

#GreenFin

Financing the Green Transition

DELIVERABLE D3.2

TRAINING MODULE 1
EVALUATION REPORT



#GreenFin

PROJECT CONSORTIUM

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INTRODUCTION TO THE REPORT

Objectives and structure

The purpose of this report is to present the results, in quantitative but above all qualitative terms, of the first module of the project's training pathway held in Vico Equense (Naples) on 4 and 5 July 2023.

Starting from the objectives and expected results of the training intervention, as stated in the GreenFin project and using the methodology developed by Donald Kirkpatrick - known as Kirkpatrick's Four Levels of Training Evaluation - we will assess the efficacy of module 1 and measure any gaps between what was expected and what was actually achieved.

The report will be structured in several parts following the methodological approach mentioned above.

Chapter 1. Aims, expected results, target group and methodology of the training pathway and module 1

Chapter 2. the methodology adopted to evaluate the training pathway

Chapter 3. the results of Module 1 assessment

a. Level 1 - Reaction.

Charts of the results and remarks, collected via the evaluation questionnaire filled in by participants after the course, are shown and analyzed.

b. Level 2 - Learning.

The evaluation of learning is carried out using the so-called 'formative' approach, i.e. assessing learning from the production of the trainees in the classroom, both the individual and the group works, and from the level of interaction and participation. The flipcharts and exercises produced in the classroom are shown and commented on

c. Level 3 and 4 – Impact (behavior and results).

The final table round conducted in the classroom is reported (Mentimeter on how they will use what they have learnt in their work as trade unionists) and, since these levels are measured after a certain period of time following the course, we undertake to verify in the next training module the impact by asking whether they have put into practice, and how, the commitment taken in the classroom

Chapter 4. Final remark, in which we will present some closing comments

APPENDIX 1 - The training agenda

APPENDIX 2 - The training minute

All the training documents and materials - the experts' PowerPoint presentations, the activity sheets, the training agenda - are part of the Deliverable D3.1 (Training materials MODULE 1) and available in the Virtual Agora dedicated to the GreenFIN project that the European Commission can access with its credentials. <https://agora.firstcisil.it/static/green-fin.html>



Chapter 1. General Aim, objectives and expected results, target group and methodology of the training pathway and module 1

The focal point of the GreenFin action is the education of EWC members and TU leaders belonging to the partner organizations in order for them to have a positive impact on the European green and social transition.

The entire project, not only the training pathway, is oriented towards the creation of a network of trade unionists and EWC members: (1) equipped to deal in terms of knowledge and sensitivity with the topic of green economy and sustainable finance, the role of the finance sector and of trade unions to promote new green skills and positions in the finance companies (knowledge objectives); (2) able to respond, with new operational methods and tools, to the challenges of collective negotiation and to contribute effectively to the European social dialogue (change objectives).

Within this horizon of meaning, the pedagogical path aims at empowering the participants-unionists, encouraging their attitude towards a greater assumption of responsibility and supporting their sense of self-efficacy, so as to become promoters of change in their organizational context and in the interaction with the employers.

Therefore, the educational path, since the early stages of the project, developed a process through which to foster the *agentiveness* - i.e. the competence to act - of the partners who, before actually attending the training courses, were engaged in the collection and critical analysis of laws and agreements at European, EWC, national and corporate level (see *Deliverable D2.2 - Unitary report on the social partners activity (good practices collection at national/company level)*)

The training pathway is developed along **two modules** with own **specific objectives**.

The first module, on 4 and 5 July 2023, **focused on the knowledge and awareness raising** on the topics of just transition and green finance. The content of the scientific partners' research and the good practices collected by the social partners were the foundation on which the module was developed.

The second module, scheduled for spring 2024, **will focus on acquiring skills useful for negotiating** the topics at company, EWC and European level. The on-the-field research and the survey outputs on SMEs' (small and medium-sized enterprises) and workers' needs analysis will be the foundation on which the module will be developed.

In accordance with the objectives described above, **the target group** to which the training course is addressed was identified among trade union negotiators and EWC members coming from the project's partner countries, who were therefore able, at the end of the training pathway, to put into practice in collective negotiations what they had acquired.



In particular, the first module (on knowledge and awareness raising) was open to all the project partners including participants coming from different economic sectors, in order for them to exchange practices on the topic and learn from each other's experience in different production and economic areas.

The Module 2 will be more focused on the finance sector and in particular on the participants' development of negotiation skills, in order for them to have an impact on the finance companies' role in supporting the green transition at European, EWC, company and national level.

The methodology used in the training pathway is active, inductive and participatory. In this way, the participants' involvement is maximized and their personal contribution encouraged, increasing their awareness of having the motivation and tools necessary to effectively change the work environment and improve the quality of their union commitment.

It will follow 3 macro conceptual steps:

- exchange knowledge with the experts (module 1)
- pinpoint the key concepts (mod. 1-2)
- identify the uncovered negotiation areas and the negotiating objectives of a TU platform (mod. 2)

The decision to develop both knowledge and change objectives in a dynamic and participatory way and, at the same time, the presence in the classroom of trainees already experienced in union bargaining will allow the training process to effectively shape the professional growth of participants, giving them the opportunity to concretely influence the workplaces they come from.

Having planned and structured an articulated system of evaluation of the training process, based on Kirkpatrick's model, will make it possible to measure participants' progress, up to assessing the first effects on the workplace of the skills and approaches acquired.

Finally, **the role of the trainers** is consistent with the conceptual and methodological framework of the learning process. Rather than teachers in an up-down position, the trainers play the role of learning facilitators, encouraging the personal contribution of participants as a basis for reflection and analysis for the construction of their process of awareness and change.

As **expected results of the Module 1**, we expected participants at the end of the module to:

- have improved, and be able to use in their workplace, the knowledge on the European legislative framework on green economy, sustainable finance and EU just transition
- have raised awareness on the green revolution's social, cultural and economic impact on workers and companies
- be able to foreseen the scenario and possible future development in the EU financial sector due to the effect of green transition in the economy and labour market
- recognize the implications of the green revolution on workers' profession and skills in all the sectors and particularly on the finance one, with special focus on P&Ms and middle management



Chapter 2. The methodology adopted to evaluate the training pathway

The evaluation of training efficacy, as already mentioned, constantly follows the training process. Evaluating the learning process means, in fact, identifying the changes that have taken place in the knowledge, skills and performance of individuals as a result of a specific training intervention, with the aim of guaranteeing coherence between the training aims and the strategies put in place during the course to achieve them.

The best known, most appreciated and most widely used hierarchical model for evaluating the effectiveness of a training program is undoubtedly the 4-level model introduced in 1959 by Donald Kirkpatrick (1924-2014). This model - defined as hierarchical because each level of evaluation is preparatory and therefore necessary to the evaluation of the next level - indicates for each of these levels, specific procedures and measurements, suitable to be applied in any organizational context.

To measure Module 1 participants' satisfaction/reaction (L1), but also to collect their perception of what they learned and their further training needs (L2), an evaluation questionnaire was used, to which other more "qualitative" methodologies of satisfaction and learning were added, such as the table round and the self-analysis at the end of the course. This concerns the so-called *summative evaluation*, that is, at the end of the course. With respect to the *formative evaluation* - aimed at measuring the level of involvement of participants throughout the training course, on the one hand, and their learning process, on the other - various formal, but above all non-formal and informal tools were used.

The diachronic dimension of the impact (L3 and L4), i.e., the measurement of training interventions with respect to the change in participants' behaviours and the organizational and workplace impact, in a dynamic and evolutionary perspective, is a particularly complex aspect to detect. However, as described in the following chapter, during the final part of the module, the training participants committed themselves to take some actions after what they have learned during the course. We will check with them during Module 2 the steps they have been taken.

