



**Setting up a European Sector Council
on Employment and Skills
in Agriculture**

VP/2011/008/0144

FEASIBILITY STUDY

Berlin, November 2012

Summary

- 1 Introduction
- 2 Changes in European agriculture
- 3 The social partners in agriculture
- 4 Developments and trends in the countries concerned
- 5 Remit and objectives of the Sector Council
 - 5.1 Sector Council working procedures (EFFAT proposal)
 - 5.2 Mainstreaming across different policy areas

Introduction

The European Union is facing major challenges, including permanently exiting the economic crisis, sustaining and safeguarding prosperity, sustainable development and the EU's economic and political place in a globalised world increasingly dominated by emerging countries. The Europe 2020 Strategy for smart, sustainable and inclusive growth aims to lay the foundations on which to meet these challenges in the coming decade and beyond.

The Commission's December 2008 and June 2009 Communications announced its plans to look into the possibility of setting up European sector councils on employment and skills. One of the key recommendations in the report by the group of experts on "New Skills for New Jobs" was the setting-up of EU-level Sector Councils to analyze skill needs and draw up proposals for updating skills in various sectors. In its flagship initiative "An Agenda for new skills and jobs", the Commission expressed its support for "the creation of sectoral skills councils" when an initiative came from stakeholders such as social partners or the relevant observatories.

Changes in European agriculture

Agriculture has tended to be synonymous with smallholdings. Entrepreneurial small farmers hired non-family labour and ran their farms on patriarchal lines. This picture has changed rapidly of late to one of expanding farms, and a more clearly market-driven agricultural policy focused on competitiveness. Sole proprietor farmers must act more entrepreneurially, i.e., keep a closer watch on the market, support their customer base and become more managerial. Farm workers are increasingly given discretionary duties. This opens the door wide to innovation and creates new jobs in both agriculture and allied areas, e.g., farm businesses with salaried employees, marketing and processing of agricultural products.

The importance of agriculture to rural employment

Despite an overall decline in agricultural employment, agriculture and its allied economic sectors play an undoubted role in the labour market, and hence the future viability of regions. In remotely-situated villages, farms may in fact be the only sources of employment. This is particularly so in many rural employment black spots in the new German Länder.¹ Allied sources of employment include the downstream sectors of processing or recovery of agricultural raw materials.

Trends and changes in employment

European agriculture is facing serious challenges. Society is placing ever-growing demands on agriculture:

- Providing healthy food
- Supplying agricultural raw materials to industry
- Producing re-growing staples
- Preserving and improving rural landscapes
- Preserving biodiversity and ecological diversity

But conversely, the public authorities/politicians are aiming to cut funding for agriculture. This is putting farms under increasing pressure of competition.

The changing nature of work in European agriculture

Structural changes in agriculture have been the focus of public debate for decades. A declining workforce and decreasing economic importance are taken as signs of agriculture's increasing irrelevance. Looking at current economic data and extrapolated official statistics this seems hard to deny. But this is to ignore its importance to employment in the upstream and downstream industries like food processing, tourism, chemicals and metals.

¹ Prof. Dr. Theodor Fock, Susanne Winge und Bettina Wiener. Landwirtschaftliche Arbeitskräfte in Ostdeutschland – Trends in Mecklenburg-Vorpommern und Sachsen-Anhalt. In: Ländlicher Raum. Agrarsoziale Gesellschaft e.V. H 20781. 62. Jg. Schwerpunktheft. 03/2011

Furthermore, the discernible decline in the number of small farms has resulted in larger average farm sizes. The pace and rate of this process may differ across Europe, but these structural changes are to be seen in all European countries without exception.

Employment in agriculture

In terms of their employment impacts, these structural changes can be seen to be reducing the agricultural share of employment. But at the same time, the share of employed workers is rising relative to the total workforce deriving its income from agriculture. Alongside family labour, the share of non-family workers is growing. Overall, the total agricultural workforce is in steady decline. This is due to ever-increasing rationalization while labour is gradually being ousted by capital as a production factor. So, for example, the working time of farm workers is being reduced by technical innovations, agricultural machinery and modern stalling systems. Additionally, the service sector is also expanding in agriculture, creating new employment opportunities.

Employees' skills

This trend is increasing employees' skill needs. The job requirements for most agricultural activities - in the developed industrial countries, at least - have changed radically. Two main emerging trends can arguably be discerned. Basic manual labour needs for which the workers concerned – mostly part-timers - require only fairly low skills are increasing. But the need for skilled workers whose qualifications are key to farms is also rising. Most of this kind of work is very far-removed from manual labour and more akin to highly-demanding brainwork. This mainly involves using agricultural machinery, process control using computer applications, or carrying out other specialized animal and plant production activities. Trade unions play a key role in these processes, especially in identifying skill needs and resulting changes of approach.

Other challenges

Small-scale farms being squeezed out by structural changes and giving way to competing farm businesses is a perennial complaint. The gradual reduction in general agricultural support mechanisms also adds to the pressure on these small farms. Current developments like land trading by international investors and speculation on commodity markets seem to be speeding up the process, although that cannot at present be said for certain. The same concentration is seen in land sales and supermarket chains. Seen against the backdrop of trends in rural Europe, work in agriculture plays a significant role. Only if those who live by it are offered worthwhile local employment opportunities will they consider these rural areas as communities in which to live and work long-term. State and supra-state authorities have the means to counteract or at least offset the process of structural change described above either through land policy or through general powers of authorizing financing. Ultimately, the extent to which these instruments are used is dictated by the policy choices of those who wield them.

Co-determination is often underdeveloped in small farms but tending to increase in larger ones, and this trend is bringing new opportunities for workplace representation and the defence of workers' interests. So, combining the opportunities for worker co-determination with the partnership principle of the EU funds can also promote forms of cross-industry participation.

The current debates on the skills shortage and forecasts about population trends and changes give added importance to an analysis of the agricultural workforce. Agriculture is particularly affected as the trend is being exacerbated by rural depopulation².

Challenges that workers must meet:

- Increasingly skilled and specialized jobs
- Willingness to up-skill
- Involvement in the business
- Less strenuous physical labour
- More brainwork, motivation and responsibility required
- Flexibility - e.g., splitting a job between two farms

The agricultural social partners

For almost 50 years, the European Social Dialogue Committee for Agriculture has regularly brought together employer and worker representatives from European Union Member States to discuss the social problems faced by workers in the agricultural sector and to develop, call for and implement joint solutions to these problems.

EFFAT (European Federation of Food, Agriculture and Tourism Trade Unions)

The union voice for over 7 million workers in European agriculture, it was set up in 1958 shortly after the newly-established European Economic Community (EEC). The Federation now links together 120 national trade unions in 35 European countries and is one of the 12 industry federations within the European Trade Union Confederation (ETUC). EFFAT has existed in its current form since 1 January 2001 as the result of the merger between two European trade union federations - ECF-IUF (the European Committee of Food, Catering, and Allied Workers' Unions) and EFA (European Federation of Agricultural Workers' Unions).

The issues facing workers in European agriculture have changed radically in the past 50 years. EFFAT keeps current developments under close review and argues its case to the European institutions to safeguard and secure good work and decent jobs in European agriculture. EFFAT presses GEOPA-COPA (Employers' Group of Professional Agricultural Organisations - Committee of Professional Agricultural Organisations) to take a clear position against undeclared work, illegal employment, social dumping and unfair competition.

² Mutation structurelle et travail dans l'agriculture

GEOPA-COPA (European farmers)

The Employers' Group of Professional Agricultural Organisations in Copa – known as Geopa-Copa - was created in 1993. Geopa's members are the national agricultural organisations that are members of Copa or authorised by Copa to become members of Geopa, and which are entitled to negotiate collective agreements at national level.. This covers about 1 million farms. The European Commission recognizes Geopa-Copa as the body that represents employers in agriculture.

