



# UPPRETAIL

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Development of an innovative apprenticeship in  
the retail sector

This project has been funded with support from the European Commission. This publication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

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## INTRODUCTION

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This document presents the main result of the Leonardo da Vinci project “DEVELOPMENT OF AN INNOVATIVE APPRENTICESHIP IN THE RETAIL SECTOR - UPPRETAIL (2013-1-ES1-LEO05-66582). The preparation of these Guidelines for Development of Apprenticeship in Retail VET system of Euro Southern area countries is based on the outcomes of the research stages of the project:

1. Research of preconditions for the development of the apprenticeship in the Retail VET system in Bulgaria, Spain, Italy and Portugal.
2. Comparative analysis of apparent good practice in apprenticeship system in Bulgaria, Spain, Italy and Portugal, seeking to define the common and different features, and with the apprenticeship situation in the DEVAPPRENT partners’ countries.

These guidelines are based on two main methodological approaches: policy learning and process approach.

Referring to policy learning, by apparent good practices of apprenticeship in the context of this project we mean the examples of various policies, measures, instruments and approaches for the development of apprenticeship in Retail Sector that can be the basis for policy learning and be used for the development of original solutions for developing apprenticeship in Bulgaria, Spain, Italy and Portugal. It means that these practices can include not only positive examples of effective practices, but also the ‘lessons’ from the failures and mistakes in the field of apprenticeship in Retail VET system.

The scope for learning from apparent good practice concerning apprenticeship can be defined and delimited by two main factors:

1. Comparability of the context and conditions of practices of apprenticeship in the partners’ countries. In this case, it is necessary to estimate to what extent the success or failure of concrete practices of apprenticeship depends upon the different conditions and features of national contexts. In so doing, it is possible to outline/estimate potential changes of context that could be favourable for the development of apprenticeship in the Retail VET system in Bulgaria, Spain, Italy and Portugal and to define how the know-how from the analysed measures can be effectively applied in the current context of these countries. We proposed to consider the following main factors of these contexts:
  - existing socioeconomic conditions of the countries (structure of economy in terms of size of enterprises, level of trade development, qualification and skills of the workforce, etc.),
  - specific features of the apprenticeship as a specific model of the national VET systems for the skills development (political economical orientation of apprenticeship model, access regimes),
  - patterns of cooperation and interactivity between stakeholders of the apprenticeship (government, employers, trade unions, training providers),
  - National policies and strategies of VET development (implementation of NQFs, introduction of outcome-based standards, modularization of VET).
2. Potential of the measures to provide know-how and ideas on how to facilitate effective implementation and development of apprenticeship in the Retail VET system of Bulgaria, Spain, Italy and Portugal. Specifically this is directly related to the contents of measures, their goals, objectives and effectiveness in solving different problems of organization, provision, funding of apprenticeship training, its quality assurance, cooperation between stakeholders, among other issues. These guidelines will focus on the following aspects for such policy learning:
  - How to strengthen the capacity of enterprises (especially retail SMEs) to take more responsibility for the enterprise and funding of apprenticeship?
  - How to motivate and support enterprises (especially SMEs) in the organization and funding of apprenticeship in the Retail Sector? How to make apprenticeship more attractive to employers?
  - What legal, fiscal concessions or exemptions can help support motivation of employers and trade unions to participate in the provision of apprenticeship in the Retail Sector?

- What are the possible ways and patterns of effective distribution and allocation of funding of apprenticeship that enable maximal output from modest volumes of funding?
- How to integrate effectively apprenticeship in the Retail Sector with the work processes in the enterprises, especially considering practices of outsourcing and subcontracting?
- How to enable, develop and sustain effective cooperation and interactivity between the stakeholders involved in apprenticeship?
- How to provide the supply of qualified tutors and trainers of apprenticeship in the retail enterprises?
- How to exploit existing infrastructure of initial and continuing VET for the development of apprenticeship (sectorial training centres, private providers of training, former employment training centres)?

Process approach requires designing the recommendations of guidelines referring to the requirements of the different stages of apprenticeship process from the marketing of apprenticeship and enrolment of apprentices to the assessment of competences and awarding of qualifications of apprentices. It also requires relating the recommendations to the different needs of stakeholders and participants involved in this process.

These guidelines are designed for all stakeholders and interest groups that are or will be involved in the implementation and development of apprenticeship in Retail VET system of Euro Southern area countries, and especially in Bulgaria, Spain, Italy and Portugal:

- Policy makers responsible for the policy and regulation of VET (including the issues of apprenticeship): Ministry of Education and labour market, Centre for Development of Qualifications and VET. These stakeholders need the information and knowhow on the apprenticeship funding policy or model, institutional structure of apprenticeship (rights, responsibilities of institutions, interactions between institutions), recommendations on updating and adapting legal regulations, as well as recommendations on compatibility of the currently developed VET policy instruments, (sectorial occupational standards, VET standards and national curricula of modular training) with the development of apprenticeship training.
- VET providers: Initial VET schools, regional VET centres, sectorial practical training centres, private providers of training, higher vocational education colleges. These stakeholders need know-how and recommendations about the organization of theoretical and practical training in apprenticeships (time, place), management of human resources in training institutions (teachers and trainers involved in apprenticeship activities), contracting with apprentices and enterprises, curriculum design, application of training methods.
- Enterprises and employer associations: Enterprises that provide training, sectorial associations of enterprises. These stakeholders need know-how and recommendations about cost-effective management and organization of apprenticeship in the context of human resources management and development activities of enterprise, know-how of the effective integration of apprenticeship training in the production process, methods for on-the- job training and quality assurance of training, recruitment and selection of apprenticeship supervisors and their qualifications, ideas about the coordination of apprenticeship training amongst the enterprises in the sectors/ branches.
- Stakeholders involved in the assessment of competences of VET graduates: VET trainers, tutors of the enterprises, public authorities, etc. These stakeholders need know-how and recommendations concerning organization and provision of competence assessment of apprenticeship.
- Trade unions and professional organizations: These stakeholders need the guidelines for monitoring and protecting the rights of apprentices, recommendations on the provision of support and guidance to apprentices in their workplaces, know-how concerning external quality assessment of apprenticeship.

The guidelines consist of the following parts:

1. Comparison of the context and processes of apprenticeship developments in the retail sector in Bulgaria, Spain, Italy and Portugal, identifying the common characteristics and main different aspects regarding the

general context of apprenticeship in the retail trade sector, the legal framework and the organization of apprenticeship.

2. Model for implementing the apprenticeship in the retail sector in Bulgaria, Spain, Italy and Portugal, at three levels: Policy level (involvement and roles of stakeholders, quality control, funding and legal regulation), VET centre (trainers' profile, training methodology, activities and assessment, link between the training in the VET centre and at the company) level and Company level (curriculum design, quality control, apprenticeship organization (role of the tutor), enrolment of apprentices, and assessment of learning outcomes).

# COMPARISON OF APPRENTICESHIP DEVELOPMENT IN THE RETAIL SECTOR IN BULGARIA, ITALY, SPAIN AND PORTUGAL

## The context of apprenticeship in the retail trade sector

Development of apprenticeship involves wide range of different contextual factors. Apprenticeship and work based learning usually depends on the structure of economy, the role played by the big enterprises and small and medium business, skills needs, social partnership models and other issues. All these contextual factors are specific to the country of origin and are related to the different pathways of socio-economic and cultural development of that country.

Looking into the context of apprenticeship in the retail trade sector in Bulgaria, Italy, Basque Country (Spain) and Portugal the following common features can be mentioned:

- Domination of the small and medium size enterprises (SMEs) in the sector. It implies certain difficulties in the development of apprenticeship due to the smaller financial and economic capacity and potential of such enterprises to implement apprenticeship, as well as the stronger orientation of SMEs to the competition based on prices and low labour costs. However, the domination of small and medium size enterprises also creates some pressure to establish different networks of cooperation and partnership to respond to challenges of skills shortage in the sector. This trend is favourable to the development of apprenticeship.
- Flexibility of the employment patterns in the sector. Retail trade sector in the all partners countries is flexible and open for the employment and self-employment of the different groups, including the vulnerable groups in the labour market, such as youth (in Italy) and migrants (Basque Country, Spain). Flexibility of employment is favourable to the development of apprenticeship, because flexible employment regimes also require more flexible and workplace oriented or based learning and training. In this way apprenticeship acquires more support from the main stakeholders of the sector and enterprises, especially from the side of employers and trade unions.
- Domination of the medium and low skilled jobs in the sector, implying higher precariousness of employment. This feature of the sector has different implications to the development of apprenticeship. From the one side, it is favourable for the short-term and low-cost apprenticeship schemes based on the quick provision of the basic workplace related know-how and skills. From the other side it precludes implementation and development of the solid dual apprenticeships that require bigger involvement and investments from the different stakeholders.

Looking to the **differences** in the context of retail trade in the partners countries several important factors can be noticed:

- Increasing of the differentiation of the retail trade services and orientation to the competition strategies based on innovation in Basque Country (Spain), which demands an increasing of new skills and qualifications in the sector, a favourable condition for the development of apprenticeship. Increasing digitalization of sales processes in this country may have different effects on apprenticeship: when the digitalization enhances development of the new work processes and emergence of new competence needs, it is favourable for apprenticeship; if digitalization takes the form of digital taylorism it may only enhance short-term and only workplace based apprenticeship providing basic vocational skills.
- Internationalisation of the trade sector activities in Portugal and increasing of the trade relationships with Portuguese speaking countries, which demands the development of new skills and competences that can be satisfied with the apprenticeship training schemes.

- Strong influence of the small and medium-sized enterprises and important regional disparities in the development of retail trade companies in Italy. The north-central regions, where the penetration of large retailers has been more intense, especially in the past decade, contrasts with the area of the South where the presence of large commercial distribution turns out to be smaller on average, although in moderate growth in recent years. Legal regulation of the retail trade business in some cases limits its development.

## Legal Framework and Environment of Apprenticeship in Italy, Basque Country (Spain), Portugal and Bulgaria

The legal frameworks that regulate or are related to apprenticeship in the partner countries are very diverse in many terms:

In terms of the institutional forms of apprenticeship, the legal acts of partner countries foresee very different types: in Italy it foresees apprenticeship integrated in the initial VET and compulsory education, apprenticeship for the employment training, continuing vocational training, higher education; in Basque Country (Spain) it exists legal regulations for dual apprenticeship; in Portugal national legislation affirms the leading role of the initial VET schools in the apprenticeship schemes and provides no legal status of worker for trainees and no status of employers for enterprises accepting trainees. In Bulgaria the company-based form of apprenticeship is foreseen only for the crafts sector.

In terms of the level and form of legal regulation a strong influence of regions can be found in defining delivery of apprenticeship training in Italy with tripartite contracts of apprenticeship and it foresees an increasing of the tendency of apprenticeships without contracts, a legal framework in Spain (Basque country) permitting the initiatives of regional and sectorial stakeholders in the establishment of apprenticeship schemes, a strong national regulation of apprenticeship regulating establishment of contracts between the trainees and VET providers in Portugal and a legal regulation of employers based apprenticeship in crafts in Bulgaria.

In **Italy**, the legal framework of apprenticeship is based on the special employment contract opening access to the apprenticeship as a right-duty to education and training (or first level) aimed at achieving a qualification through initial vocational education and training, professional apprenticeship, aimed at obtaining a professional qualification through training on job and apprenticeship for the acquisition of a diploma or advanced training (or higher apprenticeship), which allows to pursue degrees in secondary school and higher education, including undergraduate, master, PhD programs, as well as higher technical specialization.

Apprenticeship Contract is tripartite and concluded by the companies, the apprentice and the training institution. As for business, it is expected that it is possible to enter into a contract of high apprenticeship in all manufacturing sectors. With regard to apprentices, the contract may be entered into with young people aged between 18 and 29 years old.

The regulatory framework governing apprenticeship in Italy has recently been affected by important changes. The novelty of the rules should be seen as the need to make apprenticeship fully operational as a tool for inclusion, training, education, and cultural and professional growth for young people, and not just as a working contract.

**In the Basque Country (Spain)**, the internship in the school based initial VET system is regulated by Law in a general way, not specifically for each different sector. Initial Vocational Training (Official) addresses to school-aged young people which is arranged as follows:

- The specific professional modules of the initial professional qualification (PCPI): Addressed to people aged between 16 and 18 who didn't obtain the Mandatory Secondary Education Graduation (ESO) title.
- The intermediate degree training cycles (Intermediate Degree Technicians)
- The higher degree training cycles (Higher Degree Technicians)
- Specialisation courses (legislation pending), whose objective is the improvement of the students' competences of the Intermediate and Higher Degree series.

In the Initial Vocational Training (official), the internships in companies (FCT – Training in the workplace) are mandatory, meaning that they are part of the educational curriculum.



Employment training has more attributes of the dual apprenticeship regulation. The Royal Decree 395/2007, of March 23, regulates the different educational initiatives which form the vocational training subsystem for the employment, its functioning and funding rules, and its organizational structure and institutional participation.

Within the employment training programs, the education linked to obtaining a Certificate of Professionalism is gaining more weight. The Certificate of Professionalism is an official document which recognizes the professional competences that each person has got for the development of a work related activity with significance for the employment. It refers to the qualifications of the National Catalogue of Professional Qualifications; it is issued by the Labour Administration and determines the education required for each profession in the workplace.

Apprenticeship Courses are one of the modalities of the **Portuguese** VET system and consist in initial training of young people, where the main focus is its integration in labour market. Therefore, the training in VET institution takes place at the same time as the practice in real context in a company (PTW), in an alternating system.

Before the PTW starts, VET entities must identify potential Entities of Support to Alternating (ESAs) for its development, immediately after the in-class training gets started. The first step is the identification of a potential ESA near the partnership network, according to the required profile. The first contact with potential ESA is established by training manager (of VET entity) near human resource manager of the identified company. If the company is interested and available to be an ESA, an agreement is established between both entities. It must be noticed that this agreement includes the terms of reference of the PTW<sup>1</sup>, individual training plan for each trainee<sup>2</sup>, responsibilities of each one of the stakeholders, schedule and assessment.

The development of apprenticeship courses in retail sector it depends on public funding which is provided by the IEFP, I. P.

In **Bulgaria** the traineeship and apprenticeship are not subject on special normative document (law, ordinance, decree, regulation, etc.), but are discussed in several laws and sub-legislative acts:

- Law on Employment Promotion;
- Craft Act that settles the practice of crafts, organization of crafts and artisan training
- Law on Vocational Education and Training, which regulates the practical training, organized as educational practice and work-based practice;
- Schools can organize themselves and/or cooperate with legal and physical individuals producing goods and services, fulfilling the educational requirements for achieving qualification in a profession or documentation on vocational training school or the applicant for vocational training.

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<sup>1</sup> As established by the Decree n. 1497/2008 of 19<sup>th</sup> of December.

<sup>2</sup> Usually negotiated between Training Manager of VET entity and HR Manager or Tutor of the company.

## Organisation of apprenticeship in the retail sector: institutions, stakeholders and their partnership

Organisation of apprenticeship training in the partners' countries is very diverse with various roles and powers of involved partners and stakeholders.

In **Italy** the in company training is organised by the collective agreements between trade unions and employers, where employers enjoy high autonomy in the definition and change of contents of curricula, certification of skills and competences. The regulation and trade union agreements have given the possibility to the commercial sector to pay training course for apprentices inside the company: collective agreements and bilateral bodies define the notion of training in the company and determine, for each training profile, duration and mode of delivery of training, recognition of the professional qualification and recording in the training booklet.

In other words, there are three distinct features of the organization of apprenticeship in Italy:

1. The notion of business training (training inside the company);
2. The identification of training profiles for each reference and educational profile, determining the duration and mode of delivery of training;
3. The establishment of procedures for the recognition of professional qualifications and recording in the training booklet.

Another distinctive feature of the organization of apprenticeship in Italy is the development of apprenticeship schemes at higher education level.

The organization of apprenticeship in **Basque Country (Spain)** is characterized by the minor role of business stakeholders in making decisions on the funding and organization of apprenticeship, as well as good relationships and coordination between training providers and regional administration.

In general, the normative regarding Vocational Training for Employment comes from the Spanish Government, but the Basque Autonomous Region has competences transferred regarding Education and Employment, and therefore it is able to develop and adapt the norms to the particularities of its region.

In general, there is a good coordination among the training centres and the administration. At first, the norms are already given, as well as the curriculum design for each professional qualification, but there is also some leeway for adaption to the region. Regarding the internships, the Education Centre informs the Administration about the development of the internship (calendar, timetable, and others) and coordination between both parties is established. The training centre, following the curriculum design for each professional qualification, establishes the standards of the student evaluation related to the component of the apprenticeship, which will take place in the enterprise. It is responsible for finding the most appropriate companies trying to guarantee that the training is suitable for acquiring the competences which the student should get in order to obtain the qualification.

Another distinctive feature of the organization of apprenticeship in Spain is the strong reference of the contents of training to the national occupational standards.

The main specific features of the organisation of apprenticeship training in **Portugal** is, on one hand the wide variety of involved training providers (including initial VET centres, private training entities, employers, employment agencies, etc.) and, on the other hand, the centralization of the regulation and financing on the state, under the management of the Employment and Professional Training Institute (IEFP, I. P.).

IEFP, I. P. provides public service and its mission is to stimulate the creation and qualification of Portuguese workforce and to fight unemployment, by executing the active policies of employment, namely vocational and educational

training. To achieve its mission, IEFP, I. P. has decentralised services, a structure which provides a service of proximity in all national territory. Decentralised services are organised in a called Centres Network, composed by:

- Employment Centres;
- Employment and VET Centres;
- Training and Professional Rehabilitation Centres.

The Employment and VET Centres are able of providing Apprenticeship Courses. However, other entities - External Entities of Training (EET) - can also provide this VET modality, such as:

- VET Centres with subsidiary management of IEFP, I. P.;
- VET institutions with active protocols of collaboration also with IEFP, I. P.;
- Other entities with IEFP, I. P. authorization and finance support.

Organisation of apprenticeship in **Bulgaria** is distinguished by the high diversity of organization and funding schemes. Financing activities for organization of traineeship and apprenticeship in companies and public institutions is not uniform and is performed by different sources. Mostly it is publicly funded, mainly from the state budget and European Social Funds (ESF), but there are examples of their own (in-house), and for funding of various projects and programs of NGOs.

