Discussion Paper No. 89

Unions and vocational training

A manual assisting unions to become involved in promoting activities related to vocational (re)training

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Discussion papers are preliminary material to stimulate discussion and critical comment. The views expressed by editorial staff and contributors do not necessarily reflect those of the ILO.

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INTERNATIONAL LABOUR OFFICE GENEVA
Introduction

The ILO Programme and Budget 1990-91 planned to

- "identify the problems encountered by unions in extending their vocational training services,
- further their interest in training,
- develop a manual to assist unions in planning and implementing activities related to vocational (re)training."

This plan did not attach importance to carrying out vocational training (VT) by unions themselves, but rather to their services and activities related to VT. Thus the project dealt primarily with the following messages: unions should be more interested in VT; should develop policies and activities to promote VT (by understanding it as an outstanding means for achieving workers' satisfaction and productivity); to request a higher standard of VT; to secure the financing of VT; to take part in supervising ongoing VT in-plant and in all kinds of training institutions, particularly, if VT is using public or collective funds.

This ILO activity can be seen as a follow-up of the ILO booklet "Trade unions and vocational training: A workers' education guide" by Harold Dunning published in 1984. The booklet deals extensively with the issue of vocational training, but provides only a few pages on the possibilities for unions to promote the subject. This booklet on the other hand focuses entirely on these possibilities. Readers who want more details about VT are referred to the publication by Harold Dunning and to the ILO Conventions and Recommendations concerned which are mentioned later on.

In order to produce the manual, several unions were asked to report their experiences. Reports were received from: the Malaysian Trades Union Congress; the Trades Union Congress (TUC) of the United Kingdom; and the Zambia Congress of Trade Unions. The situation in Brazil is described in a broader report written by two university professors. Excerpts from these reports are given in chapter III.

The International Confederation of Free Trade Unions was asked to comment on the draft manual. Its comments can be found in chapter II. The reports and comments show that the manual is appreciated, but it is seen as being too sophisticated by those unions which have to fight with a very poor vocational training situation or system in their countries. The main obstacles to implementing a VT promotion system like that outlined in the following manual are:

- The unions often do not possess the necessary power (in terms of number of members, acknowledgement in society and shared political power);
- The unions often do not have the necessary funds at their disposal to be prepared for large-scale and expertise-based promotion of VT;
- The national VT system is in a poor state (in terms of public awareness and public and/or private funding).

It will not be possible and it is not the aim of this manual to improve the basic situation of the unions as such. This will be left to particular countries or other ILO activities.

This means, that in many countries, promoting VT is reduced to repairing or healing the worst symptoms and meeting the most urgent needs through any means and by anybody, including the unions themselves. Nevertheless, the manual does not only refer to the poorest situations, since even unions in industrialised countries (like the UK) still demand a more advanced tripartite system of influencing VT. Hence, this manual outlines a sophisticated tripartite system for influencing the promotion of VT. The appropriate system elements for application in a particular country can be chosen from the full menu. The contents and subjects relevant to a specific country situation cannot be covered by a manual of this sort, and so are left to the unions of each country.
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I. A manual to assist unions in promoting activities related to vocational (re)training

A. Introduction

This manual will provide hints for unions to promote, support, plan, and implement vocational training (VT) in their domestic domain, that is under the specific economic and political circumstances of their countries. Thus the manual has to deal with at least two difficulties. Firstly: circumstances differ greatly from country to country, so that users must select those hints appropriate to their domestic situation; secondly: although the manual tried to be applicable to different political structures and systems of VT, it was impossible to avoid the fact that some basic principles are underlying the hints given. These basic principles include the following:

B. Assumptions

1) VT is considered to be of public interest; i.e., it should not be left to the economic interest of individual firms. Governmental bodies at all levels concerned, as well as the representatives of buyers and sellers of VT, have a joint responsibility for its functioning.

2) Apprenticeship, at least, is considered to be an educational activity, i.e., apprenticeship is part of the education to which each individual has a fundamental right in order to develop his/her own potential.

The following definitions are used according to the ILO Glossary on VT:

VT: Activities which aim at providing the knowledge, skills and attitudes required for effective and efficient performance within an occupation or group of occupations. It encompasses initial, refresher, further, updating and specialised job-related training. It may, but does not necessarily include general educational subjects.

Retraining: Additional training to acquire the skills and knowledge needed to practise an occupation other than the one for which the worker was originally trained; may require basic training plus specialisation.

