

## **EUROPEAN PROJECT**

***“Financing the Green Transition. Transnational collective bargaining and the role of EWCs in supporting European banks' shift towards environmental and social responsibility. Focus on new job profiles and P&Ms re-skilling” # 101052465***

**Qualitative surveys: proposals to maximize operational synergies**

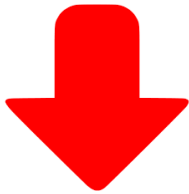
**Francesco Discanno, Scientific Partnership Coordinator**

**CFDT Paris, 11 October 2022**



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## FIELD RESEARCH

Through field sources, the scientific partners aim at collecting **LIVE raw data**, outside the already published literature.

When researchers are “in the field,” they are immersed in the real world.

In our case - they are involved in the everyday work of EWC members, trade unionists and professionals, i.e. the key respondents of the inquiry.



## TWO METHODOLOGIES OF FIELD RESEARCH

Field research can be qualitative and quantitative.

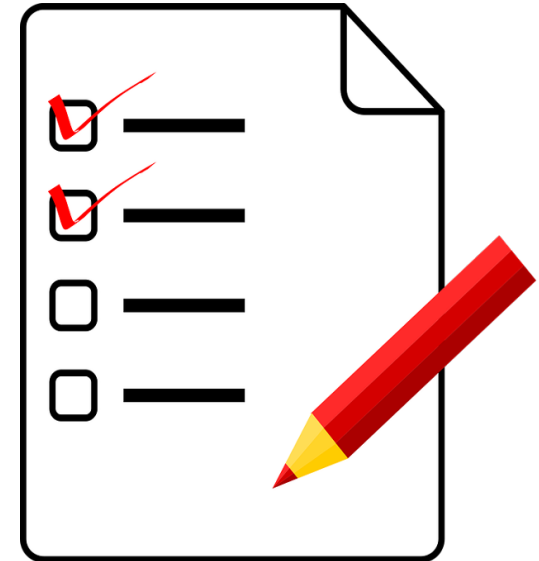
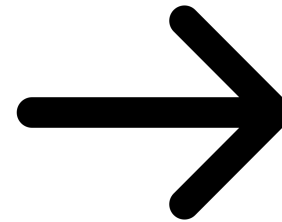
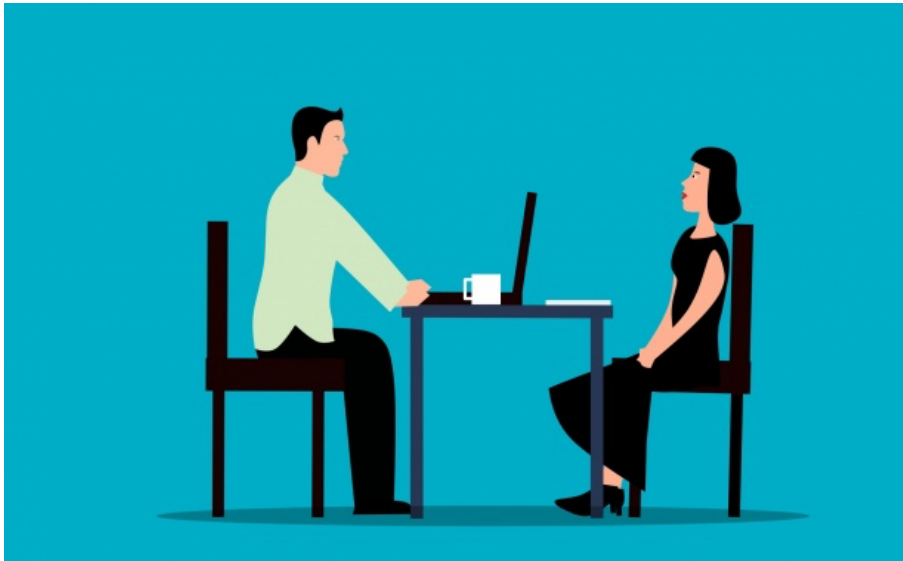
The *interaction* of qualitative and quantitative approach is used for the *exploration and description of a phenomenon.*

Qualitative studies illustrate in detail what people think and how they respond within society.