- Another distinctive feature of the organisation of apprenticeship in this country is low state regulation and coordination of apprenticeship initiatives in the field of employment and labour market policies leading to lack of coordination of stakeholders and their responsibilities. Nevertheless, it is possible to identify the main stakeholders of the apprenticeship training and their responsibility as described below: Ministry of Education and Science coordinates and ensures the methodological control of the interaction between schools and employers.
- Regional Education Inspectorates are responsible for the identification of young students which dropped out from school and provide information on the regional LOD range. Their responsibility is also to inform and advice students who dropped out from school, about traineeship and apprenticeship.
- Employment Agency provides methodological guidance, perform overall coordination and organization for implementation of activities to promote and support traineeship and apprenticeship. The agency allocates funds to targeted programs about traineeship and apprenticeship.
- Regional Employment Service provides methodological assistance and support of the “Labour Office” in the implementation of activities to promote and support traineeship and apprenticeship. They also coordinate the communication and interaction between persons in charge, at regional level, by promotion of activities of traineeship and apprenticeship.
- Training institutions are responsible for concluding an agreement on conducting training, for the acquisition of a professional qualification and/or key competencies and by issuing documents of successful graduates.
- Employers have as responsibility: the creation of workplaces for traineeship and apprenticeship, the conclusion of individual work contracts with trainees/apprentices; the payment of salaries to the employed trainees and apprentices for the actual work time, in accordance with the provisions of the Labour Code; the insurance of the employed trainees/apprentices, according to the Social Insurance Code and the Health Insurance Act; the additional payment of the remuneration of mentors entrusted with the training of employed young apprentices.

## DEVELOPMENT OF INNOVATIVE APPRENTICESHIP IN RETAIL SECTOR IN BULGARIA

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### Overview of the apprenticeship courses in Bulgaria

The study of the available information indicates that in the past in Bulgaria (before changes in 1989) there was a tradition of traineeship specialists with secondary education in "Retail". Schools, which trained professionals in this field (vocational schools - colleges and technical schools, as well as among the general schools (school) with vocational training and vocational training centres (PEC) had contracts with the state companies where they held traineeship students both during the training cycle and the state practices. A lot of young graduates with secondary education and relevant specialty are joining the enterprise in which they were trainees.

Nowadays in Bulgaria there is no united system of traineeship/apprenticeship. Some of the larger companies in this area have similar practices, which in most cases are carried out within the projects financed by pre-accession funds after accession to the EU Structural Funds, the so-called Operational programs or other programs of the EU "Leonardo da Vinci", "Grundtvig" and others. On the other hand secondary schools which prepare such images (vocational schools) have almost no opportunity to organize work experience for their students. This is due to their limited budgets which are not sufficient to finance the internships to students.

The introduction of a dual system of education will begin with pilot programs as early as 2015 - 2016 year. In this first stage of project financing EU funds will be used, thus the business and professional schools will be supported with a resource.

Apprenticeship programs can be an essential part of professional training, in which young learners spend regulated time at school and in the firm. Thus, deeper connection between theory and practice will be achieved. Apprenticeship makes students more self-confident and more skilful and open to new positions in companies. Unfortunately, at present this opportunity for professional training is still not sufficiently active in Bulgaria. Restrictions are largely determined by the way which vocational training as well as in vocational schools and in vocational training centres are regulated. Obviously, for apprenticeship to be effectively used as a form of training in a profession, it requires some changes in the legal and institutional framework of the management of continuing vocational training (CVT), including apprenticeship. This change includes the regulation of relations between public authorities, educational institutions (schools and VTC) and businesses, including financing of the system of apprenticeship.

### General conditions for the implementation of these guidelines and recommendations

This handbook has been developed within the project "Development of innovative apprenticeship in the field of retail" (Uppretail (2013-1-ES1-LEO05-66582). It is addressed to all stakeholders who are representatives and have clearly stated interest in the "retail" and in particular in the preparation of professionals in this field by creating a system of apprenticeship. On the one hand, these are the various professional organizations (unions, associations, etc.) of retailers as well as social partners (trade unions and employers' organizations), on the other hand, these are training organizations (vocational schools and vocational training centres), government institutions involved in vocational education and training (Ministry of Education and Science (MES), Ministry of Labour and Social Policy (MLSP), the National Agency for Vocational Education and Training (National Agency) and the Regional inspectorates of education in all districts of the country. Stakeholders are mostly all small and medium "retail" enterprises which need better trained personnel.

The purpose of this handbook is to outline the basic terms and conditions for the establishment of an apprenticeship in retail. The document describes the legal and institutional framework of continuing vocational training (CVT), including apprenticeship. The indicated regulation should govern the organization of apprenticeship (internship) in SMEs. The role and responsibilities of all stakeholders in the organization of the process of apprenticeship is also commented.

## Guidelines for the improvement of the development of apprenticeship on Bulgarian retail sector

### Policy level

The institutional framework in Bulgaria for the management of continuing vocational training (CVT), including apprenticeship, is built at national, regional and local level.

National level		
Institution	Main responsibilities	Mission
<b>The Council of Ministers (CM)</b>	Determines the state policy in the field of education, including vocational education and training, employment and the labour market.	<p>The different ministries are involved in: development, coordination and actualizing of the SER for acquiring vocational qualification; development, coordination and actualizing of the List of professions for vocational education and training; coordination of the state plan for admission in schools which are funded by allocating funds approved by their budget for vocational education and training and monitoring their use; activities of the board and committees of experts in professional fields NA.</p> <p>Representative organizations of employers, workers and employees at national level participate in: the development, coordination and actualizing of the SER for acquiring vocational qualification; development, coordination and actualizing of the List of professions for vocational education and training; activities of the board and committees of experts in professional fields at NA; organization of examinations for professional qualification.</p>
<b>Ministry of Education and Science (MES)</b>	Manages, coordinates and implements the state policy in the field of vocational education and training; regulates and guides the continuing vocational training carried out by the system of vocational schools, vocational high schools, art schools, vocational colleges and universities. Minister of Education and Science approves State education Requirements (SER) for the acquisition of professional qualification, approves the List of Professions for Vocational Education and Training, provides conditions for the implementation of SER in the vocational education and training, approves qualification programs in the vocational education and training system.	
<b>Ministry of Labour and Social Policy (MLSP)</b>	Develops, coordinates and implements the state policy to promote employment and training for acquiring professional qualification of unemployed and employed; It is in charge of preparing the annual National Action Plan for Employment, for the determination of training needs through analysis of trends in the labour market and for the organization of professional counselling for adults; organizes the development and maintenance of the National Classification of Occupations in Bulgaria.	
<b>Executive Employment Agency (EEA) at the Minister of Labour and Social Policy</b>	Implements the state policy on promotion of employment, protection of labour market, career counselling, vocational and motivational training of unemployed and employed as well as mediation services in employment.	
<b>National Agency for Vocational Education and Training (National Agency)</b>	Is a state authority for licensing activities in the vocational education and training as well as coordination of institutions relevant to vocational guidance, training and education. NA develops draft SER for acquiring professional qualification for vocational education and training, develops and actualizes the list of professions for vocational education and training, regulates vocational training carried out by licensed centres for vocational training and various types of vocational schools.	
<b>Ministry of Culture (MC)</b>	Implements the state policy in art schools; participates in the development, coordination and actualizing of standards acquisition of professional qualification; participates in the development, coordination and actualizing of the list of professions for vocational education and training.	
<b>Ministry of Health (MH)</b>	Is involved in coordination of the List of Professions for Vocational Education and Training; defines chronic diseases, physical and sensory disabilities and contraindicated professions and courses for vocational education and training from the List of Professions for Vocational Education and Training.	
Regional level		
Institution	Main responsibilities	

<b>"Regional Employment Service" (REO)</b>	Organize the implementation of state policy on training for acquiring professional qualification; propose measures and training projects; coordinate and support the activities of the local directorates "Labour", including counselling services and guidance in the region.
<b>Regional Inspectorates of Education (RIE)</b>	Conduct state policy in the field of vocational education and training by developing projects, programs and strategies for the development, operation and improvement of vocational education and training in the region.
<b>Regional Administration (RA)</b>	Participate in the implementation of state policy on employment and vocational qualification - at regional level.
<b>Local level</b>	
<b>Institution</b>	<b>Main responsibilities</b>
<b>Municipalities</b>	Take part in the formation of policy in the field of vocational education and training in their territory and in the financing through the municipal budget primarily activities related to defining staff needs and improvement of material and technical base of schools.
<b>Directorates "Labour" (LOD)</b>	Perform intermediate activity to find work; provide professional information, advice and guidance for inclusion in the most appropriate program / measure of employment and training; organize vocational and motivational training of employed and unemployed

Social partnership in the field of continuing vocational training (CVT), including apprenticeships.

Social partnership is a critical factor for the quality of the actual training and human resources, viewed as employability. Social partnership is implemented through social dialogue between the vocational training institutions and representatives of the social partners - employers and trade unions, as well as at enterprise level - between employers and representatives of employees.

#### National level

At national level the main subject of social dialogue should be the policy of vocational training, primarily as part of the overall process of education and training. There is no special body for social dialogue at national level on issues of CVT, as well as there is not such on the issues of vocational education and training in general.

Established in 2004 **Economic and Social Council of Bulgaria (ISSB)** is the national advisory body for social dialogue which discuss and make proposals on important strategic issues of education, including professional education and vocational training for adults in context of lifelong learning. Its role as a link between the various spheres of economic and social life is especially useful. From this position the proposed solutions and recommendations are multifunctional relevant.

The **National Council for Tripartite Cooperation (NCTC)** is created and operates at national level. According to the Labour Code, NCTC discusses and gives opinions on draft laws, draft regulations and solution of Ministers; it participates in the formation of policy on vocational education and training, but has no direct role in this area.

These functions are implemented through the **National Council for Promotion of Employment (NCEP)** to the Minister of Labour and Social Policy in the context of employment policy and vocational training of employed and unemployed individuals. NCEP is a permanent body of social and administrative cooperation and consultation in the development of employment policy.

Other organs of social and administrative partnership are:

- **National Advisory Council** on qualifications of the workforce which performs the following activities: coordination of national policies and strategies for vocational training of the workforce; coordination between the social partners at national level in lifelong learning; coordination of vocational training.
- **Permanent and temporary employment committees** to district councils for regional development contribute to the conduct and coordination of the national policy on employment of national and local interests for the development and implementation of regional plans for regional development of employment and reducing unemployment and interact with local authorities and local administration.
- Councils Cooperation Directorate "Labour" of Employment Agency monitors the implementation of programs and measures included in the National Action Plan for Employment, supervises compliance with the provisions of the selection of the programs and measures.

**The National Agency for Vocational Education and Training** is a good example of the application of the principle of social dialogue. The Management Board and the expert panels of the agency are based entirely on the principle of tripartite social partnership. Given the key role of the National Agency to ensure coordination between the institutions concerned with vocational education and training, as well as normative and methodological documents that the agency develops, effective social partnership can be concluded.



**Bulgarian Retail Association (BRA)** - it was founded in early 2009. It is an association of retailers across the country. The main aims and objectives of the association are the distribution, protection and development of trade, exploration, protection and dissemination of moral, economic and professional interests of the companies in the retail sector, as well as protection of the commercial rights of the members in front of the state. Association was established, in order to increase prosperity and profitability of its members and the sector for retail, to facilitate the creation and maintenance of a good environment for buyers, to provide members to remain competitive through informative conferences and seminars, to assist members in business development and regional strategies, to promote overseas trade relations and business partnerships, working closely with government ministries and other bodies in national projects in retail, to negotiate attractive prices for specific services to its members, to provide training for staff in retail, to develop and promote retail as an attractive career and to provide research and statistical analysis for the members to work on fundamentals. Currently the members of the Association support a total of about 800 stores with an approximate area of 100,000 square meters, annual turnover ~ 250 million. In companies, the members of the BRA employs nearly 3,000 people and the contributions paid for them are worth about 1 million lev.

**Bulgarian Industrial Association** – at national level, the Chamber actively participate in the social dialogue at national and international level, where it defends the interests of the Bulgarian business in changing legislation and administrative practices. The Members of BIA branch organizations are part of all relevant sectorial collective agreements. The modern look of the BIA is largely determined by the manner of work, the serious potential of available specialists and the variety of services that its members offer.

BIA works actively on current issues of the economy as it provokes public discussion on relevant topics and in a constructive spirit, offers possible solutions: BIA is the author of numerous expert studies, draft legal documents and others, aiming to introduce the best available worldwide and European practices; The Chamber is leading business organization involved in the development of environmental legislation, including the field of waste management and climate change; BIA first drew attention to the problem of heavy company and inter-company indebtedness and since 2002 it provides annual analysis on the topic; The Chamber actively works to reform the infrastructure and energy system of the country, to reduce the administrative burden on businesses by reducing the regulatory regimes, to reduce the share of the informal economy and to overcome the serious problems in the pension and health - insurance system.

During these 20 years of serious political and economic transition Bulgarian Industrial Association has established itself as one of the leading partners of the state in setting economic policy, keeping its party disengagement and following only its principles of national responsible behaviour, competence and integrity.

**Bulgarian Chamber of Commerce and Industry (BCCI)** (established in 1895) is an independent, non-governmental association to support, promote, represent and protect the economic interests of its members, contributing to the development of international economic cooperation and assistance to European and international integration of Bulgaria. The Court's work is based on the principles of voluntary membership, autonomy and self-financing. BCCI seeks to establish fair and ethical relationships between businesses - community. Bulgarian Chamber of Commerce and the 28 regional chambers of commerce / chambers are integrated into a single system of Bulgarian chambers of commerce, which has about 53,000 retailers, associations and others. The council of branch organizations was founded and operates with BCCI. It was established on January 14, 1999. The main objectives of the Council and its activities are aimed at supporting the dialogue between state institutions and businesses, this lead to balancing the interests of professional organizations on key issues related to the creation of a favourable climate for the development Bulgarian business. Its members are 104 professional organizations.

### Regional level

At the regional level - education inspectorates and employment services maintain active links with various structures of social partnership and / or participate in them. Specific positive example of such a structure is permanent and temporary employment committees to district councils for regional development, regulated by the EPA.

### Local level

At local level social partnership is very important. It is the place where "it connects" the needs of socio-economic development and the specific needs of the labour market with opportunities to provide training and to solve the problems of compliance with the requirements of employers. With few exceptions, the social dialogue at the local level in terms of continuing training is not sufficiently effective.

A basic tool for the realization of social partnership is the collective agreement (CA) and the main way of providing its development is the social dialogue.

The statutory regulation offers opportunities to conclude a collective agreement in enterprises, collective agreement at sectorial and branch level and collective agreements by municipalities.

Development of CVT as a means of maintaining the professional qualification of employees, in particular the adaptability of the workforce, the collective agreement is an important condition. But as a rule the practice of concluding collective agreements in companies is still rare and where contracts are negotiated, it hardly includes indicator for apprenticeships, as well as provision of training to employees. There is no development of plans for training staff which should be an annex to collective agreements. In this respect the main initiative should be in the unions.

The Collective Labour agreement at sectorial and branch level can determine the overall requirements and guidelines for the development of CVT on the basis of a national agreement between the national organizations.

Identification of the strengths, weakness and guidelines for improvement of apprenticeship courses of the retail sector in Bulgarian context and at policy level.

After the summarization of the result of the interviews, made under the first activities of the UPPRETAIL project, there are identified some strengths, weakness and possibilities for improvement of the apprenticeship courses at policy level, pointed in the table below:

### Strengths

- Planning of National policies, stimulating the apprenticeship;
- Existence of a national funding programme for implementation of apprenticeship courses;
- The law requires that if the hired apprentice is under 29 years old, the employer receives funds in the amount of the minimum wage, means of insurances, and for training of the employee.

### Weaknesses

- The opportunity for apprenticeship is regulated by the Law on Employment Promotion and funded by the National Action Plan for Employment and the Operational Programme Human Resources Development. This is a subsidized employment – reimbursement for the salary and insurances on the employer's bill. Problem is the delay in the recovering of these funds, after the deadline mentioned in the contracts;
- When applying for these opportunities sometimes there is a problem with the required documents;
- The law does not provide more detailed prescriptions and regulations for the organisation of apprenticeship;
- Lack of knowledge and recognition related to the VET system, in general, and the apprenticeship courses, in particular by young people, their families and also by companies of the retail sector.

### Possibilities of improvement

The main direction for the improvement of the development of apprenticeship on policy level is enhancing the capacity of all partners to influence policy referring CTV and to support its implementation in order to build a knowledge society, achieve social cohesion and a high standard of living based on higher employment.

This requires:

- regulatory changes and involvement of the state through its agencies in this process, so that a comprehensive and lasting solution to the problem with traineeship/apprenticeship can be achieved;
- to make the necessary legislative changes, which would give opportunity to all students graduating from vocational schools to be introduced into traineeship and apprenticeship;
- to include in the legal basis of apprenticeship more acts that would enhance and motivate enterprises to take part in apprenticeship by granting concessions and privileges;
- to establish effective inter-institutional relations between partners of the education and training services, the labour market and employers;
- to develop social dialogue in specific areas on priority problems of vocational education and training in accordance with the concept of lifelong learning;
- to establish and implement effective forms of bilateral cooperation between educational institutions and communities and businesses / employers;
- to achieve the direct involvement of the social partners - employers and employees with specific rights and obligations in the process;
- to improve the legal basis of social dialogue through collective bargaining, especially at the enterprise level with purpose of approaching the European indicators to include employees in the forms of lifelong learning;
- to provide the necessary information base for effective participation of the social partners in the governance process.

#### Apprenticeship provider level

Continuing vocational training, including apprenticeship, in Bulgaria is carried out by institutions operating in the formal education and training and institutions engaged in informal learning.

