

5. POTENTIAL CONTRIBUTION BY PREMEQ - FIELDS OF APPLICATION

5.1. Sectoral bargaining - Development of a sectoral Employment Observatory and relevant two-party institutions for social dialogue

The establishment and operation of the first sectoral Employment Observatory in our country has been agreed in the biennial 1994-95 Collective Agreement signed between OTOE and the Banks. The objects of the Observatory are:

- "the collection, elaboration and evaluation of surveys, labour information, particulars on employment and on labour remuneration from all the Banks in the sector, which will be classified, processed and compared with international data in co-operation with corresponding Observatories or bodies in this country or abroad;
- the regular making out of reports on national and/or international labour developments in the sector, for the best information of the (sectoral) Committee on Social Dialogue and for the most effective prevention of and dealing with employment problems.

The Observatory is in functional connection with the Educational-Research Centre of the Hellenic Banks Association and it is supported by it in order to effectively materialise its aims..."

Now, the Employment Observatory in the banking sector is called upon to function on an independent, bilateral and scientifically reliable basis as:

- a tool for drawing ideas, methods, information and proposals in support of social dialogue as well as for elaborating suitable policies with regard to Human Resources at sectoral and enterprise levels;
- a sectoral statistical infrastructure with regard to information, recording and disseminating useful scientific findings and data pertaining to labour developments;
- (in perspective) a point of reference and a nucleus in order to develop a broader sectoral network, exchange information and have research-scientific co-operation with the University community and with research bodies and organisations in the banking sector in other European countries."

The documentation of the Employment Observatory follows the method of the "Social Report". This method has been applied in France since the end of the 1970s and it is a tool for collecting primary enterprise data already tested in European conditions. The Social Report brings together basic quantitative data in a single document; this will allow:

- an evaluation of the situation, contribution and performance made by an enterprise in the labour-social sector;
- a recording and projection of its achievements during the reference year (static image); and
- a "measuring" of the changes in employment and in other significant labour-wage variables as far as possible completed, which will be compared to corresponding data for previous years (dynamic image).

The Social Report data are grouped into seven (7) theme sections which include

- employment
- remuneration and related (insurance etc.) expenses
- conditions of hygiene and security
- all other conditions of work (working time etc.)
- education
- labour relations (collective - individual)
- all other social benefits provided by the enterprise to the employees.

For every theme section, the appropriate indices are defined and instructions are given for their correct completion, so that the data given by the various enterprises in the same sector can be comparable.

The idea of a Social Report, as it has been tested abroad and as it is partly applied by large enterprises also in our country, aims at systematising and improving information as well as enhancing communication at enterprise level, thus providing a systematically elaborated and suitably quantified basis for social dialogue.

At the same time, it encourages Human Resources Management to systematically collect data; this will facilitate them in making an integrated presentation of their work, in finding problems promptly, in planning for the future, and in presenting their report, views and proposals to the Administration, the collective representation and the shareholders in a systematic but also documented manner.

On the basis of the aforementioned, the Employment Observatory has a pilot function in our country:

- as a specialised and flexible "statistics service" on labour issues in the banking sector;
- it provides, whenever asked to do so, scientific elaborations and/or suitable support for improving the information infrastructures, the methods and the social dialogue on issues pertaining to Human Resources, training, protection of employment etc.

PREMEQ can contribute to the aims of the sectoral Employment Observatory and, through this, to the strengthening of quality and effectiveness of collective bargaining in the sector, in the following ways:

a) By assigning the central recording, grouping, validation and evaluation of the basic developments in the skills in the sector, to the Employment Observatory (or to similar two-party institutions which function or will be established in the sector in other countries), through sectoral Collective Bargaining and relevant agreements between the parties, on the basis of:

- the basic fields of knowledge for all skills provided by PREMEQ;
- a systematic recording and grouping which will now be effected at sectoral level, of the banking skills which will be found in each enterprise and of the basic competencies required for each skill;
- on the basis of international experience in the sector, a monitoring-evaluation of the basic factors influencing or expected to influence the knowledge requirements in the banking skills;
- on the basis of the corresponding enterprise data and elaborations, finding and recording the skills threatened by technical-organisational changes, degrading, change in object, a dramatic change in knowledge requirements. It is self-evident that, every year, these data will be submitted by enterprises which already apply PREMEQ.