Chapter 3. Evaluation outcomes of Module 1

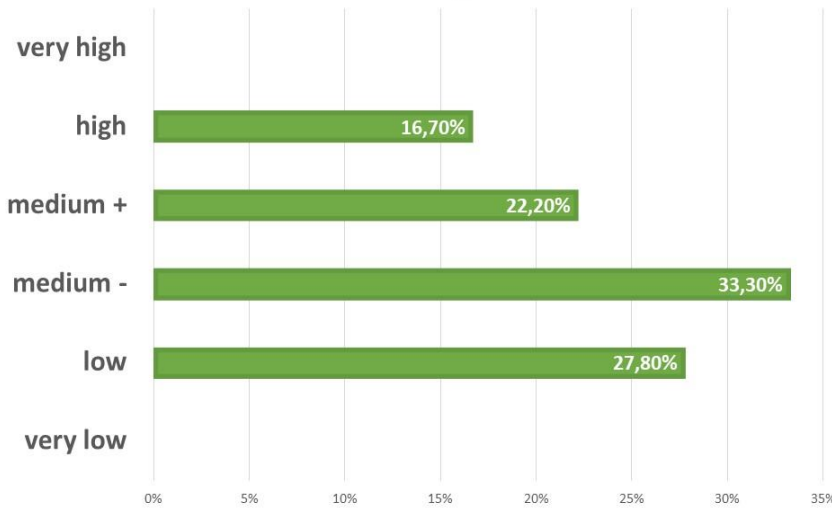
A. LEVEL 1 – REACTION

The final evaluation questionnaire, which collected the perception and satisfaction of the participants, showed a very high level of average satisfaction (over 90.1%), and an excellent awareness of the project issues following the training course.

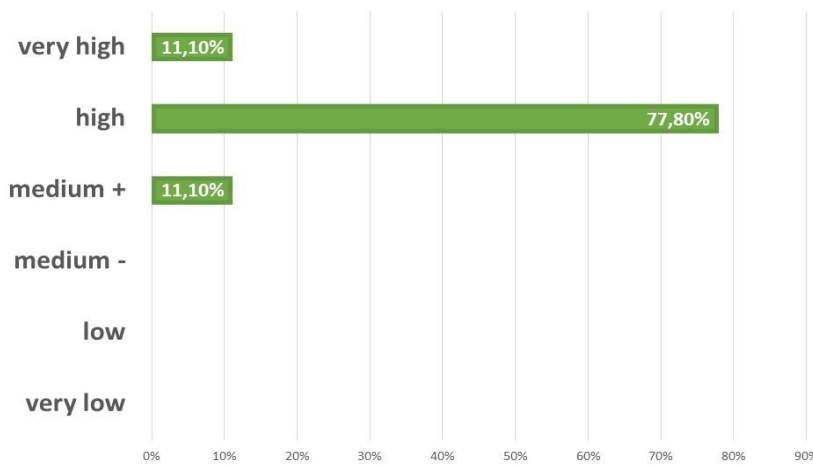


Below the charts as aggregate results of the *Google forms* on GreenFin - 1' MODULE EVALUATION and the related observations.

1. What level of knowledge on the topics did you have before the training?



2. What is it now?

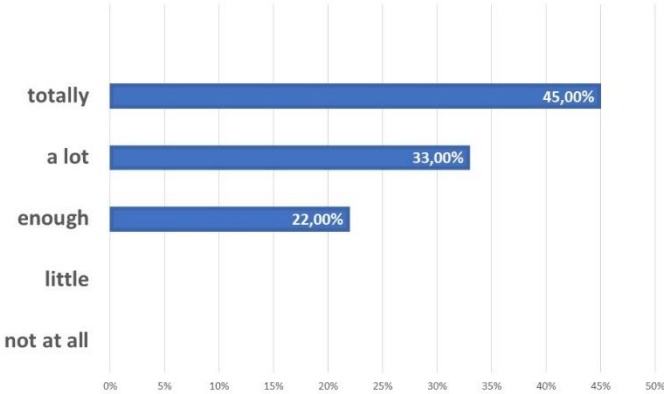


From the comparison of the 2 charts above it is evident the participants' perception of their improvements in terms of knowledge and awareness. In fact, **almost 90% declared to have reached a level of knowledge high and**



very high after the training, compared to the 16,7% of high (none very high) before the training.

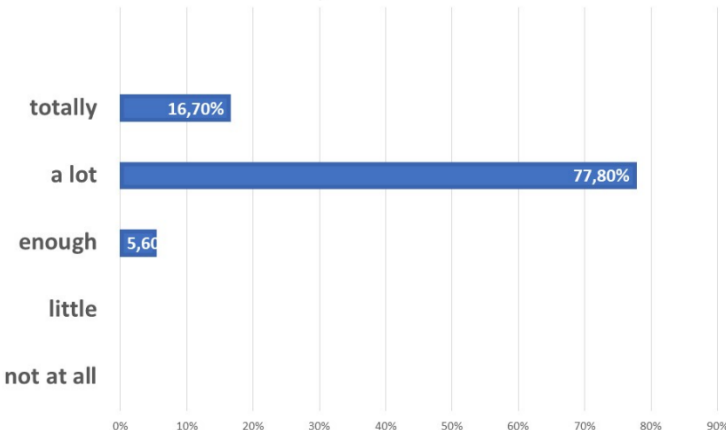
3. The course has achieved its objectives?



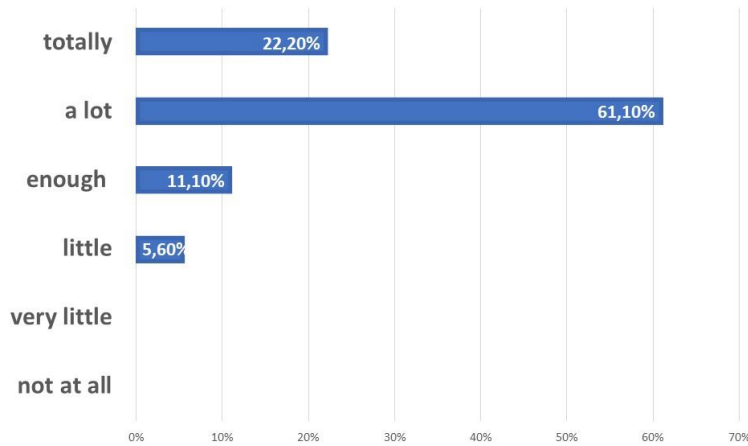
3. The course has achieved its objectives because:

- I learned to see the subject treated in another way
- I now know the new approaches and the possibility to collaborate for correct answers to the challenges generated by the current situation.
- I learned a lot of new information
- because it allowed me to understand the extent of the possible field of action.
- We've made it more clear what skills are required for the finance worker regarding the green transition
- I learned more about financial transition to green and met new colleagues to share experience and good practice.
- Make me more aware about the future
- It helped deepening and widening my understanding in the processes of greening.
- I had a lot of responses to my answers
- (of) well presented topics, interaction, shared knowledge and experience

4. Have the subjects been treated in a clear and detailed way?



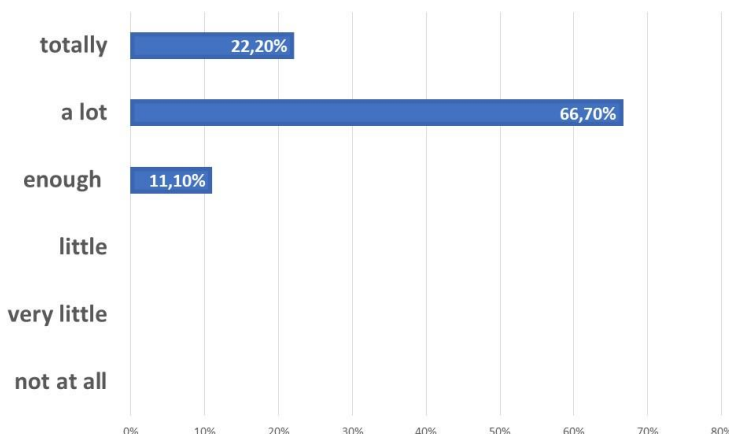
5. Do you think that the topics are useful to your role in the trade union?