The qualitative method of data collection and processing is directed at understanding experiences, opinions, views and perceptions of people in their natural settings.

Quantitative studies rely on *measurable data.*

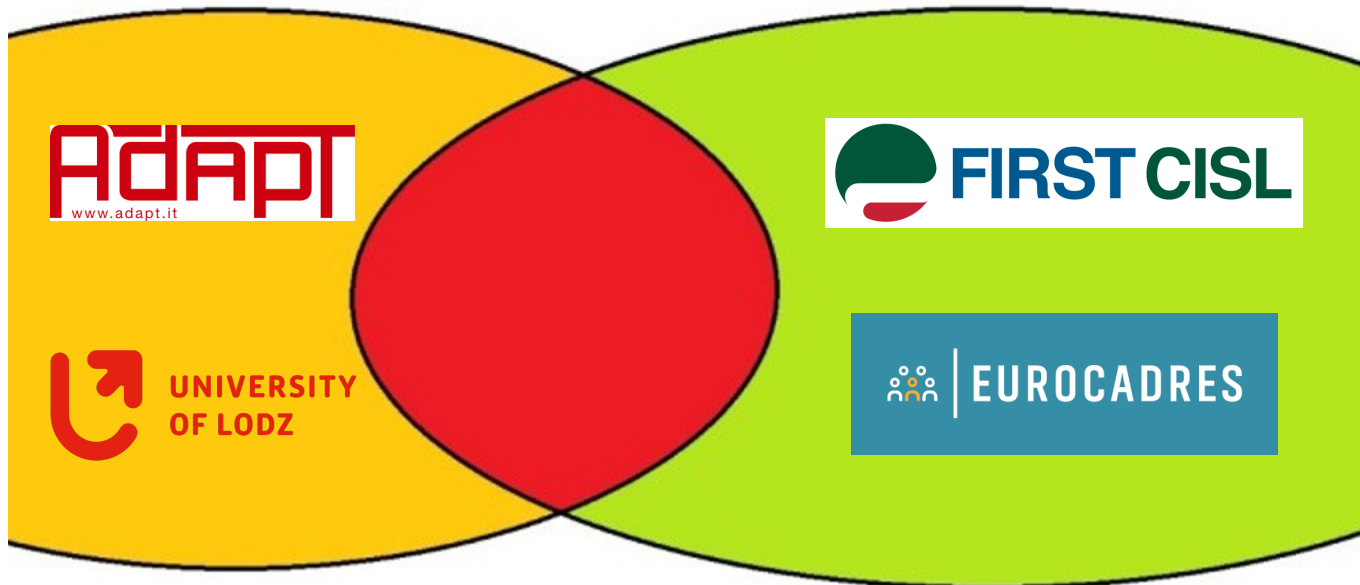
## TWO DIFFERENT TOOLS FOR DATA COLLECTION IN SOCIAL RESEARCH



iterative approach



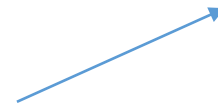
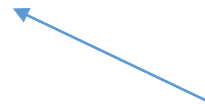
## JOINT ACTIVITIES: PHASE 1



PREPARATION OF INTERVIEWS AND QUESTIONNAIRES



## SEMI-STRUCTURED INTERVIEWS



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Trade Union



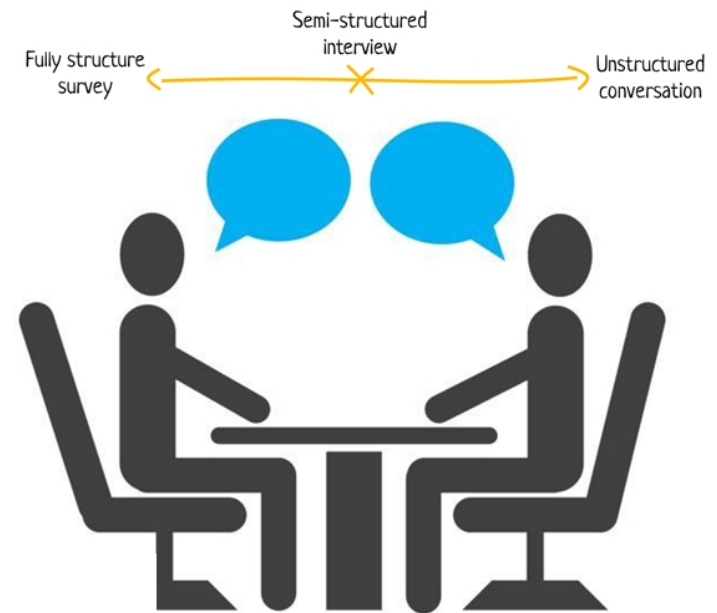
Thanks to the collaboration with all the project partners, ADAPT will prepare semi-structured interviews that will be approved by all partners and conducted with respondents from EWCs, trade union organisations, Eurocadres and Unicredit.