3) VT is considered to have tripartite management. That is, government, unions and employers have an institutionalised role in the management of VT, to achieve unanimous decision making through consensus. VT shall be the subject of a co-ordinated and concerted policy, involving, in particular, the organisations representing employers and employees, and representatives of the training market including teachers and trainers. Combative rhetoric between the partners does not prevent pragmatic mutual accommodation and cooperation.

4) VT is considered by all three partners as an important precondition for competitive economic performance for a high wage economy within the world market. They also consider that high wages are required to maintain an adequate standard of living for workers and allow them to reap a justified reward and so keep the national economy going through their purchasing power.

5) The unions' influence on VT, which this manual proposes, should focus on initial VT and VT for the unemployed and specific disadvantaged populations such as the handicapped, older workers, and immigrants.

Their influence on further VT can be similarly brought to bear, but should allow more for
regulation, funding, administration, and control for new initiatives of all kinds including at the local level. Flexibility will remain of high value for prompt competitive adjustments in a market oriented economy.

C. Organisation of the manual

The following system levels will be distinguished (see CEDEFOP/Streeck, 1987):

- the international level, with information and conventions (e.g., ILO Labour Standards) affecting national legislation;
- the national (or "intersectoral") level, with decisions extending to the entire national economy;
- the sectoral level, with decisions relating exclusively to specific economic sectors/branches;
- the regional/local level, with decisions affecting all firms in a given subnational territory;
- the enterprise (plant, workplace, shop floor) level, with decisions pertaining exclusively to individual economic or production units.

Furthermore, the following functional areas are distinguished (see CEDEFOP/Streeck, 1987):

- regulations: determining the objectives, subjects and standards of VT;
- financing: mobilising the financial resources for VT;
- implementation and administration;
- supervision and control: assessing whether objectives are achieved and standards adhered to; applying sanctions where they do not exist; and adjusting objectives, subjects and standards to changing needs.

Overlaying the above dimensions of system level and functional area yields a "grid" of permutations to be applied to VT. The level dimension will be used as the main grouping. At each level the functional areas will be discussed to define the possible activities unions may choose.

D. Overview

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<tr>
<th>Level</th>
<th>Body</th>
<th>In charge of</th>
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<tr>
<td>International</td>
<td>ILO, UNESCO, etc.</td>
<td>standards, recommendations</td>
</tr>
<tr>
<td>National</td>
<td>parliament, institute/agency, specific bodies</td>
<td>legislation, determination of general standards and subjects, regulations for all occupations, for initial VT, apprenticeship, further VT, for disadvantaged groups, examinations, annual VT report.</td>
</tr>
<tr>
<td>Sector</td>
<td>specific bodies</td>
<td>determination of standards and subjects for each occupation, apprenticeship allowances, external centres, training the trainers, further VT.</td>
</tr>
<tr>
<td>Region</td>
<td>parliament, specific bodies</td>
<td>legislation, determination standards and subjects of VT schools and centres, training of trainers, further VT.</td>
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<tr>
<td>Enterprise</td>
<td>work councils</td>
<td>determination of all enterprise based issues</td>
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E. International level

Although union activities within each country (at national, regional, sectoral, and enterprise levels) are the most important means to promote VT, in many cases international organisations may help them to act. There is, above all, the International Labour Organisation (ILO) to deal with VT in a tripartite setting. Other international organisations such as UNESCO, or for specific regions, the EC's European Centre for the Development of Vocational Training (CEDEFOP) deals with VT as well. National unions have established respective international union federations which also represent their interests concerning VT.

This is especially true of many ILO activities. Unions have taken an active part in promoting VT, resulting in a number of ILO instruments. Many Conventions and Recommendations include chapters on VT. Those exclusively dedicated to VT are the Human Resources Development Convention, 1975 (No. 142), the Recommendation concerning Vocational Guidance and Vocational Training in the Development of Human Resources, 1975, (No. 150), the Paid Educational Leave Convention, 1974 (No. 140), and Paid Educational Leave Recommendation, 1974 (No. 148). These international labour standards adopted by at least two-thirds of the 150 member countries of the ILO (in a tripartite voting procedure) have a strong impact on the national situation of each member country, even if the Conventions are only ratified by 22 (No. 140) and 43 (No. 142) member countries for enforcement in their domestic domain. ILO standards serve as references at least for internal improvements of the VT situation within each nation. A special ILO procedure of reporting annually on measures taken to meet Convention provisions guarantees that the Governing Body and, from time to time, the International Labour Conference, pay attention to the issue of VT.

Various industrial committees of the ILO deal frequently with VT issues.

