growing e-commerce and customer relationship management sophistication. The new occupations - such as e-Merchandise - will lead to the creation of new jobs in Commerce, requiring more specialised competencies and abilities, which are also being detailed in the report.

The reports are due to be released at the end of the year.



We continue our European tour of skills, training and education in the Commerce world. Moving South from the Netherlands (cf. last issue), we head now to Lisbon, with a profile of our Portuguese member Organisation, CECO, and with an interesting interview with the colleagues of CCP, presenting their activities and latest work.

Since its creation (1986), CECO, the Vocational Training Center for the Trade and Services Sectors, has contributed to encourage and support the development and upgrading of the trade and services sectors at a national level, as well as to promote vocational education and training for young people and people already at work.

CECO offers a broad spectrum of training and services, to youth, companies and professionals.

Different types of training courses targeted to young people, and ranging from EQF/NQF level 3 to 5 qualification, are developed, enabling CECO to provide qualifications to young future workers, answering efficiently to labour market demands. Attending CECO courses, within the Apprenticeship System for instance, provides young people a chance to use immediately the acquired competences through on-the-job training periods, while attaining a double certification

level 4 Professional Qualification as well as an equivalent secondary education degree, or in the field of Technology Specialisation, with candidates attaining a Level 5 Qualification with recognised progression towards Higher Education.

Simultaneously, CECO develops certified catalogue and tailor-made vocational training programmes targeted to the national workforce (employed or unemployed) of the trade and services sector, improving in this way the qualification and the performance and skills of both employees and jobseekers. Support services for companies and organisations of the commerce and services sector are offered, with a view to support companies performance and productivity. The valorisation of workers' experiences is also channelled through CECO's status as member of the national network entrusted with the accreditation of prior learning, offering the opportunity to recognise, validate and certify knowledge, skills and competencies of prior learning and working experiences.

These services and initiatives are successfully supported by a strong R&D and innovation commitment, in partnership with national public and private stakeholders and within international projects, networks and organisations.

An interview with...

Confederation of Commerce and Services of Portugal *Confederação do Comércio e Serviços de Portugal*



Q: What are the main features of the Commerce sector (and related services) in Portugal?

■ The trade and services sector, in Portugal, is a quite diversified sector in terms of business areas, and it is mainly based on microenterprises. The sector still presents some deficit of qualifications amongst its entrepreneurs and workers, although important changes have been introduced to contradict this problem. There is also a high rotation in employment.

Q: Tell us about CCP. What are its mission and core objectives?

■ CCP is a social partner, participates in the Permanent Commission for Social Bargaining and represents around 200,000 enterprises and a million workers. Amongst its main objectives - which generally consist on defending the sector's companies that it represents - CCP also aims to upgrade the competitiveness of its enterprises and the skills level of its entrepreneurs and workers. To fulfil this objective, CCP is responsible both for the management of several vocational training and training-on-the job programmes, based on training and consultancy methodologies, which aim to upgrade

the enterprises ability to compete in the market. It also promotes a set of studies that aim to prospectively identify the sector's needs for qualification, so as to draw a strategy that provides an adequate reply, and proposes - in a sustainable way - a set of actions that might raise the quality of the training offer in the sector.

CCP also owns the Commerce School of Lisbon, a school oriented to young people that aims to promote V.T. actions in the area of professional courses, and ensures, in partnership with IEFP (the Public Institute for Employment and Vocational Training) the management of a V.T. centre created on the basis of a protocol between both entities: CECO, whose activities are mainly oriented to the needs of the sector's workers, both providing an offer based on catalogue and developing V.T. based on specific requests.

Q: Very interesting work! And what are the core findings of this research?

■ Currently, we are developing a study that aims to elaborate a Strategic Vocational Training Programme for the

Trade and Commerce - 2014-2020, and that presents two main objectives: on one hand, to know the state of the art in terms of the trade and services sector's qualifications, taking into account the evolution that took place in the most recent years; on the other hand, to know the prospective needs of qualification, as well as the strategy to be followed in order to provide an adequate reply to those needs. It is also foreseen that the study may actively contribute to the public training policies, as well as to the updating of the public regulating instruments of the EVT system.



young people to the sector?

■ Making V.T. offer adequate to its demand, so as to adjust the provided offer to the labour market needs and to ensure the desired levels of employability; promoting the quality of the EVT institutions; using innovative

and updated training methodologies; a wider involvement of students/trainees in the business world, through the reinforcement of the training on-the-job, are some of the measures that we consider important to boost the sector's attractiveness to young people.

Q: Are other specific groups of workers targeted ?

■ Entrepreneurs are a public of special relevance to CCP, due to our role as sector's umbrella organisation, along with the importance that this group has on the labour market quality. Raising the qualification level of this particular group, as well as improving its strategic skills in general, has been a priority for our Confederation - sustained on several partnerships with university entities with whom we have developed several courses.

Q: What strategy and actions do you deem necessary to meet the needs highlighted in the report?

■ We consider that the involvement and the consultation of all stakeholders of the sector is fundamental, as well as the involvement of the several public and private actors of the EVT system, along with a multi-method approach that might include a variety of techniques for collecting information and for promoting the active participation of the identified actors.

Q: Are any specific provisions foreseen to attract

Surfing the Net – Links & Resources

European Sector Skills Councils

The Web Portal of the initiative by European Commission (DG Employment, Social Affairs and Inclusion) aiming at anticipating the need for skills in specific sectors more effectively and achieving a better match between skills and labour market needs.

> ec.europa.eu/social/main.jsp?catId=784

Sector Skills Alliances

A Commission initiative designed to promote European cooperation within specific sectors of the economy. SSAs develop vocational skills from the perspective of labour market needs, ensuring cooperation between education and employment.

> ec.europa.eu/education/events/2014/20140415-sector-skills_en.htm

Funding on education and training

A gateway to all the opportunities and funding to improve Vocational Education and Training across Europe.

> ec.europa.eu/education/funding-search_en.htm

Editorial team

Ilaria Savoini
Laila Castaldo

Production and Direction

EuroCommerce
UNI Europa Commerce



The responsibility for the content of this Newsletter lies with the authors. It does not represent the opinion of the European Commission.

The European Commission is not responsible for any use that may be made of the information contained therein.

This Newsletter has been produced with the financial support of the European Commission.



EuroCommerce
Avenue des Nerviens, 85
B – 1040 Brussels
Belgium
www.eurocommerce.be



UNI Europa Commerce - Global Union
Rue Joseph II, 40
B – 1000 Brussels
Belgium
www.uniglobalunion.org