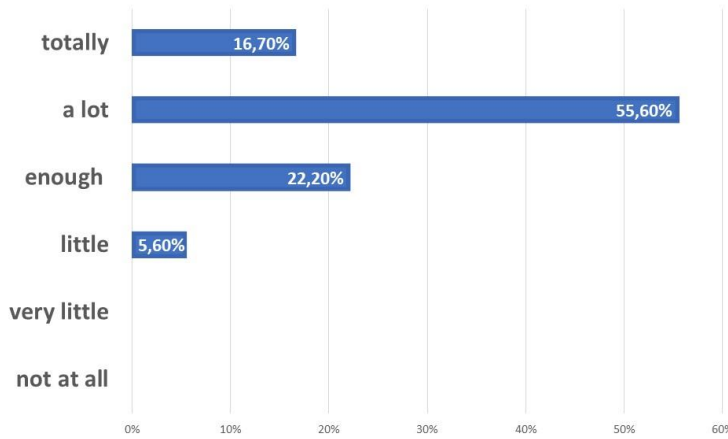
5. Do you think that the topics are useful to your role in the trade union? which topics and why?

- The way how to approach the energy transition in relation to jobs
- Green economy because we all have to contribute at this.
- Clarification regarding green jobs, the legal basis involved and especially the exchange of experience regarding the updating of collective labor contracts.
- I have a greater insight into the requirements of the Trade unions to assist workers in the green transition. Especially just transition.
- How to encourage green jobs and business.
- The role of finance in the green and just transition
- Encourage the union to get more active instigating the company in its efforts to further decrease its ecological footprint.
- climate change and results
- The impact on the work market and the sociological and cultural aspects of the green revolution affecting workers and trade union representatives/The role of finance in the green and just transition - it is what we do

6. The training allowed you to expand knowledge on theoretical topics

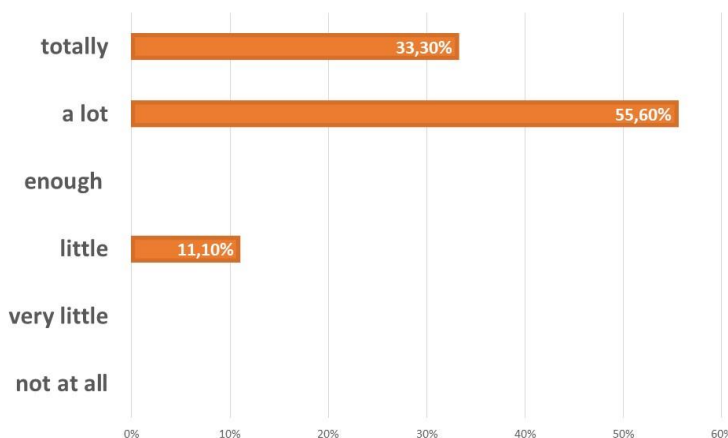


7. The training allowed you to acquire greater capacity of analysis

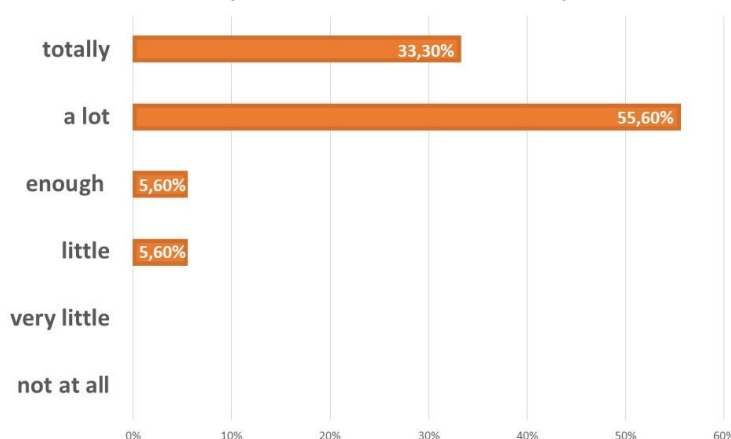


From the analysis of the above blue charts (q. 3-4-5-6-7) on the value of topics covered during the course, it is obvious the participants' perception of the training high quality, usefulness and effectiveness. In particular, **78%** affirmed that the training fully reached its objectives (question 3), **95%** that the topics has been treated in a clear and detailed way (q.4) and over **83%** that the contents of the training was very useful for their role as trade unionists (q.5).

8. The training has called you in further training needs with respect to theoretic knowledge



9. The training has called you in further training needs with respect to the development of skills



Which skills/topics?

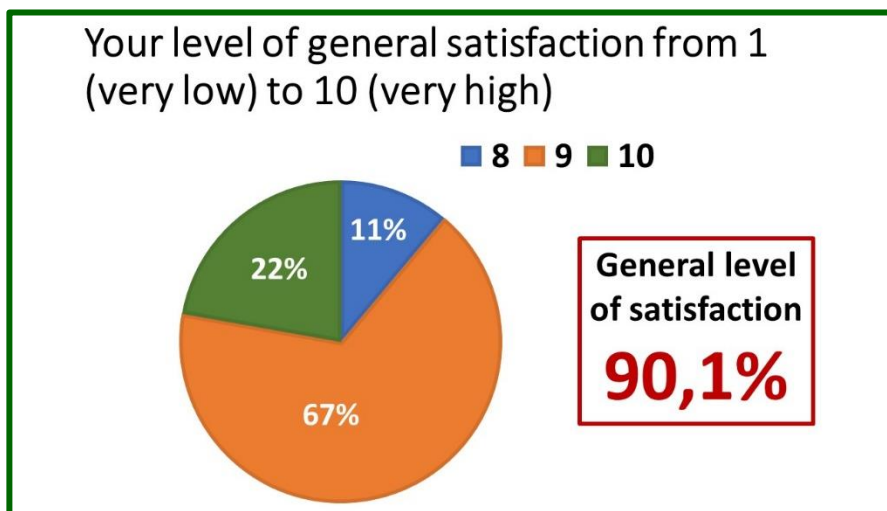
- To deep the real finance role
- The energy transition
- the subject of the future professions that will emerge from this green transition in our finance sector. This allows you to have a positive aspect to dig
- Future green development
- green transition
- To improve the qualitive of skills.
- to develop new skills about the environment
- The role of trade union representative in the green and just transition
- To better understand the climate changes and what kind of measures could really improve environment

From the analysis of the above orange charts (q.8-9) on the training needs after the module, it is clear that participants are motivated to continue deepening topics related to the green economy and sustainable finance, and that they attach importance to the topics in relation to their role as trade unionists. In particular, **almost 90%** of the respondents stated their needs to go deeper in the development of their skills in order to be more effective as TU, which is exactly what we intend to accomplish throughout the training path. Their comments reinforced this impression.



What progress this course allows you to do?

- To integrate my knowledge about Green economy
- The challenges of finance in relation to new energies
- It familiarized me with the issue of green jobs and the current situation, including notable experiences from different EU countries. The contact with the participants and the possibilities of collaboration for the exchange of experience should not be omitted either.
- networking updates on Europe state of the art in various countries
- be able to put "green" in all company negotiations, at all levels and in all matters dealt with by TU
- Awareness and in-depth approach to a green future in all areas
- access to info and regulation as well as other new approaches towards the companies
- To understand better the difference between knowledge and sensibility.
- To be more interested in this topic because without involvement of as much people as possible green deal could be misused by some group of multinational business groups.



From the above charts on the over-all sentiment of the participants on module 1, it is more than evident their degree of contentment with the training (**over 90% the general level of satisfaction**). Especially important their remarks on the added value and innovativeness of the contents in relation to their role as trade unionists and their intentions, as one of them wrote, to 'put "green" in all company negotiations, at all levels and in all matters dealt with by TU'.