Geopa is authorised by Copa's statutes to represent the employers of agricultural workers to the EU authorities and agricultural worker organisations on everything pertaining to the promotion of employers' specific social interests. Geopa determines its policies in meetings and at seminars. It reports periodically to the Copa Praesidium, which may only refuse to endorse the decisions made by Geopa if it goes beyond its specific mandate.

In accordance with the consultation procedure set up by the Treaty on the Functioning of the European Union, Geopa transmits to the Commission opinions on proposals for Regulations and Directives governing social policy, and may in relevant circumstances submit impact studies prior to any policy proposal. It may also forward the Commission resolutions adopted jointly with EFFAT.

Activities carried out to date by the social partners at European level

The social partners in European agriculture work closely together at both national and European level. Ongoing work in the social dialogue has resulted in a number of European agreements. An agreement on vocational training has led to the Agripass being implemented in agriculture. National and European projects are taking forward the work on these agreements. The work with Agripass has involved the social partners in the EURES (European network of public employment services) and ESCO (European Skills, Competences and Occupations taxonomy) processes.

EFFAT has a coordinating role in the planning and implementation of the European Social Fund (ESF) and the European Agricultural Fund for Rural Development (EAFRD). The employer and union networks are involved in both national and European-level support committees and ensure the implementation of measures through a wide range of activities. This wide range of experiences will do much to foster discussions in the Sector Council. The network will extend into the regions to carry out the necessary research, discussions and optional activities.

What we want from a Sector Council:

- A better, ongoing debate on vocational training
- Specification of objectives, contents and methods of:
 - basic vocational training
 - continued professional skill development

- qualifications for professional advancement
- Scope for recognition of informal learning

Developments and trends in the countries concerned

A key part of the project on the feasibility of a sector skills council for agriculture was to describe how deep-reaching structural changes had differentiated and transformed work in agriculture in different countries, resulting in new conditions of employment and other skills requirements to be met by workers.

The following information is the result of research done during the project, in some cases informed by lessons learned from past completed joint projects³. The project partners have checked the conclusions and added any missing information.

BULGARIA

Trends and developments in agriculture

The number of agricultural holdings decreased by a quarter between 2007 and 2010. The utilized agricultural area (UAA) is 3 620 900 ha, divided between 358 000 agricultural holdings. Over 13 000 agricultural holdings have no UAA. About 80% of UAA is leased⁴.

Half of the country's approximately 111 000 sq. km of land is used in agriculture. In 2009, agriculture accounted for 6% of GDP. In 2005, agricultural exports rose 13% to top one billion euros, while imports rose by 10%, pushing up the export-import cover ratio in 2005. Bulgaria also has a positive balance of agricultural trade with the EU. Cereals are the country's main export. Significant quantities of sunflower seed and cheese are also exported. Pigmeat, poultry and beef are the main imports.

In 2012, 2.41 million (28.5%) of Bulgaria's 7.5 million population were rural dwellers. The big landowners - mostly urban dwellers – own more than 80% of all the country's agricultural land, but employ only 25-35% of the rural labour force.⁵

Over 751 000 people worked on agricultural holdings in 2010. Their number has decreased by 21% compared to 2007. Of this total employed workforce, 697 000 fall into the family labour category. Labour input was 394 000 annual work units (AWU) in 2010, a decrease of 16% compared to 2007.⁶

The ageing of the labour force and farm operators/managers is a big issue for Bulgarian agriculture. By 2010, the share of workers aged under 35 had fallen to 6.8%.⁷ The particular

³ E.g., "Agri-Trans" (2008-2010), "Strukturwandel im ländlichen Raum" (2010), "Beschäftigungsanreize in der GAP" (2011). Cf. www.peco-ev.de

⁴ http://www.mzh.government.bg/MZH/Libraries/Agrostatistics - documents/R_A170-PreliminaryDataCensus2010-eng.sflb.ashx

⁵ Agra-europe 39/12, 24.9.2012, S.12.

⁶ http://www.mzh.government.bg/MZH/Libraries/Agrostatistics - documents/R_A170-PreliminaryDataCensus2010-eng.sflb.ashx

conditions of agricultural production, low incomes and poor working conditions, combined with rural living conditions put most young people off wanting to work in agriculture.⁸ Many seasonal agricultural workers are recruited from other EU countries.

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 1.2%⁹

Social partners:

Union:

FNSZ - Federation of the Independent Trade Unions in Agriculture

FKP-PODKREPA - Federatsia Khranitelna Promishlenost iPodkrepa

Employer:

Co-ordination Council of Bulgarian Agricultural Organisations CCBUL – Geopa

National and regional councils

The National Employment Agency, the operational arm of the Ministry of Labour and Social Affairs, is responsible for implementing the government's employment policy. The National Agency for Vocational Training (NAVET), established in 2000 when the Vocational And Continuing Training Act came in, is a specific agency of the Cabinet of the Republic of Bulgaria. Its responsibilities include licensing training centres, keeping an updated register of licensed bodies, quality monitoring, control and maintenance, drawing up training standards and identifying occupations. Coordinated measures for lifelong learning and continuing training, and the introduction of tried and tested European practices, are implemented cooperatively with the social partners. Training standards are framed, training schools and teachers certified, and lists of occupations drawn up jointly.

The National Council for a trilateral partnership, the National "Social Solidarity" Initiative, and the National Job Creation Council are other arenas where the social partners have input into initial and continuing vocational training.

⁷ <http://www.factfish.com/de/statistik-land/bulgarien/landwirtschaftliche%20arbeitskr%C3%A4fte>

⁸ [Agripass-online.eu](http://agripass-online.eu)

⁹ <http://epp.eurostat.ec.europa.eu/tgm/table.do?tab=table&init=1&language=en&pcode=tsdsc440&plugin=1>

DENMARK

Trends and developments in agriculture

Agriculture is highly mechanized and an important sector of Denmark's economy. Two-thirds of the country's total land area is farmed, and two thirds of its agricultural produce is exported. Danish agricultural holdings numbered 42 099 in 2010, about half farmed full-time. The average farming area was 63.4 ha in 2009; however, 65% of Denmark's total agricultural area is comprised of holdings bigger than 100 ha.

Livestock is very important. Cattle and pig production are specialized into large production units and by far the biggest agricultural export. About half the ham consumed in Britain comes from Denmark. 90% of crop products go for animal feed. Fruit and vegetable growing also form a big part of Danish agriculture. Agriculture and forestry accounted for about 3% of GDP in 2011.¹⁰ Agricultural including agro-industrial production accounts for 20% of Danish exports. Denmark is also one of the biggest pigmeat producers in the world.

In 2009, Denmark had a workforce of nearly 2.8 million (75.7% of 15-64-year-olds), of whom a quarter were employed part-time. Approximately 43 000 persons - 3% of the labour force - work in agriculture.

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 32.3%

Social partners

Union:

3F - Fagligt Fælles Forbund

Employers' Federation:

GLS-A - Gartneri-, Land- og Skovbrugets Arbejdsgivere

National and regional councils

The national joint training committee for agriculture specifies re-skilling and continuing vocational training needs. The social partners are represented and responsible for the quality of the training, defining its content, programmes, duration and the final certificates of qualification within the Committee on the basis of legal frameworks. They also grant accreditation to training businesses and verify that training provision meets labour market needs. A sector study is done on this each year. Funding is provided by the Ministry of Education.