**Major institutions, which carry out CVT are:**

Institution	Main responsibilities
<b>Vocational training centres (VTC)</b>	<ul style="list-style-type: none"> <li>- Provide guidance on activities and educational lines. Activities should be organized by taking into account the acquisition of knowledge, skills and competencies. It is important to focus attention on professionalized modules in order to have a very clear idea of the definition of school capacity as well as efficacy of the training lines.</li> <li>- According to the way the vocational training is organized, conduct both formal and informal learning. They are entities licensed by the National Agency for the implementation of vocational training. VTC are state, municipal or private, Bulgarian with foreign participation.</li> <li>- Certify the completed training by documents according to SER for documents in the educational system (Ordinance № 4, 16.04.2003 on the documents in the system of public education, issued by the Minister of Education and Science, Gazette. 41 / 8.05.2003).</li> <li>- National Agency licenses VTC and then it controls their activities. All centres licensed after 2002, offer vocational training with the acquisition of I, II and III level qualification or as part of profession.</li> </ul>
<b>Vocational schools, Vocational high schools, Colleges</b>	<ul style="list-style-type: none"> <li>- Certify the completed training by documents according to SER for documents in the educational system (Ordinance № 4, 16.04.2003 on the documents in the system of public education, issued by the Minister of Education and Science, Gazette. 41 / 8.05.2003).</li> </ul>
<b>Centres for information and vocational guidance (CIVG)</b>	<ul style="list-style-type: none"> <li>- They should refer to the institutions of continuing vocational training although they are not developed as part of the system of vocational education and training.</li> <li>- National Agency licenses CIVG and then it controls their activities. All centres licensed after 2002, offer vocational training with the acquisition of I, II and III level qualification or as part of profession.</li> </ul>
<b>Universities, Specialized higher education institutes, Colleges of higher education</b>	<ul style="list-style-type: none"> <li>- They conduct continuing vocational training by specialized units at universities. These institutional units have different names, according to the decision of the Academic Council - "Sector for Postgraduate Studies", "Institute for Postgraduate Studies", "Centre for Continuing Education," "Open and Continuing Education" "Centre for Lifelong Learning" and other . Private colleges under HEA which organize training for degree "specialist" usually do not have separate internal structures, but also offer continuing education programs and specializations.</li> </ul>
<b>Various non-governmental organizations, enterprises and firms</b>	<p>CVT is informally offered by various non-governmental organizations, enterprises and firms. The chitalishte (public libraries) have potential for such training. These traditional Bulgarian cultural and educational organizations can perform a number of activities to enrich the knowledge of the people and their adherence to the achievements of science, art and culture, including the importance for their professional development. In smaller towns and villages they are the only organizations that provide access to the library, internet and other information.</p>

Training for acquiring professional qualification may be carried out by ministries, municipalities, employers' organizations, organizations of workers and individual employers. Enterprises perform informal continuing vocational training for training their own employees. Forms of training are vocational training, job training, seminars, conferences and more.

According to the EPA vocational training for unemployed individuals can be performed by the employers themselves under certain conditions. Overall, the challenges facing institutions for continuing vocational training, including VTC, refer to:

- coordination of tasks, activities and resources according to policy priorities for the development of human resources;
- improving mechanisms for information openness and feedback;
- improving the quality of education and its convergence to the modern requirements, providing access to the European labour market;
- establishing mechanism for motivating users of qualification services as well as organizations which invest in continuing vocational training;
- uniting the efforts between the social partners, local authorities and non-governmental organizations that are relevant to improving investment in human capital.

It is important to underline that in the vocational and educational training of the retail sector, there are, in Bulgaria, three specialisations, which are available in the VET schools of different regions of the country. These major areas are:

- ⇒ 3410201: Seller - consultant
- ⇒ 3410401: Wholesale and retail
- ⇒ 3451202: Trade.

For these three main subjects there are a total of 13 vocational schools in Bulgaria (NSI data). Accordingly, major "Sales Consultant" in 1 school, major "Wholesale and Retail" in 2 schools and major "Trade" in 10 vocational schools.

Majors in the Commercial, offered in universities in different regions of Bulgaria. The main courses for the sector have a total of four higher education schools throughout Bulgaria. Number of CVT, offering courses in the field of trade.

According to NSI data, the highest number of all VTC in country is those that offer training in "Sales Consultant" (50% of all centres). The lower share has the centres which offer training in "Cashier", "Kalkulant" and "Supplier" between 2 and 3%. Analysis of the distribution of CVT, offering training in trade shows that more than 1/3 of them are on the territory of Sofia. In other cities such as Burgas, Varna, Plovdiv, Ruse the share is between 10 and 17%.

From the distribution of educational organizations in "Trade" it can be concluded that:

- the proportion of vocational and higher education institutions preparing specialists in the field of trade are **quite limited** as compared to VTC their share is negligible.
- in the field of public education future employees who are preparing for the sector are **extremely low**. Provided that "Trade" is one of the largest economic sectors in the country, both in numbers of employees, size investments and gross value added.

Before passing the level of vocational training centres, *it is important to define and know the organizational model where apprenticeships should be conducted*. As it is already known, we have different models of stores for retail (1/10 15/20 employees or agents), therefore it is very important to make a clear analysis of the organizational model. Thus we can define the strategy, taking into account also the possible changes in the labour market.

This analysis can be done by taking into account one or more product fields. The main objective is to reach out the process map and professional tasks in order to demonstrate the link between school and extra-curricular activities and training in the work situation.

Such as at the policy level, is possible to identify the main strengths, weakness and possibilities of improvement of the apprenticeship courses on the Bulgarian retail sector based on the apprenticeship providers' perspective.

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• There is a wide network of VET centres (in different geographical areas) – this helps the approaching to a wide range of users and creates opportunity to increase the efficiency and employability in accordance with the labour market and European requirements;</li> <li>• A good working IT platform with information about all licensed VET centres in the country;</li> <li>• High and strictly observed by the responsible bodies quality of the training courses;</li> <li>• VET trainers have good pedagogical skills and competences;</li> <li>• The most VET centres have new and modern necessary equipment;</li> <li>• The idea for the Life Long Learning is very popular, mainly among the young people.</li> <li>• During the apprenticeship course the accent is on gaining practical knowledge, skills and competences and not on memorizing facts and information.</li> </ul>	<ul style="list-style-type: none"> <li>• The method of financing programs for traineeships / apprenticeships - subsidized employment programs only target employers rather than VET centres; the connection between the employer and the VET centres is broken; application process is very long; the implementation of the projects is linked with many bureaucratic obstacles;</li> <li>• Not so good and effective connection between companies and VET centres;</li> <li>• Difficulty on involving more actively the companies of the retail sector on the development and implementation of the apprenticeship courses.</li> <li>• Difficulty to attract young people really motivated to participate in the apprenticeship courses.</li> <li>• The apprenticeship course is sometimes used as a way to avoid the unemployment, and not as possibilities for extending of the work experience.</li> </ul>
Possibilities of improvement	
<ul style="list-style-type: none"> <li>• VET programmes must be the same for all providers of VET (including those providing apprenticeship). VET programme is the basic reference document for the planning of training process, material and methodological resources, teaching staff. It indicates learning outcomes, requirements for teachers, methodical and material resources needed for the implementation of programme. This means that the contents apprenticeship training must coincide with the contents of school-based VET. <i>It is a very important precondition to ensure permeability between apprenticeships, the school based pathway of VET and higher vocational education.</i></li> <li>• Provide connection between the theoretical and the practical part in order to develop skills, knowledge and competencies, required by the companies.</li> <li>• Strengthen the relationship between the mentor and the Centre for vocational training and the role of mentoring in the development of technical - professionalized skills to guide the learning process of the apprentice.</li> <li>• Find the tools, processes and procedures for evaluating the results.</li> <li>• Configure quality framework and process for monitoring and evaluating the quality of mentoring courses in the field of retail.</li> <li>• Define promotional strategies to encourage apprenticeships and attract employers to use this tool.</li> <li>• Set up a working system of validation and transfer of knowledge, gained during the apprenticeship course.</li> </ul>	

### Company level

It is a crucial role for companies to define training model and lines. This will help it to determine the necessary skills and to take measures for their fulfilment also in view of the productive and social change.

Moreover, it is essential to identify specific professional profiles in terms of skills, competencies and knowledge.

The role of the mentor: the role of mentor on the part of the company and the lack of guidelines on which they are governed. It would be much better if some kind of guidelines were offered for assessment in the learning process within the company.

During the interviews, made on company level, there was underlines the following strengths, weakness and possibilities of improvement:

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• The labour relations between the apprentice and the company are well regulated by the law;</li> <li>• When the company offer apprenticeship opportunities during subsidized employment programs – there is a period to check whether the worker will handle his tasks. Economic advantages are that the employer does not pay of their budget for work during this time;</li> <li>• When the appointed trainee is motivated to work a job, apprenticeship can satisfy the needs of the company. The apprentice remains at the company after completion of the apprenticeship.</li> <li>• The Apprenticeship courses have effective impact on young people’s qualification, contributing to their knowledge and integration related to the real work context.</li> </ul>	<ul style="list-style-type: none"> <li>• Fewer employers provide an opportunity for students of the profession to do a traineeship or apprenticeship in their organizations. On the one hand, this is due to the employer’s lack of financial resources to maintain such programs;</li> <li>• There are not always trained mentors that can teach appropriately their knowledge and skills; there are not any typical programs for this type of training;</li> <li>• Each company selects the methods of training in apprenticeship. There is no regulated methodological assistance. Any employer has to seek for assistance on his own;</li> </ul>
Possibilities of improvement	
<ul style="list-style-type: none"> <li>• Employers that support programs for traineeship and apprenticeship should have tax breaks and regulated subsidies;</li> <li>• The funding for apprenticeship programs takes place within projects that are limited in time. This should be a constant, on-going process;</li> <li>• To organize apprenticeship in the first place financial resources are needed. They would come primarily from the state. Participation of employers can be expressed in the provision of relevant equipped workplaces, mentors, and monitoring of the apprenticeship.</li> <li>• It is obligatory to have a coherent program between the host organization and the VET centre, as and coordination of all the activities of the organization and conduction of the process of apprenticeship;</li> <li>• The enterprise should have a decisive word on the apprenticeship program. It must be consistent with the real processes in the company.</li> </ul>	

### Plan of action for the development of apprenticeship on Bulgarian retail sector

Based on the strengths, weakness and guidelines for the improvement of the development and implementation of the apprenticeship courses on Bulgarian retail sector, identified for each one of the levels of analysis (policy, apprenticeship providers and company levels) it was designed a plan of action for the inclusion of the mentioned guidelines on the apprenticeship courses. This plan of action is organized by possibilities of improvement, measures to incorporate in the apprenticeship courses of the Bulgarian retail sector and the identification of the stakeholders responsible for the incorporation of these measures.

Addressing these challenges, a number of actions should be taken, some of which relate to the initial pre-vocational education, initial vocational training and higher education.

Level		Possibilities of improvement		Guidelines/Measures		Responsibilities	
		Nr.	Description			Contributors	
Policy	Development of internal capacity of the social partner organisations (trade unions and employers' associations) to play a full role in developing the apprenticeship system	1	Direct and active involvement of trade unions and employers associations in different projects of VET development related to apprenticeship and practical training by proposing concrete obligations and responsibilities.			Employers' organisations Trade unions Training centres	
		2	Building a positive image and raising the prestige of apprenticeship and supervision of apprentices amongst employers, employees and trade union representatives.				
	State support and legitimization of the activities of social partner organisations in embedding social dialogue in the apprenticeship system	3	Introduction of legal regulations and awarding legal statuses necessary for the active participation of trade unions and employers' organisations in the apprenticeship system.			Trade unions Employers' organisations	
		4	State assistance in coordinating and intermediating the agreements of social partner organisations in the system of apprenticeship. State institutions could act as providers of information, advice and guidance; offering independent arbitration in these processes; helping to overcome different obstacles and problems related to the lack of trust and possible conflicts of social partners; assisting in finding rational solutions to disputes and disagreements on various issues related to the distribution of obligations, responsibilities and usage of benefits of participation in the apprenticeship system.			Governmental agencies	
		5	Financial and fiscal measures of support to the activities of social partner organisations in embedding social dialogue in the apprenticeship system.			Private and state specialized agencies State institutions	
Apprenticeship providers	To adapt and modernize the systems of vocational education and training (VET) and general education at the national level	6	It is necessary the vocational education and training systems to be modernized, because now as a general trend, at all educational levels, most institutions focus on "teaching" communication skills, and include lessons related to these communication skills into existing curriculum. It is observed opposite development in this area - in some high schools, there are again calls for conventional knowledge and teaching more technical and administrative skills, as increased attention to communication skills eventually will be at their expense. This applies to secondary education (associated with important knowledge of foreign languages, mathematics, physics and chemistry), this holds also for university education (too broad curriculum).			VET Associations Apprenticeship providers	
	To work with all relevant stakeholders and to intensify cooperation in education and training	7	A key finding is that the challenges facing the education and training sector cannot be solved by education and training institutions themselves. It needs a variable group of stakeholders to work together to provide joint responses and decisions on the range of			Companies Institutes of education and	



		<p>the identified challenges.</p> <p>It is necessary to enhance co-operation of all stakeholders, including companies, institutes of education and training, social partners, research institutes and public authorities in order to adapt to new realities, and joint action is an effective tool for stimulating undertaking and implementing changes.</p> <p>Enhanced co-operation of all stakeholders, businesses, organizations, education and training, social partners, research institutes and public authorities, will help to reduce the deficit of information on current and emerging skills needs.</p>	<p>training</p> <p>Social partners</p> <p>Research institutes</p> <p>Public authorities</p>
	<p>Preparing for retraining, improving of skills and simultaneously acquiring multiple skills</p>	<p>8</p> <p>Some professional functions will face big changes (service workers, administrative-supporting staff, and logistic staff) as well as changes in the quality of their set of skills. Technology will replace large units of labour in these professional functions: according to a research of International labour Organization there will be reduction of 5 to 40% in distribution. Changes in skills will be required for the remaining workforce. This development will primarily affect directly the major companies in the retail sector, but will also affect the SME sector in the retail. While major retailers will need more e-skills, creativity and skills in customer care are also of increasing importance.</p> <p>The acquisition of multiple skills will become more important for highly skilled professionals in the sector of retail.</p> <p>Consequence of technological change not only excellent technical skills, but also knowledge about the development of the value chain, and intercultural and language skills will become increasingly necessary in almost all high-skilled occupations. To address specific customer needs professionals in sales and marketing will need additional excellent knowledge of consumer and communication skills to survive and grow in the highly competitive market scenario.</p>	<p>VET Associations</p> <p>Apprenticeship providers</p> <p>Institutes of education and training</p>
	<p>To increase flexibility and modularisation</p>	<p>9</p> <p>Several conclusions follow from the strengths and weaknesses of the different systems of the VET sector-specific challenges on the one hand, and the needs of employers, on the other hand.</p> <p>First, it requires increased flexibility in education and training in technical professions. Flexibility means the ability of the VET system to adapt effectively to new training needs in terms of quality and quantity. Flexible VET system is needed especially in conditions in which fundamental changes are made, and professional profiles and features change rapidly. Modularisation of education and training is recommended to achieve greater flexibility and timely response to the changing content and the increased need for training. Even if problems arise in the modularisation of training in some IVET systems, modular systems facilitate the growth of competence and facilitate the interaction</p>	<p>Companies</p> <p>VET Associations</p> <p>Apprenticeship providers</p>

			<p>between the systems of IVET and CVET (CVT). Flexibility is needed in various forms of education and training. In general, the joint study combines learning face-to-face and group-based learning with modern forms of media offline and online forms of e-learning modules such as digital learning websites, video conferencing, collaborative applications in training news (information) groups, blogs and interactive online training. Thus reducing the cost of future training and increasing flexibility in combining work and study. Other positive effects on the following skills: since large parts of the training are focused on the learner and informal learner absorbs some competence, self-criticism, self-motivation, determination and efficient processing of information.</p>	
	Development of e-learning and blended learning, recognition of skills across Europe	10	<p>The wider use of e-learning also in apprenticeships would help relieve SMEs. Furthermore, e-learning is an extremely useful tool to support learner's supervisors of apprentices in companies and provide latest information on developments in the sector.</p> <p>The joint identification of professional standards for the retail sector at EU level is important for the recognition of qualifications and competences throughout Europe. Currently, there are huge differences between Member States. Internationalization and globalization of retailing supports greater recognition of skills and competences within Europe. This can help labour mobility through transparency and recognition of skills across Europe.</p>	<p>Companies VET Associations Apprenticeship providers</p>
	Joint training networks to promote apprenticeships in the sector	11	<p>Particularly joint training networks between firms that were created for employment (and also for mature workers) as a result of technological change and the development of various business niches will become more important in the future. The main objective of the system is a joint training apprentice to pass through all the stages of an apprenticeship, although the basic training company can provide some of these phases. Senior and experienced staff can become mentors to incoming job in the enterprise or from other companies, and to assist and train in some very specific skills</p>	<p>Companies VET Associations Apprenticeship providers Trade Unions Trade Associations</p>
	To promote sector-specific skills at an early stage	12	<p>On-going technological change and fierce competition in the sector require early combining of theoretical, academic and professional knowledge of all educational levels and in all forms. It must be possible for transferability and connectivity of different systems of education and training. Diplomas to finalize mandatory distributions for at least ten days in the company of the sector.</p> <p>Cooperation with businesses in retail trade can ensure that the skills related to employment, continuously updated in accordance with modern requirements, and that the latest developments are integrated into the curriculum and practical activities (studies). Educational trail also gives students a general and broad view of the modern supply chain in the sector of retail.</p>	<p>Companies Social partners VET Associations Apprenticeship providers Trade Unions Trade Associations</p>

Company	Promoting apprenticeships and their value to employers both in the public and private sectors	13	Employers will benefit from developing the skills of apprentices to fit their sector needs and organisational gaps. Apprenticeship can be presented as a cost effective way of addressing the skills gaps that exist within the economy.	Apprenticeship providers Companies Trade unions
		14	Enhancement and support to enterprises to create special apprenticeship workplaces (through subsidies, tax reductions and exemptions).	State institutions
		15	Employers can develop other skills and competences amongst young workers to ensure a fully rounded employee in tune with the needs of the organisation and able to work with the apprentice to continue to up skill and to achieve promotions and fully pay back the organisations investment.	Companies
		16	Apprenticeships ensure that the workforce has the practical skills and qualifications organisation needs now and in the future. The mixture of on and off job learning ensures they learn the skills that work best for the business.	Companies
	Building a positive image and raising the prestige of apprenticeship and supervision of Apprentices amongst employers, employees and trade union representatives.	17	Experience of the development of apprenticeship in other countries demonstrates that the positive image and prestige of apprenticeship amongst the social partners can become a strong motivator for their involvement and participation in the development of apprenticeship systems. Here participation of enterprises or employers' organisations in apprenticeship could be used for building their image as socially responsible stakeholders, attractive and prestigious employers, etc.	Apprenticeship providers Companies Trade unions Employers' organisations

## Conclusions and recommendations on education and training in trade sector

There are six major challenges that will affect the future of education and training in distribution and trade sector:

- 1) Continuing technological developments will bring fundamental changes in business strategies and professional functions in terms of quality and quantity, which are not yet stabilized;
- 2) The heavy national and European competition will lead to lower profit opportunities and few resources for training staff, which will strongly influence the SMEs in the retail sector. Given the importance of education, it is necessary to prepare the system of education and training for this trend;
- 3) Globalization, supported by technological developments will lead to global supply of products and respectively internationalization of business models which will have an impact on more highly qualified experts in larger companies, operating at an international level as well as on the need for mutual recognition of qualifications;
- 4) Changes in consumer behaviour and mass custom manufacturing will lead to new niches in the sector and the emergence of new business models and respectively to greater specialization and differentiation of skills;
- 5) Enhanced gender segmentation of the labour force, predominantly young and female labour force, especially in the professions in the services of part-time with significantly lower wages of the workforce in middle age dominated by men in technical professions;
- 6) Dominance of SMEs in the sector, which will have limited opportunities for self-addressing of the emerging need for skills. It will affect the CVT and require new and innovative solutions.

