



**Identifying the Actors in the
Shipbuilding Sector in View of
Setting up a European Council
on Employment and Skills**

Final Report
(ref. E3780 v02)

31st October 2012



Control and revisions form

Identifying the Actors in the Shipbuilding Sector in View of Setting up a European Council on Employment and Skills

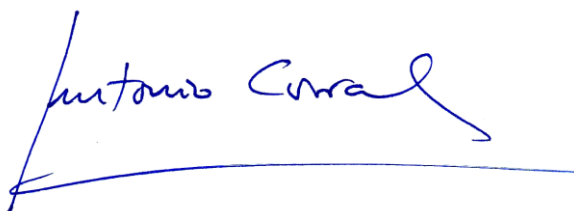
Final Report
(ref. E3780 v02)

Donostia-San Sebastián, 31st October 2012

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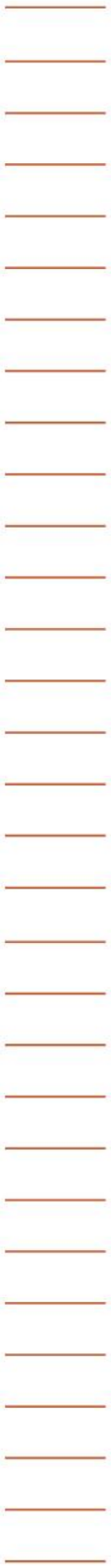
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1. Introduction

1. Introduction

1.1 Context and main goals pursued by the study

This research project, namely "Identifying the actors in the shipbuilding sector in view of setting up a European Council on Employment and Skills", has been developed in the framework of the Shipbuilding European Social Dialogue fostered by CESA (Community of European Shipyards' Associations)¹ and EMF (European Metalworkers' Federation)². It has been funded by a grant application supported by the European Commission (Budget line 04.04.01.03) and awarded to CESA. IKEI Research and Consultancy has been the research team assigned to conduct the project.

In this sense, the main purpose of the project is to identify the main national/regional actors and structures involved in skills and employment development in the European shipbuilding, ship repair and marine equipment sector, with the aim of building a network of relevant actors at European level.

More precisely, the specific goals to be pursued by the research include the following ones:

- To investigate the activities and programs of existing national/regional structures and actors involved in the skills and employment development of the European shipbuilding, ship repair and marine equipment sector.
- To investigate the interest of these structures in providing a basis for setting up a long-term sector European Council on Employment and Skills.
- To evaluate the added-value and merits of setting up such a sector-specific European Council on Employment and Skills.

The current report is structured in four different sections, including this first introduction section. Then, Section 2 is interested in describing the methodology used in order to carry out this research. Meanwhile, section 3 presents the main findings obtained from the research, including the identification and mapping of the existing national/regional structures and actors involved in the skills and employment development of the European shipbuilding, ship repair and marine equipment sector, the analysis of their interest to engage in a European Council on Employment and Skills, the feasible prospective design and structure of this European Council on Employment and Skills from the perspective of the identified structures/actors and, finally, the possible contributions to be expected from these structures/actors to this European Council on Employment and Skill.

¹ Last June 2012, CESA has come together with EMEC (the European Marine Equipment Council) to form SEA Europe (the European Ships and Maritime Equipment Association).

² Since last May 2012, EMF is integrated into IndustriAll European Trade Union, representing the interest of workers in the metalworking, chemical, energy, mining, textile, clothing and leather sectors

1. Introduction

Finally, section 5 summarises the main findings and extracts some conclusions obtained from the whole research. The information is complemented with several Annexes.

1.2 Brief characterisation of the European Shipbuilding, Ship-repair and Marine Equipment Sector

1.2.1. Shipbuilding and ship-repair industry

The European shipbuilding industry is currently composed of approximately 150 large shipyards producing, converting and maintaining merchant and naval ships and other hardware for maritime applications. These shipyards produce on a yearly basis an approximate turnover of €30 billion each year and give employment to more than 120,000 direct jobs in Europe, where up to 75% of those built ships go to export markets. The sector invests approximately 10% of turnover in Research Development and Innovation every year³.

As far as the recent evolution of the European Shipbuilding sector is concerned, and according to the estimations produced by CESA in its last annual report 2010-2011, the shipbuilding market in Europe has improved in 2010, in the sense that total new orders during this year were five times higher than the 2009 level, reaching 2.5Mln CGT. However, and due to the prolonged period of low new orders, the European orderbook has fallen to 6.3Mln CGT at the end of the year, roughly 1.5 years production.

Concerning shipbuilding production figures, turnover figures have marginally increased in 2010 compared to the past year but remains lower than average for 2006-2008 levels. With the orderbook at the lowest level in a decade, the output level is expected to fall further, as new orders often have a lead time of more than one year. Unfortunately enough, European shipyards seem to have been particularly affected from the recent world economic and banking crisis.

Notwithstanding these difficulties, the European shipbuilding industry is world leader in the production of high tech complex vessels and boats solutions for the various sea applications (i.e. cruise ships, fast ferries, non-standardised container vessels, dredgers, off-shore support vessels, naval vessels such as conventional submarines and fast patrol boats, research vessels and other specialised vessels). In this regard, existing prospects for the flexible and high-tech European yards are positive, especially when referring to some concrete highly specialised markets (i.e. fishing, off-shore oil and gas exploitation, maritime tourism, cable and pipeline laying, off-

³ See CESA's web page http://www.cesa.eu/about_the_industry

1. Introduction

shore renewable energy generation, sub-sea mining, security and defence, various research activities, etc).

The European shipbuilding sector is also characterised by a fluent sectoral social dialogue, especially as far as human resources and skills issues are concerned. In this respect, the Community of European Shipyards Associations (CESA) and the European Metalworkers Federation (EMF) have established back since September 2003 a formal Social Dialogue Committee for the shipbuilding and ship-repair sectors, which was the first of its kind in the metal trades in the EU. So far, this Committee has created several working groups on different aspects such the "image of the sector", "worker training and qualifications" or "cyclical activities and restructuring issues". Related also to the human resources domain, the European shipbuilding sector has got a wide network of good training and education providers related to the sector (vocational training centres, universities).

1.2.2. Marine Equipment industry

Meanwhile, and as far as the Marine Equipment is concerned, estimations provided by the European Marine Equipment Council (EMEC)⁴ suggest that the European marine equipment industry generates an average yearly turnover estimated at around €42 billion (data for 2008), employing directly more than 287,000 workers and generating more than 436,000 indirect jobs. Currently, the European industry represents a 40% of the worldwide market share, with important competitors coming from Japan, South Korea and increasingly China.

European equipment industries are world leaders in propulsion, cargo handling, communication, automation, environmental and security systems. The major shares in the EU production value refer to mechanical engineering including engines (26%), electrical engineering/electronics (18%) and steel products (15%) (Balance Technology Consulting et al, 2000). The leading country in the European marine equipment sector is Germany (representing a 15% of the world market share), where other important European players include the United Kingdom, Italy, the Netherlands, France, Spain and some landlocked countries such as Austria or the Czech Republic).

Interestingly also, the European marine equipment sector is very active in international markets, in the sense that it exports nearly 46% of its production to third countries (outside Europe and mainly to main Asian shipbuilding countries such as South Korea, China, or Japan) and up to 50-60% of its production if only the European market is taken into account. Precisely, those EU countries that are the biggest players in the marine equipment sector are also major export champions, where this is particularly the case

⁴ As mentioned before, EMEC has recently joined CESA in the new association SEA Europe, the Ships and Maritime Equipment Association.

1. Introduction

of Germany, the United Kingdom, the Netherlands, Italy, and France (web page EMEC and ECOTEC, 2006)⁵.

The European marine equipment sector derives its competitiveness from the high degree of specialisation and the production of innovative and reliable high quality products, well recognised at world level (ECOTEC, 2006). From a product specialisation perspective, European equipment industries are particularly strong in propulsion, cargo handling, communications, automation, environmental and security systems (Ikei, 2009)⁶.

1.3 European Sector Councils on Employment and Skills

In the December 2008 and June 2009 Communications⁷, the Commission announced its intention to explore the possibility to set up European Sector Councils on Employment and Skills. In its report⁸, the expert group on New Skills for New Jobs (NSNJ) recommends the creation of EU Sector Councils as one of its key actions for the analysis of the skills needs and the development of proposals for updated qualifications in each sector. This initiative received also the support from the Consultative Commission on Industrial Change from the European Economic and Social Committee⁹.

In the flagship Communication "An Agenda for New Skills and Jobs"¹⁰, the Commission indicates that "it supports the creation of Sector Skills Councils at European level when an initiative comes from stakeholders such as social partners or the relevant observatories".

Meanwhile, European Ministers for Vocational Education and Training, the European Social Partners and the European Commission underlined the role of the European sector skills councils in improving the quality and efficiency of vocational education and training (VET) as well as its attractiveness and relevance by strengthening the anticipation of skills and competences development.

⁵ ECOTEC Research & Consulting, Employment Trends in all Sectors related to Sea or Using Sea Resources, Final report for the European Commission, DG Fisheries and Maritime Affairs, September 2006. Available on the Internet at: http://ec.europa.eu/maritimeaffairs/studies/employment/main_report.pdf

⁶ IKEI, Comprehensive Sectoral Analysis of Emerging Competences in the European Building and Repairing of Ships and Boats sector, San Sebastian, 2009. Available in Internet at: http://www.emec.eu/docs/building-repairing_ships_and_boats.pdf

⁷ COM (2009) 257 final: A Shared Commitment for Employment

⁸ New Skills for New Jobs: Action Now, see <http://ec.europa.eu/social/main.jsp?langId=en&catId=89&newsId=697&furtherNews=yes>

⁹ Exploratory opinion CCMI/68 adopted the 17/02/2010 on Matching skills to the needs of industry and evolving services – possible introduction of sector-based employment-skills councils at European level

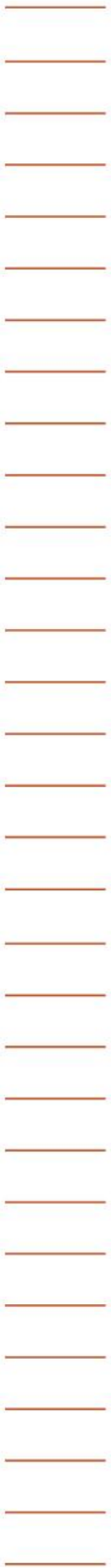
¹⁰ COM(2010) 682/3: An Agenda for new skills and jobs: A European contribution towards full employment

1. Introduction

According to the European Commission, an EU Sector Council on Employment and Skills can be defined as a permanent structure composed of key stakeholders of a particular economic sector (including representatives from trade unions and employer organisations, members of education and training systems as well as other actors such as those involved in economic development), and intended to develop different employment and skill related activities at EU level such as:

- Collect on a regular basis studies performed in EU Member States and at European level on sectors' skills deficits and future demands for skills and competences in link with employment in the selected sector.
- Create syntheses of the information collected.
- Confront the information on skills needs with available information on the supply of skills (also collected at Member State level) and to have discussions and exchanges between the sector's stakeholders and those who design the education and training programmes in the different Member States of the EU.
- Participate in the setting-up effective partnerships for the anticipation of change bringing together the stakeholders of the sectors.
- Support initiatives to promote the mobility and exchange of students
- Integrate in the discussions the role to be played by existing European tools in education and training, such as the European Qualification Framework (EQF), the European Credit Transfer and Accumulation System (ECTS), the European Credit System for Vocational Education and Training (ECVET), and EUROPASS.
- Provide recommendations on the basis of the discussions between Councils' members, to be addressed and disseminated to stakeholders across Member States.

According also to the European Commission, these European Sector Councils constitute a practical tool to pool together and exchange existing information on the topic as well as to feed the sectoral social dialogue better than if stakeholders relied only on their national sources. Thus, the final goals of these Councils would be to achieve a better adequacy of the supply of training to the demand for skills in view of reducing the skills mismatches resulting in skills gaps and shortages; reduce unemployment; improve business performance and, finally; improve the skills level of the workforce, always from an EU general perspective.



2. Methodology used in the research

2. Methodology used in the research

2.1 The research process

The research process has been primarily based on an on-line surveying exercise amongst a number of identified national/regional structures and actors involved in skills and employment development in the European shipbuilding and ship repair sector. Specifically, the research process has consisted of 6 main steps that are next explained:

Step 1 - Elaboration of an Inception report

IKEI elaborated in the early phases of the research an Inception report, to be used as the basis for a mutual understanding of the objectives, methods and general concepts relevant for the study amongst CESA/EMF and IKEI.

This inception report included, amongst other elements, the following ones:

- Objectives to be pursued by the project
- A clarification of the type of actors and organisations to be included in the research.
- A request for collaboration from CESA/EMF in order to identify the list of actors/structures involved in labour market and skills development in the shipbuilding and ship-repair sector to be contacted by selected country.
- A Research guideline, to steer homogeneously the research comprising at least:
 - A conceptual framework (objectives, scope and definitions)
 - Preliminary Questionnaire guidelines to national actors and structures to be interviewed.
 - Preliminary templates for information gathering (questionnaire grids and questions to be included).
 - The on-line interviewing platform to be used
- A Preliminary Index for the intermediate and final reports
- A Final detailed time schedule for the research project

This Inception report was elaborated in the time period comprised between mid February 2012 till mid March 2012. The Inception report was presented in a kick-off meeting held last 15th March 2012 in the EMF premises in Brussels.

Step 2 - Identification of structures/actors to be addressed by the research

The second step in the research process consisted in the identification of the main existing national/regional structures and actors involved in skills and employment development in the European shipbuilding and ship

2. Methodology used in the research

repair sector. In this regard, IKEI suggested a number of characteristics that should be fulfilled by these national/regional structures and actors, namely:

- They work on the issue of employment and skills/training (i.e. identify and monitor training needs, identify employment opportunities and trends in demand and supply of skilled labour, anticipate skill needs and competencies, match the supply and demand between workers and companies, develop occupations standards and qualifications, training provision, etc).
- They primarily deal with the shipbuilding/ship-repair/marine equipment sector or, alternatively, their activities include these sectors in addition to other sectors.
- They are individual organisations or multi-partite institutions that function as a platform in which more than one type of stakeholders are involved.
- They work in a structured and continuous way (they have a permanent operative structure).
- They carry out their tasks at national and/or regional level.

IKEI prepared a letter to be sent by CESA/EMF to national representative associations, requesting the identification of relevant structures/actors fulfilling the defined criteria in their respective countries (see Annex D). After sending this letter, CESA/EMF received and compiled the lists of institutions suggested by national representatives, and reported it back to IKEI.

Apart from the contact lists provided by CESA/EMF, IKEI had to use its own knowledge and resources in order to complement the information in those countries where significant information gaps were identified.

This research step was conducted in the time period comprised between mid March 2012 till end April 2012

Step 3 – Elaboration of the questionnaire

IKEI developed a questionnaire to be responded by identified structures/actors. This questionnaire was structured around the following main domains:

- Identification of structures/actors involved.
- Mapping of activities conducted by these structures/actors (e.g. activities conducted and specialisation).
- Analysis of the interest of these structures/actors to engage in a European Council on skills and jobs for the Shipbuilding/ship-repair sector (e.g. prospective structure and design, contributions, etc).

The questionnaire was approved by CESA/EMF before being sent to the identified structures/actors (see Annex C). Moreover, and in order to facili-

2. Methodology used in the research

tate the answering process, the questionnaire was translated into four languages, that is to say, English, French, German and Spanish.

This research step was conducted in the time period comprised between early March 2012 till Mid April 2012.

Step 4 – On-line surveying process

The next step consisted of sending a formal invitation to the structures/actors identified. In particular, an email was sent by IKEI to all the available contacts, written in four languages (i.e. English, French, German and Spanish). This email included, in addition to a formal letter signed by CESA/EMF presenting the project and its objectives, an on-line link to the questionnaire that was only accessible to the identified structures/actors (see Annexes). As already suggested, respondents were given the opportunity to answer this questionnaire in four possible languages, that is to say, English, French, German and Spanish.

During the following weeks, IKEI tried to foster the participation of prospective structures/actors by sending up to 5 reminding e-mails to those structures/actors that did not respond to the questionnaire. In some cases regarded as particularly important, respondents were directly encouraged via a phone call.