B. LEVEL 2 – LEARNING

As mentioned before, the evaluation of what participants learnt during the course is carried out using the so-called 'formative approach', i.e. assessing learning from the production of the trainees in the training room, both the



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individual and the group works, and from the level of interaction and participation.

In fact, in the case of participants with professional roles and positions of responsibility within an organisation, in particular a trade union organisation, rather than assessing the level of data knowledge acquired, it is important to verify the level of awareness acquired and their motivation to put into practice in the workplace what has been assimilated in the training. But even more important is to make them aware of their possibility **to act as agents of change** and to have a decisive impact on the lives of workers and, in this case, indeed also on the planet's survival.

Motivation and empowerment are the two key words.

Training is also an opportunity to break some prejudices and open oneself to new ideas and to learn from each other experience. Therefore, in order to achieve more interesting results and, above all, to allow a fruitful exchange of ideas and experiences between trade unionists with very different backgrounds and from different countries and sectors, the working groups were organised with the criterion of maximum diversity of origin and gender.

Below the activity sheets and the flipcharts and exercises produced in the classroom during the Module 1 with some comments for each exercise.

b.1. The mind maps

i. the activity sheets

MIND MAP: THE GREEN ECONOMY

Group activity **time: 30'**





1. write on the **post-its** (1 for each) as many as possible associations concern the **green economy**
2. On a flipchart put the words '*green economy*' in the center and create with the written post-its some **CLOUDS** of logical connected words
3. Give **the clouds a name** and get ready to present you mind map with the help of a **spokesperson**

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ii. the groups' flipcharts



As it is evident from the pictures of the participants' flipcharts on the mind map, the task was carried out brilliantly and with the involvement of all groups' members. A good awareness of the course topics and a strong motivation and commitment emerge from the flipcharts outputs while, from the observations of the group activity, it was palpable the vivid views exchange among trainees coming from different organizations, sectors and countries, with diverse trade union experience and tradition but bonded by the same basic values and strong ideal motivations.

b.2. The Cards

i. the activity sheets

THE TRADE UNIONIST CARDS

Dreamer, Realist, Critical

Group activity **time: 30'**

1. Choose one of the cards: Dreamer, Realist or Critical
2. Once the groups are set, from your point of view as dreamer, realistic and critical trade unionists, answer (some of) the questions and, if you want, **integrate other considerations**
3. Prepare a flipchart and get ready to present your group activity with the help of a **spokesperson**

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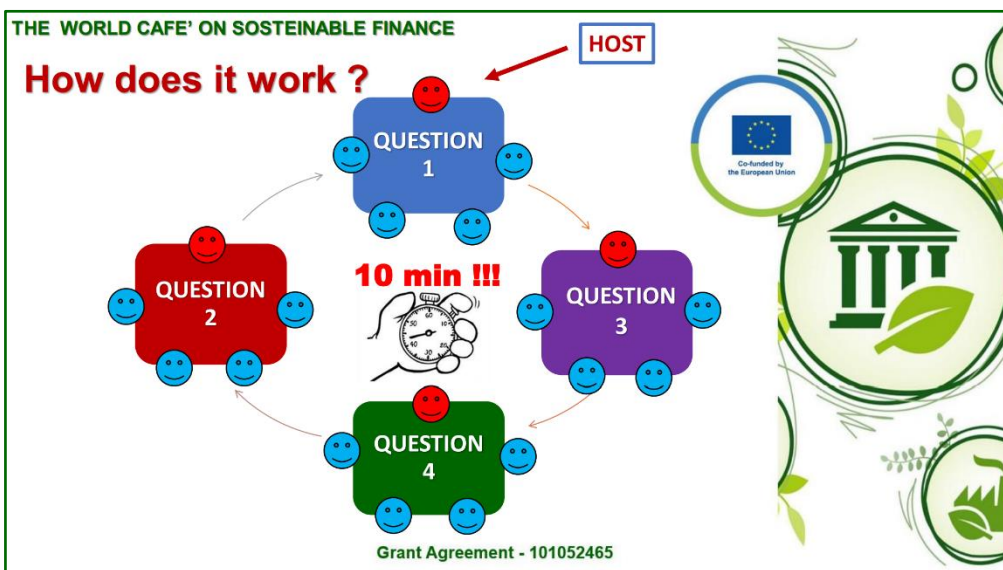
ii. the groups' flipcharts



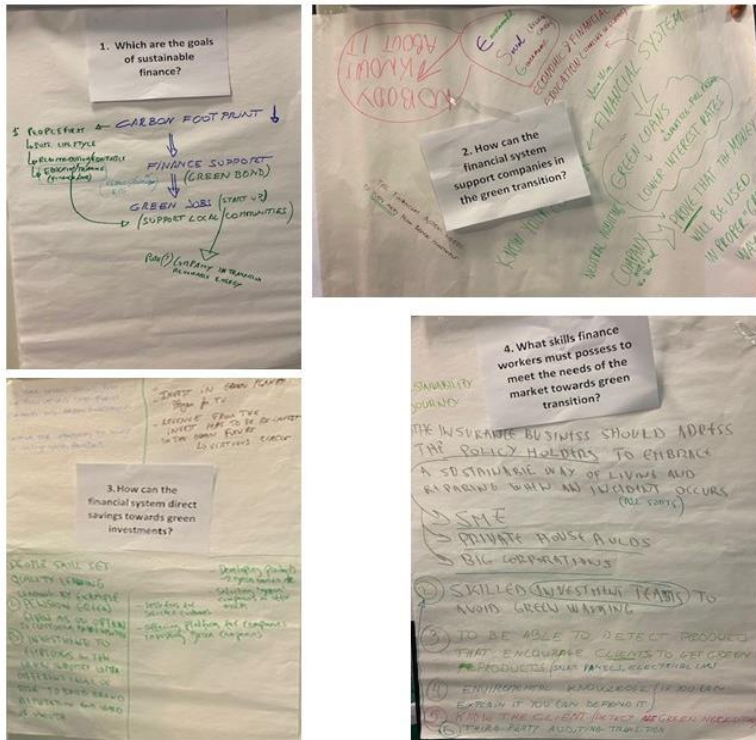
In this case the participants chose the group to work in based on their psychological approach to the topic (realistic, dreamer or critical), making evident that a different attitude can change the results. Again, the task was carried out with great commitment of all groups' members. The presentation by the spokespersons were impressive and showed a great integration among the participants of each group.

b.3. The world café on sustainable finance

i. the activity sheets



ii. the groups' flipcharts



The World Café method is designed to create a welcoming environment in which to intentionally connect multiple ideas and perspectives on a topic by engaging participants in several rounds of small-group conversation. The World Café method is particularly useful when you want to explore a topic from multiple perspectives.

Following the methodology, we asked the participants to answer to a question as a group for 10 minutes and then change the question (table), so that at the end of 4 rounds everybody has contribute to answer to all of the 4 questions. In this way we collected in short time participants' prospective on the role of finance in the green transition, ensuring that everyone in the room contributed and encouraging participants to make new connections on the topics by building up ideas on those of their colleagues. As the flipcharts above testify, the participants created a rich collective work.

b.4. The role of the trade union: SWOT analysis via Mentimeter

i. the activity sheets

Taking into consideration the role of trade unions in the green transition, what are their strengths?
Waiting for answers

Taking into consideration the role of trade unions in the green transition, what are their weaknesses?
Waiting for answers

Taking into consideration the role of trade unions in the green transition, what are the opportunities?
Waiting for answers

Taking into consideration the role of trade unions in the green transition, what are the threats?
Waiting for answers

ii. the participants' answers

THE ROLE OF TRADE UNIONS IN THE GREEN TRANSITION
SWOT RESULTS
Taking into consideration the role of trade unions in the green transition, what are their strengths?