F. National level

The national level includes nation-wide, inter-sectoral, or inter-regional issues with decisions extending to the entire national economy.

Those who play important roles at this level are the national union federation, the national employers' federation, the national government, the national parliament and the national political parties. The union federation should sit on all relevant boards, but it can also act effectively through a related political party, particularly, if decisions are made by parliament.

1. Regulation

Laws/acts on VT:

Aim:

Make sure that the unions' role is adequately considered in all regulations concerning the determination of objectives, subjects and standards of VT; e.g. establishing participation procedures for giving union consent or consultation before or during the political decision-making process.
Action:
Use the general political power the unions possess, possibly through related political parties.

National institutes or agencies in charge of determining subjects and standards of VT:

Aim:
Ensure that unions are adequately represented on the boards of such institutes or agencies, and work actively, co-operatively and constructively by appointing VT experts to the boards.

Action:
Use the general political power and the expertise in VT which unions possess or should develop.

Decreeing of general initial training regulations for all occupations (setting minimum standards, skills and knowledge to be acquired, guidelines for structuring subjects and duration, sketching examination standards, and setting requirements for those who will be allowed to train apprentices):

In the field of further VT there are fewer decrees. This field is more open to new initiatives and agreements between the social partners who normally propose decrees where they feel it necessary. An example is allowing certified artisanal foreman/master/Meister to run their own businesses and to train apprentices under the regulations for initial VT.

Aim:
Be involved in the preceding process of consultation in order to enter into tripartite agreements.

Action:
Contribute to the drafting of these regulations through the co-operation of VT experts, possibly with political parties.

2. Financing

The unions are not directly involved in mobilising resources for VT (with the exception of union-owned VT institutes). The financing of apprenticeship and VT must be set up by national legislation, using public resources, possibly supplemented by different forms of a levy system.

The financing of further training is not based on public resources, but primarily left to employers, supported by incentives, contributions and subsidies of national and regional authorities.

Aim:
Observe that resources allocated supply sufficient apprenticeship training sites and that employers contribute adequately to the fundraising system and/or provide necessary training sites.

Action:
Use the general political power which unions possess within the legislation process, possibly through related political parties.

The financing of further VT for the unemployed and other disadvantaged groups is often covered by unemployment insurance and/or similar funds to which employers and employees jointly contribute:

VT for unemployed or other disadvantaged groups:

Aim:
Ensure that an adequate proportion of the unemployment insurance fund or other funds is concentrated on the unemployed and respective disadvantaged groups.

Action:
Use union representation on the board.

3. Administration

Social partners participate to a very limited degree in the implementation and administration of VT at the national level. If examination issues, such as questions, are set by a central agency, (e.g., of the Chambers of Commerce) unions should be represented on the board.
Setting examination questions nation-wide:

Aim:
Monitor the setting of examination questions.

Action:
Delegate a VT expert to the board.

4. Control

The VT system should be regularly evaluated at the national level in a Government's VT Report to the parliament. This report should contain data on all relevant quantitative and qualitative aspects of VT policy. Some examples are: national and regional trends on the training market; subjects and structure of VT; and situation of specific groups. Social partners should be entitled to add their statement to the report using additional or alternative information from their own research institutes, and/or from independent scientists in universities or other research institutes.

National VT report:

Aim:
Be entitled to comment on the national VT report.

Action:
Use the general political power and the expertise in VT which unions possess or should develop in order to comment.

G. Sectoral level

This level deals with decisions related exclusively to specific economic sectors, occupations, or branches. These decisions are usually made by boards comprising the social partners. Government and parliament are normally not involved at this level.

1. Regulation

Decreeing of initial training regulations for each occupation (setting minimum standards, skills and knowledge to be acquired, guidelines for structuring subjects and duration, sketching examination standards, and setting requirements for those who will be allowed to train apprentices):

Aim:
Be involved in the preceding process of consultation to be able to enter into tripartite agreements or decision-making.

Action:
Contribute to the drafting of these regulations through the co-operation of VT experts from the sector/occupation in question.

The process may become difficult or even confrontational if the new regulation has effects on wage groups and rates.

Collective bargaining and agreements between social partners can include educational leave for the whole sector.

Educational leave:

Aim:
Include educational leave issues in collective agreements.

Action:
Convince employers that educational leave is a means of strengthening the competitive situation of the sector through a better qualified workforce.

2. Financing

Aim:
In case firms are not legally required to provide training sites, unions may contribute to the mobilisation of resources or sites through collective bargaining agreements, possibly imposing levies on firms that do not provide training.