This on-line surveying process has taken place in the time period comprised between early May 2012 till End August 2012.

Step 5- Analysis and elaboration of an Interim Report

IKEI elaborated an Interim report that was presented in an ad-hoc Workshop held last 19th July in the EMF facilities in Brussels. This Interim report presented the main comparative research results obtained from the questionnaires collected until early July 2012.

Step 6– Analysis and elaboration of a Final Report

With all the questionnaires collected in the previous phase and considering the results of the interim workshop, a Final report has been elaborated by IKEI. This Final report (the current document) presents the main research results obtained from all the collected questionnaires and extracts a series of conclusions and suggestions for the future of the project. This Final report is expected to be presented in an ad-hoc final meeting to be held early next October 2012.

2. Methodology used in the research

2.2 Scope and sampling

In total, 199 organisations fulfilling the suggested criteria were identified in the analysed European countries, including Turkey (see Annex A to see the list of contacted organisations). A formal invitation to fill in the survey was sent to all of them.

These relevant institutions to be contacted were identified in 22 European countries (including Turkey). In particular, CESA/EMF provided contact lists for 11 countries, according to data received from national representative associations. Meanwhile, the contact lists for the remaining 11 countries were directly found by IKEI. In addition to this, IKEI complemented the lists provided by CESA with a number of extra contacts in 5 countries. All in all, CESA/EMF provided contact details of 124 institutions, whereas the remaining 75 institutions were directly found by IKEI.

Germany, the UK and Denmark were the countries where more suitable institutions were identified and invited to participate (with 23, 21 and 20 contacts respectively), followed by The Netherlands (18) and Spain (17). On the opposite, in Greece, Norway and Turkey, only 2 organisations per country were contacted, whereas in Latvia and in Austria only 1 institution was contacted.

Table 1. Organisations contacted, by country.

Country	Total of organisations contacted	Organisations provided by CESA	Organisations found by IKEI
Germany	23	17	6
United Kingdom	21	-	21
Denmark	20	20	-
Netherlands	18	17	1
Spain	17	6	11
Croatia	14	14	-
Finland	14	14	-
Italy	13	13	-
Lithuania	9	9	-
France	9	6	3
Sweden	6	-	6
Belgium	5	-	5
Estonia	5	-	5
Poland	5	4	1
Romania	5	-	5
Portugal	4	4	-
Bulgaria	3	-	3
Greece	2	-	2
Norway	2	-	2
Turkey	2	-	2
Austria	1	-	1
Latvia	1	-	1
TOTAL	199	124	75

Source: Ikei, field work. 2012.

2. Methodology used in the research

On the other hand, contacted institutions included different types of organisations such as employers' associations, trade unions, initial vocational and training providers, universities and research centres, public authorities, transversal/multipartite organisations, private companies (shipbuilding yards) and, finally, other institutions (for instance, consultancy firms). Next table provides an overview of the number of organisations contacted by type. Clearly, the largest group corresponded to universities and research centres (62), followed by employers' associations (30) and vocational educational and training providers (27).

Table 2. Organisations contacted, by type.

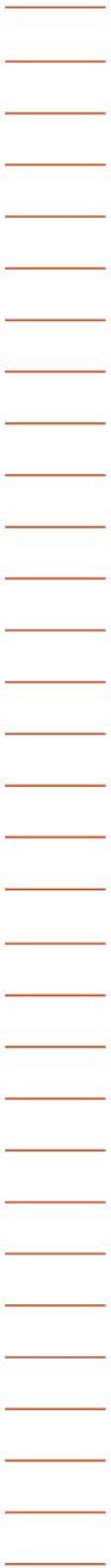
Type of organisation	Number of organisations
University/Research Centre	62
Employers' Association	30
Vocational education and training provider	27
Transversal/ multipartite organisations	22
Private Company	21
Trade Union	15
Public Authorities	14
Others	8
TOTAL	199

Source: Ikei, field work. 2012.

Out of the 199 organisations contacted, 53 organisations responded to the IKEI's invitation to fill in the questionnaire, which means a response rate of 26.6%. In any case, it must be pinpointed that 3 of these organisations answered that they were not interested in collaborating in the project (i.e. completing the questionnaire). These three organisations were located in Denmark, Germany and the United Kingdom.

As a consequence, a total of 50 organisations effectively filled in the questionnaire (effective response rate of 25.1%). In this sense, the information presented in the following sections of this Final report refers to these 50 effectively responding organisations.

Together with this report, an Excel file is provided containing the list and contact details of all contacted organisations and of those which answered the questionnaire. This lists can also be found in two Annexes at the end of this document.



3. Main Findings

3. Main Findings

3.1 Mapping of structures / actors involved and their main activities

This section intends to describe the structures and actors that have effectively answered the questionnaire (i.e. 50 in total), basically considering the type of organisation, their country location and the activities they carry out (the individual identification of each one of these 50 respondent organisations can be found in Annex B).

To start with, and as far as the type of organisations responding the questionnaire, the majority of the answers come from universities/research centres (12 answers), vocational education and training providers (11 answers) and transversal/multipartite organisations (7 answers), whereas employers' associations, trade unions and private companies have completed 5 questionnaires each. Finally, public authorities have sent 4 questionnaires. The remaining organisation did not classify itself under any of the options provided in the survey.

Table 3. Respondent organisations, by type, and response rate.

Type of organisation	Respondent organisations	% of respondents over total contacted
University/ research centre	12	19.4 %
Vocational Education and training provider	11	40.7 %
Transversal/ multipartite organisation	7	31.8 %
Trade Union	5	33.3 %
Employers' Association	5	16.7 %
Private company	5	23.8 %
Public Authorities	4	28.6 %
Other	1	12.5 %
TOTAL	50	25.1 %

Source: Ikei, field work. 2012.

Interestingly, the response rate for each type of organisation shows that the highest rates of response correspond to Vocational Education and Training providers (40.7%), followed by trade unions (33.3%) and transversal/ multipartite organisations (31.8%). Meanwhile, the lowest response rate corresponds to employers' associations (16.7%), as well as to the group "others" (12.5%), which has a single respondent.

Meanwhile, and as far as the geographical origin of the 50 respondent organisations are concerned, the available data shows that The Netherlands is the country with the highest number of responses (10), followed by Germany (7 surveys completed) and Spain (6). Conversely, in Croatia, Greece and Poland only one answer has been obtained, whereas in countries such as Austria, Estonia, Latvia, Norway, Sweden and Turkey no organisation did respond to the questionnaire.

3. Main Findings

Table 4. Respondent organisations, by country.

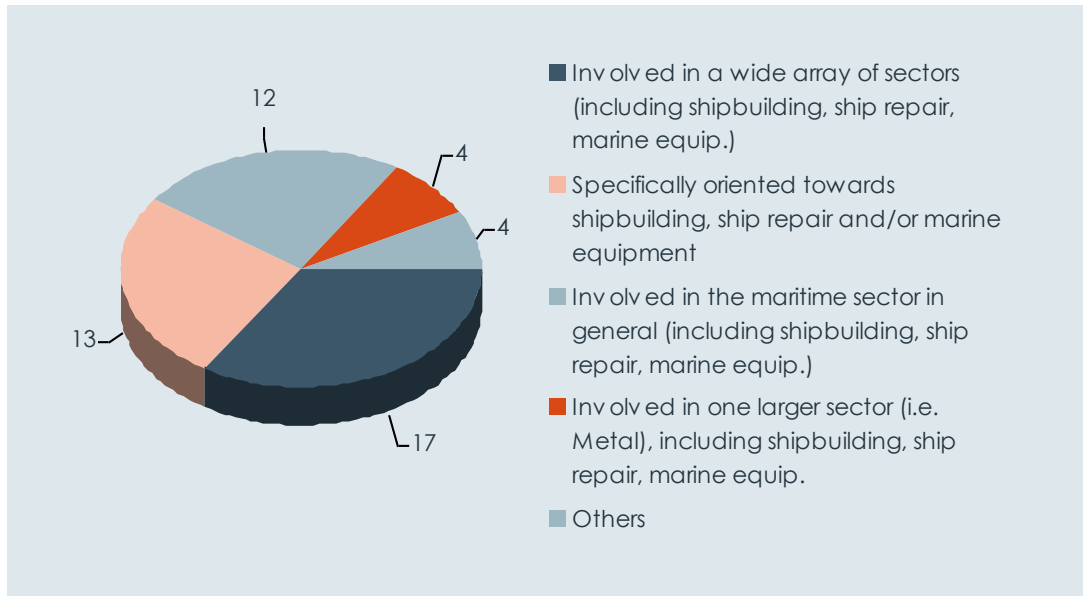
Country	Total of Surveys Completed	% of respondents over total contacted
Netherlands	10	55.6
Germany	7	30.4
Spain	6	35.3
Finland	4	28.6
Italy	3	23.1
France	3	33.3
United Kingdom	3	14.3
Bulgaria	2	66.7
Denmark	2	10.0
Lithuania	2	22.2
Romania	2	40.0
Portugal	2	50.0
Belgium	1	20.0
Croatia	1	7.1
Poland	1	20.0
Greece	1	50.0
Austria	-	0.0
Estonia	-	0.0
Latvia	-	0.0
Norway	-	0.0
Sweden	-	0.0
Turkey	-	0.0
TOTAL	50	25.1

Source: Ikei, field work. 2012.

Concerning the sectoral scope of the respondent organisations, a third of them (this is 17) cover a wide array of sectors (including shipbuilding, ship repair, and marine equipment sector). On the other hand, 13 institutions are specifically oriented towards the shipbuilding, ship repair and/or marine equipment sector, whereas 12 are involved in the maritime sector in general (including of course shipbuilding, ship repair, and marine equipment sector activities). In contrast, only 4 institutions are involved in one larger sector, such as metal, whereas the final 4 institutions refer to the scope of "others", in the sense that they are involved in training and education activities in general, with no sector specific approach.

3. Main Findings

Graph 1. Sectoral scope of respondent organisations (only one possible answer)



Source: Ikei, field work. 2012.

With regard to the activities conducted in the field of employment, training and skills, the majority of the respondent organisations confirm that they monitor and/or anticipate skill needs and competencies in the sector (41 respondents). Next, other common activities carried out by the respondent organisations include the identification of current and future labour demand and supply (30) and the development of continuing vocational training activities for workers in the sector (29). As well as this, the development of standards and qualifications for the sector or the provision of initial vocational education and training activities is also mentioned by more than a half of the respondents (26 for each activity). On the other hand, only 16 organisations state that they develop training activities for the unemployed, whereas 15 say that they carry out procedures for the recognition and accreditation of sectoral skills or occupational profiles.

Other additional activities in the field of vocational training and skills which have been specifically cited by the institutions contacted include collaboration with education centres developed by private companies and research centres (e.g. specific projects, guest speakers, in-company training, etc), as well as cooperation activities carried out by trade unions and public authorities in the field of employment and training.

3. Main Findings

Table 5. Activities conducted in the field of employment, training and skills, by the respondent organisations (possibility of more than one answer)

Activity	Number of organisations
Monitor/anticipate skill needs and competencies in the sector	41
Identification of current and future labour demand and supply	30
Development of Continuing Vocational Training activities for workers in the sector	29
Development of standards and qualifications for the sector	26
Development of Initial Vocational Education and Training activities in the Sector	26
Development of activities to increase the inflow of workers into the sector	22
Analysis of the evolution of the sector workforce and its characteristics (age, gender, geographical origin, etc)	20
Development of Training activities for unemployed workers in the sector,	16
Development of procedures for the recognition and accreditation of sectoral skills/occupational profiles	15
Other activities specified related to vocational training and skills	9

Source: Ikei, field work. 2012.

With regard to the main geographical scope of the respondent organisations, 24 organisations work at national level, 15 organisations carry out activities at multinational level and the remaining 11 organisations limit their activity to their regional or local area (Table 6).

Table 6. Main geographical scope of respondent organisations (only one possible answer)

Geographical scope	Number of organisations
National level	24
Multinational level	15
Regional/local level	11
TOTAL	50

Source: Ikei, field work. 2012.

If the type of institution is considered, data collected shows that a large part of the trade unions, public authorities and employer's associations that have responded the questionnaire work at national level. In contrast, private companies are mainly involved in multinational activities.

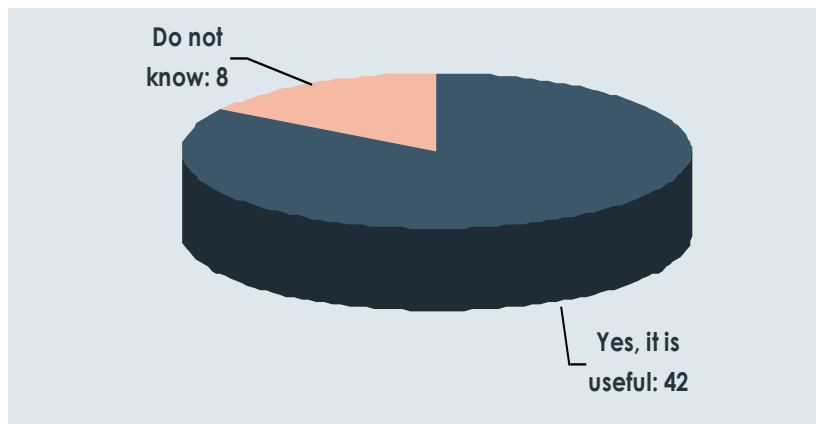
In particular, with regard to the institutions which work at multinational level (mostly private companies, but also education providers and research centres), they suggest that the main countries where they work are other European countries, although some have also mentioned countries such as the USA, Brazil or some Asian countries (e.g. China, India, South Korea and Vietnam), amongst others.

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3.2 Analysis of the interest of these actors to engage in a European Council on Employment and Skills

This part of the report intends to analyse the interest of the respondent institutions to engage in a European Shipbuilding Council on Employment and Skills. In the first place, the institutions were asked if they considered the idea of such a Council to be useful for the sector. The great majority of them (42) confirmed its usefulness, whereas 8 answered that they did not know. No institution gave a negative response.

Graph 2. Usefulness of a European Council on Employment and Skills

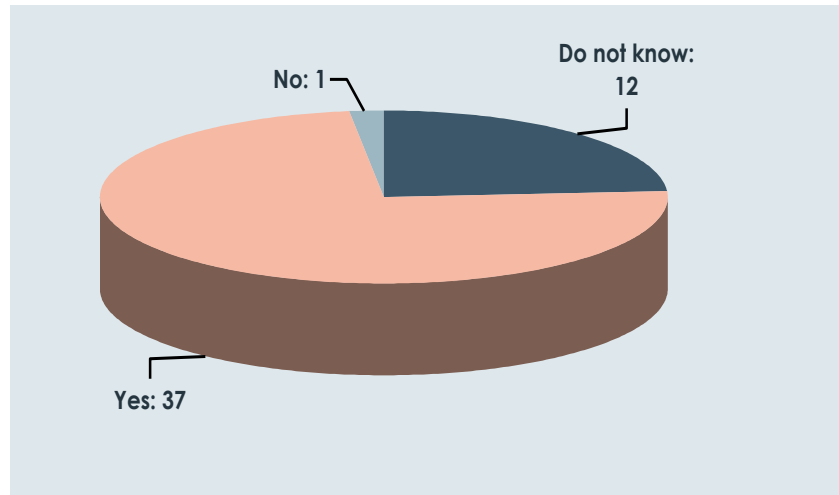


Source: Ikei, field work. 2012.

Concerning the interest for participating in a European Council on Employment and Skills, the majority of the institutions (37 out of the 50 institutions which answered the questionnaire) confirmed their interest in taking part in such a Council. In contrast, only 1 institution showed its disinterest, whereas 12 said not to be sure about it.

3. Main Findings

Graph 3. Interest for participating in a European Council on Employment and Skills



Source: Ikei, field work. 2012.

Out of the 12 organisations that are not sure about their interest in taking part, 6 of them confirm in any case that a European Council would be useful.

Differentiating the answers by type of respondent institution, the available information shows that all employers' associations and public authorities which have responded the questionnaire consider that a European Council on Employment and Skills would be useful for the sector, and the large majority of them confirm to be interested in taking part (similar result for trade unions). Meanwhile, although all transversal/ multipartite organisations think it would be useful, still one of the respondents is not sure about participating in this council.

Table 7. Usefulness of a European Council on Employment and Skills and interest in participating in it, by type of organisation.