The knowledge to enter into negotiations	The support of their members	the or "joint" work in top management at the works
Not any more time for the unions to have a much better preparation in negotiations and decisions	The ideal trade unions is very important	The "traded" power and resources
To separate from "OT" without being used just for the profit of the companies.	Historical focus on coping with the green transition objectives to negotiation and cooperation	The support of the trade union members that know that the TU will help them for a better life
Trade union helping each other and collecting knowledge, supporting employees in many sectors	A platform to discuss and establish a partnership and initiatives of dialogues associated with other stakeholders in the green transition	Impacts the communication of the role of the environment as known to members and representation

THE ROLE OF TRADE UNIONS IN THE GREEN TRANSITION
SWOT RESULTS
Taking into consideration the role of trade unions in the green transition, what are their weaknesses?

Little power in decisions	the inertia of top management	The TU option is not taken into consideration when the company has the goal only to make profits
Overall in Europe the Trade unions are subject to too many different and local agendas. Making it difficult to speak with "one voice"	Non-union support to negotiate the commitments in the transition	absence of shared participation from the employees and an ongoing process where we do not have the younger generations taking on other roles, we need to be more inclusive
The Money, profit, it always first	Union density level in start-up companies and among young people should go up, in order to gain more power to negotiate.	Non-representation in decision making bodies, co-management
They do not have any legal tool to participate on the process and take their opinion into account.	Can fall into the trap of considering the QT more important than well-being of their members	

THE ROLE OF TRADE UNIONS IN THE GREEN TRANSITION
SWOT RESULTS
Taking into consideration the role of trade unions in the green transition, what are the opportunities?

Report of the change. Make sure that the needs of their members are taken into consideration and respect.	to involve younger generations become more inclusive	to become more young officers in our TU new alternative our representation bodies
No opportunities, must do it	The opportunities are to increase the number of members of trade unions on company level	to learn the right balance between the QT and the TU needs and adapt the strategy regarding on the balance
We have the chance through of these new regulation to create better jobs, and therefore protect more the workers	Overcoming leader delays questions and commitments and strategies innovative	To be an actor of the process, to promote the interests of the trade union in the change
When talking the shift in labour market into green economy having been OT for trade unions, we might, again, have more members, but regarding the green transition, each should have history	we can become relevant for the Young generation and letting them have a voice in the climate debate	To strengthen this position, supervise the direction of QT to be favourable for peaceful society

THE ROLE OF TRADE UNIONS IN THE GREEN TRANSITION
SWOT RESULTS
Taking into consideration the role of trade unions in the green transition, what are the threats?

To be more Green and forget about what are the needs of the TU members	For me there is no threat, only opportunities	Not to be supported by others
a total generational lapse with older generations retiring and not enough joining, no more reliance on numbers	To be "out of the game". But as this is a MUST, we can only see opportunities	Forget about the members' needs!
Not being a part of the process, QT could be just the tool to increase profits.	Jobs losses, we have to try not to let the companies to take advantage of this process to turn it into a restructuring process in labour terms	To much bureaucracy will hinder actively intervention and therefore hinder reaching our main goal in saving the world. Less talk, more action
if generations next point to have "traditional" is a good point to have an events demonstration in more in a grade of emotional/qualitative	The transition to new jobs on the solution for employees and will have difficulties to be part of this changes.	If the trade unions is not able to be on top of the change will be hindered as well

In the last activity, applying the SWOT analysis approach, the participants were asked to identify individually the strengths, weaknesses, opportunities and threats of the role of trade unions in the green transition. They answer to the questions using *Mentimeter.com* - an app that enables users to share knowledge and real-time feedback using their mobile phone – and their observations were shown on the screen, shared and commented by the experts. As shown above the task was carried out with great commitment of all trainees.

C. LEVEL 3/4 – IMPACT

The diachronic dimension of the impact (L3 and L4), i.e., the measurement of training interventions with respect to the change in participants' behaviours and the organizational and workplace impact, in a dynamic and evolutionary perspective, is a particularly complex aspect to detect. However, during the final part of the module, the training participants committed themselves to take some actions after what they have learned during the course and we will check with them during Module 2 the steps they have been taken.

Below the activity developed at the end of the training to assess their perception of the module added value and their motivation to carry on with the dissemination of what they have been learning and to take some action after the training.

c.1 – Mentimeter Q.1

The first question of the final evaluation in plenary at the end of module1 was about the added value of the training for the participants. It was an individual exercise via Mentimeter.com.

As shown in the slide, the most common answer was **knowledge**, followed by **experience**, **interaction** and **hope**. We can paraphrase by writing: *'the knowledge acquired during the training throughout the interaction and exchange of experiences with the other participants, the trainers and experts gave me the hope to think that we as trade unionist can do something to impact on the topic of green and social transition'*. If our interpretation is correct we

What I take home from this training



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have reached the main objective of the training: strengthen participants' belief in their ability to act as agents of change to shape reality.

c.2 – Mentimeter Q.2

The second question of the final evaluation in plenary at the end of module1 was about the action participants intend to take after what they learnt during the training. It was an individual exercise via Mentimeter.com. This is the key question to evaluate their motivation to act once back at their companies or organization workplace.

The biggest, so the most written, word is **act**, followed by **share** and **disseminate**. By putting together the key words written via Mentimeter, making a reasoned reading of them, and integrating the comments made by the participants in the final round table, we can undoubtedly state that participants, most of which leaders and in charge of negotiation in their trade union, intend: 1. share and disseminate among their colleagues what they acquired with the aim of make it a common knowledge in their organization, 2. most importantly, use their knowledge to promote new agreements at company, national and European level, so that to affect the situation.

What I will do from tomorrow on



Chapter 4. Final remarks

Analyzing the overall results collected using the Kirkpatrick 4 level model, we can confidently say that the set-out expected outcomes of the first training were largely achieved.

This was due, on the one hand, to the thoroughness of the module design and the expertise and competence of trainers and expert researchers, and on the other hand, to the high profile of the participants, all of whom experienced trade unionists and some of them already familiar with the subjects, and their commitment and willingness to get involved in the training activities and to exchange views and ideas with each other and with the trainers and lecturers.

Referring specifically on the expected outcomes initially set:

The participants at the end of the module:

- improved, and will be able to use in their workplace, the knowledge on the European legislative framework on green economy, sustainable finance and EU just transition
- raised awareness on the green revolution's social, cultural and economic impact on workers and companies
- will be able to foresee the scenario and possible future development in the EU financial sector due to the effect of green transition in the economy and labor market
- recognized the implications of the green revolution on workers' profession and skills in all the sectors and particularly on the finance one, with special focus on P&Ms and middle management

From the side of their personal perception and sentiment, the final evaluation questionnaire showed a very high level of average satisfaction (over 90.1%), and an excellent awareness of the project issues following the training course.

Moreover, the key words most frequently used by participants to describe their state of mind in the final round table at the end of the course were: awareness, sharing, innovation, participation, change of perspective.

A further and decisive test of the level of partners' attention and involvement on the project's issues will be assessed by the commitment they will show in the next stages of the action. Indeed, they will be called upon to cooperate with the scientific partners to translate and subsequently disseminate the on-the-field survey questionnaire among their colleagues and in their workplaces.

Finally, as stated before, the true success of the training course will be proven by the activities the partners will take in their workplaces and in carrying out their roles as active trade unionists. We will monitor this both during the second module of the course and during and after the conclusion of the project.