Action:
Use regular negotiations for collective bargaining in favour of VT.
Training allowance rates for apprentices:

Apprentices who are trained at the workplace, sometimes in combination with part-time school, often get allowance rates in a number of countries. These allowances are paid by enterprises, or the state, or a mixed system. The amount is only part of what they will earn after finishing their apprenticeship successfully. Rates should reflect the mutual interest of their situation. While working they should get a certain remuneration, as they are still learning they cannot receive the full equivalent pay, thus are a source of cheap labour for employers and thus provide an incentive for apprenticeship within the enterprise.

Aim:
Achieve adequate training allowance rates for apprentices.

Action:
Make training allowance rates for apprentices subject to regular collective bargaining.

Small firms are often not able to provide apprenticeship. In these cases it may be appropriate to create external training centres. The necessary training costs may be shared by a levy from these firms. As far as such an external training system is not covered by national legislation unions may make the creation and fund raising subject to collective bargaining.

VT sites outside the individual enterprise:
Aim:
Ensure VT through external apprenticeship training sites.

Action:
Make the creation and funding of external training subject to collective bargaining. Try to be represented adequately on the board.

3. Administration

Establishment and administration of external training centres:

Aim:
Partake in the establishment and administration of external training centres.

Action:
Ensure that an union expert in VT is on the board.

Training and examination of instructors:

The training and examination of instructors is often organised on the sectoral (or regional) level.

Aim:
Monitor the standard setting of the training and examination of instructors.

Action:
Ensure that an union expert in VT is on the board.

4. Control

Since sectoral employers' associations and organisations play a key role in regulating and implementing VT and send delegates to many advisory, planning, and decision-making bodies concerned with the national economy and policy, unions must develop adequate expertise at this level.

VT expertise aggregation:

Aim:
Assemble VT expertise and provide qualified representation.

Action:
Establish sectoral VT expertise in a special VT department in close relationship with experts in enterprises.

H. Regional level

This level deals with decisions affecting all firms, training establishments, etc., in a given subnational territory, such as region, district, community, locality, department or municipality. Sometimes there are further dif-
ferences in responsibility among these subnational territories. For reasons of applicability in this manual, these differences are not taken into consideration.

1. Regulation

Where there is some form of distribution of responsibilities between the central government and regional authorities, e.g., federal structure of the VT system refer to the hints given under "National level" which then have to be applied regionally.

Often the responsibility for carrying out national regulations, particularly examinations, is delegated to regional authorities, e.g. Chambers of Commerce or committees for ratification of certificates and diplomas. Sometimes legislation on training centres, vocational schools, and educational leave are subject to regional responsibility.

Issuing regulations on training centres, vocational schools, and examinations:

Aim:
Ensure that unions are adequately represented on respective boards by appointing VT experts to the boards.

Action:
Use the general political power and expertise in VT which unions possess or should develop. The chair of some boards or committees may alternate annually between an employers' and a workers' representative.

The regional and sectoral level is of great importance for further VT. Individual Chambers are often in charge of setting regulations which may be taken up at the national level after some time of testing.

Issuing regulations on further VT:

Aim:
Take an active part in creating regulations for further VT.

Action:
Use expertise in VT for proposing new regulations for further VT possibly on boards such as Chamber committees.

If the VT system is federal, the responsibility for further VT schools or centres is left to regional authorities.

Schools or centres for further VT:

Aim:
Ensure that unions are adequately represented on the boards of such schools and work actively, co-operatively and constructively by appointing VT experts to the board.

Action:
Use the general political power and expertise in VT which unions possess or should develop.

In case legislation on educational leave or any other training is left to regional authorities, such as territorial parliaments, unions should follow similar ideas as given under "National level".

Legislation on educational leave:

Aim:
Ensure that the unions' role is adequately considered in regulations concerning educational leave, such as the determination of objectives, subjects and standards of VT. An example is establishing participation procedures for giving union consent before or during political decision making. (Refer to ILO Convention, 1974 No. 140)

Action:
Use the general political power and expertise which unions possess, possibly through related political parties.

2. Financing

Where the VT systems is federal, the financing of VT may be partly subject to regional authorities. This may, for example, refer to vocational schools. Regional authorities may
support campaigns for additional apprenticeship training sites, and provide regional firms with subsidies to increase their willingness to provide training. Often external training centres are regionally based and do not only cover a specific sector or occupation. Lastly, regional authorities in a federal system may have the right to pass legislation concerning further VT in their own region, e.g., vocational schools and colleges. In these cases unions may act respectively as stated under "National level".