Type of organisation	Usefulness			Interest in participating		
	yes	no	don't know	yes	no	don't know
Employers' Association	5	0	0	5	0	0
Trade Union	4	0	1	4	0	1
Public Authorities	4	0	0	3	0	1
Vocational Education and training provider	9	0	2	6	1	4
University/ research centre	9	0	3	9	0	3
Transversal/ multipartite organisation	7	0	0	6	0	1
Private company	3	0	2	3	0	2
Others	1	0	0	1	0	0

Source: Ikei, field work. 2012.

3. Main Findings

On the other hand, vocational education and training providers, universities/research centres and private companies are more doubtful than the previous groups concerning their participation in the Skills Council. In this sense, 4 out of 11 vocational education and training providers, 3 out of 12 universities/research centres and 2 out of 5 private companies state that they do not know if they would participate or not in such a council, whereas only 1 vocational education and training provider explicitly denies an interest in participating in such a council.

On the other hand, the elements that might influence the decision of the organisations to participate have been also analysed. In this regard, the element most influencing the institutions' opinion is the availability of external funding, considered of high importance by 31 respondents, followed by the objectives and tasks pursued by the Skills Council, considered of high importance by 29 institutions.

Table 8. Elements influencing the organisation's decision to participate.

Elements	Number of organisations			
	High importance	Quite importance	Little/ No importance	Do not know
Availability of external funding	31	11	1	7
Objectives, goals and tasks pursued by the EU level SSC	29	12	3	6
Commitment of relevant stakeholders and organisations from your Member State	24	14	5	7
Commitment of relevant stakeholders and organisations from other Member States	17	21	5	7
Concrete/practical design and organisation of the EU level SSC	16	20	6	7
Others	1	0	0	49

Source: Ikei, field work. 2012.

Meanwhile, the commitment of relevant stakeholders and organisations from the own Member State is marked as highly important by 24 institutions, whereas the commitment of relevant stakeholders from other Member States is considered as highly important by 17 institutions. Finally, the concrete design and organisation of the EU level Skills Council is considered of high importance by 16 respondents.

The previous information can be also presented in a different way, using for this purpose a 0-100 index showing the average importance given to each one of the elements listed (0 not important at all, 100 extremely important). In this regard, and distinguishing the answers accordingly to the interest of the respondents for participating/not participating in a prospective EU level Skills Council, the institutions which are interested in participating in such a Council give a higher importance to all the listed elements, whereas not interested and doubtful organisations are more likely to consider the proposed elements of less importance.

3. Main Findings

Graph 4. Elements influencing the organisation's decision to participate. Average importance (0-100 Index)



Source: Ikei, field work. 2012.

Although there are not huge differences between the group of interested institutions and the group of not interested and doubtful institutions in the order of main elements influencing the organisation's decision to participate, it is remarkable that the commitment of stakeholders from other Member States is relatively more important amongst not interested and doubtful organisations in comparison to interested organisations.

In any case, and as a whole, it can be concluded that the most influencing element for the whole of the respondent organisations is the availability of external funding, which reaches an average importance of 91.2 for interested organisations and 85.2 for not interested and doubtful ones (in a 0-100 index). On the contrary, the least influential element for the interested organisations relates to the commitment of stakeholders from other Member States, whereas the design and organisation of the Sectoral Council is the least relevant element amongst doubtful and non interested organisations).

3. Main Findings

3.3 Prospective design and structure of a European Council on Employment and Skills

This section intends to outline the design and structure of a prospective European Council on Employment and Skills according to the respondent organisations. To start with, the questionnaire asked about the possible stakeholders that should be represented in this Council. According to the institutions which have answered the questionnaire, the type of stakeholder that most institutions think should be represented is employers' associations (42 out of 50 respondents have selected it).

Next, public authorities and trade unions have been also selected by the majority of the respondents (38 and 34 respectively), followed by continuous vocational training providers and initial vocational education and training providers (32 in both cases). In the last place, national and regional transversal/ multipartite organisations (such as skills councils, training funds, etc) have been signalled as relevant stakeholders by 29 respondents.

Table 9. Stakeholders that should be represented in a prospective Skills Council (possibility of more than one answer)

Type of stakeholder	Number of organisations giving a positive answer
Employers' Association	42
Public Authorities (Ministries responsible for Education, Employment, Industry)	38
Trade Union	34
Continuing Vocational Training providers	32
Initial Vocational Education and Training providers	32
National / regional transversal/ multipartite organisations	29
Other	4

Source: Ikei, field work. 2012.

As well as this, and distinguishing between respondents interested/not interested in participating in a prospective Skills Council, it can be observed that in general terms the group of interested organisations is more likely to select more types of institutions to be represented in this Council. Conversely, not interested and doubtful organisations suggest a lower number of types of stakeholders.

On the other hand, concerning the possible fields and activities to be developed by a potential Skills Council, the available information shows that the most interesting activities to be developed by such Council should include the monitoring/anticipation of skill needs and competencies in the sector, followed by activities to promote continuous vocational training

3. Main Findings

(CVT) for workers in the sector, the identification of current and future labour demand and supply and, finally, the exchange of good practices among countries/organisations. By way of contrast, the activity fields where interviewed agents suggest their lower level of interest include the improvement of the mobility of workers between Member States, as well as the analysis of the evolution of the sector workforce and its characteristics.

Table 10. Possible fields and activities to be developed by a prospective Skills Council. Interest for the organisation.

Fields of activity	Number of organisations			
	High interest	Quite interest	Little/ No interest	Don't know
Monitor/anticipate skill needs and competencies in the sector	32	10	4	4
Activities to promote CVT for workers in the sector	27	13	7	3
Identification of current and future labour demand and supply	27	15	5	3
Exchange of good practices among countries, organisations, etc.	26	18	4	2
Activities to promote IVET in the sector	26	10	9	5
Development of standards and qualifications for the sector	24	16	5	5
Development of procedures for the recognition and accreditation of sectoral skills/occupational profiles	22	15	10	3
Analysis of the evolution of the sector workforce and its characteristics (age, gender, geographical origin, etc)	22	11	13	4
Improvement of the mobility of students between Member States	21	14	9	6
Activities to promote training for unemployed workers in the sector	21	12	12	5
Activities to increase the inflow of workers into the sector	18	18	8	6
Improvement of the mobility of workers between Member States	11	18	13	8
Other	4	-	3	43

Source: Ikei, field work. 2012.

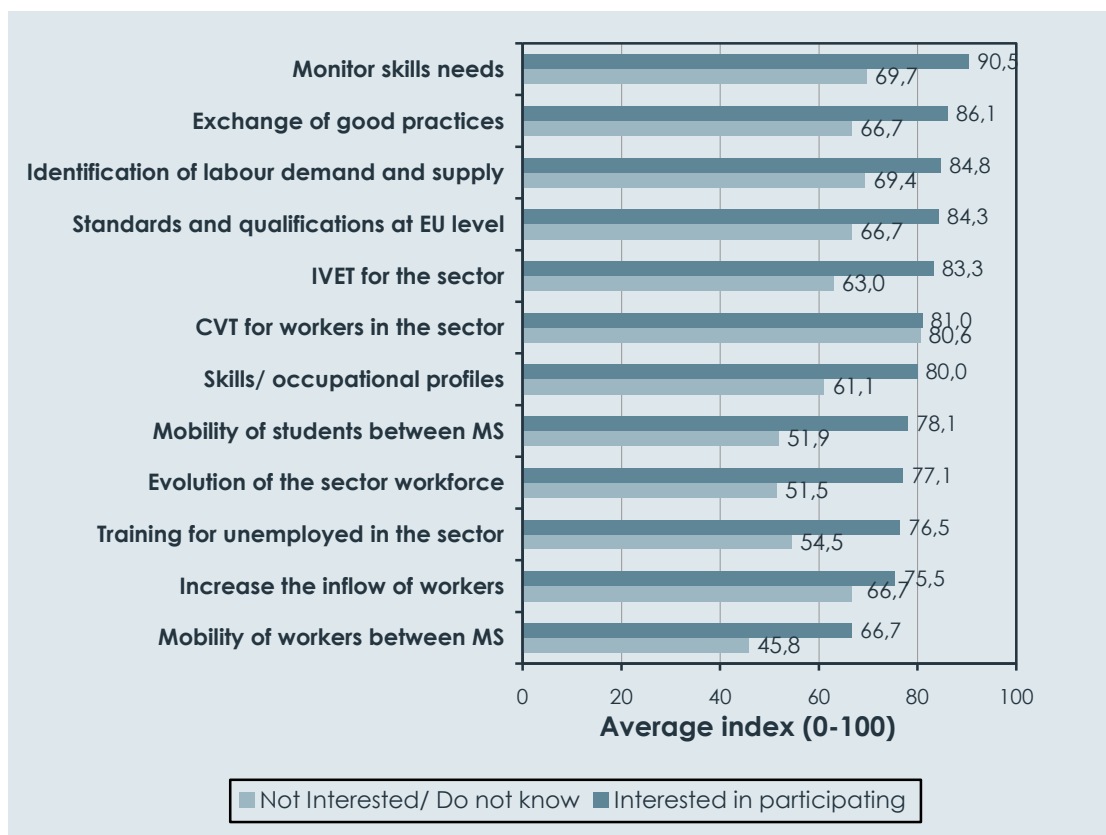
By type of organisation, public authorities and trade unions are likely to consider a higher number of activities to have high or quite interest. Conversely, in general terms, Vocational Education and Training providers and university/ research centres have a lower average interest in the activities proposed.

Interestingly also, it is remarkable to comment on the specifications made by the surveyed organisations which have referred to other activities. In particular, these organisations have mentioned the following possible fields of action including improvement of co-operation and legal framework between authorities from different countries concerning payment of salaries, taxes and other fees and obligations, mobility of workers, etc; the organization of centres of excellence for education and training at all levels, and in all areas where shipyards are active, in cooperation with social partners; or actions to develop a steady drumbeat of orders and to open up national markets, in order to ensure that key skills are retained.

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Next Graph 5 complements the information previously presented. More precisely, it shows the average interest of the surveyed organisations for the 12 possible fields and activities listed in the survey, distinguishing if they are or not interested in taking part in a prospective Skills Council.

Graph 5. Possible fields and activities to be developed by a prospective Skills Council. Average interest for the organisations surveyed (0-100 Index).



Source: Ikei, field work. 2012.

As the figure shows, organisations interested in taking part in a prospective Skills Council are more likely to consider the proposed activities to be of high or quite interest, whereas the average index among not interested and doubtful organisations is lower for basically all the activities and fields proposed. The only exception refers to the development of continuous vocational training activities for workers in the sector, which seems to be of equal importance both for organisations willing to take part in a Skills Council as well as by not interested and doubtful organisations.

On the other hand, the most interesting activities amongst interested organisations include the monitoring/anticipation of skills needs and competencies in the sector, the exchange of good practices amongst countries/organisations, the identification of current and future labour demand

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and supply or the proposal of standards and qualifications homogeneous at EU level (well above 84 on a scale from 0 to 100). In contrast, the least interesting fields include activities to improve the mobility of workers between Member States or activities to increase the inflow of workers into the sector, although these activities are rated above 66 on a scale from 0 to 100). Meanwhile, the most interesting activity for those organisations not interested in taking part in a prospective Skills Council refers to the development of continuous vocational training activities for workers in the sector

3.4 Looking to the future: contributions to a prospective European Council on Employment and Skills

This last section intends to study the type of contributions that the 50 organisations surveyed would make to a prospective European Council. In this regard, the types of contribution that most organisations (34) are ready to make relates to the sharing of own quantitative/qualitative information on skills and employment, followed by the active participation in the development of new quantitative/qualitative information on skills and employment (33 organisations suggest this possibility).

As well as this, an active participation in the development of new tools, joint actions, policies on skills and employment and the sharing of own methodologies, tools, joint actions and policies on skills and employment are also frequently suggested (in 30 and in 29 cases respectively). Interestingly enough, only 2 of the surveyed organisations would be ready to provide funding for this council.

Table 11. Type of contribution that the organisation would be ready to make to a prospective Skills Council (possibility of more than one answer)

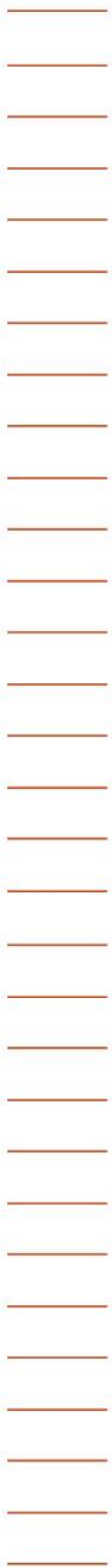
Type of contribution	Number of organisations giving a positive answer
Share own quantitative/qualitative information on skills and employment	34
Actively participate in the development of new quantitative/qualitative information, research activities on skills and employment	33
Actively participate in the development of new tools, joint actions, policies on skills and employment	30
Share own methodologies, tools, joint actions and policies on skills and employment	29
Provide funding for this council	2

Source: Ikei, field work. 2012.

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Additionally, it is interesting to look at the number of contributions that each surveyed organisation would be ready to make. In this respect, it can be said that only 2 institutions would be ready to make the 5 types of contributions proposed, whereas 15 institutions have marked 4 different types of contributions. As well as this, 10 institutions have signalled 3 and 2 types. Finally, 8 institutions have suggested that they would be ready to make only 1 type of contribution, whereas 5 organisations are not able to identify any contribution.

As it can be expected, and if the interest of the organisation for participating in a prospective Skills Council is considered, not interested and doubtful organisations are in general less open to make contributions in comparison to interested organisations. Thus, and whereas approximately 2/3 of those institutions interested in taking part in a prospective Skills Council are ready to make three or more contributions, this percentage goes down to approximately 1/6 in the case of not interested organisations.



4. Conclusions and suggestions

4. Conclusions and suggestions

4.1 Main conclusions stemming from the research

- This research project, namely "Identifying the actors in the shipbuilding sector in view of setting up a European Shipbuilding Council on Employment and Skills", has been developed in the framework of the Shipbuilding European Social Dialogue fostered by CESA (Community of European Shipyards' Associations) and EMF (European Metalworkers' Federation). It has been funded by a grant application supported by the European Commission (Budget line 04.04.01.03) and awarded to CESA. IKEI Research and Consultancy was the research team assigned to conduct the project.
- According to the European Commission, EU Sector Councils on Employment and Skills can be defined as those permanent structures composed of key stakeholders of a particular economic sector (including representatives from trade unions and employer organisations, members of education and training systems as well as other actors such as those involved in economic development), and intended to develop different employment and skill related activities at EU level.
- The central goal of this project is the identification of the main national/regional actors and structures involved in skills and employment development in the European shipbuilding, ship repair and marine equipment sector, as well as their activities and programs. Furthermore and specially, the project has investigated the interest of these stakeholders in providing a basis for setting up a long-term EU Sector Council on Employment and Skills in the sector and, finally, the added-value and merits of setting up such a European Council.
- The research process has been primarily based on an on-line surveying exercise amongst a wide number of identified national/regional structures and actors involved in skills and employment development in the European shipbuilding, ship repair and marine equipment sector. For identifying these structures and actors, IKEI had the support of the CESA/EMF national representative associations, which were able to identify a long list of relevant structures/actors fulfilling a number of pre-defined criteria in their respective countries. Subsequently, this list was complemented by IKEI in those countries where significant information gaps were identified. The whole research project was conducted in the time period comprised from mid February 2012 till end October 2012.
- All in all, a total of 199 organisations fulfilling the suggested criteria were identified in the 22 analysed European countries (including Turkey). CESA/EMF provided contact details of 124 institutions, whereas the remaining 75 institutions were directly found by IKEI. Germany, the UK and Denmark were the countries where more suitable institutions were identified and invited to participate, followed by The Netherlands and Spain.