Over the past 15 years technological developments have led to a radical change of some sectors in retail. Electronic commerce expands into different areas and physical shopping has been reduced in several product categories. Recent developments in electronic commerce can lead to collapse the intermediary in the value chain, and in some cases, such as footwear, apparel, publishing, music, sales and distribution is performed more directly from the manufacturer via online shops or new forms of mediation. The end user buys digital products and orders products directly from the manufacturer without any intermediary in retail or wholesale. The increased automation in the collection of logistics data will be fully implemented. This will reduce the average skilled jobs mainly in administration, management of goods and industries which need less advice. In addition, it can stimulate even more "deskilling" of professions than today, as digital devices take control and tell the service worker what to do. On the other hand, this could be a chance of qualification and skills of the remaining workers in services and logistics, and assigning them to others, more highly skilled jobs.

In order to collect more varied opinions and to be made purposeful suggestions, a discussion for the development of apprenticeship in the retail sector was conducted.

The main objective of the discussion was also further development of guidelines for the apprenticeship system in Bulgaria.

Participants in the discussion were representatives of different vocational schools, of the Regional inspectorate of education, retail companies, carrier consultants and experts in the sphere of vocational trainings.

After the summarization of the results of the discussion, there are identified some suggestions and possibilities for improvement of the apprenticeship process, pointed below:

- The National Agency for Vocational Education and Training should take the role of the coordinator of the whole process of apprenticeship at national, regional and local level;
- It should be established an organization/body, that will represent the interests of the business in the process of the development and establishment of the apprenticeship;
- The way for acceptance of apprentices in the company should be unified and regulated at national level;
- Representatives of the business associations and the companies should be engaged in different activities in the schools, that will popularize the benefits of the apprenticeship among the pupils;
- The proportion of the theory - practice classes in the academic programs should be changed. Currently in the vocational schools the theoretic classes are 60% of the whole program. The possibilities for practicing the acquired knowledge should be increased;
- The vocational guidance should be applied more active among the younger children (from primary schools). The introduction of vocational guidance should be regulated by law;
- The role of the Municipality in the processes of vocational guidance should be more active; it should also impose the idea of apprenticeship and provide assistance, although the vocational schools are not financed by the Municipality.

# DEVELOPMENT OF INNOVATIVE APPRENTICESHIP IN RETAIL SECTOR IN ITALY

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## Overview of the apprenticeship courses in Italy

The apprenticeship plays a critical role to facilitate an easier transition of young people from school to work (STW - school to work) because it is a system that can improve the employment prospects of young people, contributing to the acquisition of skills and experiences related to work and closely aligned with employers' demands, making award qualification recognised nationwide, enhancing connections between young people and work on behalf of the market and giving young people a valuable first work experience.

For more than 15 years, in Italy apprenticeship is hit by reform projects, aimed at upgrading the many great features of tools to facilitate the transition of young people into work, to support businesses and local production systems in developing skills, to stimulate dialogue and collaboration between training and production systems.

The occurred reforms have shown increasing attention to the quality of the skills transmission process, focusing in particular on the process of learning - formal and informal - that takes place within the work context. Thus the enterprise, from the place where work "in a process of acquisition of professionalism" played almost exclusively to coaching, becomes potentially place of deployment of formal paths of skills transmission, with courses designed and delivered by experts, with a particular focus on professional/technical and basic skills.

Finally, the Consolidated Acts on apprenticeship, approved in July 2011, has given to the social partners and collective bargaining the ability to regulate the ownership and implementation of the "technical and professional" training.

The apprenticeship in Italian system has not taken off because of constraints and bureaucratic burdens, both at national and regional levels. Unfortunately, after the important step taken with the Consolidation Act of 2011, shared by government, regions and social parts, Italy has chosen a wrong direction in contrast with the indications offered by some best experiences in other European countries. Instead of implementing a widely shared legislation, year after year it has started by removing certainty to operators and preventing them from constructing a matching system between demand and supply of labour, focused on the professional needs of the productive sectors towards which the training and skills development of young people has to be addressed.

In Italy there is a strong need of a strategy for the consolidation of an efficient system of apprenticeship:

- for the revival of apprenticeship, the European institutions indicate the existence of a stable regulatory and institutional framework, in Italy, with the new Jobs Act (the new reform made by the Italian Prime Ministry), it is the 10<sup>th</sup> intervention in three years;
- It is necessary to follow an active role of the social partners, but these were gradually excluded from the sharing of the latest legislative reforms and have shown little activism, especially in the implementation of the apprenticeship of the first and third level;
- The involvement of business is variable. On specific projects are recorded interesting experiments, but it is needed something more defined and consolidated.
- The dialogue between business and schools is completely absent, which is crucial both in terms of guidance, both for the definition of skills requirements and for the designing of a correspondent and adequate education.

Therefore it lacks a righteous matching between apprentice and a place on the job, the spread of the methodology of alternation, skills certification, steps towards highly personalized paths;

- The strengthened aspect of Italian system seems to be the existence of ad hoc funding, a well-defined contractual discipline and a good quality in mentoring/tutoring of apprentices.

To change direction, it is not enough a few tweaks to the scaffolding of the Uniform of 2011, but it serves a real alliance for apprenticeship to call together all stakeholders - government and the states, social partners, schools and training centres and providers - and fulfil what was agreed three years ago with the Consolidated Act of 2011.

## Guidelines for the improvement of the development of apprenticeship on retail sector in Italy

It is necessary to improve the system, through the creation of a “true alliance for apprenticeship” to call together all stakeholders - government and state, social partners, schools and training - and fulfil what was agreed three years ago with the Consolidation Act of 2011.

The present work – guidelines - is intended to highlight the weaknesses of the system and highlight the opportunities and strategies to be put in place for the implementation of apprenticeship in the field of retail sector on three levels:

- Policy level;
- Apprenticeship provider level;
- Company level.

At each one of these levels, the possibilities to enhance apprenticeship system in retail sector and improve the attractiveness of VET system in apprenticeship scheme will be explored.

### Policy level

The most significant intervention of T.U. (Consolidated Action) lies in the redefinition of competences of the various institutions for the application of the institute/system. It is possible to distinguish 2 defined areas: one area reported the types of contract of **1<sup>st</sup> level of apprenticeship (apprenticeship for the qualification and professional diploma)** and **3<sup>rd</sup> level (high apprenticeship training and research)** of close regional expertise. The main features of this area are the different learning goals and the achievement of a certificate that is useful to raise employability and to reduce the education and training levels in the complex.

Another area is the **2<sup>nd</sup> level apprenticeship (professional apprenticeship or job contract)**, entrusted entirely to collective bargaining and aimed to create a more effective matching of demand and supply to facilitate the integration of young people into the labour market.

**With reference to 1<sup>st</sup> level apprenticeship**, the resulting output of the training is the acquisition of educational profile, corresponding to one of the 21 professional qualifications and diplomas among the 21 regional professional defined, based on the agreement reached on 29/4/2010 (Joint Conference State-Regions).

Following an agreement at the Conference of State, after hearing the social partners, each Region will regulate the aspects of apprenticeship training for young people in the age group 15-25 years:

- duration, not exceeding three years, for the achievement of professional qualification and four years for the professional degree;

- number of hours of training outside and inside the company according to the objective of achieving a qualification or a professional degree and the standards required by law 226/05;
- General standards to ensure the quality of business education.

The collective labour agreements define how to deliver training on the job in accordance with the standards established by the Region. The possibility to fulfil the obligation of education through apprenticeships is confirmed. The problem is how to promote access to apprenticeship for the qualification and the professional degree of young people without a diploma or qualification for people aged 18-26 (business incentives, contractual measures, regional measures).

**Apprenticeship advanced training and research** is aimed at the acquisition of qualifications (upper secondary school, ITS (Istituto Tecnico Superiore) and IFTS (Istruzione e formazione tecnica superiore), universities including doctorates in research), research activities, activities for access to the professional experiences. The last type requires the connection with the regulation of individual professions and specification of the generic reference to "professional experience". Regions determine regulation and duration of the training aspects in agreement with the social partners and educational institutions and research. In the absence of regional regulation, there are conventions concluded between individual employers and educational institutions and research. Also in this case, it is very urgent to identify incentives for that type of apprenticeship up to now scarcely used.

**The professional apprenticeship or contract job** is aimed at obtaining a professional qualification for contractual purposes. The discipline of that contract is largely entrusted to the collective bargaining agreements which define the general aspects, while the category of national collective agreements have to adjust the duration and mode of delivery of training to acquire the technical and professional skills and specialist concerning the specific contract profiles. It is always collective bargaining establishing duration, even minimum apprentice contract, but not exceeding 3 years and 5 in crafts. In addition to training in vocational and trade, it is expected to offer public training aimed at the acquisition of basic and transversal skills to a total number of hours not exceeding 120 hours in three years. This type of training is managed by the Regions, after hearing the social partners.

In the professional apprenticeship technical-professional and specialist programs are integrated, carried out under the responsibility of the company also from a financial perspective, as well as training activities governed by the regions and financed with public resources "within the resources annually available. In defining the discipline of basic training, regions must take into account age, educational qualification and skills of apprentices training is aimed to. Bargaining, in relation to the specific contract profiles, in addition to defining the number of hours of training needed to acquire the technical and specialist skills, also lays down the method of delivery of training (classroom, with coaching, distance,) and activation of forms of control and recording of training. Therefore, it is very important to determine the conditions under which it is possible or not to implement training activities planned in the company: back, therefore, the need to define the characteristics of the company with training capacity.

The **definition of reference standards** for testing the activity of apprenticeship follows a dual regulation.

The educational standards refer to the first and third type of apprenticeship (except for apprenticeship research) and are defined, within 12 months after the entry into force of the Consolidated Law, the Ministry of Labour in consultation with the Ministry of Education and after agreement with the Conference of Regions. Professional standards relate professional apprenticeships and apprenticeship research and are defined in collective agreements or national category with specific agreements during the contractual period.

Certification mode is twofold: training undertaken and the professional qualification in contractual eventually acquired is recorded in the training booklet by the employer; while the skills acquired by the apprentice will be



certified in a manner determined by the regions on the basis of the Catalogue of Professions and recorded in the training booklet. In this way the skills acquired in apprenticeship become expendable in the education system. For this reason, the imposition of the Catalogue of Professions and the special technical body, with the task of harmonizing the various professional qualifications acquired through the various types of apprenticeship, allows the correlation between educational standards and professional standards. The goal of the Directory of Occupations is to ensure the usability of skills however acquired the entire system of education-job training.

Regarding the 1st level apprenticeship, in order to face the long standing problem of early school drop-out, it is necessary to define amount, manner and content of the training. There is a relative lack of interest of the companies and the problem of the definition of the levels of payment for apprentices and adjustment of working hours. It remains the crux of the possible lowering of the age to 15 years in a difficult relationship between regulation/concerted regional and national bargaining category.

Regarding professional apprenticeship, one of the nodes is certainly tied to the speed and depth of the updating process of national collective agreements, which represent a central role in the success (or otherwise) of the new apprenticeship. The long-standing issue of the definition of a national framework of qualifications and training standards in connection with the processes of European harmonization (EQF, ECVET). The link between professional standards and training is one of the nodes associated with the construction of the Catalogue of Professions.

Referring to the 3<sup>rd</sup> level apprenticeship (high apprenticeship), the root node is the bet to make it a tool and not more widespread essentially "niche", as it represents a great opportunity for a dialogue between the academia (university) and the business world.

The introduction of new rules, essential and reconfigurable at the regional level, has jumped basically the path of consultation with the social partners and especially with the regions. A comparison that should be encouraged as soon as possible in order to avoid potential constitutional conflicts; even though for the good use of ESF resources, to promote apprenticeships and, more generally, youth employment, particularly in the Southern regions, it is an important issue on which it can do more and better.

Finally, a strategic task that the institution must preside, whatever the method chosen to implement, is to raise awareness and guidance for young people and families. It is an action that takes place at two levels: general information on the apprenticeship system, the opportunities it offers to young people; guidance to those young people who want to enter the labour market, choosing an apprenticeship contract.

### Apprenticeship Provider Level

In the apprenticeship system, as a form of alternation training, there is an educational structure different from the company, which supports and/or enrich the training process that takes place at work. The training agencies candidates to make apprenticeship training must be "accredited" by the competent public entity. This means that they must show they have some requirements suitable to carry out the assigned tasks. So the company itself or the region the apprentice training agency is located at will implement its obligation to external training. In the Italian system, however, the inclusion of the agency in the apprenticeship training takes place only at a later time, after the contract has started.

The training may take place inside or outside the enterprise. In fact, if the company has some specific requirements and declares "internal training capacity ", it can also manage the training, in whole or in part. This does not just mean that it can be made in or out of the local business environment but above that training can be a complete direct ownership of the company. This possibility is regulated by a number of specific requirements

relating to the possession of skills training by individual companies. The responsibility of the training is in the head directly to the company that has the ability to manage it directly if it is in possession of "training capacity": it is not a generic or theoretical but concrete task to be achieved through a genuine process of planning and delivery that sees the company protagonist of choices, activities, interventions to document through the PFI (Individual Training Plan).

Training must first and always be "formal". This means that it must be designed, planned, delivered and evaluated explicitly (and of course operationally). The company must then set the training in a conscious way, defining objectives, methods, times before moving to the implementation and evaluation of what was planned.

The external training is funded by public loans and it is definitely formal as:

- It is delivered by a training provider centre accredited by the Region,
- It is made on the basis of a draft submitted by the public body and approved,
- Its activities are reported and its results evaluated

It is also a formal external training, financed by the same company and made by an accredited training centre. The requirements for company training are:

Company with no training competency	Company with training competency
<i>Training has to be delivered by a training centre outside the company and it has to cover all the hours for the apprenticeship period. In this case, company has to appoint one more provider centre accredited by the Regional Jurisdiction.</i>	<i>Company has to deliver training autonomously. It can also activate a training process in an "integrated" way (inside or outside the company) through an accredited training centre.</i>

It should identify the "training profile" and the rules of detail (i.e. the set of rules, the macro-objectives and content of the documents which refer to describe the PFI) defined by law and contracts. Depending on the situation of the regional legislation and business features rather than the apprenticeship training, such rules may be in different documents.

<b>1<sup>st</sup> case</b>	Training profiles are defined by the regions, which - through a special regional law – set durations, figures of reference, rules, etc. Companies that have hired apprentices in these regions and provide training to realize even partially outside the company must comply with these restrictions when hiring and for the duration of the contract
<b>2<sup>nd</sup> case</b>	In the case of Regions not have defined a regional law, the discipline of the professional apprenticeship (and therefore the definition of profile training) is described in the national collective agreements entered into by category associations of employers and job comparatively representative. Companies that have hired apprentices in these regions are therefore required to refer to the national agreements between the social partners in the field of professional apprenticeship.
<b>3<sup>rd</sup> case</b>	In the case of companies that provide training exclusively inside, the profiles of the professional apprenticeship training can be defined by the collective bargaining agreements signed at national, local or company associations of employers and job comparatively representative at national level or by bilateral agencies. In this case the intervention of collective agreements must be in consideration of regional arrangements, if there is any

### Possibilities of improvement

In apprenticeship, training must be the "instrument", for the placing on a path of continuous training and not only input to work. Therefore it is extremely important to be able to create motivating and attractive situations of training outside, highly work-related activities and experiential, in order to raise awareness and enhance the role played by the apprentice in the company and to prepare setting appropriate training and functional all learning. Giving support to the training as a path of change/activation of the potential of learners, involves a motivated and aware choice. Even for the apprentice, training cannot be approached as an obligation/constraint dictated by law. It is an opportunity for personal and professional growth which should be properly managed, and that is a significant point of engagement to understand the importance of training throughout the working life. The main purpose of the training input apprentice, whether on or off the job, is the acquisition of a minimum level of competence through measurable performance expendable in the labour market, with particular attention to the professional reference. The identification of training standards aims to promote the integration of the young in the job work by reinforcing the possibility of "moving" inside it. Threads of training on and off the job takes on the task of forming a worker/citizen cantered on individual access to skills during the entire working life, as a guarantee of the right to employability and, at the same time, able to deal positively with the condition of flexibility of the labour market.

### Company Level

As previously mentioned, company has the most important task in the formation of the young apprentice. On the one hand it prepares and follows the activities progress within the work environment, as well as the development of required skills. On the other, it allows the participation of the apprentice in training activities aimed at the acquisition of additional skills and knowledge, useful to perform work tasks and to complete the path of personal and professional growth of the young. Finally, the company must certify the skills acquired by the employee at the end of the period of apprenticeship.

The training aims to develop the skills of the apprentice, so that it becomes more and more independent in carrying out effectively the tasks required by the professional role for which he/she was hired. However, the training is costly, both for the company and for the young people.

For the enterprise, it is to devote time and resources to help the apprentice to acquire the knowledge and skills needed. For the young people, it is committed to learn and practice new things, which often require a significant effort of attention and application.

The planned training from apprenticeship to succeed requires two preconditions:

- the company consider the young apprentice a resource in which to invest, so that he/she can increase their skills and contribute to the future development of the company;
- the young apprentice is willing to engage and interested in increasing their professionalism within the company in view of a future recognition

Training can only be effective if the company and the apprentice are aware that training experience is an investment for the future where the benefits outweigh the costs. If there is not a common interest to work to achieve certain results of professional growth of the young, the conditions for developing an effective training process within the relationship of apprenticeship do not even exist.

Apprenticeship allows the company to save on costs related to the insertion of a new employee. The costs in terms of time and effort spent on training are recognized by the law, which allows companies that hire apprentices to

achieve considerable savings contributions for the duration of the contract. At the end of the apprenticeship period, in the case of final recruitment of young, facilities shall be extended for another 12 months. Moreover, the wages of the apprentice's percentage reduced compared to that of a skilled worker hand framing. On the one hand there are limitations to the use of the apprentice within the work environment (weekly hours of work, overtime, night work ...). On the other, there is an obligation to involve the youth in the activities of external training, subtracting the time of its use in the workplace.