All the above can be kept in a suitably codified-automated form; this will allow the parties to have, at any moment, a full picture on developments with regard to skills and levels of knowledge, and on the corresponding actions which have been taken or are in abeyance in the sector, in each enterprise or internationally.

b) By finding, through groups of experts, the parties which will function in the framework of the Observatory (or relevant two-party institutions and infrastructures), the gaps existing or changes effected in the knowledge profiles for each of the threatened skills, and this through the application of the PREMEQ procedures.

c) By elaborating and submitting specific proposals to the parties (negotiators, members of two-party committees for social dialogue, specialised committees and bodies for Education etc.).

The proposals might include:

- the planning of integrated sectoral programmes for training/re-training, in order to adjust the skills of the holders of the relevant jobs/skills to the new requirements; and/or
- the provision of specialised support with regard to the planning of training programmes which will be effected by the individual enterprises in the sector, through the application of PREMEQ;
- a new vocational orientation for the employees who are threatened with firing-downgrading in their work due to the change in their work requirements;
- the planning and application of sectoral training programmes and shifting to suitable alternative jobs, in the same and/or other enterprises in the sector (inter-banking system for the protection of employment-thinking out of alternative jobs); and/or

- providing specialised support in order for the enterprises in the sector to apply corresponding programmes on intra-enterprise or inter-enterprise mobility;
- the planning of integrated courses for specific categories of employees and cadres, in order to cover modern knowledge requirements and to immediately develop the knowledge provided in professional development inside or outside the individual enterprises in the sector.

In any case, the application of PREMEQ contributes in broadening the role and effectiveness of the Employment Observatory

- as an infrastructure for information, documentation and promotion of the essential social dialogue in the sector on issues of protection of employment, professional development, education and training;
- as a basic tool for the prediction of labour developments, protection and prompt adjustment of employment to the new conditions;
- as a sectoral mechanism for support/comparative evaluation, enrichment and general development of the enterprise data and applications on issues of education and training.

5.2. Preventive Management and Human Resources Programming in enterprises in the sector

The modern enterprise environment is changing very rapidly. Now, a central element in the effectiveness and competitiveness of an enterprise is the ability to monitor as well as to promptly predict developments and the new needs produced by them.

The same is also true in the field of Human Resources, where it is not sufficient to deal with problems afterwards, not of course to make a fire-extinguishing, ad hoc intervention in order to cover the quantitative and qualitative labour needs, usually when these become unbearably pressing.

What is required is new and integrated methods for planning and adjustment in order to develop human resources under the continually changing new conditions.

The Human Resources Programming is an integrated set of prediction and prevention policies, which refers to employment and to the professional qualifications of human resources in Banks. The object of these policies is:

- A systematic prediction of the quantitative and qualitative labour needs (old and new jobs, needs in new skills and in professional qualifications), in relation to the medium and long-term development strategy of a Bank.
- A systematic recording and generally a fuller knowledge of the existing human resources, of their experience, their capabilities and potential for their development.
- A defining and application of dynamic policies on arrangement of labour mobility, enrichment and protection of existing jobs, but also of their adjustment to the new conditions (technology, market, diversification of products and needs of customers, greater satisfaction on the part of labour, quality etc.).
- The application of specific measures which will allow to cover the future quantitative and qualitative labour needs. These measures will facilitate a suitable adjustment and full development-evolution of the existing Human Resources, but also prompt renewal and completion through hiring from the external labour market, where it is necessary.

The following are included in the concept of Human Resources Programming:

- elaboration of methodology, means, information and organisational infrastructure;
- application, monitoring and, from time to time, revision of the policies pertaining to programming, preventive management of employment and labour skills.

It is obvious that Human Resources Programming is connected with all the fields where a personnel policy is exercised as well as with the strategic planning itself of enterprises.