APPENDIX 1

THE MODULE 1 AGENDA

Training course - Module 1
4-5 July 2023, Aequa hotel - Vico Equense (NA)

AGENDA

1' DAY - 4 JULY

09:00 Opening & welcome

09:05 #GreenFin project presentation

| *Paola Vinciguerra - First Cisl*

09:20 Scientific partners and research tasks presentation

| *Francesco Discanno - First Cisl*

09:30 Participants' presentation and icebreaker

10:20 The training pathway: general aim, objectives and structure

| *Anna Masiello - First Cisl*

Coffee break

11:00 Group Activity

12:00 Framing the European strategy towards a green economy

| *Iwa Kuchciak - University of Łódź*

12:40 Debate

Light lunch

14:30 Activity in plenary



14:40 The impact on the work market and the sociological and cultural aspects of the green revolution affecting workers and trade union representatives

| *Iwa Kuchciak - University of Łódź*

15:20 Group Activity

Coffee break

16:50 The labour market polarisation between new green skills and traditional competences

| *Iwa Kuchciak - University of Łódź*

17:20 Group Activity

18:00 End of day 1

2' DAY - 5 JULY

09:00 Group Activity

10:15 The role of finance in the green and just transition

| *Margherita Roiatti and Sara Prosdocimi - Fondazione Adapt*

Coffee break

11:30 How can digitization support the finance system in the green transition? A swot analysis for job and customer protection

| *Domenico Iodice, Project Manager - First Cisl*

12:10 Final Evaluation

12:50 Project next steps

| *Paola Vinciguerra - First Cisl*

13:00 Lunch & end of training



APPENDIX 2

THE MODULE 1 MINUTE

July 4

9:00 am. Opens the meeting Paola Vinciguerra, First CISL National Trainer, who greets everyone and welcomes everyone.

She then presents the project with the help of slides.

([PPT](https://agora.firstcisl.it/pluginfile.php/499/mod_resource/content/1/1%20VINCIGUERRA%20-%20PROJECT%20PRESENTATION.pdf) ¹⁾
(https://agora.firstcisl.it/pluginfile.php/499/mod_resource/content/1/1%20VINCIGUERRA%20-%20PROJECT%20PRESENTATION.pdf)

She also presents the partners and tasks of the scientific research, the coordination of which is the responsibility of **Francesco Discanno**, First CISL National Trainer.

The title of Discanno's paper is: "[Scientific partners and research tasks presentation](https://agora.firstcisl.it/pluginfile.php/503/mod_resource/content/1/2%20DISCANNO%20-%20Scientific%20partners%20and%20research%20tasks%20presentation.pdf)".

(https://agora.firstcisl.it/pluginfile.php/503/mod_resource/content/1/2%20DISCANNO%20-%20Scientific%20partners%20and%20research%20tasks%20presentation.pdf):

Premise

The green economy transition is a critical global priority, and financing plays a crucial role in driving this transformation. Transnational collective bargaining and the involvement of European Works Councils (EWCs) can contribute significantly to supporting European banks' shift towards environmental and social responsibility. In particular, they can address the challenges related to new job profiles and the need for reskilling in the banking sector.

The transnational collective bargaining is primarily involved in the green finance transition. This transnational interaction concerns negotiations that take place between employers and employee representatives across different countries. It enables workers to have a voice in decisions that affect their work, including the transition to green banking practices. By engaging in transnational collective bargaining, bank employees can advocate for environmental and social responsibility measures, such as sustainable investment practices, climate risk financial assessment, and financing towards the reduction of carbon footprints and -at the same time -safeguarding the quantity and quality of labour, which means protecting employment and guaranteeing just conditions also in the workplace.



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As you know, EWCs are representative bodies that bring together employee representatives from different European Union (EU) member states in multinational companies. EWCs can play a crucial role in facilitating dialogue, cooperation, and decision-making processes related to the green transition of finance within European banks. They provide a platform for employees to voice their concerns, offer suggestions, and participate in shaping the bank's environmental and social responsibility strategies. EWCs can collaborate with management to ensure that the transition to a sustainable banking sector is inclusive, socially just, and considers the interests of both workers and the environment.

The green transition in the banking sector will likely create a demand for new job profiles. These profiles may include roles related to sustainable finance, environmental risk

assessment, renewable energy investment, and green technology research and development. Transnational collective bargaining can be used to ensure that workers are adequately prepared for these new job profiles. It can facilitate discussions on training programs, upskilling initiatives, and career development opportunities to support employees in acquiring the necessary skills and knowledge for the green economy. All these measures have also the aim of preserving employment and ensuring both safe and fair working conditions at the workplace.

The shift towards environmental and social responsibility in banking requires a re-skilling of professionals in key positions, such as portfolio managers (P&Ms). P&Ms need to acquire expertise in sustainable finance, ESG (environmental, social, and governance) criteria, impact investing, and green portfolio management. European banks can collaborate with EWCs to design training programs and provide resources for P&Ms to develop the necessary skills and competencies. This collaboration ensures that the green transition is effectively integrated into the banking sector, and P&Ms are equipped to make informed decisions aligned with environmental and social goals, with the parallel objective to maintain and update their relevant job position in the companies.

The University of Lodz and ADAPT: the role of the scientific partners

The project takes shape in the Community framework for the protection and strengthening of information, participation and consultation of workers in companies on a Community "scale", as per the EWC directive.

This type of EWC project receives a specific line of financial support from the EC and normally does not require the participation of scientific partners. First Cisl's choice to involve researchers in a project concerning the EWC derives from the need for an in-depth exploratory and descriptive approach to the topics of interest, aimed at integrating



trade union knowledge. This approach aims at an optimal finalization of the project results in terms of depth of analysis, systematicity of investigation and effectiveness of application.

The scientific partners taking part in the project are the University of Lodz (Poland) and ADAPT (Italy).

The research activities in relation to the project objectives are the following:

a) collect basic information and conduct both desk and field research to create the knowledge bases on which to develop the first training session relating to the new cultural approach and the acquisition of awareness on environmental and social sustainability;

b) collect and analyze European and national laws and regulations on Green Economy and Green Finance;

c) collect and analyze the European/national/company collective bargaining and agreements on the project topics;

d) conduct desk and field research aimed at identifying the new professional profiles -and related skills -needed by the European financial sector to move towards a credit model based on ESG, in order to create the knowledge base on which to develop the second training session.

The specific role run so far by the University of LODZ is the investigation of the sociological and cultural aspects of work in the transition to green finance.

The University of Lodz has completed a desk research based on a minimum of 30 sources.

The secondary research report produced by the University of Lodz has been published in May, 2023.

The results of the desk research of the University of Lodz form the basis of this first course for EWC members and employee representatives.

The specific role run so far by ADAPT is the exploration of the regulatory profile of the transition and the contractual perspective of new jobs. ADAPT's desk research is based on a minimum of 30 sources.

The desk research report produced by ADAPT is going to be published soon. The results of the desk research conducted by ADAPT will form the basis of the second training course for EWC members and workers' representatives who bargain at company level.

The University of Lodz and ADAPT are also working together on a field research based on qualitative interviews and a quantitative survey.



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The floor passes to **Anna Masiello**, First CISL National Trainer, who explains the objectives and methodologies of the Training Course with the help of slides ([PPT 3](#))

https://agora.firstcisl.it/pluginfile.php/512/mod_resource/content/1/3%20MASIELLO%20-%20TRAINING%20GreenFin%20-%20VICO%20EQ%20eng.pdf .

Then we move on to socialization (**ICEBREAKER**), which is done outside. 6 photos are placed on 6 tables, one photo per table, the participants, after viewing the photos chose one, positioning themselves near the relevant table
https://agora.firstcisl.it/pluginfile.php/505/mod_resource/content/1/WS%201.%20ICEBREAKER.pdf

Afterwards each participant introduced himself or herself, explaining the reason for the choice.

After the coffee break we resumed with work in groups, again outdoors (**MIND MAP: THE GREEN ECONOMY**)
https://agora.firstcisl.it/pluginfile.php/506/mod_resource/content/1/WS%202.%20MIND%20MAP%20THE%20GREEN%20ECONOMY.pdf .

Participants, divided into 4 groups work following the instructions on the worksheet.

1. *write on the post-its (1 for each) as many as possible associations concern the green economy*
2. *On a flipchart put the words 'green economy' in the center and create with the written post-its some CLOUDS of logical connected words*
3. *Give the clouds a name and get ready to present you mind map with the help of a spokesperson*



Back in the classroom, each spokesperson illustrates the poster prepared (see photo Work 1 - Photo Poster - Concept Map Work 1).