4. Conclusions and suggestions

- The contacted institutions included different types of organisations such as employers' associations, trade unions, initial vocational and training providers, universities and research centres, public authorities, transversal/multipartite organisations, private companies (shipyards) and, finally, other institutions (for instance, consultancy firms). Universities and research centres, followed by employers' associations and vocational educational and training providers were the groups more represented in the sample.
- Out of the 199 organisations contacted, 53 organisations responded to the research team's invitations to fill in the questionnaire, although 3 of these organisations answered that they were not interested in completing the questionnaire. As a consequence, a total of 50 organisations effectively filled in the questionnaire (response rate of 25.1%).
- The majority of responding organisations classified themselves as universities/research centres (12 answers), vocational education and training providers (11 answers) and transversal/multipartite organisations (7 answers), followed by employers' associations, trade unions and private companies (5 answers each). Finally, public authorities sent 4 questionnaires.
- As far as the geographical origin of these organisations is concerned, the survey responses were quite unbalanced. The Netherlands, Germany and Spain were the countries more interested in the survey. By way of contrast, in countries such as Austria, Estonia, Latvia, Norway, Sweden and Turkey no organisation did respond to the questionnaire.
- A third of respondents cover a wide array of sectors (in addition to the shipbuilding, ship repair, and marine equipment sector), although there is an important representation of institutions specifically oriented towards the shipbuilding, ship repair and/or marine equipment sector or involved in the maritime sector in general (including of course shipbuilding, ship repair, and marine equipment). Most of the organisations mainly work at national level.
- The commonest activities conducted by these organisations in the field of employment, training and skills include the monitoring/anticipation of skill needs and competencies in the sector, the identification of current and future labour demand and supply, the development of continuing vocational training activities for workers in the sector, the development of standards and qualifications for the sector or the provision of initial vocational education and training activities.
- The great majority of respondents (42 out of 50) confirmed that a European Shipbuilding Council on Skills and Employment would be useful, whereas the remaining institutions are not sure about it.
- Meanwhile, the majority of the institutions (37 out of the 50 institutions which answered the questionnaire) confirmed their interest in taking part in such a European Council, whereas only 1 institution showed its

4. Conclusions and suggestions

disinterest and 12 institutions said not to be sure about it. Out of the 12 organisations that are not sure about their interest in taking part, 6 of them confirm in any case that a European Council would be useful.

- Employers' associations, public authorities and trade unions seem to be more interested in their possible participation in such a Council. The elements that would most influence the decision of the organisations to participate include the availability of external funding, the objectives and tasks pursued by the Council and the commitment of relevant stakeholders and organisations from the own Member.
- According to respondents, the main stakeholders to be represented in this European Council include, in this order, employers' associations, public authorities and trade unions. Meanwhile, the main activities to be developed by such European Council should include the monitoring/anticipation of skill needs and competencies in the sector, followed by activities to promote continuous vocational training (CVT) for workers in the sector, the identification of current and future labour demand and supply and, finally, the exchange of good practices among countries/organisations.
- The main contributions that surveyed organisations are ready to make to a prospective European Council include the sharing of own quantitative/qualitative information on skills and employment, or the development of new quantitative/qualitative information on skills and employment. Interestingly enough, only a very limited number of the surveyed organisations would be ready to provide funding for this council.

4.2 Some suggestions for the future

- In order to further develop the idea of setting up a European Council on Employment and Skills in the shipbuilding, ship repair and marine equipment sector, and having in mind the results obtained in this research several steps can be suggested for the coming months.
- To start with, the sector's European social partners (basically CESA and EMF¹¹) should take a key decision whether to go ahead with the project for a European sector Council on Employment and Skills. In this regard, this research project has shown that there seems to be a good basis for engaging in future activities in this domain, in the sense that there is a minimum "critical mass" of 37 organisations in Europe that declare to be interested in the setting up of a European Skills Council in the sector. Additionally, 12 more organisations that are still doubtful about their involvement could also participate, depending on the conditions. This group should be specifically addressed by the project

¹¹ It is worth stressing that CESA is now part of SEA Europe, whereas EMF is now also part of IndustriAll.

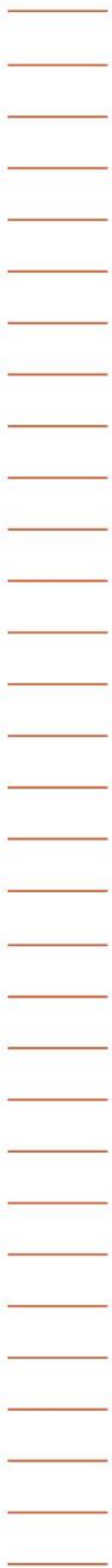
4. Conclusions and suggestions

promoters in order to gain their involvement. Even if the sample used for the survey may be considered not fully representative, the response rate and the generally positive reception of the idea amongst stakeholders imply that the project can be feasible.

- Also, the research has shown the main activities that such a European Skills Council could provide added-value to participants. The long term returns of the project for the sector should be stressed: adequacy of the supply of training to the demand for skills; general improvement of the skills level of the workforce, less skills mismatches and reduced shortages of qualified personnel; replacement of the ageing workforce; better social dialogue; and ultimately, improvement of business performance.
- Linked to the previous point, CESA and EMF should define a list of key relevant actors and organisations involved in the shipbuilding, ship repair and marine equipment sector in Europe and Member States that should be included and consulted on the convenience and work contents of the future European Shipbuilding Sector Council. It is crucial to count with a core group of key organisations that push the project forward. This group should be the basis upon which construct the Sector Council and progressively extend its coverage.
- A subsequent step to be taken would refer to the operative definition of the European Shipbuilding Sector Council. This step, to be lead by CESA and EMF, would require the elaboration of a first draft outlining several items such as the type of tentative members to be included in the Sector Council, the roles and responsibilities of each member, the main activities (work programme) to be developed by this European Sector Council, governance issues (managing bodies) and last but not least, the establishment of a provisional budget (including the final contributions that participants should do in order to participate in this European Shipbuilding Skills Council.
- Thirdly, the results obtained from this research, together with the draft containing the operative characterisation of the European Shipbuilding Sector Council which is being proposed, should be disseminated amongst all relevant sector actors and organisations. CESA/EFM national representative associations could play a key role in this respect, actively disseminating at national level these documents and attracting those organisations interested/doubtful in participating to such a European Skill Council, as well as other stakeholders deemed as relevant (including public institutions at national and regional level).
- Therefore, the real interest of all contacted organisations and stakeholders in their participation in a Shipbuilding Skills Council should be assessed, according to the precise strategic lines and conditions established in the operative definition draft. The project's promoters should also take into account all the main suggestions and recommendations stemming from these organisations and stakeholders in relation to the operative definition draft.

4. Conclusions and suggestions

- Finally, provided that a clear compromise and support to the project is found amongst a "critical mass" of relevant sector stakeholders, CESA and EMF, together with other relevant stakeholders, should formally constitute and launch the European Council on Employment and Skills for the Shipbuilding, Ship Repair and Marine Equipment sector with the first meetings and first outputs. Again a progressive, step-by-step approach could be advisable, with a focused initial work programme that gradually expands as the organisation gains experience.



Annex A. List of contacted organisations

Annex A. List of contacted organisations

COUNTRY	Name of the organisation	Contact person	Type of Organisation
Austria	Österreichischer Verein für Navigation. Instituto austriaco de navegación	Dr. Stephan Mayer	University/ Research Centre
Belgium	AGORIA (employers' organisation and trade association in the technology industry)	Mr. Jos Pinte	Employers' Association
	ANAST Naval Architecture Unit (University of Liege)	Philippe Rigo,	University/ Research Centre
	Antwerp Port Authority	Mr. Eddy Bruyninckx (CEO of the Port of Antwerp); Mr. Dirk Van Vaerenbergh	Public Authorities
	Flamea vzw		Employers' Association
	ITMMA. Institute of transport and maritime management antwerp		University/ Research Centre
Bulgaria	BULNAS (Bulgarian National Association of Shipbuilding and Ship repair)	Mr. Svetlin Stoyanov	Employers' Association
	Bulyard Shipbuilding Industry, S.A.	Mrs Desislava Makedonska (HR Director)	Private company
	Varna Scientific and Technical Unions (VSTU)	Mr. Nedelcho Vilchev	Vocational education and training provider
Croatia	(FESB-Split) Faculty of Electrical Engineering, Mechanical Engineering and Naval Architecture		University/ Research Centre
	(Hrvatska brodogradnja -Jadranbrod d.d.) Croatian shipbuilding corporation -JADRANBROD d.d.	Siniša Ostojić;	Employers' Association
	(Hrvatska obrtnička komora) Croatian Chamber of Crafts	Dragutin Ranogajec	Employers' Association
	(Hrvatski Brodarski Institut) Croatian Naval/Shipping Institute		University/ Research Centre
	(Hrvatski registar brodova – CRS) Croatian Register of Shipping – CRS	Zlatko Zulim dipl. ing. General manager	Other (e.g. company register)
	(Hrvatski zavod za zapošljavanje) Croatian Employment Office	Ms. Mirjana Zečirević; Ms. Katarina Čurković (Expert Advisor For Professional Guidance and Selection)	Public Authorities
	(Ministarstvo gospodarstva RH) Ministry of economy of Croatian Republic	Gordana Vudrag	Public Authorities
	(Ministarstvo znanosti, obrazovanja i sporta RH) Ministry of Science, Education and Sports of Croatian Republic	Duje Bonacci	Public Authorities
	(Pomorski fakultet-Split) Maritime Studies-Split	Ana Vidak [avidak@pfst.hr]	University/ Research Centre
(Sindikata metalaca Hrvatske-Industrijski sindikat - SMH-IS) Metalworkers' Trade Union of Croatia -Industrial TU / SMH-IS		Trade Union	

Annex A. List of contacted organisations

COUNTRY	Name of the organisation	Contact person	Type of Organisation
Croatia	3. MAJ Shipyard		Private company
	Brodosplit Shipyard	President of the Board SRĐAN KOVAČ, dipl.oec.	Private company
	Brodotrogir Shipyard		Private company
	Uljanik Shipyard		Private company
Denmark	Aalborg University	Anne Cole	University/ Research Centre
	Aarhus School of Marine and Technical Engineering	Head of the Department for Mediation and Preparation for Employment	University/ Research Centre
	Copenhagen Business School (CBS – CENSEI: Executive MBA in Shipping & Logistics)	Henrik Sornn-Friese	University/ Research Centre
	FORCE Technology	Peter Sørensen	University/ Research Centre
	Fredericia Maskinmesterskole (Marine Engineer)	Torben Dahl	Vocational education and training provider
	IndustriensUddannelser	Henrik Amdi Madsen	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	IT University of Copenhagen (Software development)	Anna Kinch/Anders B. Mellson	University/ Research Centre
	Københavns Maskinmesterskole og Elinstallatørskole (Marine Engineer and Electrician)	Annette Orup	University/ Research Centre
	MARTEC (Maritime Training and Education Centre)	Dorthe Bille	Vocational education and training provider
	Maskinmesterforeningen (Association of Mechanical Engineers)	Per Jørgensen	Other (e.g. engineers' association)
	Schools: Bachelor of Technology Management and Marine Engineering		University/ Research Centre
	SIMAC (Svenborg International Maritime Academy - Marine Engineer, Ship's officer, Shipmaster)	Jan Askholm; Lene Østergaard	University/ Research Centre
	Technical University of Denmark (DTU - Chemical Engineering)	Kim Dam- Johansen	University/ Research Centre
	Technical University of Denmark (DTU - Electrical Engineering)	Kristian E. Stubkjær	University/ Research Centre
Technical University of Denmark (DTU - Management Engineering)	Søren Salomo	University/ Research Centre	

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COUNTRY	Name of the organisation	Contact person	Type of Organisation
Denmark	Technical University of Denmark (DTU - Mechanical Engineering)	Jorgen Juncher Jensen	University/ Research Centre
	The Central Organisation of Industrial Employees in Denmark	Henrik Kjærgaard	Trade Union
	University College Nordjylland	Gitte Carstens/Juliet P. Butler	University/ Research Centre
	University of Southern Denmark (All types of Engineering)	Jette Toft Iversen	University/ Research Centre
	University of Southern Denmark (Centre for Maritime Research and Development – MFI)	Jacob Kronbak	University/ Research Centre
Estonia	ASSOCIATION OF ESTONIAN BOATYARDS		Employers' Association
	Estonian Metalworkers' Federation (EMAF)		Trade Union
	Estonian Shipowners' Association		Employers' Association
	KURESSAARE AMETIKOOL; vocational training in small craft building TTÜ KURESSAARE KOLLEDŽ; applied higher education and further training in small craft construction		Vocational education and training provider University/ Research Centre
Finland	Aalto University	Pentti Kujala	University/ Research Centre
	Aalto University, The Department of Applied Mechanics The Department of Applied Mechanics The Department of Applied Mechanics The Department of Applied Mechanics Department of Applied Mechanics Department of Applied Mechanics The Department of Applied Mechanics Association of Finnish Marine Industries	Pentti Kujala	University/ Research Centre
	Association of Finnish Marine Industries	Merja Salmi- Lindgren	Employers' Association
	Centre for Economic Development, Transport and the Environment	Kimmo Puolitaival	Public Authorities
	Centre of Maritime Studies (University of Turku)	Eija Velin	University/ Research Centre
	Finnish Metalworkers Union	Timo Eklund	Trade Union
	Finnish National Board of Education	Seppo Valio	Public Authorities
	Machine Technology Center Turku Ltd	Juha Valtanen	University/ Research Centre
	Pro (trade union for clerical employees)	Aimo Vainikainen	Trade Union

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COUNTRY	Name of the organisation	Contact person	Type of Organisation
Finland	Satakunta University of Applied Sciences	Liisa Karinen	University/ Research Centre
	STX Industry Academy	Vesa Eskonen	Private company
	Turku University of Applied Sciences	PenttiHäkkinen	University/ Research Centre
	Turku University of Applied Sciences	Liisa Kairisto-Mertanen	University/ Research Centre
	Turku Vocational Institute (TAI)	IlkkaPinomäki	Vocational education and training provider
France	Cluster Maritime Français	Philippe Perennez; Marie-Noëlle Tiné, chargée des Relations Extérieures;	Employers' Association
	Ecole Nationale Supérieure Maritime	Cyrille Pelletier Doisy	University/ Research Centre
	ENSA BRETAGNE	FRANCIS JOUANJEAN	University/ Research Centre
	Institut Français de la Mer	Francis Vallat	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	IUT LORIENT	JEAN VERGER	University/ Research Centre
	LYCEE ARISTIDE BRIAND ST NAZAIRE	ANNIE CASTAGNÉ	Vocational education and training provider
	Observatoire Prospectif et Analytique des Métiers et Qualifications de la Métallurgie	Francoise Diard	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	Observatoire Transport Maritime		Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	Pôle Mer PACA " Sea Innovation and Business Cluster PACA"	Florian CARRE: (Brussels representative, head of European Affairs) carre@polemerpaca.com / +32 2 550 02 56	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
Germany	Blohm + Voss Repair GmbH	Lutz Risswick	Private company
	Blohm + Voss Shipyards GmbH	Lutz Risswick	Private company
	Bundesinstitut für Berufsbildung BIBB	Berufsbildung	Public Authorities
	Eckener Schule	Hannes Manzke	Vocational education and training provider

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COUNTRY	Name of the organisation	Contact person	Type of Organisation
Germany	Fachhochschule Flensburg	Zentrale Studienberatung/Herr Dinslage und Frau Arnold	University/ Research Centre
	Fachhochschule Kiel	Kuhlenbeck, Thomas [Thomas.Kuhlenbeck@fh-kiel.de]	University/ Research Centre
	Fachhochschule Stralsund	Studienberatung Frau C. Respondek	University/ Research Centre
	Flensburger Schiffbau-Gesellschaft mbh & Co. KG - FSG	Frauke Nagel	Private company
	Hochschule Bremene. Leader of the degree program "Schiffbau- und Meerestechnik".	Mr. Gudenschwager	Vocational education and training provider
	Howaldtswerke-Deutsche Werft GmbH		Vocational education and training provider
	IHK-Flensburg	Ruth-Böhm-Bayer	Vocational education and training provider
	Lloyd Werft Bremerhaven GmbH	Herr Ahlfeld	Private company
	Lürssen-Kröger-Werft GmbH & Co. KG	Dennis Borrmann, Ausbildungsleiter	4. Vocational education and training provider
	MEYER WERFT Akademie GmbH	Frau Stamm	Private company
	Ministerium für Bildung, Wissenschaft und Kultur des Landes Mecklenburg-Vorpommern (Ministry for Education, Science and Culture Mecklenburg-West Pomerania)	Herr Dr. Thomas Behrens Herr Ulf-Peter Knüppel	Public Authorities
	NEPTUH - Werft GmbH Rostock	Carsten Schreiber	Vocational education and training provider
	P + S Werften GmbH	Herr Plötz	Private company
	Peters Schiffbau GmbH Am Hafen 6 25599 Wewelsfleth Germany	Herr Mark Dethlefs, Geschäftsführer	Private company
	Schiffer-Berufskolleg RHEIN. Vocational Training of "Inland waterway carriers", "Boat- and Shipbuilders", "Specialists in port logistics"	Dipl.-Ing. Klaus Paulus	4. Vocational education and training provider
Technische Uni Berlin	Servicebereich Ausbildung – IIAB -	University/ Research Centre	
Technische Universität Hamburg-Harburg	Studienberatung/Frau Preuß, Frau zur Borg	University/ Research Centre	