Moreover, the appointment of the company tutor and administrative procedures related to the management of this contract are further commitments for the enterprise. In order to exist and develop, a company must constantly be able to meet the demands of their target market, providing products and services that meet customer needs, both in terms of price and quality. This requires the availability of adequate financial and technological resources, but above all the presence of motivated and competent, able to ensure the achievement of business objectives and the continuous improvement of the quality of the production process. A company that believes every employee an important resource to achieve their goals will take care with particular attention being switched on, organizing it as a training process designed to develop the motivation and skills of the person.

Learning is more effective when the different knowledge and skills are not presented separately, but acquired as resources to address the practical problems that arise at work, so that they can experience their utility immediately. The training activities therefore should not be separated from work. A training program for apprentices could not be limited to specific moments to devote to the transmission of specific knowledge and skills, to be implemented in classrooms and laboratories and/or external. The entire training period must be designed as a training that takes place mainly through the work, even if it uses other moments (both internal and external to the company) that are useful to help develop the skills that are tested and refined in the employment context. The company must promote and develop the ability to innovate and improve to remain competitive: it is invested by the need to change, transform itself anew their assets, their internal processes and their processes of exchange with the external environment. Organizational development, innovation and capitalization of knowledge appear to be the size of strategic importance for its adaptability and competitiveness. Learning emerges as a strategic factor for the success of the enterprise.

### Role of the tutor

The company tutor is the person who takes the role of guide and facilitator of the path of integration and learning of the young apprentice throughout the apprenticeship contract. This figure should also cooperate with the structure of external training, to promote the integration of learning activities outside the undertaking and learning in the workplace. Finally, he is called to assess the skills acquired by the apprentice, for an attestation by the employer. In craft or with less than 15 employees working as tutors may also be exercised by the head of (D.M. 8 April 1998). In the event that is designated by the tutor as an employee, he or she must have the following characteristics:

- a) a contractual status equal to or greater than the open the apprentice will achieve at the end of the period of apprenticeship;
- b) carry out work activities consistent with those of the apprentice;
- c) have at least 3 years of work experience.

It is expected that the regions, in agreement with the representative organizations of employers and trade unions, program specific training actions for business mentors. In addition, each tutor is required to attend a training initiative for a minimum of 8 hours which is realized with educational institutions that organize external training.

The tutor must be concerned in particular:

- Define the individual training project in collaboration with the educational structure;
- Accept and introduce the apprentice in the context of work, clarifying the activities and responsibilities of the role of reference that will get to play;
- Explain the objectives that characterize the professional growth of the apprentice, establishing a covenant of mutual commitment to get to achieve the intermediate and final results that are provided;
- Submit the plan of activities that will be progressively allocated in enterprise and purpose of the extra training company;
- Organize moments of explanation, coaching, analysis and reflection with the apprentice, to help him develop the skills required by the professional role;
- Encourage integration between the content addressed in external training and activities carried out in the workplace;
- Assess the levels of competence achieved gradually by the apprentice;
- Manage periodic talks with the apprentice, along with how it is going to evaluate the path of integration, analysing the difficulties that arise, to determine the most appropriate way to address them, keep up the motivation to commit to learning;
- Will have to establish effective cooperation with the agency's tutor training following activities external to the company.

## Conclusions and recommendations on education and training in trade sector

The most significant elements for the improvement of the system of apprenticeship in the trade may be summarized as follows:

- Create a strong synergy between educational institutions and businesses, even before the signing of the contract of apprenticeship, an indispensable condition to make alive system of alternation;
- Define a project for the training of the apprentice unit, i.e. providing contribution of the company and the external structure; the project should be defined before the first (or at recruitment) and should specify the objectives to be achieved; these targets will be based on the monitoring and final evaluation;

- The project should start from the needs of the company, and be framed within a framework of standards nationally defined, specified and possibly extended to the regional level; these standards, defined in consultation with the social partners, should ensure the marketability of the objectives achieved and promote young employability;
- Identification and regulation, as part of training structures the presence of figures who play the role of interface with business and who "follow" the formation outside the company through the figure of the "tutor training";
- The institution (state, region, etc.) must promote proper training of the figures responsible for the training of apprentices, that company tutor and tutor training;
- The institution must promote action orientated to young people, in order to increase the awareness of the choices and reduce interruptions of contracts;
- Promote the employability and employment of young people following the path of apprenticeship, or make sure that the learning outcomes achieved enable the young people to make a good performance on the labour market in response to the path of apprenticeship;
- Promote cooperation between the responsible institutions, the training organizations, companies - in particular craft and small and medium enterprises-and the social partners, to improve the relevance and effectiveness of training.

Learning to learn is the necessary condition for the flexibility of adaptation to the rapid evolution of organization changes of professional systems. Learning process should be conceived as a practice contextualized within the organization in a meaningful activity.

Production organization is the learning context, the place where the employees work, think and learn from problems situations that is called to face.

In order to provide improvement in the apprenticeship system, it is needed to focus on the role of tutor who signs the passage to a new way to think about the apprenticeship: from an imitative to a cognitive apprenticeship. The education of company tutor(s) in the learning process in work situation assumes a considerable importance for the workers' future.

For this purpose, guidelines and recommendation testing will be focused on the development of a new profile of tutor as a key lever of the re-introduction of the apprenticeship in the retail sector.

# DEVELOPMENT OF INNOVATIVE APPRENTICESHIP IN RETAIL SECTOR IN THE BASQUE COUNTRY (SPAIN)

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## Overview of apprenticeship courses in The Basque Country (Spain)

In this project, we are focusing on the situation in the Basque Country, the Autonomous Region of Spain in which the partners of the UPPRETAIL project are located, due to the factor that each Spanish region is different.

In our case, the Spanish Government has transferred the competences in Education and Employment to the Autonomous Region of The Basque Country, but always following the general guidelines established by the State's Legislation.

Our main aim is the improvement of the internship and apprenticeship system, which is focused on:

### 1. Initial Vocational Training (Official), addressed to school-aged young people.

The competent Administration in the Basque Country regarding Vocational Training is the Department of Education, Linguistic Policy and Culture of the Basque Government.

In the Initial Vocational Training (official), the internships in companies (FCT – Training in the workplace) are **mandatory**, meaning that they are part of the educational curriculum and one person can only obtain the Graduation Title (Intermediate or Higher), once he/she has passed satisfactorily the internship in the company.

The duration of the internship for the specializations of Commerce, Commercial Activities (Intermediate Degree), and Sales Management (Higher Degree) is 360 hours.

### 2. Employment Training, addressed to unemployed people.

The competent Administration in the Basque Country regarding Training for Employment is the Department of Employment and Social Policy of the Basque Government and its Employment Service Agency, Lanbide.

It comprehends a series of educational activities addressed, mainly, to unemployed people who lack the specific vocational training, or whose qualification is insufficient to access or re-enter the labour market. It is addressed to people between the age of 16 and 65 and the Public Administration grants it.

Within the employment training programs, the education linked to obtaining a Certificate of Professionalism is gaining more weight. The Certificate of Professionalism is an official document, which recognizes the professional competences that each person has got for the development of a work related activity with significance for the employment.

Because of the high rate of unemployment among young people (aged 16 to 29), the Basque Government, set up a novel project, in 2012, named HEZIBI, based on the Dual Training, an apprenticeship method which combines training and work.

It is a project set up and coordinated by the Departments of Education and Employment of the Basque Government, together with the Vocational Training Centres Network, and other stakeholders, business organizations, etc.

The aim of HEZIBI program is to develop a rotational Vocational Training model, addressed to students from Vocational Training and young unemployed people, with the objective of improving their professional competences obtaining a Certificate of Professionalism or an initial vocational training title in a rotation system, with a paid working activity in the enterprise.

The student keeps a working relation with the enterprise and, at the same time, an academic relation with the Vocational Training Centre. The rotation-training model, transfers part of the apprenticeship program to the enterprises, making them key agents in the student's learning process.

The program is addressed to students aged 16 to 30, registered in Lanbide, the Basque Employment Service; an Employment Contract for the Training and Apprentice is made between the company and the student / worker, and the job assigned to the student must be closely related to the professional profile of the formative cycle.

The student participating in the program is exempt from doing the FCT (internship in the workplace), because it is replaced by the working activity in the company. Generally, the projects have a first course taking place in the educational centre, and a second one in rotation (with a maximum of 75% of the time at the company and the rest in the educational centre), supported by a 1 year contract.

In this program, the student's assessment is shared between the centre and the enterprise.

## General conditions for the implementation of these guidelines and recommendations

One of the main conclusions of the document "Research of Preconditions for the Development of the Apprenticeship in the Retail VET System in The Basque Country" is that Training and Apprenticeship are very important for the improvement of the professionalism and competitiveness of the companies, in general, and the retail sector enterprises, particularly.

The Guidelines and Recommendations we introduce in this document are based on desk research of the situation in our country and the interviews held in previous stage of the project. These Guidelines have been introduced to the VET centres and responsible people for the retail sector during the National Training Seminar we organized. The participants have validated the guidelines and given their opinion, contribution and suggestions for their improvement.

The Guidelines are focused on the Retail sector, but most of them are applicable to all the sectors and the VET System in general.

For the implementation of these Recommendations, It is necessary to meet some general conditions:

- All stakeholders must be considered
- The implementation of the Guidelines requires the involvement of all of them: VET / school centres, teachers, tutors, companies' owners / administrators and employees, students, whose contributions and opinion will be essential.
- Most of the recommendations are liable to be applied in VET System in general and all the sectors.
- These Recommendations are flexible.

In addition, the involvement of the stakeholders is necessary to make their implementation possible.



## Guidelines for the improvement of the apprenticeship development on the Basque retail sector (Spain)

As we have mentioned in the introduction of this document, the Guidelines and Recommendations for the development of apprenticeship in retail sector in The Basque Country will be introduced at three levels:

- Policy level;
- Apprenticeship provider level;
- Company level.

At each one of these three levels, we will introduce the main possibilities of improvement of the apprenticeship system in retail sector in The Basque Country, in order to contribute to the improvement and attractiveness of the VET system, in general, and in particular of the Apprenticeship addressed to the Retail Sector.

### Policy level

The funding system of the Vocational & Continuous Training in the State (Spain) and in the Basque Autonomous Region, is characterized by its strong institutionalization (the decisions and resources are mainly institutional), and the stakeholders and business sectors play a minor role compared to other countries.

In general, the normative regarding Vocational Training for Employment comes from the Spanish Government, but the Basque Autonomous Government has competences transferred regarding Education and Employment, and therefore it is able to develop and adapt the norms to the particularities of our region.

According to the interviews being held with technicians from the autonomous Administration, a better coordination with the State Government is demanded to participate more actively in the norms design. There is also a demand for more coordination within the Administration of the Basque Government, specifically, among the Departments of Employment and Education because, in some cases, there are conflicts regarding competences that should be solved.

In general, there is a good coordination among the training centres and the Administration. At first, the norms are already given, as well as the curriculum design for each title. It does seem that they have some leeway for adaption.

On the other hand, companies, through their business organizations, transmit their needs and interests to the relevant Administrations, Education Centres, but is necessary to deepen the interrelationship to foster the adaption of the education to the real necessities of the companies, in order to reinforce their implication and commitment with the system. Therefore, we have a clear improvement opportunity in our sector that we can reach through the improvement of Apprenticeship and fostering its development in Retail sector companies.

In our specific case, the image and attractiveness of our sector is not very good, so it is necessary to find ways to foster an improvement of our sector's image for hiring and maintaining qualified personnel, to increase the demand for specialized training in the retail sector, for the enterprises and their current and future employees. This would favour an increase in the number of centres offering specializations in the retail sector, the fulfilment of internships in our companies and the incorporation into the labour market in our sector, which will help in sensitizing our entrepreneurs, regarding the necessity to count on qualified personnel to improve the viability, competitiveness and sustainability of the sector.

From our point of view (based on the previous research), there are some **possibilities of improvement**, at Policy Level:

- To promote the different kinds of Apprenticeship to companies of the retail sector
- To promote, specially, the Dual Training to companies of the retail sector, VET centres and students
- More flexibility and less red tape to foster the implementation of the different options of Apprenticeship in the retail sector companies.
- To promote the Professional Certificates in the retail sector: Training and practices for unemployed and employed people, as a way to improve the image and professionalism of our sector.
- Improvement of the collaboration and cooperation between the main government institutions and stakeholders.
- More involvement of Government institutions to support the retail sector: Image and attractiveness of Retail.

Our Guidelines and Recommendations, try to give a solution to these weaknesses or possibilities of improvement, at this level.

### Apprenticeship provider level

Despite the important presence of the retail sector in the Basque economy, it doesn't have a good perception among part of the society: low professionalization image, high prices, bad working conditions, In addition, it is considered that anyone is able to work or open a store, and that no qualification or specific competences are needed.

Perhaps this is the reason why we find that, out of the 139 vocational training centres (public and private) located in The Basque Country, only 14 offer some speciality in Commerce.

Intermediate Degree: Commercial Activities

Higher Degree: Sales Management and Commercial Areas

In some cases, the responsible people for the different centres have told us that they don't offer it because there is no potential demand from students, and in other cases that they stopped offering it because it seemed like qualification was not necessary to work in the sector. Therefore, here we have a clear challenge that we have taken into account in our Recommendations.

In general, there is a good coordination among the training centres and the Administration. At first, the norms are already given, as well as the curriculum design for each title. It does seem like they have some leeway for adaption.

Regarding the internships, the Education Centre informs the Administration about the development of the internship (calendar, timetable, and others) and coordination between both parties is established.

The centre, following the curriculum design for each title, establishes the standards of the student evaluation; which apprenticeship must take place in the enterprise. It is responsible for finding the most appropriate companies trying to guarantee that the training is suitable for acquiring the competences the student should get in order to obtain the title.

For that, the enterprise must inform the centre of the tasks that the student will be performing during the internship, the calendar and timetable, as well as assign a tutor who will be the responsible of the student during his/her stay at the enterprise. The enterprise subscribes an agreement for the internship provided by the training centre, and the centre provides the Administration with the data requested for its management, organization and follow up.

In general, the training centre provides the enterprise with a notebook to manage the internship, with the instructions to follow by the enterprise and the student, the competences that the student should acquire during the apprenticeship process, competence assessment, final report, etc.

However, sometimes they find some difficulties to find the suitable companies and to do the necessary monitoring during the Internship and Apprenticeship process.

From our point of view (based on the previous research), there are some **possibilities of improvement**, at Apprenticeship Provider Level:

- To foster the relationship between University and companies of retail sector, to improve the sector professionalism and competitiveness, because so far, the relationship between the retail sector and the educational sector has focused on the VET centres.
- Continuous updating of the curricula and the knowledge of the faculty, because, in general, the training in VET is very “academic”\_and there is a lack of real knowledge about the real needs of Retail. The curricula design comes prepared for the VET centres, but they are able to adapt it.
- To foster agreements between VET centres and companies.
- Improvement of the practice process in company, with the support of the VET centre.
- Motivation and involvement of the students in the training (at VET) and apprenticeship process.
- Organization of activities to improve the knowledge of retail, among the students.
- To introduce, from Primary School, some subjects and activities linked to foster the personal initiative and the enterprising spirit.
- To make the students aware about the importance of lifelong learning

Our Guidelines and Recommendations, try to give a solution to these weaknesses or possibilities of improvement, at this level.

### Company level

Carrying out an internship in the workplace doesn't imply a working relation between the enterprise and the student. An internship agreement is signed provided by the training centre and the relevant Administration is informed about it (the Department of Education, in the case of students coming from Initial Vocational Training, or Lanbide if the student comes from Employment Vocational Training). In addition, the internships do not have any cost for the companies.

In Dual Training the situation is different because in this case, there is a work contract between the enterprise and the student who becomes part of the workforce.

Companies participate in the system, communicating its necessities to the training centres and to the Administration, embracing the interns, bearing in mind that it is a good opportunity to meet people to be included in their workforce when they need them. Also, to provide the interns with the necessary training to fulfil their academic education, and get to know the business reality.

In general, the work of the enterprises related to Apprenticeship is quite good, but both, the Administration and the training centres, agree that, in some case, a change of mentality in the enterprises is necessary:

People doing an internship are not workers without a cost but people training (in this case in the workplace) and the enterprise has the responsibility to get involved in the training, in order to adapt their knowledge to the businesses necessities. There is room for improvement in this regard but, in general, the work of the enterprises is considered adequate.

The role of the tutor is key: he/she must be responsible for the apprentice training, for organizing the apprenticeship and for defining the objectives, he must get involved with the interns sharing with them his/her experience and knowledge, and guiding them in the apprenticeship process.

We have to bear in mind that the tutors from the enterprises do not receive any previous training to prepare them for the task. It all depends on their implication, experience and know how.

From our point of view (based on the previous research), there are some **possibilities of improvement**, at Company Level:

- To make the companies aware of the importance of their involvement in Apprenticeship, their contribution to the professional development of the future workforce in the retail sector.
- To make the business owner / manager aware of Apprenticeship and to clarify what Apprenticeship means.
- To define the necessary profile and have the option of selecting the suitable student.
- To select the suitable person in the company who will take the role of tutor; to motivate the selected tutor and to give him/her the training to be able to assume this role.
- To improve the image and attractiveness of the retail sector (related to work conditions)

Our Guidelines and Recommendations, try to give a solution to these weaknesses or possibilities of improvement, at this level.

## Plan of action for the development of apprenticeship on Basque retail sector

Taking into account the situation in The Basque Country, we have designed an Action Plan, which contains a series of Guidelines and Recommendations, for the improvement of the VET System in The Basque Country and Spain.

It is focused on the Retail Sector, but it is able to be applied and translatable to other sectors.

These Guidelines and Recommendations are flexible and are organized by levels: policy, apprenticeship providers and company level.