3. Administration

Regional bodies, such as Chambers of Commerce or committees, may be responsible for the following: decisions on the suitability of firms to provide VT; maintaining files on all training contracts; authorising extensions or cuts in training time; arbitrating conflicts between apprentices and firms; supervising and controlling of workplace training; interpreting national regulations; and local co-ordinating of VT between school and workplace in conjunction with local government authorities in charge of vocational schools.

Different regional committees:

Aim:
Monitor the regional administration of VT.

Action:
Ensure that a union expert in VT is on the board of the concerned committees or is kept informed.

4. Control

At the regional level, bodies such as Chambers of Commerce or committees, may have control and advisory responsibilities for workplace training through full-time specialists such as training counsellors.

Where the VT system fits into a federal structure, regional authorities may be in charge of vocational schools or centres which have to be supervised and controlled by the regional government, mostly without the participation of the social partners.

Chamber's VT committee:

Aim:
Partake in and contribute to the Chamber's VT committee.

Action:
Draw your own information on VT from your VT representatives in many enterprises to cope with conflicts of interest with employer-dependant training counsellors.

External training centres:

Aim:
Partake in the supervision and control of external training centres.

Action:
Ensure that a union expert in VT is on the board.

Training and examination of trainers/instructors:

The training and examination of instructors is often conducted in regional centres.

Aim:
Monitor the supervision and control of regional centres where instructors/trainers are trained.

Action:
Ensure that a union expert in VT is on the board.

I. Enterprise level

This level is concerned with decisions pertaining exclusively to an individual economic or production unit, such as an enterprise, firm, company, plant, workplace, office, or shop floor.

Since the decision on whether or not to provide in-plant VT is taken at this level, the influence
of workers is important and can be effective. Activities at this level, particularly those on further VT, often have a great mutual impact on the sectoral, regional, and national level.

At the enterprise level decisions are made about filling the discretionary space left by national or regional regulations, e.g., concerning initial training or apprenticeship. Innovative methods are often employed in large firms to create training standards that may exceed minimum requirements laid down in national standards. By contrast, in small or medium-sized firms, union representatives have to argue for national standards as basic requisites. Problems may arise in small firms where there is no union representation.

Unions tend to complain about the fact that they have too little influence on high level decision-making or decision-preparing bodies. Experience shows that the main problem is the great difference between firms in attitudes towards VT and in the ability of worker representatives to conduct meaningful negotiations with their employers about VT.

Work councils or committees also in charge of VT:

Aim:
Ensure that a workers' representative with expertise in VT can take part in the negotiation process, and may monitor the establishment, implementation, administration, and control (e.g., the meeting of national standards) of VT within the enterprise for all employees, possibly within an annual VT plan of the firm.

Action:
Brief at least one workers' representative per firm in these areas of VT including long-term cost-benefit calculations and other advantages for the firm.

High training standards improve the performance and flexibility of the workforce, thus making the firm more adaptable and better able to provide greater job security. Well-trained workers are less likely to be laid-off and be replaced by newly qualified external personnel.

Further VT at this level, often conducted as on-the-job or in-plant training, is not subject to, or carried out under legal regulations, but is of great importance since it occurs frequently and is usually well performed.

J. Internal union activities

This part of the manual deals with possibilities unions have to prepare themselves for the promotion of VT.

Experience from several countries shows that unions are more interested in having political power and influence than in working regularly with high level expertise in promoting VT. However, long-term influence and power can and should be based on profound knowledge and expertise which cannot be neglected by other social partners.

Developing expertise and potential in VT:

Aim:
Set up a training promotion unit at different levels (national, sectoral, regional/local) which will be able to handle functional areas (regulations, financing, implementation and administration, supervision and control) by full-time VT officers.

Often union representatives do not sit on councils and boards as representatives of their own organisation, but rather in their capacity as experts on VT. (Sometimes vice versa.)

This unit should be able to allocate information from all sources such as research and science, and from representatives on different boards, especially from in-plant work councils. Some unions operate their own research institutes. This is necessary where independent research does not really exist, and/or the independent researcher could not be contracted as external collaborator for the union purposes.
This unit should be able to provide counselling and VT guidance to its members.

**Develop a VT philosophy:**

The unit should be able to advocate the unions’ VT policy through all means including public relations activities.