¹⁰ http://www.agricultureandfood.de/statistik-/danische_landwirtschaft.aspx

GERMANY

Trends and developments in agriculture

Germany is the EU's second largest agricultural producer after France. The country produces four-fifths of the food it eats. However, agriculture accounts for less than 1% of gross domestic product (GDP). Some 850 000 people work mainly in the agriculture and forestry, but also the fishery sectors. About one in two of the working farm population is a sole proprietor farmer.

Germany has some 370 000 agricultural holdings. Their number has declined significantly with the structural changes of recent years. Increasingly large acreages are farmed by ever-shrinking numbers of farmers. In 2007, the average farming area was 45 hectares. The total utilized agricultural area was close to 17 million hectares.

Organic agriculture is increasingly important. The number of organic farms has grown steadily to stand at 19 000. At 2007 year-end, 5.1% of the total farming area was already being cultivated in accordance with EU regulation requirements for organic farming.

The pace of farm concentration is quickening in Germany, with ever-fewer but larger and more productive farms. This structural factor contrasts with a contracting labour force and an increase in mostly immigrant seasonal workers. At the same time, the number of workers is rising in some regions. Concentration of holdings, however, strengthens the union role and is conducive to better pay and sectoral policies. Collective bargaining is coordinated at the federal level, but then adjusted to accommodate regional differences. Latterly, wages had lost purchasing power, but after the last round of collective bargaining, IG BAU secured an increase from €7.5 to €8.5 in the minimum wage for the lowest-paid farm workers. This situation would not justify talk of a crisis in Germany's agricultural sector. Investments in biogas and renewable energy have increased in recent years and, alongside more traditional capital spending, have delivered good profit margins to farm enterprises.¹¹

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 7.8%

Social partners

Union:

IG BAU – Industriegewerkschaft Bauen-Agrar-Umwelt

Employers' federation:

GLFA – Land- und forstwirtschaftliche Arbeitgeberverbände/Bauernverband

¹¹ FAI/CISL (HG.), Claudio Stanzani: Eine moderne Tarifverhandlung zur Gestaltung eines wettbewerbsfähigen Agrarbereichs im Rahmen der GAP (Gemeinsamer Agrarpolitik), Rom, 2011. [*A modern collective bargaining for the development of a competitive agricultural sector in the CAP (Common Agricultural Policy)*]

National and regional councils

Vocational training in agriculture is organized through sandwich training in vocational schools, farms and inter-industry training centres. The Federal Institute for Vocational Education and Training (BIBB) is recognised as a centre of excellence for vocational research and for the progressive development of vocational education and training in Germany. A public agency with separate legal personality accountable directly to the federal government, the BIBB is funded directly from the federal government budget and is subject to the legal supervision of the Federal Ministry of Education and Research (BMBWF). The BIBB's key body is its Central Committee, formed of 8 representatives each from the employers, workers and the Länder, plus five federal government representatives.

There are also various bodies operating at the national level concerned with the changing needs of the labour market and skills development:

- Institute for Employment Research (IAB)
- Federal Employment Agency
- the Ministry of Education's Innovation in Continuing Training Group

Councils/agencies specific to agriculture

Relevant bodies like the Chambers of Agriculture implement the BIBB Central Committee's decisions: implementing programmes, organizing training, coaching trainees, acting as examination bodies, certifying businesses, etc.

FRANCE

Trends and developments in agriculture

Agriculture plays a major role in land use and landscape conservation in France. The 15% decline in the country's useable agricultural area since 1950 has been offset by urbanization or forest development. Useable agricultural area occupies 54% of the total area of France, compared to an EU average of 41%. French agriculture accounts for 2.2% of gross domestic product. France is one of the EU's biggest agricultural producers.

Family-run farms are declining in number. The development of agricultural societies formed by shareholders gives farmers better working conditions, makes it easier for young people to set up, and spreads the financial risks.¹²

According to figures from the National Institute of Statistics and Economic Studies (INSS)¹³, approximately 14 million people - a quarter of the total population - live in rural areas, which occupy 82% of the total area of France. The rural population has increased slightly since 1970 (adding 2 million inhabitants), but the comparative economic importance of rural areas relative to the total population is declining.

The share of the labour force working in French agricultural holdings is 3% or about 750 000 persons. While most farm work is still today done by family members, the share of wage labour is rising, having gone up from 18% in 1988 to 29% in 2007.

Approximately three-quarters of French food exports go to EU member countries. Long the foremost exporter of processed agricultural products, France has now slipped to third place behind Germany (since 2005) and the Netherlands (since 2008).

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 5.5%

Social partners

Unions:

FGA-CFDT – Fédération générale agro-alimentaire CFDT (food and drink)

FGTA-FO – Fédération générale des travailleurs de l'agriculture, de l'alimentation, des tabacs et allumettes et des services annexes - Force Ouvrière (agriculture, food, tobacco, matches and allied industries)

FSCOPA-CFTC Agri – Fédération des syndicats chrétiens des organismes & professions de l'agriculture (Christian unions for agricultural bodies and trades)

Employers' Federation:

FNSEA - Fédération nationale des syndicats d'exploitants agricoles (farm owners)

¹² http://www.dialogue-avenir.eu/fileadmin/user_upload/pdfs/2011-07_DGAPana_F_Chatellier_www.pdf

¹³ Institut national de la statistique et des études économiques

National and regional councils

The National Joint Committee for Employment (CPNE, 1986) organized into regional joint committees for employment (CPRE) in 1993 brings together employers and workers' representatives. Its responsibilities include negotiating conditions of employment, the development of occupations and vocational training, verification of vocational studies certificates and recognition of public and private vocational training providers, providing support and advice to young labour market entrants, vocational training and retraining for health-impaired, seasonal and disabled workers. Examinations are also organized by the joint committees and relevant official bodies. Furthermore, it fulfils an advisory role to the joint industrial councils (social partners).

The ANI (National Inter-industry Agreement) Act passed in 2004 requires all sectors to compile a register of their occupations and skill requirements. The objective is to support businesses in developing a training policy, to support employees' career progression, and map changes in occupational skills.

Councils/organizations specific to agriculture

The National Association for Employment and Training in Agriculture (ANEFA) was set up by the social partners in 1993 to promote agricultural jobs and provide information for the recruitment of agricultural workers. The Association produces publications on job profiles and training opportunities in agriculture, puts forward demands for agricultural trades and publishes information on labour needs in agriculture. It applies the job profiles defined by the CPNE. It is funded by a 0.02% levy paid equally by agricultural employers and workers.

The Farmworkers' Training Insurance Fund (FAFSEA) is a state-recognized joint agricultural industry training fund. All farm businesses must pay levies to FAFSEA for continuing vocational training calculated on the total agricultural workforce at various levels based on the size of the farm's workforce. A total of 178 500 farms (99% of them with fewer than 50 employees) currently pay FAFSEA levies and 1 230 000 workers receive FAFSEA financial support.

FAFSEA contracts services out to the Centre for Professional Training and Agricultural Promotion (CFPPA), a public continuing agricultural training agency under the Ministry of Agriculture. Its services are overseen by the training organizations certification body OPQF. Private organizations can also apply for FAFSEA funding.

Other bodies involved: regional chambers of agriculture.

Formagri, the information platform of the Penelope lifelong learning agency, develops innovative learning methods, promotes self-learning, acts as an information hub and supports correspondence courses..

UNITED KINGDOM

Trends and developments in agriculture

British agriculture is intensive, highly mechanized, highly subsidized and efficient by European standards. Approximately 60% of the country's food needs are met by less than 2% of the labour force. Agriculture accounts for less than 1% of GDP; approximately two-thirds of production is livestock, one-third is crops.