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COUNTRY	Name of the organisation	Contact person	Type of Organisation
Germany	Universität Duisburg Essen	Studienberatung	University/ Research Centre
	Universität Rostock	Allgemeine Studienberatung	University/ Research Centre
Greece	EENB - Association of Hellenic Shipbuilding & Shiprepairing Industries	Mrs. Eleni Spagi	Employers' Association
	Technological Educational Institute of Athens (Department of Ship Building Technology).	Mr. Belibassakis Konstantinos	University/ Research Centre
Italy	Accademia Italiana della Marina Mercantile	Daniela Fara	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	Centro Cantieristica & Nautica		Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	CETENA	Giovanni Caprino	University/ Research Centre
	Distretto Ligure delle Tecnologie Marine Liguria Cluster of Marine/Maritime technologies	Lucio Sabbadini	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	Distretto Tecnologico Sicilia Trasporti Navali		Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	DITENAVE- Distretto delle Tecnologie Navali - Friuli Venezia Giulia	Livio Marchesini	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	Istituto di Cultura Marittimo Portuale di Trieste		Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	Polo universitario La Spezia Facoltà ingegneria nautica	Elisabetta Nardi	University/ Research Centre
	ProgettoMare Friuli Venezia Giulia	Paola Stuparich	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	Università di Genova Facoltà di ingegneria navale	Dario Boote	University/ Research Centre
	Università di Trieste Facoltà di ingegneria navale	Alberto Marino' [marino@units.it]	University/ Research Centre
	Università Federico II – Napoli - Facoltà di ingegneria navale		University/ Research Centre
	Università di Messina – Corso di Laurea in ingegneria navale	Sabrina Arena; Signorino Galvagno	University/ Research Centre

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Latvia	RIGA SHIPYARD		Private company
Lithuania	"Lloyd's Register EMEA" Klaipėda branch	Manager Virginijus Jovaišas	Other (e.g. private company for consultancy and assessment services)
	JSC"Western Shipyard"	Administration Director Tomas Vainorius	Private company
	Klaipėda Ship Repair and Building School	Acting Director Arvydas Vaitkus	Vocational education and training provider
	klapeida University. Marine Engineering department	Dr./Rima Mickevičienė	University/ Research Centre
	Lithuanian Maritime Academy	Director Professor Dr./Viktoras Senčila	University/ Research Centre
	LLC "Bureau Veritas Lit."	Fleet Manager Igor Janovskij	Other (e.g. private company for consultancy and assessment services)
	LLC "Det Norske Veritas"	Manager Audrius Šileika	Other (e.g. private company for consultancy and assessment services)
	LLC "Germanischer Lloyd"	Manager Andrej Dutov	Other (e.g. private company for consultancy and assessment services)
	Qualifications and Vocational Education and Training Development Centre	Lina Vaitkutė, e-mail lina.v@kpmc.lt; tel. + 370 5 2498187	Public Authorities
Netherlands	Association FME-CWM association of enterprises in the technical Industry	W.Berentsen	Employers' Association
	CNV Vakmensen , trade Union	E. van de Mheen	Trade Union
	De Vries Makkum	J. van Groning	Private company
	Dutch Maritime Network Netherlands	info@dutch-maritime-network.nl	Employers' Association
	Dutch Shipbuilding Association	M.Torpstra	Employers' Association
	FNV bondgenoten, trade union	R. van den Bergh	Trade Union
	Hogeschool NHL /HBO Scheepsbouwkunde	Van Leunen	University/ Research Centre
	IHC Merwede BV Metaalbewerker	P.Wemmers	Vocational education and training provider

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Netherlands	Marin	Henk Prins, manager R&D	University/ Research Centre
	Metalent	R.Nagtzaam	Vocational education and training provider
	ROC Friese Poort-Scheeps-en Jachtbouw	Meinte Visser	Vocational education and training provider
	STC-Group HBO Scheepsbouwkunde	Ir, R. Jansen	Vocational education and training provider
	STC-Group-Scheeps-en Jachtbouw	H. Wentink	Vocational education and training provider
	Stichting A+O Metalekro	Drs. M.B.Fennema	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	Stichting OOM	E. Yperlaan	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	Stre@m Metaalopleidingen	B Wijzenbroek	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	University Maritieme Techniek	Prof. H.Hopmans	University/ Research Centre
	Wärtsila Trainings Centrum	J. van den Corput	Private company
Norway	Norsk Industri - Federation of Norwegian Industries	Mr. Egil Holland (Director); Mr. Tor Erik Haanes-Larsen	Employers' Association
	Norwegian Marine Technology Research Institute	Mr. Oddvar Inge Eide; Mr. Terje Nedrelid	University/ Research Centre
Poland	CDK "Europartner" Sp z o.o.	Marzena Bałdyga	Vocational education and training provider
	Gdansk Foundation for management development	Krzysztof Balcerzak	University/ Research Centre
	Gdansk University of Technology	Dr hab eng Janusz Kozak	University/ Research Centre
	Gdynia Maritime University	Prof. Marek Grzybowski	University/ Research Centre
	Polish Maritime Network Institute Poland	Mr. Bogdan Sedler	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
Portugal	FOR-MAR	Eng. Rui Patrício	Vocational education and training provider

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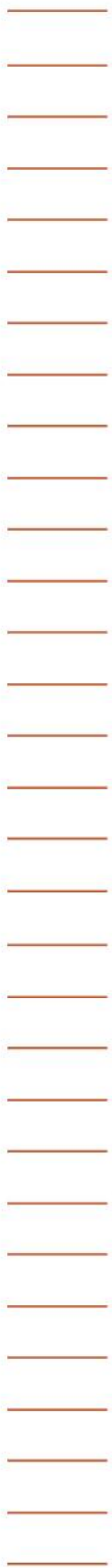
COUNTRY	Name of the organisation	Contact person	Type of Organisation
Portugal	NAUTIBER	Eng Rui Roque	Private company
	SAMUEL E FILHOS	Samuel do Carmo	Private company
	SIMA	Dra ANA FILIPE	Trade Union
Romania	Alewijnse Romania (registration name in Romania SC RETEC SA)	Mr. Dumitru POPERESNIUC, 132 Al. Moruzi Str. 402 Building, 1st Floor 800223 Galati, Romania, d.poperesniuc@retec.ro, www.alewijnse.ro, Mobile phone: +40 731 560946, Phone: +40 236 307459, Fax: +40 236 449146.	Private company
	ANCONAV (Romanian Shipbuilders Association)	Mr. Gelu Stan (Managing Director)	Employers' Association
	ICEPRONAV	Ms. Alina Florea (Managing Director)	Private company
	Naval Architecture Faculty, "Dunarea de Jos University of Galati"	Prof. Dr. Engineer Adrian Lungu	University/ Research Centre
	SC BRODRENE DAHL SRL ROMANIA	22nd, Ing.Dumitru Ivanov street, 820242-Tulcea, Romania ; www.dahl.ro ; phone/fax +4 0240536743 / +4 0240536744	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
Spain	ACLUNAGA - Asociación Cluster del Sector Naval Gallego	Tomás casquero	Employers' Association
	ASOCIACION DE EMPRESARIOS METALURGICOS DE GALICIA		Employers' Association
	Centro de Formación Federación Minerometalúrgica Región de Murcia, S.A.	D. Andrés Saura Vidal	Vocational education and training provider
	Cluster marítimo español	Arturo Gonzalez Romero	Employers' Association
	Escuela Técnica y Superior de náutica y máquinas navales UPV(EHU)	Eloy López Garcia	University/ Research Centre
	Federación de Industria de CC.OO.	Juan Blanco Blanco	Trade Union
	Fondo Formación Euskadi, S.L.L.	D. Mikel Colina Arce	Vocational education and training provider
	FORGA - Fundación de Orientación Profesional de Empleo y Formación en Galicia	D. Antón Francisco Casal Díaz	Trade Union
FORMEGA - Fundación Galega do Metal para a Formación, Cualificación e Emprego	Dña. Susana Barreras Viso	Transversal/multipartite organisation (training funds, etc.)	

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COUNTRY	Name of the organisation	Contact person	Type of Organisation
Spain	FORO MARÍTIMO VASCO	Javier Lopez de la calle	Employers' Association
	Fundación Metal Asturias - La Fundación para la Formación, La Cualificación y el Empleo en el Sector Metal	Pilar Suarez Fernandez	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	Gerencia del Sector Naval	D. Juan Rojo	Public Authorities
	INCUAL Servicio de las Cualificaciones Industriales y Técnicas	Juan Antonio González Mata	Public Authorities
	Instituto vasco de cualificaciones profesionales	Javier Mardones; Ana-IVAC [kei.ivac@euskalnet.net]	Public Authorities
	PEQUEÑOS Y MEDIANOS ASTILLEROS. PYMAR	JESUS ALGARRA LOIS	Employers' Association
	Plataforma tecnológica marítima	Carlos Ruiz de León Loriga	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	Universidad politécnica de Madrid. ETS ingenierías navales.	José Luís García Garcés	University/ Research Centre
Sweden	Chalmers University of Technology	Cecilia Hedenstierna	University/ Research Centre
	Industrifacket Metall (IF Metall)		Trade Union
	Swedish Marine Industries Federation - SWEBOAT	Mats Eriksson	Employers' Association
	Swedish maritime administration	Peter Fyrby: Head of Shipping Management;	Public Authorities
	Swedish Shipowners' Association	Linda.Friberg@sweship.se	Employers' Association
	The Swedish Ship Officer's Association		Trade Union
Turkey	Birlesik Metal-Is Sendikasi (BIRLESİK)		Trade Union
	Turkish Marine Industry Association - DENTUR	Yavuz Sipahi, Chairman of the Board	Employers' Association
United Kingdom	Alliance of Sector Skills Councils	Mr. Richard Beamish	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	British Marine Federation	Ms Sarah Dhanda	Employers' Association
	Douglas-Westwood Limited	Mr. John Westwood	Others (e.g. private c.for consultancy and assessment services)

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COUNTRY	Name of the organisation	Contact person	Type of Organisation
United Kingdom	Furness enterprise limited	Harry Knowless	Employers' Association
	HOTA Training	Miss Linda Ellis	Vocational education and training provider
	Hull Training. Engineering training center	Mr Noel Johnson	Vocational education and training provider
	Humberside Engineering Training Association (HETA)	Mr James McIntosh	University/ Research Centre
	Humberside Engineering Training Association (HETA)	James McIntosh	Vocational education and training provider
	IMarEST (Institute of Marine Engineering, Science & Technology)	Mr. Graham Hockley	University/ Research Centre
	International Institute for Marine Surveying	Mr. John Lawrence	Others: Professional Institute
	Maritime London U.K.	Mr. Bill Lines	Employers' Association
	Naval Shipbuilding in northwest England	Mr. Stuart Klosinski	Trade Union
	SEMTA	Jinny McDonald-Matthews	Transversal/multipartite organisation (training funds, skills councils, observatories, etc.)
	Shipbuilders and ship-repairers association	Dr. Ashutosh Sinha. Mr. Tom Dougherty	Employers' Association
	Social Research & Regeneration Unit, University of Plymouth	Mrs. Karen Sumser-Lupson (Maritime Theme Manager)	University/ Research Centre
	Society of Maritime Industries	Mr. John Murray	Employers' Association
	Society of Maritime Industries U.K.	Mr. John Murray	Employers' Association
	The Chamber of Shipping U.K	Mr. Mark Brownrigg	Employers' Association
	The National Skills Academy for Manufacturing		Vocational education and training provider
	UK Commission for Employment and Skills	Mr. Simon Perryman	Public Authorities
Unite The Union	Mr. Bernie Hamilton	Trade Union	



Annex B. List and description of respondent organisations

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	Country	Name of the organisation	Type of organisation	Brief description of the organisation (as provided in the survey)
Organisations interested in participating				
1	Bulgaria	Varna Scientific and technical Unions (VSTU)	Vocational education and training provider	<p>Varna Scientific and Technical Unions (VARNA) Varna Scientific and Technical Unions is a non-governmental, non-political organization. It is a member organization of the Federation of the Scientific and Technical Unions in Bulgaria (FSTU) which unites 19 scientific and technical unions (STU) and 34 local societies in the major cities of the country.</p> <p>The main goals of the organization are to unite and support the efforts of its members to:</p> <ul style="list-style-type: none"> - professional progress; protection of the intellectual, professional and social rights of the specialists and promotion of their prestige in the society; - involvement of experts in science and technology in projects supporting the regional development, as well as formulation and implementation of the scientific and technological policy of the region and the country; - restructuring and protection of the Bulgarian production. <p>The basic activities of VSTU are:</p> <ul style="list-style-type: none"> - training and qualification: vocational training courses for students, high school and university graduates, unemployed, etc. (computers, foreign languages, specific professional training, under specific orders of companies, inclusively). - scientific activities: organization and coordination of scientific and practical conferences, workshops, discussions, exchange of experience, etc. on topical problems of science, technology and world economy; scientific trips in the country and abroad; presentations of companies and technological achievements and innovations; development of regional programs and projects; - information and publishing activity: keeps the society informed about scientific and technological achievements and promotes the dissemination of scientific and technical knowledge, high technologies and innovations . Publishes information bulletins and thematic series of "HTC" magazine (ISSN 1310-8573), as well as other printed publications. <p>Expert's consultations: Consultations, expert's appraisals and predictions in the field of science, technology, economy, intellectual and industrial property, finance and taxation, performed by highly qualified scientists and experts, duly licensed and certified.</p> <p>Engineering activities: Based on his long term experience and traditions, the VSTU is able to form teams from scientists, engineers, technicians and economists and to perform projects in different fields of the industry and economy: Economical analyses and strategies, Ship design, Introducing of up to date information technologies and CAD/CAM systems, Standardization, Civil engineering, Environment protection and reliability</p>
2	Bulgaria	Bulyard Shipbuilding Industry SA	Private company	<p>Bulyard Shipbuilding Industry EAD is the largest shipbuilding enterprise in Bulgaria. The company designs, constructs and repairs ships up to 100 000 DWT. Over 850 vessels for owners of 27 countries have been built for the over one-hundred years long history of the shipyard. The product portfolio comprises Product Tankers, Chemical Tankers, Container Carriers, Bulk Carriers, General Cargo vessels, Coal Carriers and Multipurpose vessels.</p>
3	Croatia	Hrvatska brodogradnja - Jadranbrod d.d. Croatian Shipbuilding Corporation (english translation)	Employers' Association	<p>Government Authority, Shipbuilding Industry Association, coordinative body, centre of information, representing in international bodies (such as CESA, SEA Europe)</p>