More specifically, it can be developed as an information infrastructure and as a reference framework for:

- determining and applying suitable policies on the education-training of personnel;

- tracing the needs to enrich labour tasks, as well as planning wage or other incentives with regard to undertaking of responsibilities and a smooth professional development;
- an effective and mutually acceptable arrangement with regard to the internal mobility of employees (promotions, transfers, placement of cadres, coverage of specialised needs etc.);
- development of inter-enterprise dialogue and essential participation of employees in the elaboration and materialisation of targets as well as in upgrading employment and work conditions. So, it becomes a basis for a documented and fruitful thinking with regard to the future of the Bank, as it brings out the usefulness and need to have a strategic-development planning without pushing aside or adjusting the human resources in a mechanical violent and "retrospective" manner.

The application of policies on preventive human resources management presupposes the existence of specific information infrastructures with regard to:

a) The demand in Human Resources, namely, the quantitative and qualitative needs of the enterprise in Human Resources, as these arise out of the changing environment and the new strategic, technical-organisational and labour choices made by the enterprise.

* Information required:

- Needs for staffing arising out of new strategic choices;
- Needs for staffing arising out of the development in business.

* Methods for collecting information:

- A Questionnaire on Strategic Targets (on the basis of the bank's strategic plan);
- Annual programme on business;
- Description-recording of existing objects and requirements in knowledge/skills with regard to every job or specific profession;
- Appraisal on the evolution of the above requirements under the new conditions.

b) The Supply of Human Resources, namely, the existing Human Resources allocated in accordance with the existing specific professions, knowledge and skills, experience, performance and/or various demographic indices (age, previous employment etc.).

* Information required:

- Experience, well commanded competencies, employees' interest in developing, career etc.
- Annual performance of employees and potential to develop;
- Turnover of personnel due to retirement, dismissal, resignation, sickness etc.).

* Method for collecting information:

- A Bulletin for the quantitative and qualitative recording of human resources;
- A Bulletin for Evaluation of the Performance and Development of personnel;
- Annual Questionnaire on the turnover of personnel;
- Predictions on needs in human resources per job category, skill, functional unit etc.

c) Correspondence between Supply and Demand on Human Resources based on:

- the needs and development requirements for each job/specific profession in the enterprise, on the basis of a specific analysis and specifications of the relevant jobs;
- the potential for developing knowledge, skills and qualifications in order to adjust the objects of each job

and the relevant qualifications of their holders to the new requirements;

- a clear tracking down of Human Resources deficiencies in knowledge-qualifications;
- taking measures (training, updating, shifting to a more suitable/alternative job in order to deal with deficiencies and handle effectively all necessary changes.

* Necessary information:

- Descriptions-specifications of jobs and responsibilities;
- Human Resources available, knowledge and qualifications commanded;
- Needs for educational support;
- Programmes, means and training infrastructures available.

* Method for collecting information:

- Form for describing the job;
- Specialisation in minimum qualifications and knowledge of the holder which are necessary and desirable;
- Setting of targets/appraisals on the evolution of knowledge and qualifications;
- Recording of human resources by means of the Bulletin for Recording Human Resources;
- A system for a diagnosis of educational needs;
- An education programme.

PREMEQ can contribute essentially in applying and enriching the systems on Programming-Preventive Human Resources Management through strengthening the relevant information infrastructures and methods.

More specifically, as it becomes clear from the technical manual on its application, PREMEQ provides:

- a specialised recording of knowledge requirements for all specific professions and/or jobs, with a direct co-relation of its objects/activities with the basic fields of knowledge valid in the banking sector;
- the potential to systematically monitor and develop those factors (technological, organisational, market factors etc.) which ceaselessly transform these requirements, and also to make an evaluation of the degree their impact on each field of knowledge pertaining to the job or skill examined;
- the potential to detect the extent of the differences between the existing and the forthcoming knowledge requirements per job or skill;
- the potential to eliminate these differences either at the level of job holders (re-training, complementary updating/education on the basis of individualised programmes) or by means of planning alternative versions in employment and career (shifting to another similar, relevant or higher position, with or without complementary education).

In this manner, the Bank will have at its disposal an integrated mechanism in order to:

- record-monitor the existing skills/jobs;
- record knowledge requirements in every skill and every established field of knowledge;
- monitor-evaluate those factors which change the requirements per job/skill;
- systematically appraise the expected changes in requirements but also in the existing jobs and skill themselves;
- Seek specific ways to cover the deficiencies and needs in competencies found, through mobilising the

educational functions and/or planning alternative ways for employing those employees whose work is threatened with elimination/dramatic change;

- give detailed information on the expected pressures and consequent knowledge-educational needs per job/skill.