The United Kingdom produces less than 60% of the food it eats. Falling agricultural prices have driven farmers' incomes down despite EU subsidies (5th biggest beneficiary of EU agricultural subsidies)¹⁴. This is not a financial incentive to attract younger people into farming. The average age of UK farmers is 59.

Since 1994, the statutory Organic Aid Scheme has been promoting a changeover to organic production, with increasing success. Organic production has a 10% share in the EU. Free-range livestock rearing is most prevalent in the United Kingdom. Animal welfare is taken very seriously.

In 2009, 290 000 full-time employees (annual work units) worked in agriculture, just over 13% fewer than in 2000. A projection into the future reveals a replacement shortfall: an additional 60 000 workers will be needed in the next 10 years.¹⁵

Reference data

Participation in lifelong learning - persons aged 25 to 65 years old in 2011: 15.8%

Social partners

Union:

UNITE - Unite the union

Employers:

NFU - National Farmers' Union

National and regional councils

While the following organizations play a vital role, a long list of other government agencies, non-governmental and private sector bodies are involved in skills development in the broad sense

- UK Commission for Employment and Skills (UKCES)
- Sector Skills Councils (SSC)
- Association of Employment and Learning Providers, England (AELP)

¹⁴ <http://www.bbc.co.uk/news/world-europe-11216061>

¹⁵ www.lantra.co.uk

- Devolved (regional) governments: Northern Ireland, Scotland, Wales
- Higher Education Funding Councils (HEFC - England, Wales, Scotland, Northern Ireland)
- Qualifications and Curriculum Development Agency (QCA)

Councils/organizations specific to agriculture

LANTRA - Learning and Skills Council (LSC) - is a sector skills council that supports skills and training for people and businesses in the land-based and environmental sectors.

LANTRA is an independent organization owned and managed by industry employers.

LANTRA works with employers, unions, education specialists and the UK's governments to identify industry needs, develop skills strategies and define job profiles.

City & Guilds is a vocational education organization that offers various courses leading to qualifications for employees in forestry and agriculture among other sectors. The qualifications offered are recognized by employers and delivered in a wide range of schools and training centres.

The Agricultural Wages Board has both direct and indirect responsibility for 154 000 farm workers. It is the main body for recognizing agricultural workers' skills through minimum wages and working conditions. It also has powers to recognize qualifications, skills and abilities, conditions of learning, terms and conditions of employment, e.g., holidays and sick pay. Negotiations in the Agricultural Wages Board are based on pay levels reflecting experience and qualifications.

ITALY

Trends and developments in agriculture

The number of farms has fallen by over a third in Italy between 2000 and 2010. There were 1 620 844 farms in 2010. The trend has affected all regions uniformly, but especially small and medium-sized farm enterprises (less than 30 ha).

In contrast, there has been an increase in the average size of farms. The national average of 7.9 hectares per farm conceals a very unbalanced distribution. The biggest agricultural holdings, located in Northern Italy, have a useable agricultural area of 14.4 ha in the north-west and 9.8 ha in the north-east, compared to just 5.1 ha per farm in the South. Additionally, agricultural holdings with a UAA of over 30 ha (5.3%) are increasing and are now working about 54% of agricultural land.

Small-scale farming remains the defining set-up in Italian agriculture, however: 95.4% of farms are worked directly by owners and their families.

Between 2000 and 2010, a 50.9% contraction in the workforce was accompanied by a shift to paid labour, whose share rose from 14.3% to 24.4%, while that of family labour decreased by 56.6%. Furthermore, foreign workers make up 6.4% of the total workforce employed in agriculture and 24.8% of paid labour. 57.7% of these foreign workers come from EU countries, while 42.3% are from outside the EU..

All forms of insecure and illegal work in substandard conditions are rife among migrant workers. Trade unions, the government and employers' organizations are currently involved in court action to resolve the issue of redeemable vouchers given as special remuneration in the agricultural sector (“truck” system)..

In economic terms, agriculture accounts for approximately 2% of Italian GDP. Italy is Europe’s second biggest wine producer after France, and the second largest olive oil producer next to Spain.

Italy’s agricultural sector is showing signs of crisis and a sharp fall in farm profitability. The main complaints are increased transport costs and the influence of retailing, especially supermarket chains whose large profits are made at producers’ expense.¹⁶

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 5.7%

Social partners

Unions:

ALPA - Associazione Lavoratori Produttori Agroalimentari

¹⁶ <http://www.arc2020.eu/front/2012/08/agricultural-census-in-italy/>

FAI/CISL - Federazione Agricola Alimentare Ambientale Industriale
FLAI/CGIL - Federazione dei Lavoratori dell'Agroindustria
UILA - Unione Italiana Lavoratori Agroalimentari
UIMEC-UIL - Unione Italiana Mezzadri e Coltivatori Diretti

Employers' federations:

CONFAGRICOLTURA - Confederazione Generale dell'Agricoltura Italiana
CIA - Confederazione Italiana Agricoltori
COLDIRETTI - Confederazione Nazionale Coldiretti

National and regional councils

ISFOL – Istituto per la Formazione dei Lavoratori
Riconversider (Federacciai's career advisory and vocational training body)
Postgraduate Masters and PhD courses organized jointly by industry (e.g., RIVA) and the University
ICSIM – Istituto per la Cultura e la Storia d'Impresa “Franco Momigliano”

Councils/organizations specific to agriculture

Agriform¹⁷ is an organization for vocational training in agriculture set up in January 1999 and funded by the social partners. Farmers are represented by Agriform Confagricoltura, Coldiretti, CIA, and agricultural workers by the trade unions Flai-CGIL, FAI-CISL, UILA-UIL and CONFEDERDIA.

Agriform aims to promote and support initiatives to improve and develop the vocational skills of agricultural workers. Agriform deals with job searches, strategies to improve theory training and vocational guidance to improve the link between education and the practical world of work and to put a clear message across on the skills needed by farms.

Agriform was set up with support from the Ministry of Labour and Social Affairs as part of a specific project to identify and collect the training provision proposed in the agricultural sector. The vegetable, olive oil, wine, livestock and horticulture sectors were reviewed, and the needs of organic farming and certification were also analyzed.

¹⁷ <http://www.agriform.org/index.asp>

CROATIA

Trends and developments in agriculture

Croatia's agricultural sector is underdeveloped in comparison with other countries. 14.2% of the total workforce works in agriculture. The share of agriculture in Croatia's gross domestic product was 6.4% in 2008.

Croatia's agricultural sector is made up of smallholdings. The average utilized agricultural area is 1.9 ha; only 1% of Croatian farmers have a UAA greater than 20 ha. The main reason for the fragmentation of Croatian agriculture is inheritance law which allows agricultural land to be split up to sub-profitability levels. One-third of total agricultural land (2.7 million hectares) is State-owned. Of the privately-owned remainder - 1.8 million hectares - almost 41% lies fallow and unfarmed. Despite a favourable climate, agriculture is seriously underperforming. Wine is a major Croatian export product. Agriculture is in crisis due to the requirement for Croatia to accept tariff-free access of cheap, highly-subsidized imports of EU agricultural products.

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 2.3%

Social partners

Union:

PPDIV - Sindikat zaposlenih u poljoprivredi, prehrambenoj i duhanskoj industriji i vodoprivedi Hrvatske (Union of agricultural, food and tobacco industry, and water resources employees)

Employers:

HUP - Association for the food industry and agriculture

National and regional councils

The National Agency for initial and continuing vocational training (Agencija za strukovno obrazovanje i obrazovanje odraslih) is a public body founded in 2010 to develop new and update old curricula to address labour market and further training requirements.

Councils/organizations specific to agriculture

Adapting initial and continuing vocational training curricula is a key responsibility of the sector councils composed of various stakeholders set up in each sector. They advise and make recommendations on learning content, forecast future skill needs and sectoral promotion. The councils' members are appointed and dismissed by the Minister of Education, and their sponsoring department is the Ministry of Education.