The floor is then turned over to Iwa Kuchciak of the University of Lodz, who presents the first part of her paper: "Framing the European Strategy for a Green Economy". (PPT 4)
https://agora.firstcisl.it/pluginfile.php/504/mod_resource/content/1/4%20IWA%20-%20GreenFin_Training_Module1_platform.pdf

It's off to lunch

Work resumes at 2:30 p.m. with a short exercise, done outside, to reactivate the classroom. THE activity also aims to have **participants memorize their names**: in turn, you pass a ball to each other calling out the name of the participant to whom you throw it; if you do not remember the name, you ask. On the second round, the balls become 2, then 3 and then 4. The activity lasts 7-8 minutes and reaches the goal, activated participants, return to the classroom.

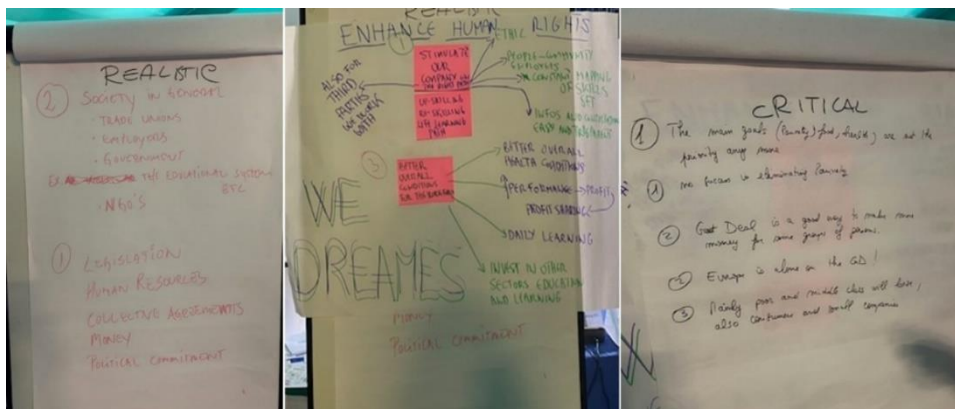
Then **Iwa Kuchciak** from the University of Lodz relates and presents the **second part** of his report 'The impact on the work market and the sociological and cultural aspects of the green revolution affecting workers and trade union representatives' (PPT 4)
https://agora.firstcisl.it/pluginfile.php/504/mod_resource/content/1/4%20IWA%20-%20GreenFin_Training_Module1_platform.pdf

At 3:20 p.m. we go to the groups for the exercise "[The Unionist Papers.](https://agora.firstcisl.it/pluginfile.php/507/mod_resource/content/1/WS%203.%20TRADE%20UNION%20CARDS.pdf)"
https://agora.firstcisl.it/pluginfile.php/507/mod_resource/content/1/WS%203.%20TRADE%20UNION%20CARDS.pdf

The exercise aims to exercise critical thinking by taking different perspectives on the topic of green transition.

The exercise goes like this: in plenary, each participant chooses a card based on the perspective/role he/she wants to play: **Dreamer**, **Realist** or **Critic**. There are 8 cards for each role. Groups are formed according to the chosen/assigned card.

Once the groups are created, we proceed to the task:



"From your perspective as dreamy, realistic and critical unionists, answer (some) questions and, if you wish, integrate other considerations.

Prepare a poster and be prepared to present your group activity with the help of a spokesperson." (Photo in File - Photo Posters "TUnionist Cards").

After 30 minutes, we return to plenary for debriefing: In turn, each group spokesperson presents the poster with the answers to the questions. The speaker makes some remarks.

After that, lecturer **Iwa Kuchciak** proceeds with the **third part** of the report. "*The labour market polarisation between new green skills and traditional competences*" (PPT 4)

https://agora.firstcisl.it/pluginfile.php/504/mod_resource/content/1/4%20IWA%20-%20GreenFin_Training_Module1_platform.pdf

After a brief discussion at 5:30 p.m., the day concludes.

July 5

Work resumes at 9:00 a.m. The first activity is the [WORLD CAFE](https://agora.firstcisl.it/pluginfile.php/508/mod_resource/content/1/WS%204%20WORLD%20CAFE%20ON%20SOSTAINABLE%20FINANC%20E.pdf). https://agora.firstcisl.it/pluginfile.php/508/mod_resource/content/1/WS%204%20WORLD%20CAFE%20ON%20SOSTAINABLE%20FINANC%20E.pdf, This is a dynamic activity involving group work. Objective of the activity: **to have participants reflect in a participatory and creative way on 4 aspects** inherent in the topics covered by the course, and prepare/activate participants for the next unit.

In plenary there are 4 tables, participants divided into 4 groups, take turns addressing one question/table at a time, moving between tables. 10 minutes per question/table to explode ideas. Only 1 participant per table never moves, the table host, who welcomes the participants and then at the end will report on his table's issue board.

The 4 themes:

1. What are the goals of sustainable finance?
2. How can the financial system support businesses in the green transition?
3. How can the financial system direct savings toward green investments?
4. What skills do financial players need to meet market needs toward green transition?



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At the end we return to the classroom and in turn the 'hosts' report on the 4 posters. (Photo in File - Photo Posters WORLD CAFE'- work 3)

The floor was turned over to **Margherita Roiatti** and **Sara Prosdocimi** from Adapt who reported with the help of slides. [PPT 5 https://agora.firstcisl.it/pluginfile.php/509/mod_resource/content/1/5%20ADAPT%20-%20GreenFin_D3.1_ADAPT.pdf](https://agora.firstcisl.it/pluginfile.php/509/mod_resource/content/1/5%20ADAPT%20-%20GreenFin_D3.1_ADAPT.pdf)

We reproduce below the abstract provided by the authors:

https://agora.firstcisl.it/pluginfile.php/515/mod_resource/content/1/5%20ADAPT%20-%20ABSTRACT%20INTERVENTO%20%20VICO.pdf

“Work Package 3: Training activities

Duration: M11 – M18 Lead Beneficiary: FIRST CISL

Objectives

The focal point of the action is the EDUCATION OF EWC MEMBERS AND TRADE UNIONISTS belonging to the organizations of the participating countries, in order to build a network of trade unionists:

- *trained in terms of knowledge and sensitivity to the issues of Green Economy and Responsible Finance*
- *able of carrying on negotiations at company/national/EWC/European level with a new operational method, contributing effectively to the European Social Dialogue progress on the issue*

All the training activities will be divided in TWO MACRO STEPS:

MODULE 1 (AWARENESS - KNOWLEDGE) of the training path open to both the financial sector and other sectors of trade union representation and developed in blended mode, alternating online and face-to-face activities.

AGENDA

ADAPT – THE ROLE OF FINANCE IN THE GREEN AND JUST TRANSITION

(45 minutes)

Introduction: the role of finance in the green and just transition: a focus on definitions and main available open-access resources (Margherita Roiatti) – 10 min

The European framework on green finance: insights from the Taxonomy regulation and the Right of information -15 min (Margherita Roiatti)

What’s new? The Directive on Corporate sustainability due diligence – 5 min (Sara Prosdocimi)

Good practices of the finance sector in the green transition - some insights from the Virtual Agorà – 15 min (Sara Prosdocimi)



Discussion".

After the coffee break, we proceed with an individual and plenary exercise: the [SWOT ANALYS](https://agora.firstcisl.it/pluginfile.php/511/mod_resource/content/1/WS%20SWOT%20ANALYSIS%20VIA%20MENTIMETER.pdf) made with the help of a Mentimeter. https://agora.firstcisl.it/pluginfile.php/511/mod_resource/content/1/WS%20SWOT%20ANALYSIS%20VIA%20MENTIMETER.pdf

Goal of the teaching unit: at the conclusion of the day's didactic sessions, **foster reflection** on the role of the union in the green transition using the SWOT matrix.