This mechanism will undoubtedly strengthen and enrich the policies for a preventive Human Resources management and programming required under modern conditions and which we have outlined previously.

Moreover, the social interlocutors (Administration, enterprise trade unions) can develop the procedures, the applications and primarily the results of PREMEQ, by means of enterprise agreements and Collective Agreements, so that:

- the trade unions and the representatives of employees have essential and as far as possible jointly acceptable-reliable information on the basis of a methodical appraisal of the forthcoming quantitative and qualitative changes in employment, in order to

• promptly intervene into the developments;

• negotiate documented and suitable solutions;

• the Administrations include the Human Factor in the general enterprise planning from the beginning and in an integrated manner;

• record and evaluate jointly the basic specific professions-jobs which will be covered by the system, by means of special enterprise committees consisting of representatives and experts. Alternatively, the parties can receive this information by means of sectoral elaboration in the framework of the Employment Observatory or of relevant bodies (in this connection see 5.1);

• define the responsibilities, composition, mode of functioning and technical support of the working groups provided for in the technical manual for the application of PREMEQ.

In our opinion, the working groups/consultative committees required in order to apply and monitor PREMEQ are:

COMMITTEE RESPONSIBILITIES

Committee for It develops the recorded activities in every development description job in order to trace the level of competencies of jobs - tracing skills and needs required in every field of knowledge and in every job/specific profession.

It starts from the most significant specific professions/jobs and, gradually, it covers all of them.

It monitors the impact factors, it controls and validates their impact on the particular competencies in every job/specific profession.

It is a two-party committee and, in an

advisory manner, it is supported by experts from the two parties who are made available either by the sector's bodies (e.g. Observatory) or by the enterprise bodies (trade union, Administration).

Officially, it is supported by the competent services in the Human Resources Directorate.

Committee which Specifies the It co-operates with the enterprise's Human necessary Actions regarding the Resources Education and Programming services.

Training-change of the object of work It elaborates, evaluates and makes specific proposals in order to take measures with regard to the following fields:

- individualised training planning for those job holders who undergo pressures regarding abolition-change in requirements or object;
- necessary adjustments to the enterprise training system;
- planning suitable career courses-alternative employment for those employees whose jobs are threatened with a serious downgrading, abolition or develop in complete lack of cor-respondence with

their qualifications, a lack of correspondence which cannot be covered with additional training;

- specifications for promotions and elevation of cadres to specific professions/jobs;

COMMITTEE RESPONSIBILITIES

Committee which Specifies the • specifications for hiring and/or planning necessary Actions regarding the for introductory training in order to cover Training-change of the object of work needs from the external market.

The committee is a two-party par committee and with regard to official backing and con- sultations, this is done in the same manner as the former committee.

The composition, smooth functioning as well as the reports and appraisals effected by the committees for the application of PREMEQ should be the subject of objective information, consultation and enterprise negotiation; thus, all the significant measures or frameworks of action which will be taken on the basis of the application of PREMEQ will be collectively validated.

With regard to collective arrangement, some specific fields of interest are:

- the formation of an integrated and flexible Education Programme which will fully develop the diagnosis system of PREMEQ;
- Human Resources Programming and Preventive Management in the enterprise; this will be achieved through the formation and continuous enrichment of the relevant infrastructures pertaining to information, documentation and planning.

On the basis of the aforementioned, the particular contribution of PREMEQ at enterprise level lies in the fact that it provides an integrated tool for:

- acquiring information on the forthcoming developments;
- tracing and handling the necessary changes.

In this manner, the intangible investments on Human Resources required are supported and directed systematically, whilst documented negotiation is facilitated in order to promptly deal with problems of degrading-cutting back in personnel.

The multiple benefits attained through PREMEQ, as these have been pointed out in the aforesaid, more than counterbalance the demanding and somewhat time-consuming procedures required in the application of the method, at least during the initial stages. These benefits are maximised for both sides, provided that certain preconditions, basic in our opinion, are covered in its application by enterprises in the sector.