## HOW DOES A SEMI-STRUCTURED INTERVIEW WORK?

While a structured interview has a rigorous set of questions which does not allow one to divert, a semi-structured interview is open, allowing *new ideas to be brought up* during the interview as a result of what the interviewee says (*qualitative methodology*).

The interviewer in a semi-structured interview generally has a *framework of themes* to be explored.



## LANGUAGE OF INTERVIEWS

All questions will be produced in English, then translated into national languages by the partners.



Interview guidelines will be delivered in English.



Interviews will be run in English with selected respondents.






## THE SURVEY

The four partners will draw up an online questionnaire, which will be approved by all participating organisations and submitted to trade unionists and workers' representatives operating in the most significant sectors and countries or countries participating in the project.

The field survey will identify - especially for SMEs - the financial and advisory **NEEDS** in industries that will be most affected by the Green Transition (*fossil fuels, utilities/electricity, energy, construction, transport and agriculture*).

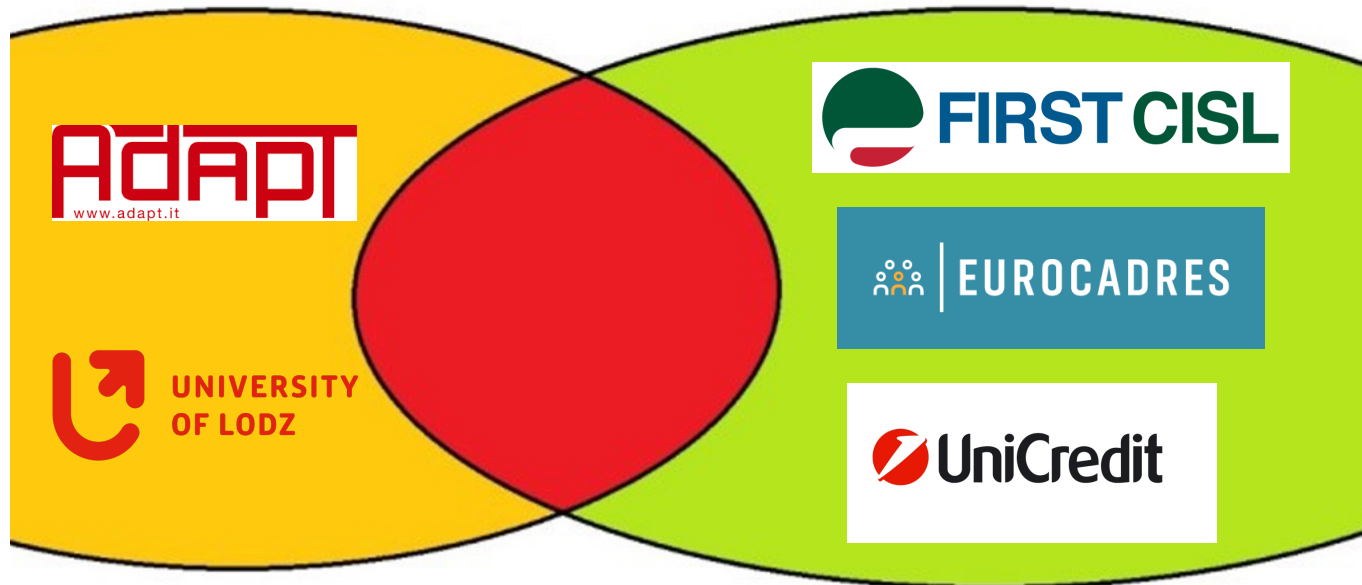
The survey will be carried out in English and translated into various national languages, thanks to the  

The survey will only use multiple choice/binary and closed questions (*measurable data: quantitative research*).