The philosophy to be advocated by unions could be based on the assumptions made in the introduction to this manual. It should comprise issues such as the following questions: Are there any restrictions (e.g. limited access, age, gender) for participants? Is there sufficient VT provision for disadvantaged groups, such as the unemployed, women, handicapped, older workers, minorities, etc.? Are national standards of VT achieved? Are instructors/trainers adequately trained? Are nation-wide examinations acknowledged? By whom? Are there others offering the same courses? Is reasonable competition given? Are those who benefit from VT adequately contributing to the financing of VT? Is vocational guidance and counselling provided? Is the VT class-room and workshop adequately linked? Are ILO standards in the field of VT ratified and applied? Are conditions of work, safety and health protection, environmental protection, nature and cultural heritage included in VT? Are transferable skills/key skills included in VT?

While developing a philosophy on VT it would be helpful to consider some findings from the current VT discussion drawn from ILO experience and research. Since these findings may not be applicable to all national situations, they must be adapted to suit each country’s needs.

1) A national VT policy and subsequently a VT plan has to be established in each country;

2) Good primary and secondary education is a key element in enhancing the efficiency and effectiveness of skilled workers. This "trainability" should comprise the following: cognitive abilities (reasoning skills and numeracy), scientific attitudes in a broad sense, mastery of the national language, communication skills, interpersonal skills, self-discipline and responsibility, attitudes to work, and basic understanding of technology;

3) There is a global trend to be seen going from manual skills to cognitive skills;

4) Theoretical training allows adaptation of workers to new job requirements;

5) Maintenance work will be more important than operating the equipment, requiring diagnostic skills;

6) Privately provided or proprietary training can be more effective than publicly provided training. However, sometimes the quality of such training is low and has to be monitored;

7) The potential of privately-based training is not adequately tapped.

8) There is a reduction of regulations on private VT, focusing instead on inspection or accreditation;

9) Publicly provided VT needs frequent linking to the labour market.

10) National VT agencies are being established independently of government ministries;

11) The service sector will grow;

12) The informal sector sometimes makes up to 90 per cent (the hidden training world) of the economy;

13) VT boards need employers (and workers’ representatives) who are present and decisive. Weak boards end up with weak representatives;

14) Whenever possible decentralise and delegate power to local institutions and hold them accountable for results;
15) Diversify sources of financing VT;

16) Make beneficiaries of VT pay for training through payroll taxes, individual tuition or other means as a powerful way to ensure self-correcting mechanisms in VT.

Unions providing their own VT:

Some unions feel it necessary to provide their own VT through operating training centres/institutes or buying courses. This can be done for different reasons, which include: a lack of other providers; to establish a certain standard in a particular field; to provide an example; to target a specific population which may be overlooked (informal sector); etc. But this will be costly and by no means sufficient to replace public or enterprise based VT.

If unions operate VT they must examine whether or not they work according to the philosophy advocated in negotiations with employers and government (see above). Some questions they should ask include: Are there any restrictions (e.g., limited access, age, gender) for participants? Are employers and public authorities involved? How? Are the examinations acknowledged? By whom? Are there others offering the same courses? Is that competition reasonable?
II. Comments of the International Confederation of Free Trade Unions (ICFTU)

The ILO Manual is, in general, found to be comprehensive and provides information on activities related to VT.

Tripartite involvement in discussions on matters related to VT may be feasible in a Western environment, but at present it is felt to be unrealistic in the current situation within most developing countries.

In a few countries like India, Israel, Malaysia and Singapore, unions have, to some extent, initiated VT projects.

Due consideration must be given to the relationship between formal education provided at school and the VT to be provided.

The study proposes the need to take into account a consensus between trade unions and employers regarding the nature of VTs.

There needs to be due consideration of the existing manpower policies of the country, and provisions to collect information necessary to identify whether or not present manpower policy is related to the present employment situations. If not, relevant alternative policy proposals/guidelines should be identified. It is also felt that certain aspects need to be studied such as:

- How VT can be identified to fill existing employment opportunities and/or planned in the country's economy.
- The unemployment benefit system in the country should keep pace with the VT conditions and plans.

A clear definition of the scope of the VT should also be included.

Research work should be initiated and implemented by national centres and the ICFTU/APRO on the ideas given above and in the ILO Manual.

ILO comments: Not all of these comments could be considered while reviewing the first draft of the manual. Some comments refer to VT subjects which may only be relevant in certain countries. Others are beyond the purpose of this manual or refer to contradictory issues, (e.g., whether VT should only be filling current employment opportunities) which have to be considered in the context of the respective situation. (See Introduction.)
III. Excerpts from case studies

A. The case of Brazil

The following excerpt is taken from "Union movement and VT in Brazil", a country report by Carlos Roberto Horta and Ricardo Augusto Alves de Carvalho. The report will be printed in full as a separate publication of the ILO.

