

Areté The Agri-food
Intelligence
Company



**A transforming European sugar industry:
new and better jobs in a competitive,
innovative and sustainable industry**

Presentation of the project

Sugar Social Dialogue meeting, October 9th, 2020

1. Objectives of the project
2. Overall approach
3. Methodology for specific project activities
4. Data collection strategy
5. Workshop facilitation
6. Final publication & final conference



Objectives of the project

4 main objectives

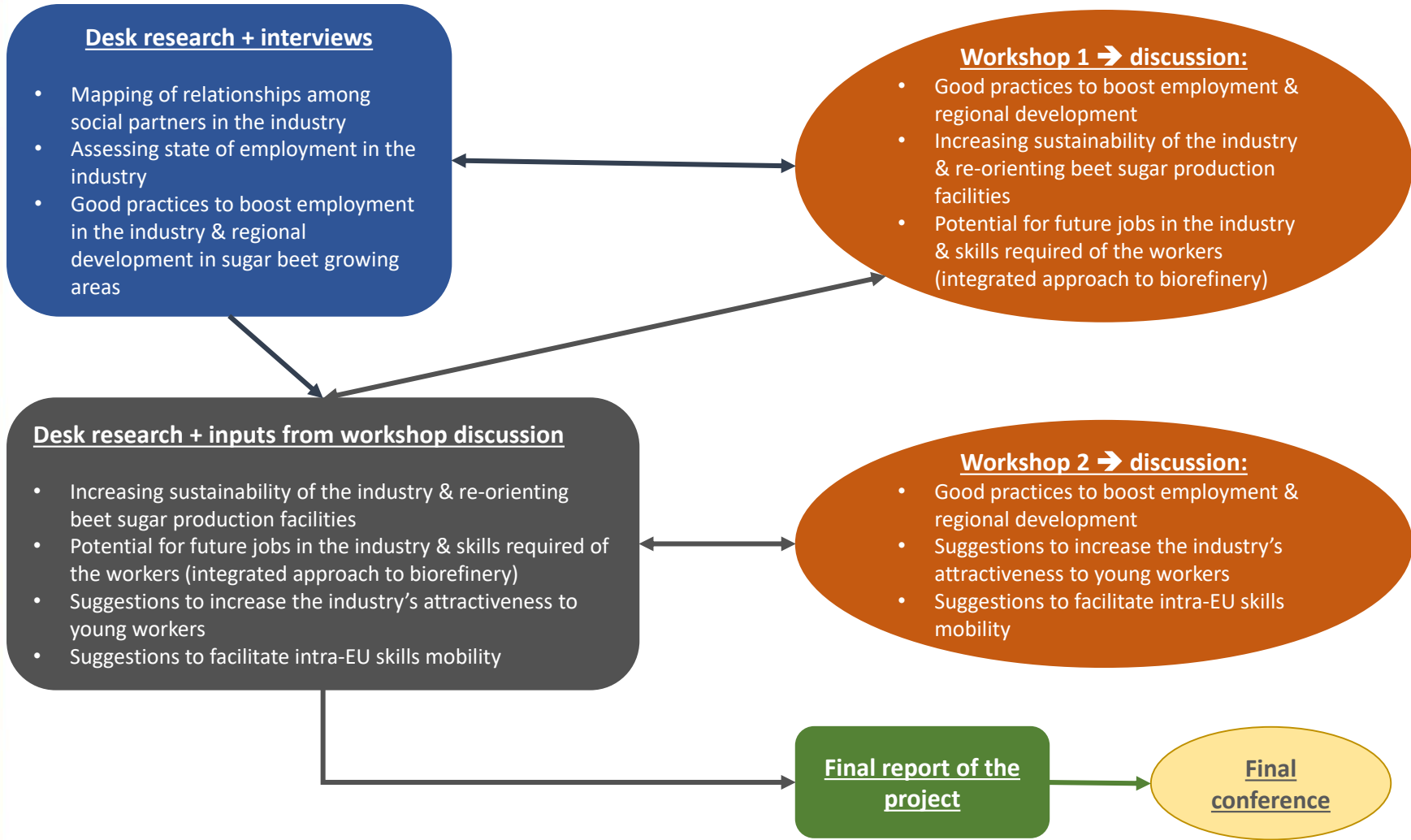
1. Map the **relationship of social partners in the sugar industry** across the EU from a qualitative perspective, collect **good practices** and assess the **state of employment in the industry**
2. Discuss the **future of the sugar industry**, including:
 - a. efforts to further **increase sustainability** and to **re-orient beet sugar production facilities** to the production of other beet-derived products;
 - b. the **potential for future jobs** in the sector and the **skills required of the workers** in a new, integrated approach to biorefinery.
3. Explore how to **increase the sector's attractiveness** to young workers in a modernised labour market.
4. Explore how to **facilitate intra-EU skills mobility**.



Overall approach

Approach and data collection tools

Overall approach



Methodology for specific project activities

1: Mapping of the relationships among social partners in the European beet sugar sector

1. Identification of **relevant social partners** at EU and national level.
2. Key aspects of the **relationship between social partners, social dialogue models** in particular → identification of **good practices**.