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	Country	Name of the organisation	Type of organisation	Brief description of the organisation (as provided in the survey)
4	Denmark	Copenhagen Business School	University/Research centre	This is a university level institution working on applied organizational, management and policy research, education and public outreach on critical issues in relation to the globalization of the maritime sector. Currently, there are 10 researchers, including 3 PhD students. Maritime teaching at CBS includes: - Executive MBA in "Shipping and International Logistics" - Diploma in "Supply Chain Management", including course in International Shipping - "Supply Chain Management" stream at the MSc. program in Economics and Business Administration - Minor in "Maritime Business" at the MSc program in Economics and Business Administration - Biannual PhD course in "Maritime Economics and Management"
5	Finland	Turku University of Applied Sciences, Ship laboratory	University/Research centre	Education of bachelor degree naval architects and marine engineers for industry and other enterprises. Teaching naval architecture subjects to other discipline students and occasionally for industrial company personnel.
6	Finland	Machine Technology Centre Turku Ltd	University/Research centre	Machine Technology Centre is a training and development center which is based on new technology in Turku region. The Center offers modern training facilities for enterprises, vocational schools and universities. The Centre is in charge of coordinating the Maritime Cluster Programme 2007-2013, both locally and nationally and also the Innovation Platform Maritime.
7	France	ENSTA - BRETAGNE : Ecole Nationale Supérieure de Techniques Avancées (National Institute of Advanced Technology, Brittany)	University/Research centre	This is an engineering school which offers, amongst others, training in naval architecture and shipbuilding.
8	France	Ecole nationale supérieure maritime (National maritime college of France)	University/Research centre	This Ecole Nationale trains officers (deck officers) and captains (master) for the merchant navy, as well as mechanic officers (engineers).
9	France	Pôle Mer PACA " Sea Innovation and Business Cluster PACA"	Transversal/multipartite organisation (training funds, skill councils, observatory organisations, etc)	Pôle Mer PACA is a " Pôle de competitivite" established by the french government in 2005 to accelerate research and technology transfer from the university, SME's and large companies in the marine & maritime sector. Collaborative research projects we support are based on scientific excellence and market oriented leading to demonstrators and providing long term solutions to employment (creating new jobs or maintaining the jobs) and sustainable economical growth. It is composed of more than 300 members representing Universities, SME's and large companies in the marine & maritime sector.
10	Germany	NEPTUH - Werft GmbH Rostock	Vocational education and training provider	Education and training department of NEPTUN - Werft GmbH Rostock

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	Country	Name of the organisation	Type of organisation	Brief description of the organisation (as provided in the survey)
11	Germany	Schiffer-Berufskolleg RHEIN. Vocational Training of "Inland waterway carriers", "Boat- and Shipbuilders", "Specialists in port logistics"	Vocational education and training provider	The Schiffer-Berufskolleg RHEIN - Vocational College for Logistics - offers vocational classes for inland navigators / water pilots / Inland waterway carriers in Germany and Switzerland as well as classes for boat-/ shipbuilders and Specialists in port logistics from all over the country.
12	Germany	Ministry for Education, Science and Culture Mecklenburg-West Pomerania (Ministerium für Bildung, Wissenschaft und Kultur des Landes Mecklenburg-Vorpommern)	Public Authorities	The Ministry of Education, Science and Culture has the task to create conditions favorable for the formation, the acquisition of knowledge and lifelong learning, creating, teaching and research at an excellent level of lift, increase exchanges between academia and industry and to promote the culture and strengthen.
13	Greece	Association of Hellenic Shipbuilding and Shiprepairing industries (EENB)	Employers' Association	The main activities of this organisation are: To intensify the cooperation amongst the member shipyards. To promote the interests of the shipbuilding and shiprepair industry within the E.U.
14	Italy	Department of Naval Architecture, Electric Engineering and Information Technologies (DITEN) - University of Genova (Italy)	University/Research centre	As a University, this Institution is engaged in the educational and research activity in the marine/maritime environment with regards to merchant and navy fleet, sailing and motor yachts.
15	Italy	Distretto Ligure delle Tecnologie Marine Liguria Cluster of Marine/Maritime technologies	Transversal/multipartite organisation (training funds, skill councils, observatory organisations, etc)	Its objectives are to support cooperative research, open innovation, high level education/training, in the field of maritime and marine technologies. Participants include: 1 University, 6of Public and Private Research Centre, 120 Enterprises including 100 SMEs , Local Administration Bodies.
16	Italy	DITENAVE - Naval and Nautical Technology District of the Friuli Venezia Giulia Region	Transversal/multipartite organisation (training funds, skill councils, observatory organisations, etc)	The mission of this institution is to improve and enhance competitiveness of naval companies and nautical SMEs of the FVG Region, using the following tools: research, innovation and education (the knowledge triangle). Main objectives include: 1.- to manage the relation between the regional demand and supply of research in order to activate synergies developing specific projects 2.- to manage the relation between the regional demand and supply of innovation offering a support to SMEs for the: - definition of projects - technological brokerage - development of business plans, -obtainment of funding. 3.- to plan and organize educational initiatives to meet the new specialized and managerial profiles, also emerging from the activities developed in the two previous sections

Annex B. List and description of respondent organisations

	Country	Name of the organisation	Type of organisation	Brief description of the organisation (as provided in the survey)
17	Lithuania	Kvalifikacijų ir profesinio mokymo plėtros centras (Qualifications and Vocational Education and Training Development Centre)	Public authorities	The main aim of the QVETDC is to ensure the developments of Lithuanian qualifications system correspond to the needs of the economy as well as national and international initiatives. The objectives are to manage Lithuanian qualifications system; to improve VET quality; to increase VET attractiveness; to strengthen the cooperation among VET actors. The key activities are the development of qualification and VET standards; applied research in VET, including specialists demand forecasts; monitoring of skills supply and demand; quality assurance arrangements in VET and development of quality culture; organisation of development of modular programmes and their renewal; development of VET credits system; compilation, analysis and dissemination of VET information; The tasks of QVETDC also include coordination of activities of Central Professional Committee and 17 Sectoral Professional Committees.
18	Lithuania	Klaipėda university	University/Research centre	Klaipėda UniversityIt is the only structurally full-rate university in a large part of Western Lithuania, where a perspective industrial and commercial potential is rallied, where marine complex is developed and distinctive cultural traditions are cherished. It was established for realization of scientific researches and studies in marine topics. Rapidly growing University today is home for over 7 000 students, over 500 professors, associate professors, lecturers, including 4 national award winners in science, culture and art, for 7 faculties (Natural Sciences and Mathematics, Humanities, Marine Engineering, Arts, Pedagogy, Social sciences, Health sciences), 2 study institutes (Navigation and Continuing studies), 3 scientific research institutes (Baltic Coastal Research and Planning, Baltic Region History and Archaeology, Mechatronics) as scientific research and study centres, library with about 0,5 million books of different topics, Botanical gardens, publishing office and Career centre. Presently developed Marine valley will undoubtedly contribute to integration of science and studies. It will be provided with modern scientific research laboratories, a ship for oceanographic researches and practical training of students. Necessity to establish and develop it is stimulated by rapid development of marine trade and increasing demand for marine researches, related to alteration of marine and coastal geo-systems, rational employment of natural resources, preservation of natural and cultural values, construction of deep-sea port in Klaipėda, reconstruction of Šventoji harbour and operation of Būtingė oil terminal.

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	Country	Name of the organisation	Type of organisation	Brief description of the organisation (as provided in the survey)
19	Poland	Economics and Management Department, Maritime University of Gdynia	University/Research centre	Department of Economics and Management conducts scientific-research in the field of economy and management connected with the functioning of economies of the Baltic Sea Region in micro- and macroeconomic scale. The employees of the Department are concentrated on problems of competitiveness, innovation, the market of enterprises and consumers, internal and external factors of enterprises' and financial institutions' activity in the integrated European and global market. The Department conducts research connected with the domestic and regional programs of the European Union. The special object of interest of the Department to work on Baltic Sea Region Observatory. The research covers Baltic Index of Entrepreneurship and Innovation. This Index will be ready soon and will be published on the Department website. Currently Department of Economics and Management realizes the project in titled "Knowledge transfer". The main goals of the project are based on cooperation between science and economy, the universities' employees and students with the owners and employees of enterprises especially in MSE sector of economy.
20	Portugal	FOR-MAR, Vocational Training Centre for fisheries and Sea	Vocational education and training provider	FOR-MAR is a Vocational Training centre for the following areas: Fisheries, Maritime transportation, ship building and repairing, Maritime machinery, Aquaculture and Fish Processing. It includes 8 training units along the continental coast. Target groups are the professionals, enterprises, adults and youngsters that want a professional qualification in these areas.
21	Portugal	SIMA- Sindicato das Industrias Metalurgicas e Afins	Trade Union	It is a National trade union covering all productive sectors, with collective bargaining in all the sectors, covering blue and white collars
22	Romania	Alewijnse Romania (registration name in Romania SC RETEC SA)	Private company	Alewijnse is a versatile provider of electrical engineering services. Our business units are active in the marine systems, industrial and constructional sectors. Our own staff do all the work on marine, industrial and utilities projects, from consultancy, engineering and installation to system start-up, service and maintenance. If something needs fixing, our engineers are on call 7 days a week, 24 hours a day. Worldwide. Our more than 1,100 employees work in business units in the Netherlands, Ukraine, Romania, Vietnam, Turkey, Brazil, Qatar and all of them have only one aim: Empowering your business. They work hard together to make Alewijnse a world leader in the electrical engineering market.
23	Romania	SC BRODRENE DAHL SRL ROMANIA	Transversal/multipartite organisation (training funds, skill councils, observatory organisations, etc)	
24	Spain	Fondo Formación Euskadi, S.L.L.	Vocational education and training provider	Human Capital Organisation whose main objective is the improvement of professional and business performance, through qualification and development. We are experts in continuous learning solutions, with almost 30 years experience in the Training and Qualification Sector, offering an Integral Service, innovative and of high added value.

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	Country	Name of the organisation	Type of organisation	Brief description of the organisation (as provided in the survey)
25	Spain	Gerencia del Sector de la Construcción Naval	Autoridad Pública	Public business institution which is part of the Ministry of Industry, Energy and Tourism. The objectives of the "Management of the Shipbuilding Sector" are to support the Ministry for the achievement of restructuring objectives in the sector, as well as the following: 1.- The success of the restructuring and competitiveness process of the shipbuilding sector, initiated according to Royal Decree 1271/1984 13th June, about measures for the naval sector restructuring, and according to chapters III and IV of the EC 540/98 Council Regulations, 29th June, about aids for shipbuilding. 2.- The achievement of the highest degree of coordination and cooperation, not only among shipyards, but also among them and marine equipment industries or any other industries related to the maritime sector in general, concerning all types of improvements and investments. 3.- The continuation of the process of training and education of shipbuilding sector staff. 4.- The fulfillment of any other objectives assigned.
26	Spain	Foro Marítimo Vasco- Basque Maritime Forum	Employers' Association	The Foro Marítimo Vasco is a non-profit organisation constituted in 1993, and which since 1999 has been recognised as a cluster by the Basque Government. It is formed by companies, associations and institutions. Its mission is the representation, defence, consolidation, promotion and improvement of the competitiveness of the companies in the Basque maritime sector, by means of the different services provided: Internationalisation, technology, management excellence, tax and financing, training, communication, information and representation.
27	Spain	Federación de Industria de CC.OO.	Trade Union	One of the main objectives of the Industry Federation of CCOO trade union is to defend professional, economic, sociopolitical and trade union interests of workers in the metal, mining and electric energy industries. Its activity is based on social dialogue, institutional and social participation, and the individual and collective assessment and defence of workers. The Industry Federation of CCOO is part of the CCOO Confederation. It is a trade union democratic organisation, formed by all persons who are affiliated. It includes 17 federations in total, as well as regional and local CCOO trade unions.
28	Spain	Pequeños y Medianos Astilleros S.R., S.A. (PYMAR)	Employers' Association	All the stakeholders are Spanish private shipyards. Objectives: - Promote and participate in R&D plans for the technological improvement and advanced technologies in shipyards. - Promote free competence among shipyards. - Propose and develop measures for the industrial promotion and diversification. - Promote the ship building industry.
29	Spain	Fundación Metal Asturias	Transversal/multipartite organisation (training funds, skill councils, observatory organisations, etc)	This is a foundation where metal sector social partners and public authorities take part. It intends to promote education and employment in the metal sector. It benefits directly more than 5,000 persons per year. It offers: vocational education and training, masters degree education (in cooperation with universities), training-employment integral projects (at national, European and international level), technical assistance (knowledge management, professional profiles definition, competence evaluation, etc.); it is responsible for the Observatory of Occupation in the Metal Sector in the region of Asturias; elaboration Competences and Professional Certificates for the Spanish Qualifications Institute; elaboration of education resources for initial vocational education.

Annex B. List and description of respondent organisations

	Country	Name of the organisation	Type of organisation	Brief description of the organisation (as provided in the survey)
30	The Netherlands	Dutch Shipbuilding association	Employers' Association	We organise all important aspects of shipbuilding for the Dutch shipbuilding industry, national and international. Our organisation assists shipyards and others to build and sell floating objects Also public and specific education is in our scope.
31	The Netherlands	FNV Bondgenoten	Trade Union	FNV Bondgenoten, the largest trade union in the Netherlands. They look after the work-related and income-related interests of over 470.000 members in the retail, services, industrial, metal, agricultural, technique, temporary agency work and transport sectors
32	The Netherlands	Hogeschool NHL /HBO Scheepsbouwkunde	University/Research centre	It offers BSc programmes for nautical officers and naval architecture. Including research projects
33	The Netherlands	ROC Friese Poort	Vocational education and training provider	Education in shipbuilding, yachtbuilding, offshore technics, shipelectronics for MBO and companys. Supported by several yards (de Vries Makkum, Icon yachts Harlingen, Barkmeijer Stroobos, Damen, Vripack engineering, Groot design and many more.
34	The Netherlands	Wärtsilä Netherlands B.V. WLSA (Wärtsilä Land & Sea Academy) Waalwijk, the Netherlands	Private company	Land & Sea Academy provides quality training for Wärtsilä Service Eorganisation and customers.
35	United Kingdom	International Institute of Marine Surveying	Professional Institute	The International Institute of Marine Surveying is an independent, non-political organisation. Membership is open to Qualified Mariners, Cargo Surveyors, Yacht and Small Craft Surveyors, and Marine Consultants from around the world. Individuals, with specialised knowledge, experience or skills able to contribute and enhance the aims and objectives of the Institute are also invited to join. They support members by providing Education programmes, training courses, seminars, conferences, workshops, discussion groups and Technical Support.

Annex B. List and description of respondent organisations

	Country	Name of the organisation	Type of organisation	Brief description of the organisation (as provided in the survey)
36	United Kingdom	Keep our future afloat campaign	Trade Union	<p>The Keep Our Future Afloat Campaign (KOFAC) seeks to sustain the core workload at Barrow Shipyard which builds nuclear powered submarines and designs surface warships. Specific aims are to:</p> <ul style="list-style-type: none"> • Sustain and grow jobs in naval shipbuilding in north west England • Secure full utilisation of the unique assets found in the north west region's naval shipbuilding industrial base and their supply chains • Sustain naval ship/submarine design capability. 60% of UK's total capability is located in Barrow <p>KOFAC'S STRATEGIC FOCUS</p> <ul style="list-style-type: none"> • Influencing Government budget, defence, industrial and skills policies and the advice their senior civil servants or consultants provide them with. We also seek to influence decisions of industry leaders, particularly through direct one to one meetings and participation in defence industry and party conferences. • Urging Government to fully fund a naval shipbuilding programme so that the Royal Navy can sustain its strategic capability, including its ability to 'surge' forces in times of crises, by placing a steady drumbeat of orders for up to 8 Astute Class and 4 Successor nuclear powered strategic deterrent carrying submarines, so they can maintain continuously at sea patrols. RFA ships and surface warships should also be built in the NW's naval shipbuilding yards. • Persuading politicians of all political parties, the Defence Industries Council, leaders of industry, national, regional and local community bodies and leaders of trade unions to support the KOFAC campaign objectives. • Influencing the investment policies of major companies involved in the UK naval shipbuilding and submarine industrial base and its supply chain. • Demonstrating productivity and affordability improvements being generated in the naval shipbuilding industry by the workforce, many of whom are trade union members. • Persuading trade union leadership to support all the planned naval shipbuilding and submarine programmes, including the successor project. • Clarifying what Ministry of Defence regard as 'complex' and 'less complex' warships. • Demonstrating that the naval shipbuilding industry is equal to the aerospace sector in importance as an advanced engineering sector, providing employment and potential to help rebalance the economy. • Promoting the importance of naval shipbuilding as a core part of the nation's defence industry at appropriate defence industry and political events