VT in Brazil is conducted primarily by employers, stimulated by government programmes and developed without any relationship with workers' organisations. Responsibility for VT is given to SENAI (the National Service of Industrial Apprenticeship) and SENAC (the National Service of Commercial Apprenticeship), both established in 1942 as a consortium between the employers and government. Besides this form of training there is a private entrepreneurial initiative that promotes courses and training in vocational schools. Before the 80's, the political and institutional limits faced by unions in Brazil inhibited any political formation or VT of workers. But even now, technical and professional knowledge is not a matter of importance to unions. The emphasis on VT is a recent matter and is seen by the union movement as being fundamentally a state obligation.

The unions complain that they have not yet achieved the right to be workers' representatives on the executive boards of SENAI and SENAC due to employers' reticence. Hence, they affirm that the lack of initiative from the union movement in VT matters may also be responsible for this situation. They propose the formation of tripartite VT commissions.

One union centre is just about to sign an agreement with the Minister of Education to obtain resources designated for VT and for instruction in reading and writing. There are a few similar activities such as courses in tailoring, sewing, lathe-working, mechanics, and how to become a locksmith. These activities are seen as part of VT in a larger perspective associated with the political education of unionists, quality of life and citizenship. A shortage of resources defines priorities and, at this moment, a priority is the training of union leaders who have responsibility for decisions. VT is seen as a means to politically fortify workers. Political training is considered as a priority, in terms of strategical actions.

In recent years some developments by segments of the working class (worker educators of seven vocational schools) have shown themselves to be more significant than initiatives taken by workers' organisations in relation to VT. They pursue a more comprehensive approach to VT including creativity, history of the subject, ability to fulfill oneself at work, problem solving, teamwork, energy crises, etc. According to one of the school's co-ordinators: "The greatest difficulty in forming and training people through workers themselves and their union is that the unions in general have not been allowing people to make more efforts on the issue of VT." As a consequence, the financial support currently being given to the courses is precarious and there is no money for new courses to keep up with the technological modernisation now taking place in Brazil.

The end of the union tax and the investment of resources made by the European union movement tend to shape a crisis.

The illiteracy issue is an obstacle to VT.

One cannot refer to the union movement as being united. It is composed of different ideological factions, many of whom are even opposed to each other. They are not all against VT. But the "unionism of confrontation" encourages political education rather than VT in
a tripartite setting. The "unionism of results" also permits political education, but considers VT as one of its priorities on the level of acquisition of resources for VT.

Brazil is under an intense process of change, as far as the regulation of labour relations is concerned. There is now a project in Congress that deals with collective bargaining and profit distribution in enterprises. This project may bring new orientations to the present status quo of the VT issue, from the point of view of the union movement.

B. The case of Malaysia

The following excerpt is taken from a report by Dr. V. David, Secretary General of the Malaysian Trades Union Congress (MTUC).

In recent years, Malaysia, an agrarian economy, has tried to restructure its national economy to ensure equitable distribution of wealth on the premise of growth. It is trying to bring about greater inter-ethnic participation through commissioning carefully planned human resources development strategies that reach out to everyone. The private sector was urged to take the initiative. This led to the growth of the services industry from as low as 15 per cent in 1965 to 32.7 per cent of the Gross National Product (GNP) in 1989-1990.

This economic development did not result in sufficient integration of all ethnic groups and consequently caused some skill shortages ensued. There is an obvious lack of skilled and semi-skilled workers to man various assembly-line functions directly. There is also a mismatch between the available workforce and the kind of skills needed by industries. These issues have to be addressed simultaneously in the following ways: To provide apprenticeship and technical training to suitably qualified school leavers; and to provide retraining, modular and refresher courses to serving employees, and thereby reduce the gulf between skills available and skills needed.

The trade union movement felt that this social anomaly could be overcome in two ways: by putting pressure on the Government to be fair to the people by taking punitive measures against those individuals who had taken undue advantage, and by setting up equal-opportunity institutions to ensure that education and training opportunities are given to people with merit, with no favoured access to any race or class. It is precisely on this premise that the trade union movement entered the sphere of technical training, by establishing private technical training institutions. There was no other quick alternative available to workers if they desired to take advantage of increased employment opportunities resulting from the fast-growing economy. There are at present two kinds of trade union-sponsored technical training institutions. One type is partly owned by trade unions, e.g., Negeri Agro Industrial Training Complex, and the other fully owned, e.g., Workers Institute of Technology, WIT. The latter, established in 1977, obtains its funds from students tuition fees and donations from like-minded trade union establishments. Sometimes it receives assistance from overseas labour establishments in the form of trainers and equipment.