NETHERLANDS

Trends and developments in agriculture

Agriculture is a key industry for the Netherlands. Dutch agriculture is highly export-oriented and a big contributor to the national economy. Agricultural products currently account for 20% of the total value by volume of Dutch exports. The Netherlands is second only to the United States as an exporter of agricultural products. Its main export products include horticultural products (vegetables, herbs, cut flowers, potted plants) and livestock products (milk, dairy products, meat, ham, eggs). About 60% of exports go to Germany. Obviously, the densely-populated Netherlands is also a big importer of agricultural products, but these account for only about 10% of the total value of imports and include feed grain and feedingstuff for the intensive animal production sector.

The agricultural sector is renowned for its high productivity and contributes 10% of GDP. The Netherlands is a leading world exporter of agricultural products. In total, 17.5% of all exports come from this sector.

High rationalization means that farm workforce sizes are small relative to other countries. However, agricultural service providers (gangmasters) play a very important role. In 2009, the total labour force amounted to 8.6 million (77% of 15-64-year-olds), of whom almost 48% worked part-time. In the same year, there were 182 000 full-time agricultural workers (annual working units), almost 17.2% fewer than in 2000.

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 16.7%

Social partners

Union:

FNV Bondgenoten

Employers:

LTO - Land- en Tuinbouw Organisatie Nederland

RCO - Raad van de Centrale Ondernemingsorganisaties

National and regional councils

At national level, the social partners advise the Dutch government in the Social Economic Council. At sectoral level, the social partners are represented in the board of the association of expertise centres on vocational education, training and the labour market. Committees for each branch, where social partners and education providers have equal representation (the so-called *paritaire commissies*), have been created. These committees define occupational profiles, which are subsequently elaborated by educational institutions into educational

profiles. At enterprise or branch level, social partners are involved in negotiations on collective labour agreements. Training measures increasingly form part of these agreements in terms of human resource management and lifelong learning for employees.

Councils/organizations specific to agriculture

The AOC (*Agrarisch Onderwijscentrum* – agricultural training centre) Council is the sector organization for all AOC training centres in the Netherlands. AOC centres offer a wide range of vocational training courses in plants, animals, flowers, food, nature, recreation and the environment. The hundred-plus AOC training centre sites throughout the Netherlands offer preparatory (VMBO) and senior (MBO) secondary vocational education and adult education courses. The AOC Council represents the interests of AOC training centres, especially on policy and economic matters towards central government departments and societal organizations.

AUSTRIA

Trends and developments in agriculture

Austrian agriculture is broken down into very small-scale farm holdings specializing in quality products to cope with rising competitive pressure from EU enlargement. Austrian small farmers are increasingly turning towards organic farming: 20 000 organic producers worked about 15% of agricultural land in Austria in 2008. With almost 10% of the total, Austria is one of the EU countries with the highest density of dedicated organic farm holdings.

About half of Austria's total land area – 3 406 082 hectares – is agricultural. Approximately 61 000 non-family (seasonal and permanent) workers are employed on 273 210 farms. The average farm size is 42 ha - slightly up from 2007 (40 ha).¹⁸

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 13.4%

Social partners

Unions:

ProGe - Produktionsgewerkschaft

GPA – Gewerkschaft der Privatangestellten

GÖD – Gewerkschaft Öffentlicher Dienst

Employer:

LKÖ - Austrian Chamber of Agriculture

National and regional councils

Austria has a sandwich training system (public and on-the-job) organized at federal, Länder and company level. Close cooperation between all levels is guaranteed.

Educational and vocational training: the Ministry of Education, Land School Board (for the Länder), vocational schools (local level). Company-based training: Ministry of the Economy, learning centres (Economic Chambers) with the Land School Board and head of government of the Land (for the Länder), training businesses (local level).

Councils/organizations specific to agriculture

The chambers of agricultural workers are statutory bodies established in the Länder. All agricultural and forestry workers and employees are members of them. All the Austrian

¹⁸ http://www.statistik.at/web_de/services/wirtschaftsatlas_oesterreich/land_und_forstwirtschaft/index.html

Länder apart from Burgenland and Vienna have these chambers which work together in meetings to address the challenges faced by agricultural workers.

The LFI (*Ländliches Fortbildungsinstitut* – Rural Advanced Training Institute) is the Chamber of Agriculture's training provider for rural communities, dealing with technical, occupational and societal developments.

PORTUGAL

Trends and developments in agriculture

Farm holdings occupy half the geographical area of Portugal. The average useable agricultural area (UAA) per holding in 2009 was 11.9 ha, but 75% of farms operate only on 5 hectares of UAA or less.¹⁹ However, the agricultural landscape is changing and the focus is shifting to extensive production systems

Portuguese agriculture is an important economic sector, but relatively inefficient. Agriculture employs more than 15% of the total workforce but accounts for only about 5% of GDP. Years of very high rural out-migration has left many farms abandoned. Many old farms near tourism development areas are on sale to foreigners as holiday or retirement homes. Almost half of Portugal's food, including fish, is now imported. Cork oak plantations and almond-growing are in crisis due to competition from low-wage economies. Eucalyptus, a fast-growing, non-native species, has been grown in recent years to provide raw material for the pulp industry, which is a big economic sector in Portugal.

Average educational levels are relatively low in Portugal. The percentage of 15-67-year-olds with an upper secondary education is just 29% of the population.²⁰

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 11% (2006: 3.8%)

Social partners

Union:

SETAA – Sindicato da Agricultura, Alimentação e Florestas

Employers' Federation:

CAP – Confederação dos Agricultores de Portugal

National and regional councils

The Ministry of Labour and Social Solidarity (MTSS) is responsible for defining, managing and implementing employment and vocational training policies. It performs its tasks via central, regional and local services and advisory bodies.

The IEFP (Institute for Employment and Vocational Training) is the national public agency responsible for implementing vocational training policies. There are five regional offices and 60 vocational schools and training centres.

¹⁹

http://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=103238704&DESTAQUEStema=5414331&DESTAQUESmodo=2

²⁰ http://www.cedefop.europa.eu/EN/Files/5177_en.pdf

The ANQEP (Agência Nacional para a Qualificação e o Ensino Profissional) is accountable to the Ministry of Education and Labour. It coordinates the implementation of initial and continuing vocational training policies, and develops, recognizes and certifies skills/qualifications.

Councils/organizations specific to agriculture

The IEFP (*Instituto do Emprego e Formação Profissional* - Institute for Employment and Vocational Training) links together employment and vocational training organizations, including those of the social partners. It has a network of decentralized services. It is concerned with skills development for Portuguese employees, support for disadvantaged groups in the labour market, and developing a framework for evaluation and accountability - QUAR.

POLAND

Trends and developments in agriculture

Poland's utilized agricultural area of about 16 million hectares is about equal to that of Germany, and occupies just over 50% of the total land area. 39% of Poles are rural dwellers and about 16% of the workforce is employed in agriculture. While the GDP share of agriculture and forestry is in a steady decline (4.4% in 2000 down to 3.5% in 2010), it remains important to Polish society and even more so to the labour market.

Polish agriculture is characterized by a wide diversity of farming enterprises and a high proportion of small farms. Poland had almost 2.3 million farm holdings in 2010. There is an inordinate number of small farms with a usable agricultural area of up to 5 ha (70% of the total), and only approximately 1% of farm holdings larger than 50 ha. About half of the holdings are wholly or mainly subsistence farms. The quality of Polish land is below the EU average. Even so, the efficiency of some farms and processing companies - often with international partners – has made Poland a net exporter of agricultural products since 2003.