Annex B. List and description of respondent organisations

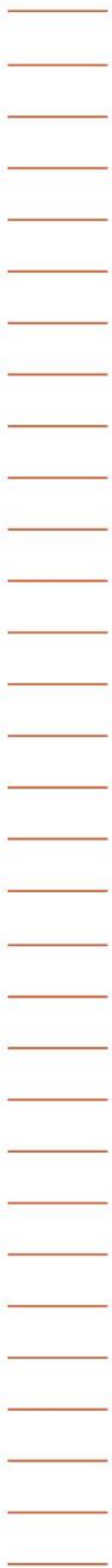
	Country	Name of the organisation	Type of organisation	Brief description of the organisation (as provided in the survey)
37	United Kingdom	Furness Enterprise Limited	Transversal/multipartite organisation (training funds, skill councils, observational organisations, etc)	Furness enterprise mission is to create a more diverse economy. It also supports the trade union and community led "keep our future afloat campaign". The partnership was "established as a response by the Furness community to a significant run down in employment in the area resulting from the rationalisation of local defence related industries and prevailing national economic difficulties". The mission is: "To drive the development of Furness towards a stronger, more balanced economic structure where it generates wealth from a broad spectrum of industrial business, agricultural and tourism activities and provides stable employment". The aims are to: -Coordinate efforts of various agencies involved in regeneration; -Lead all initiatives seeking UK Government assistance for existing new and incoming businesses; -Deliver total business support packages to companies; -Contribute to agreed strategies by others.
Organisations which are doubtful about their participation				
38	Belgium	Antwerp Port Authority	Public Authorities	The Port Authority has approx. 1650 employees. Four pillars constitute a thread through the business plan of the Antwerp Port Authority: vital port, efficient port, supported port and sustainable port. A vital port develops into the main general cargo port of Europe, an efficient port is a strong link in the worldwide maritime and logistics chains, a supported port has wide-ranging support in society and a sustainable port contributes to society, the environment and the surroundings.
39	Denmark	Technical University of Denmark, DTU Management Engineering	University/Research centre	Full-fledge research and teaching department covering all relevant scientific disciplines on Management Engineering.
40	Finland	Finnish Metalworkers' Union	Trade Union	This is a trade union for blue collar workers in metal industry.
41	Finland	STX Industry Academy. Human Resource, Education	Private company	STX Finland Oy owns a vocational school named STX Finland Oy Shipbuilding school. All education in STX Finland are organized through the school. The school belongs to the organisation of the Human Resource
42	Germany	Lürssen-Kröger-Werft GmbH & Co. KG	Vocational education and training provider	Lürssen (or Lürssen Werft) is a German shipbuilding company based in Bremen-Vegesack. Lürssen designs and constructs yachts, naval ships and special vessels. Trading as Lürssen Yachts, it is one of the leading builders of custom superyachts such as Paul Allen's Octopus and Larry Ellison's Rising Sun, one of the largest privately owned yachts in the world.
43	Germany	Peters Schiffbau GmbH Am Hafen 6 25599 Wewelsfleth Germany	Private company	At our shipyard, we build container vessels up to 900 TEU, multi-purpose vessels, special purpose ships and mega-yachts. Repairs, in particular, require a high degree of flexibility: they are either carried out at the yard or by our mobile repair service.
44	Germany	Howaldtswerke-Deutsche Werft GmbH	Vocational education and training provider	Shipyard

Annex B. List and description of respondent organisations

	Country	Name of the organisation	Type of organisation	Brief description of the organisation (as provided in the survey)
45	The Netherlands	Foundation MAritime Research Institute Netherlands (MARIN)	University/Research centre	<p>MARIN, the Maritime Research Institute Netherlands, has become a reliable, independent and innovative service provider for the maritime sector and a contributor to the well being of society. We take initiative to couple our own expertise to various application areas to broaden our ability to solve problems. By maintaining our leadership position in hydrodynamic and nautical research and development, we make our accumulated know-how and experience available for Concept Development, Design Support, Operations Support and Tool Development. This commitment to high-quality technological innovation enables you to meet the challenges facing your industry today.</p> <p>We have a dual mission: to provide industry with innovative design solutions; and to carry out advanced research for the benefit of the maritime sector as a whole. In this way, we strengthen the link between academic research and market needs. It is a unique interaction that benefits all parties concerned. The driving force behind this dual mission is a team of highly motivated and experienced people. MARIN is innovative, independent and above all, reliable.</p> <p>By feeding back the results of advanced research programmes into commercial projects, MARIN has created a powerful synergy with the maritime industry. This industry is being confronted with shorter cycle times and increasing global competition in challenging environmental and economic conditions. By becoming involved in projects as early as possible, MARIN can help meet these challenges. Our customers include commercial ship builders, fleet owners, navies, naval architects and offshore companies the world over.</p>
46	The Netherlands	A+O Metalektro	Transversal/multipartite organisation (training funds, skill councils, observatory organisations, etc)	O&O Fund, in board are trade unions and employers association
47	The Netherlands	IHC Merwede	Vocational education and training provider	The main activity is the training of employees in technical and soft skills. This institution trains employees from basic til university in cooperation with education organisations. They also have a management school for bachelors and higher level. And they have a training institute for basic skills for Shipbuilding, welding and machinery.
48	The Netherlands	STC-Group	Vocational education and training provider	The STC-Group is based in Rotterdam, The Netherlands. The STC-Group comprises on one hand the regular activities connected to vocational education on various levels, from lower vocational education and secondary school specialized in the logistic sector, up to the level of BSc Shipbuilding and a Master's degree in Transport. On the other hand it offers commercial activities in the field of maritime professional training, consultancy and operational research. The STC-Group utilizes state-of-the-art simulators and employs a highly skilled and experienced staff of 450 professionals. Most activities are tailor-made to the specific requirements of the customer. In the year 2000, the STC-Group was certified by DNV as the first education and training institute in The Netherlands to obtain the 'Investor in People' distinction, and it has kept this quality mark ever since.

Annex B. List and description of respondent organisations

	Country	Name of the organisation	Type of organisation	Brief description of the organisation (as provided in the survey)
49	The Netherlands	Delft University of Technology, Faculty of Mechanical, Maritime and Materials Engineering Department of Marine & Transport Technology	University/Research centre	Technical University - Education and research in Marine Technology It offers 3 year BSc and 2 year Msc programme Influx Bsc students approx 90 /year Specialisations in: Ship Design Ship production Shipping Mangement Marine Engineering Ship Hydromechanics Ship & Offshore Structures Ship Propulsion & Resistance
Organisations which do not want to participate				
50	Germany	Eckener-Schule RBZ Flensburg	Vocational education and training provider	The Eckener-College is a technical college located high in the North of Germany. The diversity of vocational fields and levels at the Eckener-College is one of its outstanding strengths. There are about 2200 students and 110 teaching staff.



Annex C. On-line questionnaire

Annex C. On-line questionnaire

QUESTIONNAIRE ON THE SETTING UP OF A EUROPEAN SKILLS COUNCIL FOR THE SHIPBUILDING, SHIP-REPAIR AND MARINE EQUIPMENT SECTOR

This questionnaire is intended to map the activities of your institution and the possible interest of your organisation to participate in a European Council on Employment and Skills for the Shipbuilding, Ship-repair and Marine Equipment sector.

EU Sector Skills Councils can be defined as councils composed of key stakeholders of a particular economic sector (i.e. representatives of trade unions/employer organisations, education and training providers, public bodies/authorities), envisioning to develop different activities at European level in the field of skills and employment, such as

- Collect and analyse information on sectors' demands (current and future) for skills and competences in link with employment in the selected sector
- Confront skills needs with the supply of skills
- Discuss and exchange information between sector's stakeholders and those who design the education and training programmes in Member States
- Achieve a better adequacy of the supply of training to the demand for skills and reduce current and future skills mismatches in the sector
- Participate in the setting-up effective partnerships for the anticipation of change.
- Disseminate relevant information to stakeholders across European countries

A. Identification of structures/actors involved

2. What is the official name of your organisation? (please translate if possible to English)

- _____
- (English translation) _____

3. Please provide contact details of your organisation (Contact person, complete Address, e-mail address, web site, phone/fax, country)

- 2.1. Contact person: _____
- 2.2. Complete Address: _____
- 2.3. e-mail address: _____
- 2.4. web site: _____
- 2.5. Phone/fax: _____
- 2.6. Country where the organisation is located: _____

B. Mapping of activities conducted by these structures/actors

4. Please identify which of the following organisation type better describes yours (only one answer)

- Employers' Association
- Trade Union
- Public authorities
- Vocational education and training provider → GO TO QUESTION 5
- University/Research centre → GO TO QUESTION 5
- Transversal/multipartite organisation (training funds, skill councils, observatory organisations, etc) → GO TO QUESTION 5
- Other (Please specify _____)

Provide a brief description of your institution (objectives, participants, etc)

Annex C. On-line questionnaire

5. If applicable, who are the main stakeholders that take part in the managing board (s) of your organisation (possibility of multiple answers)?
- Employers' Association(s)
 - Trade Union(s)
 - Initial vocational education and training provider(s)
 - Continuing vocational training (CVT) provider(s)
 - Universities/Research centres
 - Public authorities
 - Other (Which ones? _____)
 - Not applicable
6. Please identify the sectoral scope of your organisation (only one possible answer)
- Specifically oriented towards the Shipbuilding, Ship-repair or Marine Equipment sector
 - Involved in the Maritime sector in general (also ship breaking and recycling), including the Shipbuilding, Ship-repair or Marine Equipment sector
 - Involved in one larger sector (i.e. Metal), including the Shipbuilding, Ship-repair or Marine Equipment sector
 - Cover a wide array of sectors (including the Shipbuilding, Ship-repair or Marine Equipment sector)
 - Other (Please provide explanation)
7. Please identify the geographical scope of action of your organisation (only one possible answer)
- National level
 - Regional/local level
 - Multinational level (Which countries? _____)
8. Which of the following activities does your organisation conduct in the field of employment, training and skills? (possibility of more than one answer)
- Monitor/anticipate skill needs and competencies in the sector
 - Identification of current and future labour demand and supply
 - Development of standards and qualifications for the sector
 - Development of procedures for the recognition and accreditation of sectoral skills/occupational profiles
 - Analysis of the evolution of the sector workforce and its characteristics (age, gender, geographical origin, etc).
 - Development of activities to increase the inflow of workers into the sector
 - Development of Continuing Vocational Training activities for workers in the sector
 - Development of Training activities for unemployed workers in the sector
 - Development of Initial Vocational Education and Training activities in the Sector
 - Other activities for the promotion of vocational training and skills in the sector (please specify _____)
 - Other activities non related to the employment/skills issue (If so, please provide a brief explanation of these other activities)

Annex C. On-line questionnaire

C. Analysis of the interest of these structures/actors to engage in a European Council on employment and skills for the Shipbuilding, Ship-repair and Marine Equipment sector:

9. Please indicate which of the following possible fields and activities to be developed by a prospective Shipbuilding Skills Council at European level would be of interest for your organisation? (provide an answer for each question)

	No Interest	Little interest	Medium Interest	High Interest	Don't Know
Monitor/anticipate skill needs and competencies in the sector					
Identification of current and future labour demand and supply					
Proposals for standards and qualifications homogeneous at EU level					
Procedures for the recognition and accreditation of sectoral skills/occupational profiles					
Analysis of the evolution of the sector workforce characteristics (age, gender, geographical origin, etc).					
Activities to increase the inflow of workers into the sector					
Improvement of the mobility of workers between Member States					
Improvement of the mobility of students between Member States					
Exchange of good practices among countries, organisations, etc.					
Activities to promote Continuing Vocational Training for workers in the sector					
Activities to promote Training for unemployed workers in the sector					
Activities to promote Initial Vocational Education and Training in the Sector					
Other (please specify _____)					

10. Do you think it would be useful to have an European Council on Employment and Skills for the Shipbuilding, Ship-repair and Marine equipment sector

- Yes
- No
- Don't Know/ No answer

11. Would your organisation, in principle, be interested in participating in such a European Council on Employment and Skills for the Shipbuilding, Ship-repair and Marine equipment sector?

- Yes → Go to question 12
- No → END OF SURVEY. MANY THANKS FOR YOUR COLLABORATION
- Don't Know/No Answer → Go to question 12

Annex C. On-line questionnaire

12. Please identify the importance of the following elements for influencing your organisations' decision to participate in an European Council on Employment and Skills for the Shipbuilding, Ship-repair or Marine Equipment sector (please answer all questions)

	No Im- portan ce	Little Im- portan ce	Medi- um Im- portan ce	High Im- portan ce	Don't Know/ No Answer
The objectives, goals and tasks to be pursued by this EU level Sectoral Council					
The concrete/practical design and organisation of this EU level Sectoral Council					
The Commitment of relevant stakeholders and organisations from your Member State					
The Commitment of relevant stakeholders and organisations from other Member States					
The availability of external funding					
Others (specify _____)					

13. Which stakeholders do you think should be represented in this European Council on Employment and Skills for the Shipbuilding, Ship-repair or Marine Equipment sector (possibility of more than one answer)

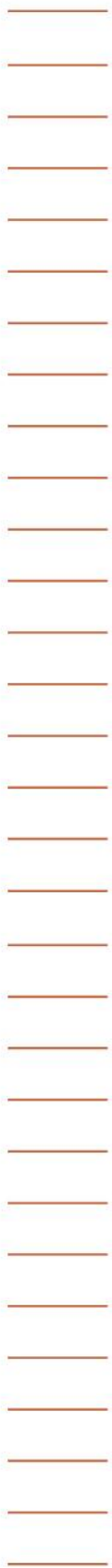
- Employers' Association related to the sector
- Trade Unions related to the sector
- Initial vocational education and training providers
- Continuing vocational training (CVT) providers
- Public authorities (Ministries responsible for Education, Employment, Industry)
- National/regional transversal/multipartite organisations (skills councils, training funds, etc)
- Other (please specify _____)

14. What type of contributions would you be ready make to this prospective European Council on Employment and Skills for Shipbuilding, Ship-repair or Marine Equipment sector (possibility of more than one answer)

- Share your own quantitative/qualitative information on skills and employment
- Share your own methodologies, tools, joint actions and policies on skills and employment
- Actively participate in the development of new quantitative/qualitative information, research activities on skills and employment
- Actively participate in the development of new tools, joint actions, policies on skills and employment
- Provide funding for this Council
- Other (please specify _____)

15. Do you have any further comment?

**END OF SURVEY
MANY THANKS FOR YOUR COLLABORATION**



Annex D. Other methodological materials

Annex D Other methodological materials



[English](#) [Français](#) [Deutsch](#) [Español](#)

San Sebastian, 7 May 2012

Dear Sir/Madam,

CESA (Community of European Shipyards' Associations) and **EMF (European Metalworkers' Federation)** as social partners in the Shipbuilding Social dialogue Committee are currently executing a project entitled "Identifying the actors in the shipbuilding sector in view of setting up a European Shipbuilding Council on Jobs and Skills" (please see attached their introductory letter). This project is supported by the **European Commission** and is currently being executed by **IKEI Research and Consultancy**.

EU Sector Councils on Skills and Jobs can be defined as councils composed of key stakeholders of a particular economic sector (i.e. representatives of trade unions/employer organisations, education and training providers, public bodies/authorities, etc.), intending to: conduct, collect and/or analyse studies on sectors' demands for skills and competences; confront the information on skills needs and supply; discuss the design of the sector related education and training programmes in order to achieve a better adequacy of the supply of training to the demand for skills and reduce current and future skills mismatches in relation with the technological evolution.

Having in mind these objectives, CESA and EMF, in collaboration with IKEI Research and Consultancy, have elaborated a short on-line questionnaire addressed to relevant sector organizations on the skills and jobs domains with three main goals:

1. Briefly identify and characterise these organisations
2. Map the activities conducted by these organisations in the field of employment and skills;
3. Analyse the interest of these organisations to engage in such a European Council on Skills and Jobs for the Shipbuilding/ship-repair/marine equipment sector.

Your organisation has been identified as a relevant stakeholder in your country dealing with skills and employment issues in the shipbuilding/ship-repair/marine equipment sector.

We would now kindly ask you to fill out this on-line questionnaire in the coming three weeks (it is foreseen that the surveying process will close by the 25th of May). It should not take you more than 15' to complete it and all your answers will be treated in a confidential way. You can access the questionnaire at the following link: [Questionnaire](#)

In case you have any questions, please do not hesitate to contact us to the following address below:

IKEI Research and Consultancy
Att: Jessica Durán
e-mail: jduran@ikei.es
Telephone: (int code) 34 943 426610
Fax: (int code) 34 943 423501

Thank you very much for your kind cooperation.