The MTUC offers the following suggestions: that international organisations should give direct financial assistance to credible non-governmental establishments such as union owned technical training institutes; that the United Nations and its agencies should urge governments to help these technical training institutes; and that bureaucratic red tape and procedural obstacles should be removed to enable these institutes to receive funds from abroad and to recruit qualified personnel from overseas.

C. The case of the United Kingdom

The following excerpt is taken from a report of the Trade Union Congress (TUC) of the United Kingdom.
In the UK unions do not generally provide VT through their own institutes, although there are some rare exceptions to this. Such training is normally provided through government schemes or by individual companies or public bodies.

**Internal union action:**

1) Some large unions do have national officers responsible for VT. Others may have a research officer who has responsibility for training amongst other policy areas.

2) In the past union representatives have not been involved in giving advice/counselling to their members. (Although this may well happen when employees agree on "action plans" with their companies in order to acquire individual qualifications as part of a national record of achievement.)

**External union action:**

1) Unions can influence VT policy through contacts with Labour Party spokespeople responsible for training.

2) There is no legislation which gives people a basic right to vocational guidance or training and retraining.

3) The Government is devolving the funding and running of VT to local Training and Enterprise Councils (TECs) which are employer led. Most TECs have one union representative sitting on the board.

4) There is no right of co-determination with unions having the right to sit on joint boards. (Under previous arrangements there was a tripartite system.)

5) Unions are involved in devising national standards for vocational qualifications (NVQs) through representatives on the National Council for Vocational Qualifications, and on some of the industry-led bodies which draw up standards of vocational competence for their industries.

6) Some unions are involved in negotiating training agreements and running training schemes through joint union/management committees. These training agreements are, however, the exception rather than the rule.

7) The TUC holds conferences promoting VT and vocational qualifications. Representatives of employers, TECs and Government Departments attend these conferences.

8) The TUC runs trade union education courses for full-time union officials helping them to negotiate training agreements.

9) The TUC also holds regular meetings with the employers' organisation and other bodies such as the Institute of Personnel Management.

The TUC has developed several booklets on training to help union officials and members to act successfully in VT. These are titled: TUC Guidance: Joint action over training; Youth training: TUC guidance for negotiators; TUC guide to NVQs: A passport to progress; TUC 1989: Skills 2000.

**D. The case of Zambia**

The following excerpt is taken from a report by Ages Mukupa, Zambia Congress of Trade Unions (ZCTU), National Centre.

Trade Unions in Zambia appear not to play a significant role in the area of VT. Promoting VT is perceived mostly as a secondary matter in relation to the mainstream activities of the unions such as collective bargaining. However, this is not to say that the necessity for it is not appreciated. Trade unions concede that failing to participate in VT programmes has been a serious oversight on their part. Trade unions also point to their poor financial position which does not allow them to partake in VT.
Unions should be more interested in VT for the following reasons:

1) Labour productivity in Zambia has been falling over the years. This has been partially attributed to the lack of skills among workers and the acute job insecurity which results.

2) The collective bargaining process in a recessed economy like Zambia’s is not an effective tool for securing, promoting and protecting members’ interests, thus it needs to be supplemented by other instruments such as VT.

3) Trade unions need to be concerned with matters related to operations of the labour market. They must actively participate in efforts aimed at formalising the informal sector.

4) Trade unions need to press for VT on the collective bargaining agenda as well as on the tripartite agenda. They need to demand representation on boards of various organisations which carry out VT.

There are a number of pros and cons to unions carrying out VT themselves.

The advantages:

1) The trade union plays a direct role in developing skills in its members.

2) The trade union uses VT to influence pay levels in industry and brings respectability to its members who are becoming more comparable to other skilled workers.

3) The trade union attracts more funding from donor organisations because they see VT as a cost-effective educational activity.

4) The trade union contributes to the social side of the commercial sector.

The disadvantages:

1) It is too expensive to run a VT unit given the poor financial positions. Hence the union has to depend on donor organisations. This, in turn, re-inforces the dependency syndrome which stifles self-reliance.

2) Trade unions themselves do not have the personnel to run VT units; they have to invest heavily in developing a cadre of trainers.
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