The Mentimeter is launched, one question at a time, everyone answers from their smartphone

- 1) Considering the role of unions in the green transition, what are their strengths?
- 2) Considering the role of unions in the green transition, what are their weaknesses?
- 3) Considering the role of trade unions in the green transition, what are their opportunities?
- 4) Considering the role of trade unions in the green transition, what are their threats?

Below is a photo of the results (*Photo Posters - Swot results work 4-complete*)

THE ROLE OF TRADE UNIONS IN THE GREEN TRANSITION SWOT RESULTS
Taking into consideration the role of trade unions in the green transition, what are their strengths?

- The knowledge to enter into negotiations
- The support of their members
- the or "good" will in top management or in leaders
- Not very many think so: the unions require a much better preparation in negotiations and directives
- The local trade unions are very important
- The "broader power and resources"
- To supervise that "ST" will be reserved for the profit of the companies.
- Historical union capacity to negotiate transverse (attentive to its qualification on the sector)
- The support of the trade union members that know that the "U" will help them for a better life style
- Union network leading with other and collecting knowledge, involving employees in many activities
- It attracts a broader role: access to participation and influence in dialogues, especially with a clearly responsible position also on other green transition
- helps to consider the role of the union in the environment on broader perspectives on representation

THE ROLE OF TRADE UNIONS IN THE GREEN TRANSITION SWOT RESULTS
Taking into consideration the role of trade unions in the green transition, what are their weaknesses?

- Little power in decisions
- the inertia of top management
- The TU opinion is not taken in consideration when the company has the goal only to make profits
- Overall in Europe the Trade unions are subject to too many different and old logics. Making it difficult to speak with "one voice"
- Non-routine is a positive logics that did contribute to a dialogical collaboration with the transition, but it is not always the case
- lack of shared participation from the employees and an aging process when we do not have the younger generations taking an active role, we need to be more inclusive
- The Money, profit. It's always first
- Union identity level in start-up companies, and among young people should go up in order to gain more power to negotiate.
- Non-representation in decision making bodies, co-management
- They do not have any legal tool to participate on the process and take their opinion into account.
- Can fall into the trap of considering the GT more important that well being of their members

THE ROLE OF TRADE UNIONS IN THE GREEN TRANSITION SWOT RESULTS
Taking into consideration the role of trade unions in the green transition, what are the opportunities?

- Support of the change. Make sure that the needs of the members are taken into consideration and applied
- To onboard younger generation, become more inclusive
- To have more young affiliates in our TU, new affiliates our representation
- No opportunities, just do it
- The opportunities are to increase the number of members of trade union on a national level
- To learn the right balance between the GT and the TU needs and adapt the strategy regarding on this balance
- We have the chance through of these new regulations to create better jobs, and therefore protect more the workers
- Discrete leader della gestione del cambiamento del paradigma lavorativo
- To be an actor of the process, be an actor - to promote the necessity of the trade union in the change
- To strengthen the position, supervise the direction of GT to be reasonable for people's society
- When having the shift in labour market into green economy having "low cost" for trade unions, new jobs, right union, more members, not forgetting the good values, such as solidarity and history
- we can become relevant for the Young generation and letting them have a voice in the climate debate
- Si parliamo molti parlano di lavoro "tradizionale" e questo porta a investimenti in settori tradizionali o in settori a medio e a lungo termine (non a breve termine)
- For me there is no memory, only opportunities
- To be "out of the game". But as this is a MUST, we can only see opportunities.
- Not to be supported by others
- Jobs losses, we have to try not to let the companies to take advantage of this process to turn it into a restructuring process, in labour terms
- To much bureaucracy will hinder a timely intervention and instead it is possible reaching our main goal in saving the world. Less talk more action
- Forget about the members needs!
- The transition to new jobs on that evolution for employees will not have difficulties to accept of this changes
- If the trade unions is not able to be on top of the strategy will be isolated in useless

THE ROLE OF TRADE UNIONS IN THE GREEN TRANSITION SWOT RESULTS
Taking into consideration the role of trade unions in the green transition, what are the threats?

- To be more clear and forget about what are the needs of the TU members
- For me there is no memory, only opportunities
- Not to be supported by others
- Si parliamo molti parlano di lavoro "tradizionale" e questo porta a investimenti in settori tradizionali o in settori a medio e a lungo termine (non a breve termine)
- To be "out of the game". But as this is a MUST, we can only see opportunities.
- Forget about the members needs!
- Jobs losses, we have to try not to let the companies to take advantage of this process to turn it into a restructuring process, in labour terms
- To much bureaucracy will hinder a timely intervention and instead it is possible reaching our main goal in saving the world. Less talk more action
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- If the trade unions is not able to be on top of the strategy will be isolated in useless

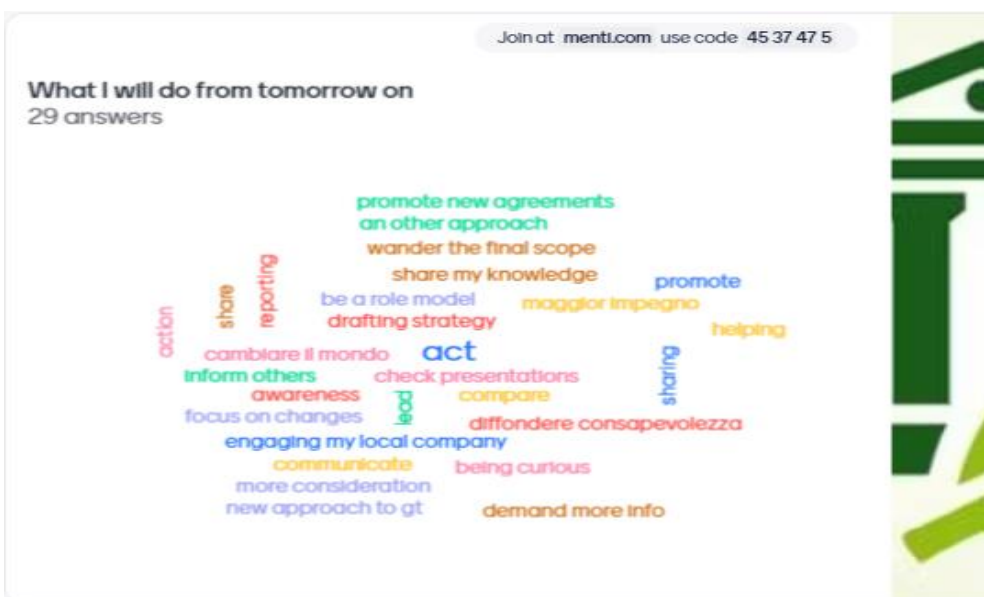
Then in plenary, all the responses are read and the floor is passed to **Cosmo Colonna** - Resp. Dept. of Environment Sustainable Development Cisl - who comments on the results and exposes with the help of slides the role of the union and Cisl in the green transition. [PPT6](#)

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https://agora.firstcisl.it/pluginfile.php/510/mod_resource/content/1/6%20COLONNA%20-%20THE%20TU%20ROLE%20IN%20THE%20GREEN%20TRANSITION%20-%20THE%20EXAMPLE%20OF%20CISL.pdf

It is time for the final verifications, the trainers launch with the help of Mentimeter a survey with the two questions:

1. **What I take home?**
<https://agora.firstcisl.it/mod/resource/view.php?id=204>
2. **What I will do from tomorrow?**
<https://agora.firstcisl.it/mod/resource/view.php?id=205>



(Photo posters - Mentimeter final work 5)



Then **Paola Vinciguerra** explains the upcoming appointments and, after the last google form of perceived quality verification, we close the day and the first module of the Training course itself.

[PPT 9](#)

https://agora.firstcisl.it/pluginfile.php/514/mod_resource/content/1/9%20VINCIGUERRA%20-%20PROJECT%20NEXT%20STEPS.pdf