### Guidelines and Recommendations at POLICY LEVEL:

Level	Possibilities of improvement	Nr.	Guidelines / Recommendations description	Responsibilities: Involved entities
Policy	To promote the different kinds of Apprenticeship to companies of the retail sector	1	To <b>design and develop a communication plan</b> with the collaboration of all the stakeholders involved in Apprenticeship to <b>show the different options of Apprenticeship</b> and encourage the retail companies and other stakeholders to <b>use and develop these options</b> .	<p>Collaboration between the Government institutions: Education, Employment and Commerce.</p> <p>Involving the main stakeholders: Apprenticeships providers, VET centres, Commercial Sector Associations, Trade Unions, Chambers of Commerce,</p>
		2	The Government institutions should <b>foster the VET centres themselves, promote the different options of Apprenticeship</b> , not leaving it at their own choice.	Collaboration between the Government institutions: Education, Employment and Commerce.
		3	To take into account <b>the business organizations</b> as intermediaries to foster the Apprenticeship	The Government institutions and the main stakeholders
		4	To <b>promote meetings among the different stakeholders</b> : to define the methods of communication, how to manage the Apprenticeship process, the role of each one, to ensure the adaptation of training to the companies' needs, the control and evaluation process	The Government institutions and the main stakeholders
		5	<b>To foster the first companies which</b> support and use these options so <b>prescribing their advantages to others</b> . It is important to deliver good practices to others, with the involvement of VET centres and associations.	The main stakeholders

Policy	<p>To promote, specially, the Dual Training to companies of the retail sector, VET centres and students</p>	6	<p>To <b><u>design and develop a communication plan, implemented by the government institutions</u></b>, addressed to:</p> <ul style="list-style-type: none"> <li>- <b><u>VET centres</u></b>: Asking for the <b>Involvement of VET centres</b>, teachers and directors to develop dual training.</li> <li>- <b><u>Companies: Meetings showing best practices</u></b> and successful cases to develop and implement this option in more and more companies of our sector.</li> <li>- <b><u>Students: Encouraging students to select this option</u></b> as an opportunity to know the labour market, start their work -life ...</li> </ul>	<p>Collaboration between the Government institutions: Education, Employment and Commerce.</p> <p>Involving the main stakeholders:</p> <p>Apprenticeships providers, VET centres, Commercial Sector Associations, Trade Unions, Chambers of Commerce</p>
	<p>More flexibility and less red tape to foster the implementation of the different options of Apprenticeship:</p>	7	<p>At present, there is a deadline for the realization of the practices, but this does not always meet the needs of companies and students. So it is necessary to make it <b>more flexible</b>:</p> <ul style="list-style-type: none"> <li>- To <b>give the opportunity to practice along the year</b> (not always with a deadline).</li> <li>- To <b>promote individual agreements</b> between companies and students (giving legal coverage to make it possible)</li> <li>- <b>Less documentation and red tape to access the Apprenticeship</b></li> </ul>	<p>Collaboration between the Government institutions: Education, Employment and Commerce.</p> <p>Involving the main stakeholders:</p> <p>Apprenticeships providers, VET centres, Commercial Sector Associations, Trade Unions, Chambers of Commerce</p>
	<p>To promote the Professional Certificates in the retail sector: training and practices for unemployed and employed people, as a way to improve the image and professionalism of our sector:</p>	8	<ul style="list-style-type: none"> <li>- Development, by the government institutions, of a <b>communication plan</b> to implement them in our sector, and <b>increase the funding</b> for the necessary courses to obtain it.</li> <li>- <b>Improvement of the system to obtain them</b>, above all, the opportunity to <b>recognize the previous experience and related training</b> (formal and informal)</li> </ul>	<p>Collaboration between the Government institutions: Education, Employment and Commerce.</p> <p>Involving the main stakeholders:</p> <p>Apprenticeships providers, VET centres, Commercial Sector Associations, Trade Unions, Chambers of Commerce</p>

Policy	Improvement of the collaboration and cooperation between the main government institutions and stakeholders	9	<p>The general system of Training and Apprenticeship runs quite well in Basque country, but it is necessary a better collaboration, communication and cooperation between the main government institutions: legal framework, relationship among them...</p> <p>They know it but sometimes, internal conflicts difficult the good relationships among them.</p>	<p>The main Government institutions involved in Apprenticeship: Education and Employment, for the improvement of collaboration between the Government institutions:</p> <p>They must resolve their conflicts in this sense.</p> <p>There are some attempts to resolve it, as the legal framework for dual training.</p> <p>In retail sector, the Direction of Commerce of Basque Government is getting involved to improve these relationships for a better development of Training and Apprenticeship in retail sector.</p>
	More involvement of Government institutions to support the retail sector: IMAGE AND ATTRACTIVENESS OF RETAIL:	10	<p><b><u>Design and development of Communication campaigns:</u></b></p> <ul style="list-style-type: none"> <li>- To improve the <b><u>image and positioning</u></b> of the retail sector, and <b>increase its attractiveness</b> (for families, new students, society in general, ...)</li> <li>- To <b><u>attract the interest of the students and the workers to the training specialties in retail</u></b> (as a good possibility of developing a <b>professional career</b>).</li> <li>- The local retail enterprises are innovating. It is necessary to improve communication through social media and others to improve social valorisation of the sector.</li> </ul> <p><b><u>To increase the funding</u></b> for the <b>realization of training for the retail sector</b> (on-going and occupational training, vocational training ...).</p>	<p>Commerce Department of Basque Government, with the collaboration of Education and Employment Departments.</p> <p>It is important to involve the retail sector association and other stakeholders that represent and foster the interests of the retail.</p>



## Guidelines and Recommendations at **apprenticeship providers' level**:

We have established **three levels**:

- **High Education Centres level (University)**
- **VET centre level:** The main goal is to **foster the excellence**, the **quality** and the **adaptation** of the Vocational training to the **needs of the work market**.
- **Secondary Education Level:** The goals of our recommendations are to **improve the image and positioning of retail and become an attractive and interesting option for the students, specifically**:
  - To foster the knowledge of the retail sector among the Secondary Education students:
    - The **importance of the retail sector** for community life and the **attractiveness** of the sector
  - To foster, personal and enterprise initiatives...

Level	Possibilities of improvement	Nr.	Guidelines / Recommendations description	Responsibilities: Involved entities
Apprenticeship Providers: High Education Centres (University)	To foster the relationship between University and companies of retail sector, to improve the professionalism and competitiveness of the sector.	11	<p>Until present, the relationship between the retail sector and the educational sector <u>has focused on the VET centres</u>. Therefore, it is necessary <u>to foster our relationships with Universities</u>, through the retail sector associations (and others).</p> <p>For that, we suggest <u>Agreements</u> between University and business organizations to cover the following:</p> <ul style="list-style-type: none"> <li>- Workplace training</li> <li>- Training of retail business owners and managers at University</li> <li>- Involvement of retail entrepreneurs in the academic training at University</li> <li>- Foster the importance of the initiative and the entrepreneurial spirit.</li> <li>- Improve the image of the retail, as a sector for the development of a professional career.</li> <li>- Joint projects University – retail associations, for the generational replacement, improvement of competitiveness...</li> </ul>	<p>Leadership of retail sector associations and other stakeholders who represent the interests of the retail sector.</p> <p>Collaboration with University.</p>

Apprenticeship Providers: VET centres	<p>Continuous updating of the curricula and the knowledge of the faculty.</p> <p>In general, the training in VET is very “academic” and there is a lack of real knowledge about the real needs of Retail. The curricula design comes prepared for the VET centres, but they are able to adapt it. So, we suggest a series of recommendations:</p>	12	<p>The organization of a series of meetings to know the real needs of the retail, to bring the following aspects together:</p> <ul style="list-style-type: none"> <li>- Difficulties of the VET centres, like updating and on-going training of the faculty, recruitment of new students, to find companies for practice, low competence levels of the students, etc.</li> <li>- Difficulties of the companies: for example, to find workers with the competencies needed, to find some profiles, to guide the apprenticeship in the workplace, support for the monitoring and evaluation of the practices, etc.</li> <li>- Definition of “what retail sector is”, in order to adapt training to their needs, taking into account the different subsectors (groceries, fashion shops, etc.) and their specific needs. And to set the difference among local shops and others (hypermarkets, department stores, etc.), whose structure and needs are different.</li> <li>- Suggestion of support tools and solutions for those needs among all the stakeholders.</li> </ul>	<p>VET centres with retail sector associations and other stakeholders who represent the interests of the retail sector. Moreover, retail companies.</p>
		13	<p>Visits of the faculty and the student body to companies of the retail sector:</p> <ul style="list-style-type: none"> <li>- To know directly the day-to-day running of a retail company, competency needs, evolution of the profiles related to sales process, the new profiles...</li> <li>- To bring closer together the educational and the retail worlds: to know new models of business, new approaches based on customer experience, fair trade, online commerce, social media, social responsibility, ecology, etc.).</li> </ul> <p>As a result, to adapt the training to it.</p>	

Apprenticeship Providers: VET centres		14	Continuous updating of the faculty's knowledge: On-going training plan addressed to the teachers (with the support of business organizations and other stakeholders).	VET centres with retail sector associations and other stakeholders who represent the interests of the retail sector. Moreover, retail companies.
	Agreements between VET centres and companies (through their associations)	15	The main goal is to foster the involvement of retail workers and workers of the retail associations, in training the future professionals (teaching activity). Subjects: practical and technical aspects and transversal aspects (leadership, motivation, teamwork, initiative, enterprising and others).	VET centres with retail sector associations and other stakeholders who represent the interests of the retail sector. Moreover, retail companies.
	Joint projects among VET centres and retail enterprises	16	Agreements among VET centres, students and companies for the development of real projects during the training at "school", and practices at the end.	VET centres with retail sector associations and other stakeholders who represent the interests of the retail sector. Moreover, retail companies.

<b>Apprenticeship Providers: VET centres</b>	<p>Improvement of the practice process in company</p>	<p>17</p> <p>To reach it, we suggest the following:</p> <ol style="list-style-type: none"> <li>1. Analyse the viability of the existence of a professional adviser, as an independent position in the VET centre, coordinated with the centre’s tutors and with all the stakeholders and agents involved. The main goal is the individual following of each student to improve the results of the training and Apprenticeship.</li> <li>2. Prepare a detailed file of each professional/work profile. There must be a direct and real link between the professional profile and the qualification with the work tasks.</li> <li>3. Simulation in VET of a job interview, a selection process, to prepare the students for a real situation in labour market.</li> <li>3. To give the company the opportunity to select the suitable student to improve the results of apprenticeship: taking into account the needs of both, the interests of the student (“hidden curriculum vitae”), etc.</li> <li>4. Improvement of the coordination between the VET centre and the company</li> <li>5. Development of a more exhaustive evaluation process of the apprenticeship (with the support of the VET centre’s tutor: guidance and models:             <ul style="list-style-type: none"> <li>- Initial: Involvement of VET centre’s tutor and company’s tutor. Setting of objectives to be able to test at the end of the process.</li> <li>- During the practice process: Coordination about both tutors and support during the practice process.</li> <li>- Final evaluation: Test of knowledge and competencies at the end of the practices. Model agreed with the VET centre.</li> </ul> </li> </ol>	<p>VET centres and companies, with the involvement and collaboration of the main stakeholders, especially, retail sector associations.</p>
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Apprenticeship Providers: VET centres	Motivation and involvement of the students in the training (at VET) and apprenticeship process	18	Suggestion of new methods of training, the importance of lifelong learning, the advantages for themselves...	VET centres
	Change of mentality of the students	19	<p>They are used to the academic's but the work world is different, so it is necessary to change their attitude (more maturity, more responsibility...) and motivate them for apprenticeship (without a salary), as an opportunity for learning and starting their professional careers...</p> <p>Best practices must be shown to students to motivate them to participate in Apprenticeship (from students to students)</p> <p>Here the role of tutors and advisers to guide them is very important. There must exist a friendly environment between tutors/teachers and students to get the necessary change.</p>	VET centres

Level	Possibilities of improvement	Nr.	Guidelines / Recommendations description	Responsibilities: Involved entities
Apprenticeship Providers: Secondary Education	Organization of activities to improve the knowledge of retail.	20	Activities, as, for example, <b>Open house</b> in the commercial establishments, <b>visits to the shops</b> (teachers & students), <b>workshops</b> in classroom, <b>shop routes</b> ...	Leadership of the retail sector, through their associations and other stakeholders. Collaboration with the Secondary Education Centres. Implication of Government institutions (Department of Education)
	To introduce, from Primary School, some subjects and activities linked to foster the personal initiative and the enterprising spirit.	21	We must make students aware that they will not always be hired by a company and that it is important to <b>create their own job</b> , and other peoples', to contribute to the <b>region's wealth generation</b> .	

<b>Apprenticeship Providers: Secondary Education</b>	To make the students aware about the importance of lifelong learning	22	It is important <b><u>to make the students aware of the importance of lifelong learning</u></b> (from Primary School).	
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## Guidelines and Recommendations at COMPANY LEVEL:

Level	Possibilities of improvement	Nr.	Guidelines / Recommendations	Responsibilities: Involved entities
Company	To make the companies aware of the importance of their involvement in Apprenticeship, their contribution to the professional development of the future workforce in the retail sector	23	<p>They must <b>welcome them in their companies</b> with the main goal that the apprentice acquires the practical knowledge and necessary competencies to become employed in our sector (<b>social responsibility</b>).</p> <p>It is essential if we want to <b>improve the professionalism and competitiveness</b> of the sector and to foster its <b>generational shift</b>.</p>	<p>Collaboration between VET centres, retail sector associations, and other stakeholders who represent the interests of the retail sector.</p> <p>Involvement of the companies of the retail sector.</p> <p>Involvement of government institutions (Education, Employment, Commerce Departments)</p>
Company	To make the business owner / manager aware of Apprenticeship and to clarify what Apprenticeship means.	24	<p>For that, there should be some <b>talks about it</b> (involvement of VET centres):</p> <p>They must be clear that <b>the student is not a worker</b> and there is not a contractual relationship:</p> <p>It is <b>training in the workplace</b> and the relationship between the company and the student must be <b>professional</b>, having very clear <b>roles for each one</b>. The main goal is to <b>train the future workers</b> and to <b>attract talent to the retail sector</b>.</p> <p><b>To get these goals, it is necessary to involve VET centres, retail sector associations</b> and the <b>Companies of the retail sector</b>. As well as the <b>government institutions</b> (Education, Employment, Commerce Departments): Meetings, communication plan, agreements, funding, etc.</p>	<p>Collaboration between VET centres, retail sector associations, and other stakeholders who represent the retail sector interests.</p> <p>Involvement of government institutions (Education, Employment, Commerce Departments)</p>



	To define the necessary profile and have the option of selecting the suitable student	25	The company's responsible person must <b><u>define the necessary profile and the tasks to be done by the selected student: Content of the job, tasks, tools, equipment, personal competencies, organization, company's culture</u></b> , etc. (with the support of the VET centre).	<p>Collaboration between VET centres, retail sector associations, and other stakeholders who represent the interests of the retail sector.</p> <p>Involvement of government institutions (Education, Employment, Commerce Departments)</p>
Company	To select the suitable person in the company who will take the role of tutor	26	<p>It is important to take into account the following aspects, related to the selection of the person who must take the role of tutor:</p> <ul style="list-style-type: none"> <li>- A person <b>involved</b> in the company, <b><u>motivated and disposed to take responsibility</u></b> for being a tutor. This person must have the <b>knowledge and the expertise needed to ensure the suitable training, guidance and evaluation</b>.</li> <li>- The <b>company's responsible person</b> must set the <b>new tasks, calendar, networking</b> (tutor, student, VET centre tutor, etc.).</li> </ul>	Retail sector companies with the support of VET centre, retail sector association, etc.
	To motivate the selected tutor	27	The owner/manager of the company must <b><u>think about the role of tutor</u></b> and the <b><u>new responsibilities</u></b> , he/she will assume: new tasks, timetable, overtime, extra-work, etc. - and <b><u>agree with the tutor the way to recognize this extra-work</u></b> .	Retail sector companies with the support of VET centre, retail sector association, etc.
	To train the company tutor to be able to assume this role	28	<p><b><u>It is important to train the company tutor to be able to assume this role</u></b>, because most times, <b><u>tutors need help</u></b> to assume this new role: training, guidance, tools, etc.</p> <p>We recommend the organization of <b><u>group training courses addressed to the retailers, tutors, etc.</u></b> (leading by the VET centres and the business organizations). It's necessary to analyse the cost of it, viability, funding sources ...</p>	<p>Collaboration between VET centres and retail sector companies (through their associations and other stakeholders who represent their interests).</p> <p>Involvement of government institutions</p>

		<p>Idea: To <b>create a network of professional volunteers belonging to retail</b> (active and/or retired professionals) to make it possible.</p> <p>On the other hand, it is supposed that the tutor has the expertise and the knowledge about the tasks the student must do, but most times, there is an <b>increasing demand of new professional profiles</b> (community manager, virtual shop manager, etc.), and, usually, there's not a worker with that knowledge. In this case, it is necessary to <b>help and support from the VET centre</b> (agreements, meetings, training...)</p>	<p>(Education, Employment, Commerce Departments)</p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Company</p>	<p>To improve the image and attractiveness of the retail sector (related to work conditions)</p>	<p>29 In general, there is <b>not a good image</b> of Retail. This is the reason why the companies and their representatives <b>must make a reflection about the work conditions</b> in the sector: salary, timetable, possibilities of development of a professional career... In addition, it is necessary an <b>evolution of profiles</b>: From salesman/woman to sales adviser (training programs to make it possible).</p> <p>The change and the improvements <b>must come from inside the sector</b> if we want to <b>attract new workers and talent</b> to our companies. With the support of retail associations (and others), VET centres, government institutions.</p>	<p>The companies of the retail sector, themselves.</p> <p>The retail sector associations and other stakeholders who represent their interests.</p> <p>With the support of government institutions (Commerce Department).</p>
		<p>30 To <b>promote and to value the on-going training</b>, the <b>training for Employment</b> and the <b>Professional certificates</b>. The workforce must take part in training with the aim of the <b>continuous updating</b> of their knowledge and competencies: the <b>owners</b> as much as the <b>workers must</b>. Moreover, the owners <b>must facilitate the participation</b> of the workers in training, and <b>recognize</b> it.</p>	

# DEVELOPMENT OF INNOVATIVE APPRENTICESHIP IN RETAIL SECTOR IN PORTUGAL

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## Overview of the apprenticeship courses in Portugal

Apprenticeship courses are one of the modalities of the Portuguese VET system and consist in initial training of young people, where the main focus is their integration into the labour market and which is characterized for being a training in VET institution which takes place at the same time as the practice in real context (in a company), in an alternating system. These apprenticeship courses in an alternating system are designed to young people between the age of 14 - 24 with the 9<sup>th</sup> grade (basic level) concluded but without the 12<sup>th</sup> grade (secondary level) concluded and who are interested in getting a professional qualification and conclude the 12<sup>th</sup> grade, at the same time. Upon the successful completion of a Vocational Course young people will be awarded a Secondary level of Education certificate and the Professional Level 4 qualification as defined by the National Qualifications Framework.