## JOINT ACTIVITIES: PHASE 2



**CONDUCTING OF INTERVIEWS AND ADMINISTRATION  
OF THE QUESTIONNAIRE**



**The joint activities also include the leading of interviews and the submission of the questionnaire, with the additional help of Unicredit:**

- interviews will be run by the research partners - through CATI and CAWI - with trade unions at the national level in the selected countries**
- the questionnaire will be submitted by the research partners to trade unionists and workers' representatives in the selected industries and countries**



## COMPUTER ASSISTED INTERVIEWING



**CATI or Computer Assisted Telephone Interviewing** is a voice interview method in which interviewers call respondents' phone numbers.

**CATI interviews are administered personally by the interviewer and the software allows interviewers to record responses and save data.**



**CAWI or Computer Assisted Web Interviewing** is another name for online surveys or interviews, which are surveys administered through a web browser or mobile application.

**Links for CAWI surveys can be sent via email and social media apps.**



## SUPPORT TO RESEARCH PARTNERS



First Cisl, Eurocadres, and UniCredit will support the scientific partners in identifying the respondents.

Quality control of the objective will be run consistently with the number of respondents:

- receiving at least 10 questionnaire feedbacks from trade unionists and workers' representatives per country selected.
- conducting the interview with at least 2 national trade union experts for each selected country **PLUS** at least 2 professionals from Eurocadres and UniCredit.



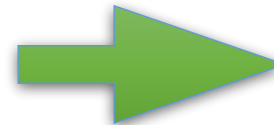
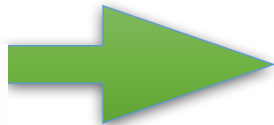
## THE CHECKS

The checks will use the following means:

- excel sheets with the raw data corresponding to the results of the questionnaire
- a written summary of the key results (about 3 pages each to be written in English)
- audio/video recording of the interviews



## PROCESSING THE INQUIRY RESULTS



The *combination* of desk research and the field inquiries aims at identifying a series of new professional figures capable of responding to the needs of the emerging market and adapting the financial sector to a new credit paradigm based on social and environmental sustainability.

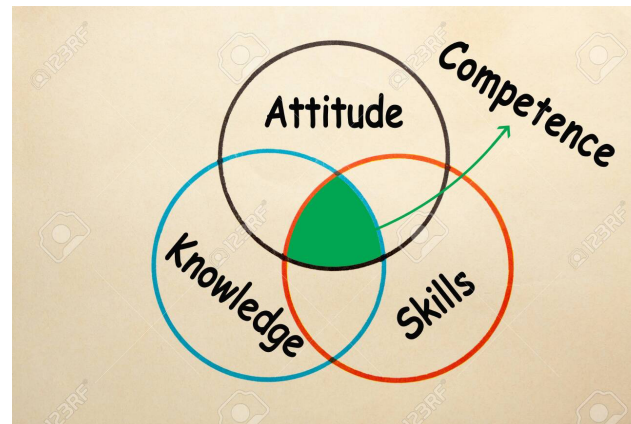
To this end, the distinctive features (i.e. the “professional profile”) will be specified in terms of:

- *expected functions*
- *organizational contexts* in which to operate
- *work organisation* methods.



## TRANSITION TO GREEN ECONOMY REQUIRES COMPETENCE

The turning point will be the definition of “Green Credit Skills”. The intersection of sets of knowledge, skills and attitudes - both professional and personal - will build the right competence.



The competence will enable workers, particularly high-level professionals, to better manage the progression to new professional roles and provide quality advice to customers.





This expertise will be identified at the European sector level and should be in line with ESCO, the multilingual *classification of European skills, competences, qualifications and occupations.*



Finally, particular attention will be paid to the company training courses necessary for the achievement of the job positions identified and useful for professional updating and retraining.