Yours sincerely,

Antonio Corral
Unit Director

Annex D Other methodological materials

[English](#) [Français](#) [Deutsch](#) [Español](#)

San Sebastian, 7 mai 2012

Madame, monsieur,

CESA (Community of European Shipyards' Associations) et la **FEM (Fédération européenne des Métallurgistes)** en tant que partenaires sociaux au sein du comité de dialogue social pour la construction navale mènent actuellement un projet intitulé « Identifier les acteurs dans le secteur de la construction navale en vue de mettre en place un conseil européen de la construction navale pour l'emploi et les compétences » (voir leur de présentation en annexe). Ce projet est soutenu par la **Commission européenne** et actuellement exécuté par **IKEI Research and Consultancy**.

Les conseils sectoriels de l'UE pour l'emploi et les compétences peuvent être définis comme conseils composés d'acteurs clé d'un secteur économique spécifique (par ex. représentants de syndicats/organisations patronales, prestataires de l'enseignement et de formations, organes/autorités publics, etc.), avec pour objectifs : conduire, rassembler et/ou analyser des études sur les demandes des secteurs en termes de compétences ; confronter les informations sur les besoins et l'offre en termes de compétences ; discuter de la conception du secteur en relation avec les programmes d'enseignement et de formation afin d'arriver à une meilleure adéquation entre l'offre de formations et la demande en compétences et réduire les disparités en termes de compétences futures et actuelles en lien avec l'évolution technologique.

En ayant à l'esprit ces objectifs, CESA et la FEM, en collaboration avec IKEI Research and Consultancy, ont élaboré un bref questionnaire en ligne sur les compétences et l'emploi adressé à toutes les organisations sectorielles pertinentes avec trois objectifs principaux:

1. Identifier et caractériser brièvement ces organisations
2. Répertoire les activités de ces organisations dans le domaine de l'emploi et des compétences ;
3. Analyser l'intérêt de ces organisations à s'engager dans un tel conseil européen pour l'emploi et les compétences dans le secteur de la construction et réparation navales /de l'équipement maritime.

Votre organisation a été identifiée comme un acteur pertinent dans votre pays sur les questions d'emploi et de compétences dans le secteur de la construction et réparation navales et de l'équipement maritime.

Nous souhaitons vous demander de compléter ce questionnaire en ligne au cours des trois prochaines semaines (la fin du processus d'enquête est prévue le 25 du mai). Répondre aux questions ne devrait pas prendre plus de 15 minutes et toutes vos réponses seront traitées de manière confidentielle. Vous pouvez accéder au questionnaire via le lien suivant:

[Questionnaire](#)

En cas de questions, n'hésitez pas à nous contacter :

IKEI Research and Consultancy
Att: Jessica Durán
E-mail: jduran@ikei.es
Téléphone: 00 34 943 426610
Fax : 00 34 943 423501

En vous remerciant de votre coopération,

Sincères salutations,



Antonio Corral
Unit Director

Annex D Other methodological materials

[English](#) [Français](#) [Deutsch](#) [Español](#)

San Sebastián, 7 Mai 2012

Sehr geehrte Damen und Herren,

CESA (Verband der europäischen Werften) und der **EMB (Europäischer Metallgewerkschaftsbund)** führen derzeit als Partner des Sozialdialogausschusses für den Schiffbausektor das Projekt „Ermittlung der Akteure im Schiffbausektor zur Einrichtung eines Europäischen Kompetenz- und Beschäftigungsrates für den Schiffbausektor“ durch (siehe beigefügtes Anschreiben zur Projektvorstellung). Das Projekt wird von der **Europäischen Kommission** gefördert und von **IKEI Research and Consultancy** umgesetzt.

Europäische Kompetenz- und Beschäftigungsrate können als Gremien definiert werden, die sich aus den wichtigsten Interessengruppen eines bestimmten Wirtschaftssektors zusammensetzen (d. h. Vertreter von Gewerkschaften/Arbeitgeberorganisationen, Bildungs- und Ausbildungseinrichtungen, öffentliche Stellen/Behörden usw.) und Folgendes beabsichtigen: Durchführung, Sammlung und/oder Analyse von Studien zum Qualifikations- und Kompetenzbedarf im Sektor; Gegenüberstellung der Informationen über Qualifikationsbedarf und -angebot; Beratung über die Gestaltung der sektorbezogenen Bildungs- und Ausbildungsprogramme zur besseren Abstimmung des Ausbildungsangebots auf den Qualifikationsbedarf und Verringerung bestehender und zukünftiger Missverhältnisse im Zusammenhang mit der technologischen Entwicklung.

Vor diesem Hintergrund haben CESA und der EMB in Zusammenarbeit mit IKEI Research and Consultancy einen kurzen Online-Fragebogen erstellt, der sich an alle relevanten Organisationen des Sektors richtet, die in den Bereichen Kompetenzen und Beschäftigung tätig sind. Der Fragebogen dient dazu:

1. relevante Organisationen zu ermitteln und kurz zu beschreiben,
2. die Tätigkeiten dieser Organisationen in den Bereichen Kompetenzen und Beschäftigung zu erfassen,
3. das Interesse dieser Organisationen zu analysieren, sich an einem derartigen Europäischen Kompetenz- und Beschäftigungsrat für den Schiffbau-/Schiffreparatur-/Schiffausrüstungssektor zu beteiligen.

Ihre Organisation wurde in Ihrem Land als relevante Interessengruppe ermittelt, die sich mit Kompetenz- und Beschäftigungsfragen im Schiffbau-/Schiffreparatur-/Schiffausrüstungssektor beschäftigt.

Wir bitten Sie deshalb, diesen Online-Fragebogen innerhalb der nächsten drei Wochen auszufüllen (als Frist für diese Befragung ist der 25-Mai vorgesehen). Dies wird nicht länger als 15 Min. dauern und Ihre Antworten werden vertraulich behandelt. Sie können den Fragebogen über den folgenden Link aufrufen: [Fragebogen](#)

Wenn Sie Fragen hierzu haben, können Sie sich gerne an uns wenden:

IKEI Research and Consultancy
z. Hd.: Jessica Durán
E-Mail : jduran@ikei.es
Tel.: +34 943 426610
Fax: +34 943 423501

Wir danken Ihnen im Voraus für Ihre Unterstützung.

Mit freundlichen Grüßen,



Antonio Corral
Bereichsleiter

Annex D Other methodological materials

[English](#) [Français](#) [Deutsch](#) [Español](#)

San Sebastián, 7 de Mayo de 2012

Estimado Señor/Señora:

CESA (Comunidad de Asociaciones Europeas de Construcción y Reparación Naval) y **EMF (Federación Europea de Trabajadores del Metal)**, como agentes sociales del Comité de Diálogo Social del Sector Naval, están llevando a cabo el proyecto "Identificación de los principales actores en el sector de la construcción naval en vistas a crear un Consejo Europeo Sectorial sobre Empleo y Competencias" (ver carta adjunta). Este proyecto está respaldado por la Comisión Europea, y está siendo elaborado por **IKEI Research and Consultancy**.

Un "**Consejo Europeo Sectorial sobre Competencias**" puede definirse como un consejo compuesto por actores de interés clave (es decir, representantes de sindicatos y organizaciones empresariales, centros de formación, autoridades/organismos públicos, etc.), con la finalidad de: elaborar, recopilar y/o analizar estudios sobre demandas de habilidades y competencias en el sector; comparar las necesidades de competencias con la oferta existente; discutir sobre el diseño de los programas formativos relacionados con el sector, de cara a conseguir una mayor conciliación entre la oferta formativa y la demanda real de competencias, y reducir los desajustes de las competencias actuales y futuras respecto a la evolución tecnológica.

Teniendo en cuenta esos objetivos, CESA y EMF, en colaboración con IKEI Research and Consultancy, han elaborado un breve cuestionario *on-line* dirigido a organizaciones relevantes del sector en el campo de las competencias y el empleo, con tres objetivos fundamentales:

1. Identificar y describir brevemente esas organizaciones;
2. Señalar las actividades desarrolladas por esas organizaciones en el campo del empleo y las competencias;
3. Analizar el interés de esas organizaciones por participar en un "Consejo Europeo sobre Empleo y Competencias" para el Sector de la Construcción y Reparación Naval e Industria Auxiliar Marítima.

Su organización ha sido identificada como un actor relevante en su país en el ámbito de las competencias y el empleo para el Sector de la Construcción y Reparación Naval e Industria Auxiliar.

Nos gustaría solicitarle que por favor nos ayude a completar este cuestionario *on-line* a lo largo de las próximas 3 semanas (está previsto que el proceso de encuestación finalice el 25 de mayo).

Rellenar el cuestionario no debería llevarle más de 15 minutos. Todas sus respuestas serán tratadas de manera confidencial. Puede acceder al cuestionario a través del siguiente link [Encuesta](#)

En caso de duda o problema, por favor no dude en ponerse en contacto con nosotros en la siguiente dirección:

IKEI Research and Consultancy
Att: Jessica Durán
e-mail : jduran@ikei.es
Teléfono: (+34) 943 426610
Fax: (+34) 943 423501

Muchas gracias por su amable colaboración.

Atentamente,



Antonio Corral
Director de Área

Annex D Other methodological materials



Brussels, 18 April 2012

Dear Sir/Madam,

CESA (Community of European Shipyards' Associations) and **EMF (European Metalworkers' Federation)** as social partners in the Shipbuilding Social dialogue Committee are currently executing a project entitled "Identifying the actors in the shipbuilding sector in view of setting up a European Shipbuilding Council on Jobs and Skills". This project is supported by the European Commission.

The purpose of the project is to identify the main national actors and structures involved in research and development on skills as well as employment in the shipbuilding and ship-repair sector and map their activities, with the aim of building a network of relevant actors at European level and, at the same time, evaluating the added-value and advantages of setting up a European Shipbuilding, Ship Repair and Marine Equipment Council on Jobs and Skills.

CESA and EMF have entrusted **IKEI Research and Consultancy** (www.ikei.es) to collaborate with us in the execution of this project. In this regard, we would like to ask you to fully collaborate with IKEI by filling out the proposed on-line questionnaire on the issue of a European Shipbuilding, Ship Repair and Marine Equipment Council on Jobs and Skills.

This questionnaire will be used as a crucial input for the project, so your collaboration is key to make this project a success over the next months. This will certainly contribute to the development and improvement of our sector, its companies and its employment.

In the meantime, we would like to thank you in advance for your support and wish you all the best.

Yours sincerely,

Reinhard Lueken

Secretary General
CESA

Ulrich Eckelmann

General Secretary
EMF

Annex D Other methodological materials



Bruxelles, 18 avril 2012

Madame, monsieur,

CESA (Community of European Shipyards' Associations) et la FEM (Fédération européenne des Métallurgistes) en tant que partenaires sociaux au sein du comité de dialogue social pour la construction navale mènent actuellement un projet intitulé « Identifier les acteurs dans le secteur de la construction navale en vue de mettre en place un conseil européen de la construction navale pour l'emploi et les compétences ». L'ensemble du projet est soutenu par la **Commission européenne**.

Le projet vise à identifier les principaux acteurs et principales structures impliqués au niveau national dans la recherche et le développement dans le domaine des compétences et de l'emploi dans le secteur de la construction et de la réparation navales et à faire un inventaire de leurs activités ; l'objectif étant de créer un réseau d'acteurs pertinents au niveau européen et d'évaluer la valeur ajoutée et les avantages d'une mise en place d'un conseil européen pour l'emploi et les compétences dans le secteur de la construction et réparation navales et de l'équipement maritime.

CESA et la FEM ont fait appel à **IKEI Research and Consultancy** (www.ikei.es) pour collaborer à l'exécution de ce projet. A cette fin, nous vous remercions de collaborer avec IKEI en complétant le questionnaire en ligne sur la question d'un conseil pour l'emploi et les compétences dans le secteur de la construction et réparation navales et de l'équipement maritime.

Ce questionnaire est une contribution cruciale pour le projet, votre collaboration est de ce fait essentielle à la réussite du projet tout au long des prochains mois. Cela contribuera certainement au développement et à l'amélioration de notre secteur, de ses entreprises et de ses emplois.

Nous vous remercions d'ores et déjà pour votre soutien.

Meilleures salutations,

Reinhard Lueken

Ulrich Eckelmann

Secrétaire Général
CESA

Secrétaire Général
EMF

Annex D Other methodological materials



Brüssel, 18 April 2012

Sehr geehrte Damen und Herren,

CESA (Verband der europäischen Werften) und der EMB (Europäischer Metallgewerkschaftsbund) führen derzeit als Partner des Sozialdialogausschusses für den Schiffbausektor das Projekt „Ermittlung der Akteure im Schiffbausektor zur Einrichtung eines Europäischen Kompetenz- und Beschäftigungsrates für den Schiffbausektor“ durch. Das gesamte Projekt wird von der Europäischen Kommission gefördert.

Es soll dazu dienen, die wichtigsten nationalen Akteure und Strukturen im Bereich der Forschung und Entwicklung zu Kompetenzen und Beschäftigung im Schiffbau-, Schiffreparatur- und Schiffausrüstungssektor zu ermitteln und ihre Aktivitäten zu erfassen, um ein Netzwerk aus relevanten Akteuren auf europäischer Ebene einzurichten und zugleich den Mehrwert und die Vorteile eines Europäischen Kompetenz- und Beschäftigungsrates für den Schiffbau-, Schiffreparatur- und Schiffausrüstungssektor zu analysieren.

CESA und der EMB haben IKEI Research and Consultancy (www.ikei.es) damit beauftragt, die Durchführung dieses Projekts zu unterstützen. Deshalb bitten wir Sie, mit IKEI zusammenzuarbeiten und den hierfür bereitgestellten Online-Fragebogen zum Europäischen Kompetenz- und Beschäftigungsrates für den Schiffbau-, Schiffreparatur- und Schiffausrüstungssektor auszufüllen.

Dieser Fragebogen wird als wichtiger Beitrag in das Projekt einfließen. Deshalb ist Ihre Unterstützung für den Erfolg des Projektes in den nächsten Monaten entscheidend und wird mit Sicherheit förderlich für die Entwicklung und Verbesserung unseres Sektors, seiner Unternehmen und Beschäftigung sein.

Wir danken Ihnen im Voraus für Ihre Unterstützung und wünschen Ihnen alles Gute für die Zukunft.

Mit freundlichen Grüßen,

Reinhard Lueken

Ulrich Eckelmann

Generalsekretär
CESA

Generalsekretär
EMF

Annex D Other methodological materials



Bruselas, 18 de abril de 2012

Estimado Señor/Señora:

Desde CESA (Comunidad de Asociaciones Europeas de Construcción y Reparación Naval) y EMF (Federación Europea de Trabajadores del Metal), como agentes sociales del Comité de Diálogo Social del Sector Naval, estamos llevando a cabo el proyecto "Identificación de los principales actores en el sector de la construcción naval en vistas a crear un Consejo Europeo Sectorial sobre Empleo y Competencias", que está respaldado por la Comisión Europea.

El objetivo del proyecto es identificar los principales actores y organizaciones nacionales implicados en el estudio y desarrollo de las competencias y el empleo en el sector de la construcción y la reparación naval, así como identificar sus actividades principales, con el objetivo de crear una red de actores relevantes a nivel europeo, y al mismo tiempo evaluar el valor añadido y las ventajas derivadas de la creación de un Consejo Europeo sobre Empleo y Competencias para el Sector de la Construcción y Reparación Naval e Industria Auxiliar Marítima.

Desde CESA y EMF hemos confiado en IKEI Research and Consultancy (www.ikei.es) para colaborar con nosotros en la realización de este proyecto. En este sentido, nos gustaría solicitarle que por favor colabore con Ikei rellenando el cuestionario *on-line* propuesto, en relación con la posible creación de un Consejo Europeo sobre Empleo y Competencias para el Sector de la Construcción y Reparación Naval e Industria Auxiliar Marítima.

El cuestionario será utilizado como una fuente de información fundamental para el proyecto, de manera que su colaboración es clave para que este trabajo resulte un éxito en los próximos meses. Sin duda, este estudio favorecerá el desarrollo y la mejora de nuestro sector, sus empresas y su empleo.

Mientras tanto, nos gustaría agradecerle de antemano su apoyo y desearle todo lo mejor.

Atentamente.

Reinhard Lueken

Ulrich Eckelmann

Secretario General
CESA

Secretario General
EMF