The first pilot course implemented in Portugal for initial training of young people was held in 1980, a fact which is known as the “starting” point for the approval of the apprenticeship courses, once it stimulated the creation of the first national law for these courses in 1984 (Decree-Law n. 102/84 of 29th of march) of the responsibility of two Ministries: Ministry of Education and Ministry of Labour and Social Security. Since then the legislation of apprenticeship courses has been changing and current law in force is the Decree n. 1497/2008 of 19<sup>th</sup> of December.

A comprehensive understanding of the apprenticeship courses in an alternating system in Portuguese context is only possible after knowing the socioeconomic context of the country along time and also the history and evolution of its VET system. Nonetheless, generally speaking is possible to identify as main features of the Portuguese apprenticeship courses the followings:

- A strong legal framework of these courses at National level defined by the Portuguese government in the figure of the Employment and Professional Training Institute (IEFP, I. P.);
- Centralization of the management and allocation of funding on the IEFP, I. P., responsible for the definition of the annual strategy (goals and indicators), technical and pedagogical methodology and also the access to funds;
- A wide variety of types of entities which can implement and promote the courses (VET centres, training schools, chambers of commerce (and other employers organisations), trade unions (and other employees associations), companies, among other).

Besides taking into consideration these features<sup>3</sup> for the development of the guidelines and recommendations for the development of apprenticeship in retail sector in Portugal, it was also taking into account the contributions and suggestions introduced by the following documents:

- “Guidelines for Development of Apprenticeship in VET system of Lithuania” developed under the DEVAPPRENT project;
- “Comparative analysis of apparent good practice in Apprenticeship System” developed under the DEVAPPRENT project;
- “Comparative analysis of good practices in Europe Apprenticeship Systems” developed under the UPPRETAIL project.

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<sup>3</sup> Introduced in the document “Preconditions of the current situation of apprenticeship in Euro southern area countries” developed under this project and available at [project website](#).

## General conditions for the implementation of these guidelines and recommendations

In the document “Preconditions of the current situation of apprenticeship in Euro southern area countries” developed under this project, it is evident that the apprenticeship courses are identified as being strategic and important to the competitiveness and performance of companies of the retail sector by the stakeholders interviewed during the need analysis held in Portugal.

Several advantages of the apprenticeship were mentioned by these stakeholders, which highlight the benefits that these courses can have on young trainees, retail companies, VET/school providers and a society as an all. Stakeholders also mentioned some constrains to the implementation of the apprenticeship courses in the trade sector and point out possibilities of improvement.

These contributions and suggestions are the base of the guidelines for the implementation of the apprenticeship scheme in the retail sector in Portugal described in the next pages and are meant to be implemented according to the following general conditions:

- All stakeholders and their roles must be considered and attended in the implementation of these guidelines;
- Despite their general character, these guidelines were developed to be implemented in VET/school entities and in small and medium enterprises (SMEs) of the retail sector in Portugal;
- The implementation of the guidelines requires the active and voluntary involvement of VET/school entities, trainers/trainers, SMEs and employees, whose contributions and suggestions will be crucial to its improvement;
- Despite the fact that these guidelines have been designed based on desk research and need analysis, they are flexible and susceptible to be adapted to specific contexts of the VET/schools entities and SMEs of the retail sector.

These general conditions for the implementation of the guidelines and recommendations for the development of apprenticeship in retail sector in Portugal must be considered in the organization of the training seminars for VET entities and teachers/trainers and companies and tutors and of the pilot-test related to the apprenticeship training methods. Under these general conditions, the Portuguese partner of the UPPRETAIL will be able to test and verify to what extent the guidelines and recommendations are suitable to the context of the country and proceed with reviewing and rectification of the necessary elements.

## Guidelines for the improvement of the development of apprenticeship on Portuguese retail sector

As mentioned in the introduction of this document, the guidelines and recommendations for the development of apprenticeship in retail sector in Portugal will be introduced at three levels:

- Policy level;
- Apprenticeship provider level;
- Company level.

At each one of these three levels, we will introduce the main possibilities of improvement of the apprenticeship system in retail sector in Portugal, in order to contribute to the improvement and attractiveness of Portuguese VET system, in general and in particular of the apprenticeship courses.

### Policy level

Portuguese government has a central role in the regulation, implementation and funding of apprenticeship courses. This fact is widely explained in the document “Preconditions of the current situation of apprenticeship in Euro southern area countries”<sup>4</sup>, but in short the responsibility of the state institutions at this level is shown in the table 1:

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<sup>4</sup> Available at [project website](#).

**Table 1** - Identification of the state institutions, its related Ministries, mission and main attributions under the Portuguese VET system.

Government institutions	National Agency for Qualification and Vocational Education and Training (ANQEP, I.P.)	Employment and Professional Training Institute (IEFP, I. P.)
Related Ministries	Public body under the joint supervision of the Ministry of Solidarity, Employment and Social Security, and the Ministry for Education and Science in articulation with the Ministry of Economy.	Ministry of Solidarity, Employment and Social Security
Mission	“Coordinate the implementation of policies regarding the education and vocational training of young people and adults, as well as to ensure the development and management of the National System of Recognition, Validation and Certification of Competences (RVCC)”. <sup>5</sup>	“Stimulate the creation and quality of the employment and fight against unemployment, by executing the active policies of employment, namely the vocational and educational training”. <sup>6</sup>
Main attributions	<ul style="list-style-type: none"> <li>- Develop and manage the RVCC system;</li> <li>- Coordinate, foster and manage the VET courses;</li> <li>- Guarantee the monitoring, assessment and regulation of VET provision;</li> <li>- Coordinate and promote the design of pathways, programme development and specific methodologies and materials for VET;</li> <li>- Establish cooperative relations or association with other stakeholders (public or private, national or international entities), namely fostering the development of Lifelong Learning with quality;</li> <li>- Contribute to the development, at European level, of exchanges and cooperation mechanisms, as well as mobility between VET systems;</li> </ul>	<ul style="list-style-type: none"> <li>- Promote the information, orientation, qualification and professional rehabilitation for placement and professional progression of the employees in the work market;</li> <li>- Promote the educational and professional qualification of young people and adults, providing dual certification training (including apprenticeship courses) and training certification, adjusted to individual pathways and relevant for the economy modernization;</li> <li>- Promote, by itself or in collaboration with other entities, professional training courses suitable to the population needs and to modernization and development of the economic fabric</li> </ul>

<sup>5</sup> Available at [ANQEP, I.P. website](#).

<sup>6</sup> Available at [IEFP, I.P. website](#).

- Promote, particularly through the design and permanent update of the National Catalogue of Qualifications (NCQ), the identification, production and the national and international comparability of essential qualifications for the competitiveness and modernization of the economy, mobilizing the main stakeholders of VET system;
- Promote the integrated assessment of the qualifications modalities coordinated by the ANQEP, I.P.;
- Contribute to the development and deepening of the Regulated System of Professions (SRAP), according to its attributions;
- Participate in the development of initial and continuous training for VET professionals.

(including the apprenticeship courses);

- Participate in the coordination of activities of technical cooperation developed with national and international organizations and foreign countries in the domains of the employment, training and professional rehabilitation;
- Implement monitoring actions, of verification and audit the financial and technical supports, provided under the measures of the employment and professional training (including the apprenticeship courses), which is executing agency.

Both government institutions, ANQEP, I.P. and IEFP, I.P. have decentralized structures<sup>7</sup> at regional and local levels and in order to achieve their missions. The decentralized structures of the IEFP, I.P., which is the national institution responsible for the regulation, management, coordination and funding of the apprenticeship courses at national level, are presented in the document “Preconditions of the current situation of apprenticeship in Euro southern area countries”<sup>8</sup>. In the same document, it is clear that besides the decentralized structures of the IEFP, I. P. (including the Employment and VET Centres), other entities identified as External Entities of Training (EET) can also provide apprenticeship courses, namely VET Centres with subsidiary management of IEFP, I.P., VET institutions with active protocols of collaboration also with IEFP, I.P. and other entities with IEFP, I.P. authorization and finance support. The profile of these EET is diverse, in fact one of the main features of the Portuguese VET system, in particularly of the retail sector, is the existence of a wide variety of educational and training providers including iVET centres, private training entities, employers, employment agencies, trade unions and retail associations, among others. Besides the involvement of these stakeholders in the implementation of the apprenticeship courses as a VET provider, is also predicted their involvement at other levels, namely at the level of the:

- Identification of the **market needs and expectations** by the development of **sectorial reports**;
- Development of **professional profiles**, through the **Sectorial Councils for Qualification (CSQ)**<sup>9</sup>, technical-consultancy working groups, created by the ANQEP, I.P. , structures of the National Qualifications Framework (NQF), whose main goal is to permanently identify the main needs of the market and update the NCQ<sup>10</sup>. Through the sectorial council for qualification of trade and marketing, different entities of trade sector, such as companies and sectorial employers` organisations, trade unions and professional organisations or chambers of commerce, industry and trade, can actively contribute to the development and update of the trade sector qualifications.<sup>11</sup>

The funding of the apprenticeship courses in Portugal is also centralized, being exclusively funded by state budget and European Social Funds (ESF), under the management and supervision of the IEFP, I.P., an organism also responsible for the national regulation of the apprenticeship courses in Portugal, a general regulation, suitable to all professional sectors (including the retail sector)<sup>12</sup>.

The legislation of Apprenticeship Courses has been changing over time allowing a progressive improvement of these courses in Portuguese context. However, and as highlighted on the interviews made under the first activities of the UPPRETAIL project, in spite of this improvement, it is possible to identify possibilities of improvement of the apprenticeship courses in Portugal. These guidelines are presented in the table below, as well as the strengths and weaknesses identified by the stakeholders also during the interviews.

<sup>7</sup> The decentralized structures of the ANQEP, I.P. are identified as *Centers for the Qualification and Vocational Training (CQEP)* and detailed information is available at <http://cqep.anqep.gov.pt/>.

<sup>8</sup> This document is available at the [project website](#).

<sup>9</sup> Created by the ANQEP, I.P. in accordance to the article no 17, of the Decree Law no 396/2007, of 21st of December.

<sup>10</sup> At the moment, and in order to cover the educational and training needs of the main national economic sectors, there are 16 CSQ in Portugal, including the CSQ related to trade and marketing, which includes the retail area.

<sup>11</sup> More information related to these CSQ, managed by the ANQEP, I.P., is available [here](#).

<sup>12</sup> In the document “Preconditions of the current situation of apprenticeship in Euro southern area countries” is widely explained that there is a national and general regulation of the apprenticeship courses and also a specific regulation of the apprenticeship courses, which is updated every year by IEFP, I.P. and both are suitable to all professional sectors.



Strengths	Weaknesses
<ul style="list-style-type: none"> <li>- Existence of a national regulation for the funding, development, implementation and assessment of the apprenticeship courses.</li> <li>- Strong commitment of Portuguese government on the implementation with quality of the apprenticeship courses.</li> <li>- High proximity between professional profile of training curricula and the labour market needs and expectations.</li> <li>- An apprenticeship course allows to get, at the same time, a school certification and a professional certification (level 4 of NQF), recognised by the Ministry of Education and Science and the Ministry of Solidarity, Employment and Social Security, as well as by the labour market.</li> <li>- Apprenticeship courses are a training offer which allows further study at a higher education level.</li> <li>- Possibility of companies of the retail sector to monitor and evaluate the curriculum evolution.</li> </ul>	<ul style="list-style-type: none"> <li>- Lack of knowledge and recognition related to the VET system<sup>13</sup>, in general, and the apprenticeship courses, in particular (in terms of characterization, advantages and positive impact) by young people their families and also by companies of the retail sector.</li> <li>- Institutional structure of the system of qualification is complex and confuse to some of the main stakeholders.</li> <li>- Similarities between the technical professional profiles in which apprenticeship courses are developed and the graduated professional profiles (there is some confusion between professional profiles of the VET system and High Education system).</li> <li>- Low involvement of companies and company associations besides their involvement as Entities of Support to Alternating (ESA).</li> </ul>
Possibilities of improvement	
<ul style="list-style-type: none"> <li>- Invest in national campaigns to promote this VET modality before communities and companies, as a real alternative for initial training of young people.</li> <li>- Promote the involvement and responsibility of the social partners (trade unions, chambers of commerce, trade and industry, companies of the retail sector) in the implementation of the apprenticeship courses at different levels: funding, definition of the qualifications, definition of the training curricula, assessment of learning outcomes, quality insurance.</li> <li>- Develop and maintain a national network of entities involved in retail sector apprenticeship courses, improving the coordination of activities and interaction between the different partners.</li> <li>- Develop and apply a quality framework and process to monitor and evaluate the quality of apprenticeship courses in the retail sector.</li> <li>- Guarantee the link between apprenticeship providers and trade market.</li> </ul>	

**Table 2** – Identification of the strengths, weaknesses and guidelines for improvement of apprenticeship courses of the retail sector in Portuguese context and at policy level.

### Apprenticeship provider level

In Portuguese VET system in general and in the retail sector, in particular, there is a wide variety of entities which provides apprenticeship courses. The document “Preconditions of the current situation of apprenticeship in Euro southern area countries”<sup>14</sup>, which identifies IEFP, I.P. as the public entity responsible for the coordination of this

<sup>13</sup> Traditionally in Portugal, VET system and its offers are seen as the last chance of young trainees at risk of dropping out or of failure.

<sup>14</sup> Document available at [project website](#).

training modality, is clear about this issue and shows that all apprenticeship providers must have a type of relation or contract with the IEFP, I.P. Thus, apprenticeship providers in Portuguese context usually are:

- Decentralized structures of the IEFP, I.P., in particular Employment and VET Centres;
- VET Centres with subsidiary management of IEFP, I.P.<sup>15</sup>;
- VET institutions with active protocols of collaboration also with IEFP, I.P.<sup>16</sup>;
- Other entities with IEFP, I.P. authorization and finance support<sup>17</sup>.

In spite of being different entities, the Portuguese apprenticeship providers are generally responsible for:

- **Organising** apprenticeship courses (dissemination, recruitment of young trainees, recruitment of VET trainers<sup>18</sup>, establish strategic partnerships, allocate physical and material resources);
- **Developing** the apprenticeship courses (specify contents according to the region, local and companies of retail sector, define specific pedagogical methodologies, define specific assessment methodologies);
- **Monitoring the practical training at the workplace** (PTW) developed in an entity of support to alternating (ESA) (maintain and manage network of strategic partnerships to PTW, define profile of companies and tutors, define the plan for PTW with the company (ensuring the coherence between theoretical and practical of the training), maintaining the communication with the tutor/company);
- **Guaranteeing the final evaluation** of the young trainee, managing this process since the very beginning of the training and ensuring the communication and interaction between all parts involved on the evaluation;
- Contributing to the **assessment of the quality** of the apprenticeship courses (involving the main stakeholders and using different and complementary methodologies and supports)
- Contributing to the **development or update of professional profile and training curricula** (there are certain VET entities with sectorial specifications, which contribute actively with ANQEP, I. P. in this process).

Such as at the policy level, is possible to identify the main strengths, weakness and possibilities of improvement of the apprenticeship courses on the Portuguese retail sector based on the apprenticeship providers' perspective. In fact, in spite of the growth of the quality of the Portuguese VET system and providers checked in the last 20 years, there are some features of the system and at apprenticeship providers' level that can be improved, as shown on table 3.

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Development and implementation of the apprenticeship courses by entities directly involved on the retail sector (VET centres/schools, companies, trade unions and chambers of commerce specifically linked to the retail sector).</li> <li>• Clear definition of the profile of VET trainers involved on the apprenticeship courses (namely of the trainers responsible for the technical/vocational training).</li> <li>• VET trainers have pedagogical skills and competences.</li> <li>• Strong commitment of some of the VET providers of the retail sector in the dissemination and promotion of the</li> </ul>	<ul style="list-style-type: none"> <li>• Wide range of entities which provides apprenticeship courses in Portuguese retail sector;</li> <li>• Strong centralization of the development of the training curricula<sup>19</sup>.</li> <li>• Difficulty on involving more actively the companies of the retail sector on the development and implementation of the apprenticeship courses<sup>20</sup>.</li> <li>• Difficulty on attract young people really motivated to participate in the apprenticeship courses.</li> </ul>

<sup>15</sup> Identified as External Entities of Training (EET).

<sup>16</sup> Idem.

<sup>17</sup> Idem.

<sup>18</sup> Professional of the VET entity which provides the in-class training.

<sup>19</sup> In spite of the existence of the CSQ, which predicts the involvement of social partners on the development and update of professional qualifications, profiles and curricula, these tasks stills very centralized on the Portuguese state.

<sup>20</sup> Besides their role as an entity of support to alternating (ESA).

VET system, in general, and of the apprenticeship courses in particular.	
Possibilities of improvement	
<ul style="list-style-type: none"> <li>• Invest in national campaigns to promote this VET modality before communities and companies, as a real alternative for initial training of young people.</li> <li>• Guarantee the link between VET entities and trade market.</li> <li>• Develop guidelines to establish, maintain and/or improve the contact and communication with companies of the retail sector.</li> <li>• Actively contribute to the process of monitoring and evaluation of the quality of apprenticeship courses in the retail sector.</li> <li>• Develop and follow-up of the implementation of the individual training plan of each young trainee.</li> </ul>	

**Table 3** - Identification of the strengths, weakness and guidelines for improvement of apprenticeship courses of the retail sector in Portuguese context and at apprenticeship providers' level.

### Company level

The main role of the companies of the retail sector on the implementation and development of the apprenticeship courses is mainly related to the support of the alternating and as an entity of support to alternating (ESA). This means that the companies of the retail sector are mostly responsible for:

- **Ensuring the PTW according to the individual training plan** (contributes to the definition of plan for PTW with apprenticeship providers, promote the integration of young trainees during PTW in the company, provide physical and material conditions to the learning in real context of the trainee, display a tutor with the adequate profile to monitor and evaluate the trainees);
- **Contributing to the development or updating of professional profile and training curricula** (certain companies with sectorial specifications contributes actively with ANQEP, I. P in this process).

The tutor, particularly, is responsible for ensuring the PTW according to the individual training plan, contributing to the definition of plan for PTW with apprenticeship entities, promoting the integration of young trainees during PTW in the company, providing physical and material conditions to the learning in real context of the trainee, training the young people and evaluating the young people's apprenticeship.