The production value of approximately 19 billion euros places Poland seventh in the EU. Meat (mostly pigmeat) and milk generate the highest production value. Poland ranked second to Germany among EU countries for potato production in 2010.

In 2010, 2.3 million workers were employed in Polish agriculture. This represents approximately 16% of the total workforce. However, only 12% of the labour force earns its living exclusively from agriculture. A poorly developed rural infrastructure and almost total lack of other employment opportunities make small farms an important social safety net in many parts of the country.²¹

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 4.5%

Social partners

Unions:

ZZPR – Związek Zawodowy Pracowników Rolnictwa
Agricultural Workers' Secretariat NSZZ Solidarność

Employers' federations:

Federacja Związków Pracodawców, Dzierżawców I Włascieli Rolnych
(Trade Union Federation of Employers in Agriculture, Farmers and Landowners)

KZRKIOR – Krajowy Związek Rolników, Kólek i Organizacji Rolniczych
(National Farmers Union)

²¹ http://www.warschau.diplo.de/Vertretung/warschau/de/05/Landwirtschaft/Landwirtschaft_Pol_Seite.html

National and regional councils

Councils/organizations specific to agriculture

ROMANIA

Trends and developments in agriculture

Romanian agriculture is more than 90% comprised of small family farms whose production is destined for nearby local markets. The growing burden of poverty on agricultural workers - more than 20% of the working population - is increasingly the cause of a rural exodus. Trade unions have for years complained about the failings of social policies that are unable to protect agricultural workers. Contrasting with the decline in the Romanian rural workforce is a rise in seasonal workers (mostly illegal immigrants) in the agricultural sector.²²

The Romanian Centre for Economic Policy (CEROPE) estimates that approximately a million small subsistence farms will have gone out of business by 2020.²³

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 1.6%

Social partners

Unions:

Agrostar - Federatia Nationala a Sindicatelor din agricultura, alimentajte, tutun, domeni si servicii conexe

CERES - Centrala Sindicatelor Lucratorilor din Agricultura si Alimentatie

Employers:

-

National and regional councils

CNFPA - National Council for Adult Continuing Training

Councils/organizations specific to agriculture

Regional networks

CEFIDEC (Mountain regions)

ANCA-OJCA (Other regions)

²² FAI/CGIL

²³ Agra-Europe, 38/12, 17 September 2012 p. 17.

SWEDEN

Trends and developments in agriculture

10% of the land area is devoted to agriculture and 90% of the crop area is in southern and central Sweden. The 71 100 farm holdings censused in 2010 is 26% fewer than 10 years ago. A large proportion of farms are family-owned. While the main crops are cereals, potatoes and oilseeds, more than half of agricultural revenue (58%) is generated by livestock farming, especially dairy production. EU agricultural subsidies account for 24% of revenue. Three in four farm holdings also have forests and combine agriculture and forestry. Forestry is a big industry in that 56% of the land area is covered in forest. Sweden is one of the most forested countries in the world.

In 2010, 1.8% of the Swedish labour force - or 177 000 people - worked in agriculture²⁴, of whom 22 000 as paid labour. The average age of farmers in 2010 was 55-59 years. 27% of farmers of known age are 65 and over, and 4% are under 35. The percentage of farmers aged 65 and over was significantly higher among smaller than larger farms.

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 25%

Social partners

Union: Kommunal

Employers' federation:

LRF - Lantbrukarnas Riksförbund

National and regional councils

The Swedish National Agency for Education supervises, supports, follows up and evaluates (primary and secondary) training providers in implementing the training objectives laid down by the Swedish Parliament (Rikstag). The Agency is assisted by national curriculum councils in the different sectors of the economy.

Councils/organizations specific to agriculture

The "National Programme Council Natural Resources" brings together representatives of employers (agriculture, horticulture, forestry, horse breeding, landscape gardening) and the Kommunal trade union.

The "Swedish Vocational Board of Agriculture and Horticulture" (NYN) is one of these representatives and also contributes to cooperation to promote vocational training, lifelong learning and employment in agriculture and horticulture.

²⁴

http://www.jordbruksverket.se/download/18_50fac94e137b680908480004069/7_Arbetskraft+inom+jordbruket.pdf

SLOVAKIA

Trends and developments in agriculture

Slovak agriculture suffered a sharp production decline after the collapse of the Soviet Union. Today, Slovak agriculture accounts for 3.8% of GDP. Of a workforce of 2.7 million, 3.5% work in agriculture. The primary agricultural products are grain, potatoes, sugar beet, hops, fruit, pigs, cattle, poultry and forestry products.²⁵

Slovakia is one of the few countries to have decided on the 1 May 2011 deadline of the transitional period in force since the country's accession to the EU in 2004 not to sell farmland to foreign buyers. The Slovak government instructed the Ministry to apply to the EU Commission in Brussels for an additional three-year extension of the deadline until 30 April 2014.

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 3.9%

Social partners

Union:

OZPP - Odborový zväz pracovníkov Poľnohospodárstva Na Slovensku

Employers:

Ruz - Employers' Federation

AZZZ SR - Federation of Employers' Associations

Club 500

National and regional councils

These are composed of representatives of the state administration, self-government administration, employers and trade unions and/or works councils, and so are described as "quadrilateral" - RUZ (Employers' Federation) – SOPC (Slovak Chamber of Industry and Commerce).

Councils/organizations specific to agriculture

National and sectoral vocational training councils

Slovak University of Agriculture, Nitra (*Slovenská poľnohospodárska univerzita*)

²⁵ <http://www.blb.bmlfuw.gv.at/vero/veranst/005/21.pdf>

SPAIN

Trends and developments in agriculture

54% of the country is devoted to agriculture, and approximately 20.1% of the area under crop is irrigated. Spain has also since 2004 been the only European country with significant areas given over to transgenic agriculture (mainly genetically modified maize).

Spanish agriculture is currently showing signs of crisis and a sharp decline in net farm incomes giving rise to fears of serious follow-on impact on the application of collective agreements, such as measures already taken against sickness absence reports or employee absences for personal reasons. Forms of contingent and off-the-books work are rising to unchecked proportions.

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 10.8%

Social partners

Unions:

FEAGRA-CCOO – Federación agroalimentaria de Comisiones Obreras

FITAG-UGT - Federación agroalimentaria de la Unión General de Trabajadores

Unión Sindical Obrera (USO), ELA, LAB, IGA, CTI, Confederación General de Trabajadores (CGT), Confederación Nacional de Trabajo (CNT).

Employers' federations:

ASAJA - Asociación Agraria de Jóvenes Agricultores

National and regional councils

CGFP - General Vocational Training Council (trilateral and inter-industry)

Centros de Referencia Nacional

INCUAL - National Qualifications Institute

Councils/organizations specific to agriculture

Livestock production – Specific benchmark centres

CZECH REPUBLIC

Trends and developments in agriculture

Along with cereals and sugar beet, hop growing is fundamental to Czech agriculture and its brewing tradition. Carp, cattle and pig breeding is also carried out. Agriculture accounts for 5% of GDP. Since the Czech Republic joined the EU in May 2004, the average income of a farm worker has increased by 108 euros. About 6% of the Czech population (200 000 people) work in agriculture.

Prior to 1989, agricultural land was still owned by state cooperatives. After the change of regime, 85% of arable land was returned to the private sector. However, productivity has fallen by 30%, particularly affecting livestock production. The structure of farm holdings has changed radically. More than half of farmers have cash flow problems. Meanwhile, there is a growing demand for organically-grown produce in the Czech Republic.²⁶

Reference data

Participation in lifelong learning - persons aged 25 to 65 in 2011: 11.4% (2006: 5.6%)

Social partners

Union:

OSPZV/ASO - Odborový svaz pracovníků zemědělství a vyzivny - Asociace svobodných odborů České republiky

Employer:

CZMAU – Czech and Moravian Agricultural Union

National and regional councils

The National Qualification Council is a Ministry of Education training advisory body. The National Training Institute (NúV) works with the National Qualification Council.