Desk research + interviews (close information gaps)

2: Assessment of the state of employment in the European beet sugar sector

1. Key determinants of the **socio-demographic situation of the workforce** in the European sugar industry (previous research carried out on the topic → *CEFS/EFFAT “Socio-demographic analysis of the European Sugar Sector”, 2015*).
2. Key determinants of **job quality in the European sugar industry**: eight compulsory minimum social standards and basic rights, joint CEFS/EFFAT “Code of Conduct” → identification of **good practices**.

Desk research + interviews (close information gaps)

3: Identification of good practices to boost employment in the European beet sugar sector and regional development in sugar beet growing areas

Will cover also good practices based on **diversification towards value adding processes based on alternative uses** for beet sugar and its co-products (molasses, pulps), for sugar beets and for residues of sugar beet cultivation (e.g. leaves).

Literature review + interviews + insights from 1st and 2nd workshops

4: Insights into further increasing the sector's sustainability and re-orienting beet sugar production facilities to the production of other beet-derived products

Will be elaborated starting **from findings of activity 3** → good practices to boost employment in the European beet sugar sector and regional development in sugar beet growing areas

Previous project on biobased economy for EFFAT

Literature review + interviews + insights from 1st workshop

5: Insights into the potential for future jobs in the sector and the skills required of the workers in a new, integrated approach to biorefinery

Will be elaborated starting from:

1. **findings of activity 3** → good practices to boost employment in the European beet sugar sector and regional development in sugar beet growing areas;
2. **findings of activity 4** → insights into further increasing the sector's sustainability and re-orienting beet sugar production facilities to the production of other beet-derived products

Previous project on biobased economy for EFFAT

Literature review + interviews + insights from 1st workshop

6: Suggestions on how to increase the sector's attractiveness to young workers in a modernised labour market

Critical review of the findings of specific activities of the project, in particular those dealing with **innovative strategies** (*e.g. implementation of value adding biobased processes; practical application of the biorefinery concept in the beet sugar industry*)

Literature review + interviews + insights from 2nd workshop

7: Suggestions on how to facilitate intra-EU skills mobility

Will be elaborated from:

Literature review + interviews + insights from 2nd workshop



Data collection strategy

Combination of:

- ***Desk research*** (*literature review + mining of relevant databases*)
- ***In-depth interviews*** (*28 interviews at EU and national level*)
- Insights from stakeholder consultation in the framework of **2 workshops**

Focus data collection efforts – interviews in particular – on a *selection of 9 Member States of special interest for the project, plus the United Kingdom*

National focuses

- National focuses in 9 MS (*Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Poland, Spain*) + **United Kingdom**



Interviews

- 28 interviews with sector associations, beet sugar companies, trade unions, institutions and independent experts

<u>Area</u>	<u>Interviews</u>
EU-27	8
Austria	2
Belgium	2
Denmark	2
France	2
Germany	2
Italy	2
Netherlands	2
Poland	2
Spain	2
United Kingdom	2
Total	28

<u>Type</u>	<u>Interviews</u>
Sector associations	6
Trade unions	10
Companies	5
Institutions	5
Independent experts	2
Total	28

Workshop facilitation

Proposed discussion topics - workshops

First workshop, to be held in Denmark

Identification of **good practices to boost employment** in the European beet sugar sector and **regional development in sugar beet growing areas**

Elaboration of insights into further **increasing the sector's sustainability** and **re-orienting beet sugar production facilities** to the production of other beet-derived products

Elaboration of insights into the **potential for future jobs in the sector** and the **skills required of the workers** in a new, **integrated approach to biorefinery**

Second workshop, to be held in Spain

Additional inputs for the identification of **good practices to boost employment** in the European beet sugar sector and **regional development in sugar beet growing areas**

Elaboration of suggestions on **how to increase the sector's attractiveness to young workers** in a modernised labour market

Elaboration of suggestions on **how to facilitate intra-EU skills mobility**

- **Materials** (factsheets, presentations) with preliminary findings of the project to be discussed → made **available to participants at least one week before the workshops**
- Each workshop opening with **2-3 key note speakers on the topics of interest**
- **Preliminary project results** presented by the experts of the project team
- Split workshop attendance into a convenient number of **discussion groups** → ***World Café* procedure** to facilitate discussion in each group

World Café procedure

Rounds of discussion	Activities
First round	Very broad questions to open the debate and to identify key topics to be addressed further → first “voting” on hottest topics/challenges/opportunities
Second round	<p>The identified key topics/challenges/opportunities are discussed more in depth → more detailed questions.</p> <p>If needed, relation maps linking causes and effects, or lists of key findings can be elaborated on “wall posters”.</p>
Third round	Key findings of the discussion → inputs and insights into the topics of interest for the project



Final publication & final
conference

Final report

- Final report in English → document fit for publication, drafted in a style suitable for wider dissemination.
- Content including:
 - Key findings of the 7 topics
 - Conclusions
 - Recommendations

Final conference

- To be held in Belgium in September/October 2021.
- Presentation of the final report of the project (key findings) by the study team.

Thank you for your attention!

Contacts

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