During the interviews, the stakeholders (including companies) underline the relevance of promoting an active involvement and more commitment by companies/tutors in the development and implementation of the apprenticeship courses at retail sector, not only during the training at the company but also on each phase of the training cycle. Thus, the possibilities of improvement of the development and implementation of the apprenticeships on the Portuguese retail sector are mainly focused on the reinforcement of the role and commitment of the companies of the sector on this process, which must be held in straight articulation with other measures defined at policy and apprenticeship providers' levels. The table 4 presents these possibilities of improvement as well as the strengths and weakness identified by the stakeholders during the interviews at the company level

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Apprenticeship courses have effective impact on young people’s qualification, contributing to their knowledge and integration related to the real work context (the alternating system allows young people to understand: what a company is, the meaning of production, the tools that can be used in a company, the knowledge, skills and competences that they have to have to work in the company and specific knowledge of the company sector).</li> <li>• Qualification of the young people contributing to the improvement of the companies’ processes and performances.</li> <li>• Recognition and validation of the tutor’s role and experience by the companies, giving him the opportunity of training young people (allows the motivation of the workers involved in the young’s people training).</li> <li>• Identification and contact between companies and qualified professionals, which can be useful for future recruitment processes.</li> <li>• Possibility of companies to get involved on the definition of professional qualifications/profiles and of the training curriculum.</li> </ul>	<ul style="list-style-type: none"> <li>• PTW occurs in an alternating system and it is not always suitable to certain functional profiles or to the companies’ activity.</li> <li>• Apprenticeship courses as an initial training for young people require sometimes a constant accompaniment and training by the tutor (mentoring), which sometimes is not compatible with the necessary autonomy and skills demanded to young people.</li> <li>• Companies and tutors do not always have the appropriated knowledge related to the implementation and development of the apprenticeships or about their role and responsibilities.</li> <li>• Lack of pedagogical and training knowledge, skills and/or competences of the tutors to train and evaluate the young trainees.</li> <li>• Lack of active involvement and responsibility of the companies as privilege contexts of training<sup>21</sup>.</li> </ul>
Possibilities of improvement	
<ul style="list-style-type: none"> <li>• Invest in national campaigns to promote this VET modality before communities and companies, as a real alternative for initial training of young people.</li> <li>• Actively contribute to the process of monitoring and evaluation of the quality of apprenticeship courses in the retail sector.</li> <li>• Develop and follow-up the implementation of the individual training plan of each young trainee.</li> <li>• Develop guidelines to establish, maintain and/or improve the contact and communication with companies of the retail sector.</li> <li>• Integrate the PTW on the company work process.</li> </ul>	

**Table 4** - Identification of the strengths, weakness and guidelines for improvement of apprenticeship courses of the retail sector in Portuguese context and at company level.

## Plan of action for the development of apprenticeship on Portuguese retail sector

Based on the strengths, weakness and guidelines for the improvement of the development and implementation of the apprenticeship courses on Portuguese retail sector, previously identified for each one of the levels of analysis (policy, apprenticeship providers and company levels) a plan of action for the inclusion of the mentioned guidelines on the apprenticeship courses was designed. This plan of action, presented on the following tables, is organized by level (policy, apprenticeship providers and company levels), guidelines for improvement (identified previously), measures to incorporate in the apprenticeship courses of the Portuguese retail sector and the identification of the stakeholders responsible for the incorporation of these measures.

<sup>21</sup> Besides their role as ESA.

Level	Possibilities of improvement	Guidelines/Measures		Responsibilities	
		Nr.	Description	Leader	Contributors
Policy	Invest in national campaigns to promote this VET modality before communities and companies, as a real alternative for initial training of young people.	1	Development of an external communication plan, including the identification of the types of audience, the main goals of the communication, definition of the message and tools for communication per audience and also the definition of mechanisms of assessment of the effectiveness of the communication. This communication plan should be implemented by the government institutions and also by other stakeholders and it could be useful to produce a TV commercial and design and conceive support materials to advertise the apprenticeship system.	IEFP, I. P. ANQEP, I.P.	Apprenticeship providers Trade Unions Trade Associations Chambers of Commerce, Industry and Trade
	Promote the involvement and responsibility of the social partners (trade unions, chambers of commerce, trade and industry, companies of the retail sector) in the implementation of the apprenticeship courses at different levels: funding, definition of the qualifications, definition of the training curricula, assessment of learning outcomes, quality insurance.	2	Reinforce the role of the social partners of the retail sector on the Sectorial Councils for Qualification (CSQ) by implementing more structured and transparent processes of their participation in these working-groups. It could be interesting to develop a specific document about the involvement and participation of the main stakeholders of the retail sector on these structures. In detail, this document should mention: which the entities involved on the process are, the description of this process of (definition of roles of each entity on the CSQ, identification of the issues to be approached, means of communication, rules of participation).	ANQEP, I.P.	VET Associations Trade Unions Trade Associations Chambers of Commerce, Industry and Trade
		3	Definition of working groups of successful entrepreneurs to cooperate in the design and conception of training curricula and in the development of a campaign to promote the advertising of the apprenticeship in retail sector among its main stakeholders.	IEFP, I. P. ANQEP, I.P.	Apprenticeship providers Companies (or representatives)
		4	Promote the flexibility of the training curricula and autonomy of apprenticeship providers and companies on the definition of the curriculum, under the State regulation, guaranteeing the matching between VET offer and labour market needs.	ANQEP, I.P.	Apprenticeship providers Companies
		5	Promote the establishment of work or traineeship formal contract between the young trainees and companies (which is an Entity of Support to Alternating (ESA)) as a complement to the training contract between young trainees and apprenticeship providers.	IEFP, I.P.	Apprenticeship providers Companies
Level	Possibilities of improvement	Guidelines/Measures		Responsibilities	

		Nr.	Description	Leader	Contributors
Policy	Develop and maintain a national network of entities involved in retail sector apprenticeship courses, improving the coordination of activities and interaction between the different partners.	6	Definition of the VET Network concept, which must include not only the CQEP but also the main stakeholders of the VET system (iVET centres/schools, companies, trade unions, chambers of commerce, industry and trade, youth organizations, among others). The document related to the VET Network concept should contemplate the VET Network “tools” (CQEP, NCQ, CSQ and other platforms and structures of support; strategy and action plan of the network) and also the VET Network concept itself (main basic features, potentialities and sustainability).	IEFP, I. P. ANQEP, I.P.	Apprenticeship providers Companies Trade Unions Trade Associations Chambers of Commerce, Industry and Trade
	Develop and apply a quality framework and process to monitor and evaluate the quality of apprenticeship courses in the retail sector.	7	Development of a Guide for the Quality of the VET system, in general, which must include: the concept of quality, main goals, quality process and patterns and stakeholders.	ANQEP, I.P. IEFP, I.P.	Apprenticeship providers Companies
		8	Define a common system and guidelines for the Project for Final Evaluation to be presented by the trainees, aiming to standardize this process independently of the VET provider or company where the student is being trained.	ANQEP, I.P. IEFP, I.P.	Apprenticeship providers Companies Trade Unions Trade Associations Chambers of Commerce, Industry and Trade
		9	Structure and implement a short training to tutors of companies from retail sector, allowing them to monitor and evaluate the PTW.	IEFP, I.P.	Apprenticeship providers Companies
	Guarantee the link between apprenticeship providers and trade market.	10	Prioritize the development and the implementation of the apprenticeship courses on retail courses by apprenticeship providers emerged from the sector entities or with strong linking to the sector.	IEFP, I.P.	Apprenticeship providers Companies

**Table 5** – Identification and description of the main measures and responsibilities related to the plan of action at policy level and according to the guidelines for the improvement of the development and implementation of apprenticeship courses on Portuguese retail sector, identified previously.

Level	Possibilities of improvement	Guidelines/Measures		Responsibilities	
		Nr.	Description	Leader	Contributors
Apprenticeship providers	Invest in national campaigns to promote this VET modality before communities and companies, as a real alternative for initial training of young people.	11	Integrates the dissemination of the apprenticeship courses of the retail sector on the external communication of the apprenticeship provider, according to the external communication plan mentioned on the guideline/measure nr. 1.	Apprenticeship provider	ANQEP, I.P. IEFP, I.P.
		12	Develop a data base of contacts of companies and social partners involved in the implementation of the apprenticeship system in the Portuguese retail system.	Apprenticeship provider	VET Associations Companies Trade Unions Chambers of Commerce, Industry and Trade
		13	Structure and promote training seminars and workshops for companies of the retail sector to introduce the apprenticeship courses, according to the following: Workshops of 2-3 hours, structured and implemented by VET providers linked to retail companies, to be implemented 2 times per year. It is crucial to include responsible of the practical training at the workplace (PTW) from the VET provider, tutors and testimonies of successful trainees in these sections, which should be developed at sectorial level (retail sector).	Apprenticeship provider	Trade Associations Chambers of Commerce, Industry and Trade
		14	Develop and advertise a promo video about the implementation of the apprenticeship system in the retail sector (advantages, impact, including testimonies). This video should be conceived with the contribution from all social partners. The idea is to structure and hold a National campaign to advertise and promote the apprenticeship system of the retail sector.	Apprenticeship provider	VET Associations Companies Trade Unions Chambers of Commerce, Industry and Trade
		15	Prepare and promote fairs and information sessions in secondary schools to advertise the retail sector as an opportunity to young students, involving testimonies and inviting young students and their parents.	Apprenticeship provider	Regular schools
Level	Possibilities of improvement	Guidelines/Measures		Responsibilities	

		Nr.	Description	Leader	Contributors
Apprenticeship providers	Invest in national campaigns to promote this VET modality before communities and companies, as a real alternative for initial training of young people.	16	Structure and promote workshops for counsellors/professionals of vocational guidance to introduce and advertise the apprenticeship system, according to the following: Workshops of 2-3 hours, structured and implemented by VET providers linked to retail companies, to be implemented 1 time per year. It is crucial to link this activity to the measure nr. 15 and together, apprenticeship provider and counsellors/professionals of vocational guidance can prepare and implement the measure 15.	Apprenticeship providers	Regular schools
		17	Structure and promote specific pedagogical training support to company level tutors, reinforcing their ability to monitor, train and assess young trainees in PTW. This support should be structured by VET providers linked to retail companies and retail unions, according to the specific needs of the tutors.	Apprenticeship providers	Companies Trade Unions Chambers of Commerce, Industry and Trade
	18	VET providers must be integrated in a VET network (which must include iVET centres/schools, companies, trade unions, chambers of commerce, industry and trade, youth organizations, among others) and actively participate in the network activities.	Apprenticeship provider	VET Associations Companies Trade Unions Chambers of Commerce, Industry and Trade	
	19	Develop guidelines to establish, maintain and/or improve the contact and communication with companies of the retail sector.	Apprenticeship provider Companies	Not applied	



Level	Possibilities of improvement	Guidelines/Measures		Responsibilities	
		Nr.	Description	Leader	Contributors
Apprenticeship providers	Actively contribute to the process of monitoring and evaluation of the quality of apprenticeship courses in the retail sector.	20	Ensure the quality patterns of the VET education according to the Guide for the Quality of the VET system (measure 7, mentioned at the policy level).	Apprenticeship provider	ANQEP, I.P. IEFP, I.P Companies.
		21	Design and implement activities to prepare the apprenticeship professionals (from apprenticeship providers and companies) for the implementation and monitoring of the apprenticeship courses: - Structure and implement a short training plan to trainers according to the desirable trainer's profile; - Structure and implement a short training to tutors.	Apprenticeship provider Companies	Trade Unions Chambers of Commerce, Industry and Trade
		22	Contribute to the definition of a common system and guidelines for Final Evaluation to be presented by the trainees (in line with guideline/measure 8).	Apprenticeship providers	ANQEP, I.P. IEFP, I.P. Companies Trade Unions Trade Associations Chambers of Commerce, Industry and Trade
		23	Structuring and maintaining a tutors' grant specifically set up to ensure the PTW at small retail companies.	Apprenticeship providers	Apprenticeship professionals Trade Unions Trade Associations
		24	Ensure the follow-up of the young trainees who drop-out of VET system identifying the causes of the dropping out and potential measures to consider in order avoid this phenomenon.	Apprenticeship providers	Parents Associations

Level	Possibilities of improvement	Guidelines/Measures		Responsibilities	
		Nr.	Description	Leader	Contributors
Apprenticeship providers	Develop and follow-up of the implementation of the individual training plan of each young trainee.	25	VET providers and companies (HR Manager and/or tutor) should develop, at an early stage, an individual training plan for each young trainee, which must contemplate: the identification of the company, young trainee and tutor; the training path (in accordance with the training curriculum of the NCQ, the regional/local needs and typology of the company); the learning outcomes (in terms of knowledge, skills <sup>22</sup> and competences); the process of organisation of workplaces and work processes for the purposes of apprenticeship; the process of assessment of the trainees during the PTW.	Apprenticeship providers Companies	Trade Unions Trade Associations Chambers of Commerce, Industry and Trade
		26	Elaboration of a template for the development of PTW reports by the young trainees. These reports should be completed monthly by the trainees according to his individual training plan, to be presented to both to - apprenticeship provider (coordinator, VET trainers) and company (HR manager, tutor) - including: identification of the professional profile (qualification, brief description of the qualification and activities), the predicted activities to be developed (individual training plan), the activities developed during that period (according to the individual training plan), main learning outcomes (e.g. "During this activity I learn.."), main constrains/difficulties, self-assessment and other relevant aspects.	Apprenticeship providers Young trainees	Companies
		27	Promote monthly seminars to young trainees: at least once a month, the VET trainer responsible for the follow-up of the PTW should promote a seminar with all young trainees participating on PTW, with the objective of sharing experience, identify constrains and ways of dealing with them, identify possibilities of improvement of the PTW at different levels.	Apprenticeship providers VET trainers	Young trainees
		28	Conceive and implement an evaluation sheet to be filled in at the end of PTW by trainees and entities supporting the traineeship and establish of a system of incentives to be implemented according to their results.	Apprenticeship providers Companies	VET trainers Tutors

<sup>22</sup> At this level is crucial to identify the so called soft skills that trainees must develop or consolidate before the first contact with company. Are examples of soft skills: team work, flexibility, communication skills, entrepreneurship spirit, ability to adapt, autonomy/initiative and others.

**Table 6** - Identification and description of the main measures and responsibilities related to the plan of action at apprenticeship providers level and according to the guidelines for the improvement of the development and implementation of apprenticeship courses on Portuguese retail sector, identified previously.

Level	Possibilities of improvement	Nr.	Guidelines/Measures		Responsibilities	
			Description	Leader	Contributors	
Company	Invest in national campaigns to promote this VET modality before communities and companies, as a real alternative for initial training of young people.	29	Integrate the dissemination of the apprenticeship courses of the retail sector on the external communication of the company, according to the external communication plan mentioned on the guideline/measure nr. 1.	Company	ANQEP, I.P. IEFP, I.P.	
		30	Be able to get involved in the training seminars and workshops to be implemented by the apprenticeship providers and, whenever possible support the development of these training seminars and workshops (as a complement to the guidelines/measures nr. 9 and 13)	Company	Apprenticeship providers Trade Associations Chambers of Commerce, Industry and Trade	
		31	Identify and promote the involvement of potential tutors on the pedagogical training to be implemented by apprenticeship providers (as a complement to the guideline/measure nr. 9)	Company	Apprenticeship providers Tutors Trade Unions Trade Associations	
	Actively contribute to the process of monitoring and evaluation of the quality of apprenticeship courses in the retail sector.	20	(Please see description above)	Company	Apprenticeship provider ANQEP, I.P. IEFP, I.P.	
	Develop and follow-up of the implementation of the individual training plan of each young trainee.	25	(Please see description above)	Apprenticeship providers Companies	Trade Unions Trade Associations Chambers of Commerce, Industry and Trade	

		Guidelines/Measures		Responsibilities	
Level	Possibilities of improvement	Nr.	Description	Leader	Contributors
Company	Develop and follow-up of the implementation of the individual training plan of each young trainee.	32	Provide feedback to young trainees and apprenticeship providers related to the monthly report of the PTW.	Companies	Apprenticeship providers Young trainees
	Develop guidelines to establish, maintain and/or improve the contact and communication with companies of the retail sector.	19	(Please see description above)	Apprenticeship providers Companies	Not applied
	Integrate the PTW on the company work process.	33	Design a strategic document to support the PTW, which should include: the relevance of the apprenticeship courses to the company (as a part of the recruitment strategy; as a strategy to involve and motivate the workers; as an opportunity to contribute to the match between training programs and the company's needs, etc.); the process of organisation of workplaces and work processes for the purposes of apprenticeship; the main figures involved on PTW and their roles and responsibilities.	Companies	Apprenticeship providers

**Table 7** - Identification and description of the main measures and responsibilities related to the plan of action at company level and according to the guidelines for the improvement of the development and implementation of apprenticeship courses on Portuguese retail sector, identified previously.

Independently of the level of analysis (policy, apprenticeship providers and company) the incorporation of the most part of the guidelines for the improvement of the development and implementation of the apprenticeship courses on Portuguese retail sector identified in the previous tables, requires the commitment and active involvement of government entities, VET providers and companies and other stakeholders. In fact, the incorporation of some of the identified measures is only possible with the agreement between the different stakeholders and a clear definition of the roles and responsibilities of each one of them in their incorporation.

## Conclusions and recommendations on education and training in trade sector

The need analysis carried out under the UPPRETAIL project allowed to design a range of 33 measures to be implemented at three levels (policy, apprenticeship providers and companies), in order to contribute to the improvement of the quality of VET systems of Euro-southern area countries. As established by the UPPRETAIL consortium, during the project implementation a test phase will be promoted to assure the measures at two of the three mentioned levels: apprenticeship providers' level and companies' level. The measures identified at policy level will also be introduced to the main stakeholders, but merely as guidelines of improvement.

For this effort, UPPRETAIL partners will develop two specific activities:

- Training seminars and workshops to apprenticeship providers and professionals, companies and tutors to introduce these guidelines;
- Pilot test of the identified guidelines to be implemented by apprenticeship providers and companies.

The strategy to the development of both activities includes the contact with strategic apprenticeship providers of the Portuguese retail sector, which will support the:

- Identification and description of the main guidelines/measures to be implemented;
- Identification and contact of apprenticeship providers and professionals, companies, tutors and other entities to get involved in both activities;
- Identification of apprenticeship courses and professionals to involve in the pilot test;
- Dissemination of the project outcomes, namely the guidelines, the further activities and its main results;
- Organization and development of the Final Conference of the project.