Councils/organizations specific to agriculture

The Czech Republic has had 29 sector councils since 2005, including in the agriculture sector. However, only employers are represented. These sectoral councils monitor changes in the sector and qualifications, offer new occupations and skills, and work with experts, government and vocational schools.

²⁶ http://www.youtube.com/watch?v=s3IGso_WWFk

Remit and objectives of the sector council

Do not await the future, prepare for it ... Seneca

I Stocktaking of the skills situation

The SQC (Sector Qualification Council) collects quantitative and qualitative data from existing national and European bodies (joint bodies, state bodies, etc.) on job searches and placements, initial and continuing vocational training, etc. It also ensures transparency between national skills standards to improve European and transnational labour market strategies and initial and continuing vocational training.

II Forward study

A Sector Council gives effect to changes in a sector of the economy. It anticipates future European developments in the agricultural sector prompted by new technologies, Europe-wide changes in consumption patterns, EU policies (trade agreements, CAP, packages of climate and environmental protection measures, etc.), and considers their impact on employment and skills. The aim is to help the industry stakeholders to come up with solutions to problematic future developments, like the gradual disappearance of know-how. All this requires the SQC to make short and long term analyses and forecasts.

III Consultation

The SQC uses the observations and forecasts made to provide consultancy input to policy makers. It makes policy recommendations for job retraining, continuing training and regional development measures, or for the adaptation of initial and continuing vocational training.

IV Information

The SQC provides targeted information to the stakeholders in agriculture, especially workers and employers, on its findings and recommendations.

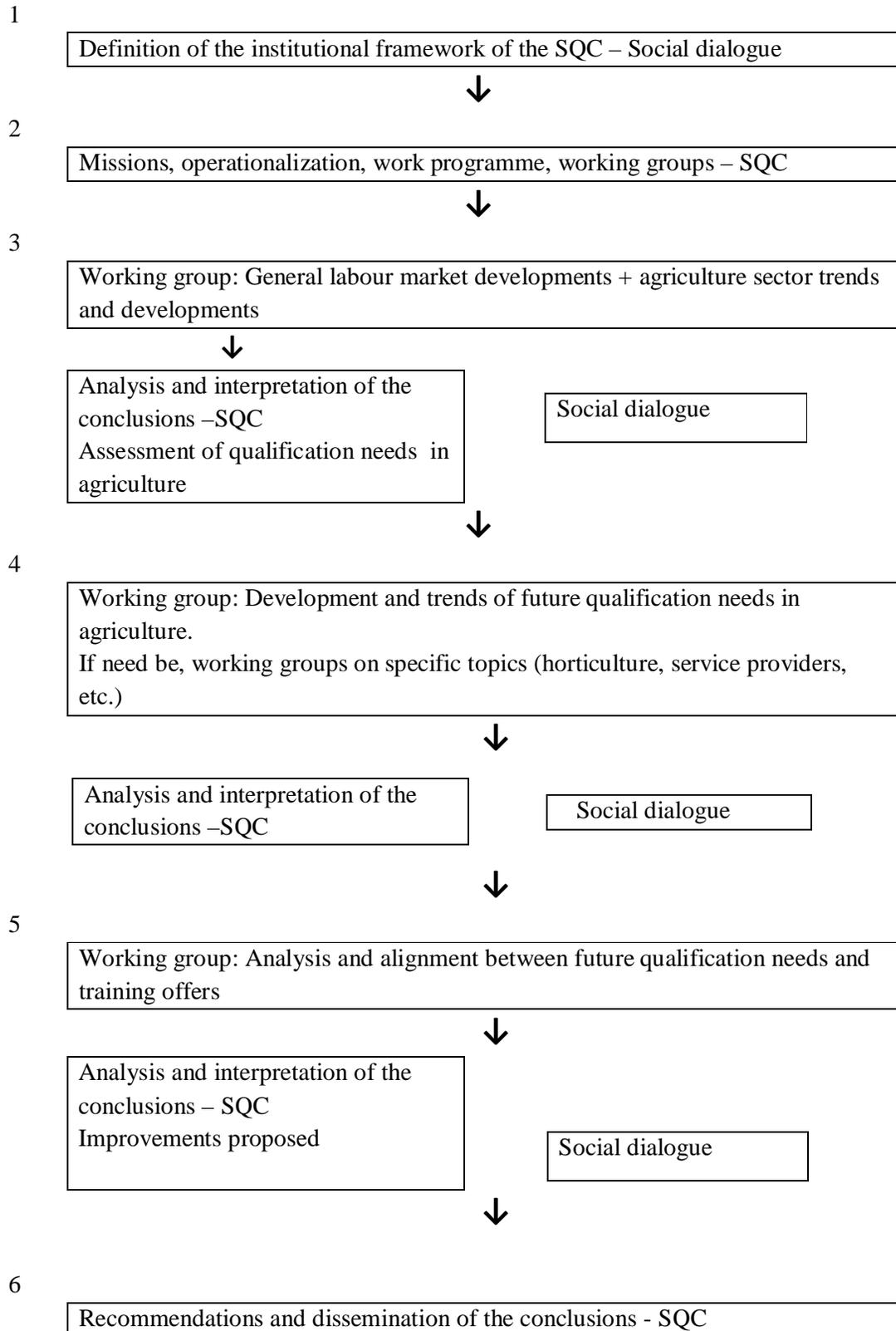
V Other tasks

A European-level SQC can contribute to the creation of national SQCs, or coordinate existing SQCs and propagate their findings at European level.

EFFAT sees various steps as being required to perform these tasks:

1. Definition of the institutional framework
2. Missions, operationalisation, work programme
3. Analysis of general labour market developments and agriculture sector trends
4. Analysis and assessment of future qualifications needs in agriculture
5. Analysis and assessment of the content and institutional aspects of formal and informal training provision and the training situation
6. Making and disseminating policy recommendations

Sector Council working procedures (EFFAT proposal)



1) Definition of the institutional framework

What?	Define the SQC's institutional framework: management bodies, members, choice of members, meetings, funding, coordination of national SQCs and existing vocational training initiatives, setting an agenda (right to put forward issues and themes)
Who?	Social partners
Where?	Social dialogue
Base data	EESC (European Economic and Social Committee) opinion, ETUC (European Trade Union Confederation) position, ECORYS feasibility study ²⁷ , FSI (Forum Social Innovation) summary report on the feasibility study ²⁸ , and the VP/2011/008/0144 project proposals.

2) Missions, operationalization, work programme

What?	Setting objectives and a work programme, setting up of working groups and appointing members
Who?	SQC
Where?	SQC

3) Analysis of general labour market developments and agriculture sector trends

What?	<ul style="list-style-type: none"> • Analyze general developments and trends in labour markets and branches of agriculture • The branches of agriculture include agriculture, horticulture, landscape gardening, the services sector, forestry, livestock production, bio-energy • Assess trends and developments, broad agricultural policy
-------	---

²⁷ Marjolein Peters, Kees Meijer, Etienne van Nuland, Thijs Viertelhuizen, Ruud van der Aa (2009) Sector Councils on Employment and Skills at EU level. A study into their feasibility and potential impact. Ordered by EU Com DG Employment

²⁸ Forum Social Innovation (2012) Vorausplanung struktureller Änderungen in der Landwirtschaft: Realisierbarkeit der Bildung eines Europäischen Rates für den Sektor. Zusammenfassender Bericht über die Durchführbarkeitsstudie. Im Rahmen des Projekts VS/2011/0370

Who?	<ul style="list-style-type: none"> • Representatives of general labour market policy and the agricultural sector: social partners, scientific institutes (Hans Böckler Foundation, ETUI [<i>European Trade Union Institute</i>], Germany's Institute for Employment Research, scientists, agricultural economists and sociologists), Chambers of Agriculture, federations (e.g., farmers' federations, employers' federations, networks of cooperatives, etc.), state agencies (Departments/Ministries of Agriculture, among others) • SQC
Where?	<ul style="list-style-type: none"> • Fixed-term working group reporting to SQC • SQC
Base data	<ul style="list-style-type: none"> • General labour market developments: the basis is the publications of the European Commission and other European bodies and national forecasts. Examples of EU sources: the 2008 Commission Communication "New Skills for New Jobs - Anticipating and matching labour market and skills needs"²⁹, the Commission staff working document accompanying the 2008 Communication³⁰ and the CEDEFOP (European Centre for the Development of Vocational Training) "<i>Skills forecasts</i>"³¹. National information sources include the research of Germany's Institute for Employment Research (IAB)³², the German Ministry of Labour and Social Affairs' job search service³³, the "new model calculations by the BIBB-IAB on occupations and qualifications until 2025"³⁴, and the publication of France's Centre for Studies and Research on Qualifications (Céreq) • Areas of agriculture: general research, European statistics (e.g., <i>Scenar 2020 Scenario study on agriculture and the rural world, Agricultural employment trends in an enlarged European Union</i>³⁵, national statistics (e.g., German agriculture - Performance facts and figures, <i>Future role of agriculture in multifunctional development</i>. Poland), regional surveys (e.g., rural structures in eastern Germany³⁶), case studies, regional conferences to reflect regional specificities
Indicators	<p>Starting by defining indicators to enable between-country comparisons of developments/trends.</p> <p>Examples: economic volume of the agricultural sector relative to total income in the economy (GDP), export/import ratio, investment in the sector, land prices, number of farm holdings, types of farming, sources of income, size and structure of the labour force (family labour, permanent and seasonal workers, gender specifics, age of workers), income structure, amount of pensions, social security</p>

²⁹ http://ec.europa.eu/education/lifelong-learning-policy/doc/com868_de.pdf

³⁰ http://ec.europa.eu/education/lifelong-learning-policy/doc/sec3058_en.pdf

³¹ <http://www.cedefop.europa.eu/EN/about-cedefop/projects/forecasting-skill-demand-and-supply/skills-forecasts.aspx>

³² <http://infosys.iab.de/infoplattform/dokSelect.asp?sortLit=2&AP=1>

³³ <http://germany.jobmonitor.com/>

³⁴ <http://www.bibb.de/en/55403.htm>

³⁵ <http://ageconsearch.umn.edu/bitstream/25395/1/pp060439.pdf>

³⁶ Fock, Theodor Prof. Dr. (2011) Zu viel Geld von außen? Über Strukturentwicklungen und Bödenmärkte in Ostdeutschland und die Rolle externer Investoren. In: Kritischer Agrarbericht 2011. Konstanz: AgrarBündnis

	entitlements, number of migrant workers in agriculture, species diversity, temperature changes, etc.
--	--

4) Analysis and assessment of future qualification needs in agriculture

What?	<ul style="list-style-type: none"> This involves analyzing the impact of trends on workers' qualifications and the qualifications, knowledge and skills that will be needed in the future.
Who?	<ul style="list-style-type: none"> Representatives from vocational training in agriculture from different countries. They are appointed by the members of the SQC. Social partners, chambers of agriculture, representatives of groups involved with vocational training (e.g., farmers' federations, employers' federations, networks of cooperatives, etc.), vocational training academics, staff of the Ministry of Education or other public agencies such as NA BIBB (national agency of the Federal Institute for Vocational Training), FAFSEA (funding organization for employee continuing training), representatives of national SQCs if any, ESCO (European Skills, Competences and Occupations taxonomy) experts SQC
Where?	<ul style="list-style-type: none"> A fixed-term working group will be set up for the purpose, meeting ... times a year. SQC
Base data	Criteria requirements of European and national qualification councils, findings of the ESCO Agriculture working group, Agripass, EU Member States' progress reports on rural development (2nd pillar of the CAP) which increasingly also include indicators on lifelong learning, national monitoring committees, additional literature, studies ("Estimating agriculture's labour needs in light of demographic changes" ³⁷ , "What employers want ..." ³⁸)
Indicators	Starting by defining indicators to enable between-country comparisons of developments/trends.. Examples of indicators: Qualifications: specialized knowledge, (social) skills and abilities of the agricultural workforce (employers and workers), classification in the national and European qualification councils, recognized diplomas. Informal qualifications: years of experience Non-formal qualifications: number of participants in continuing training programmes

³⁷ Wiener, Bettina; unter Mitarbeit von Richter, Thomas; Teichert, Holger (2004): Abschätzung des Bedarfs landwirtschaftlicher Fachkräfte unter Berücksichtigung der demographischen Entwicklung, http://www.zsh-online.de/fileadmin/PDF-Dokumente/04_2FB.pdf

³⁸ Poehls, Axel Prof. Dr.; Gerds, Marcel Dr. (2010) Was sich Arbeitgeber wünschen. In: B&B Agrar 5/2010

5) Analysis and assessment of the content and institutional aspects of formal and informal training provision and the training situation

What?	<ul style="list-style-type: none"> • Ascertain the formal, informal and non-formal qualification standards of the current labour force (workers + employers) • Ascertain initial (and continuing) vocational qualifications provision • Compare these findings against future qualification needs
Who?	Representatives from vocational training in agriculture from different countries. They are appointed by the members of the SQC. Social partners, chambers of agriculture, representatives of groups involved with vocational training (e.g., farmers' federations, employers' federations, networks of cooperatives, etc.), vocational training academics, staff of the Ministry of Education or other public agencies (e.g., NA BIBB, FAFSEA, LANTRA), representatives of national SQCs if any, ESCO experts
Where?	A fixed-term working group will be set up for the purpose, meeting ... times a year.
Base data	School certificates, vocational certificates mentioned in national and European statistics, (continuing) training provision: initial and continuing vocational training procedures, curricula, vocational registers, continuing training providers' programmes, trade cooperatives' annual reports (health and safety at work qualifications), health insurance statistics, regional field studies and surveys including interviews with employers, employees, trainees in companies and training organizations. National progress reports on rural development (2nd pillar of the CAP), ESF (European Social Fund) reports, collective agreements
Indicators	Number of participants in vocational training and continuing training courses Qualifications: specialized knowledge, (social) skills and abilities of the agricultural labour force (employers and workers), classification in the national and European qualification councils, recognized diplomas. Informal qualifications: years of experience Non-formal qualifications: number of participants in continuing training programmes

6) Making and disseminating policy recommendations

What?	<ul style="list-style-type: none"> • Assessing the findings of working groups • Making recommendations on matters where agricultural vocational training and its resources need adapting to future developments. • Dissemination of recommendations
Who?	<ul style="list-style-type: none"> • SQC • Social partners
Where?	<ul style="list-style-type: none"> • SQC • Social dialogue

Base data	Working groups' conclusions
Indicators	National and European social partners' websites and other media/networks, national SQCs, media/networks of vocational training providers involved in working groups (e.g.. FAFSEA NA-BIBB, LANTRA)

Mainstreaming across different policy areas

Social dialogue

ESF/Progress

CAP/Rural areas

EURES/ESCO/Agripass

European SQCs/Definitions