



# METALOG PROJECT



## Deliverable 9:

### WP4 – Final Report – Draft

*Date*

18 July 2015

*Partner*

3s

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# Contents

1 Introduction	1
<hr/>	
2 Methodology	2
<hr/>	
3 National consultation plans	4
3.1 National consultation plan Austria	4
3.2 National consultation plan France	4
3.3 National consultation plan Germany	4
3.4 National consultation plan Italy	4
3.5 National consultation plan Hungary	4
<hr/>	
4 National Results	5
4.1 Results from national workshop	5
4.1.1 National workshop results - Austria	5
4.1.2 National workshop results - France	6
4.1.3 National workshop results - Germany	7
4.1.4 National workshop results - Italy	8
4.2 Results expert interviews	12
4.2.1 Results expert interviews - Austria	12
4.2.2 Results expert interviews - France	17
4.2.3 Results expert interviews - Germany	18
4.2.4 Results expert interviews - Italy	24
4.2.5 Results expert interviews - Hungary	27
<hr/>	
5 Web Survey	28
5.1 Results Web survey	28
<hr/>	
6 Conclusions	35
<hr/>	
7 Annex	36

# 1 Introduction

The METALOG project aims at concerting and transferring efforts undertaken by various European logistics projects and initiatives and to consolidate and broaden existing networks and partnerships in the sector. In order to reach this aim, the project has two major objectives, namely the development of a Qualifications Framework for the logistics sector (LQF) and the consolidation of a European Logistics Skills Network.

By this, the project consortium intends to improve the transparency and comparability of qualifications at European level and to create better coordination of the "VET landscape" and the working world with the aim of better coordinating qualification contents and competence requirements of the industry as well as establishing a forum for the anticipation of future skills needs. More information of the project and the project consortium representing partners from 6 European countries (AT, DE, IT, FR, UK, HU) can be found here: <http://project-metalog.eu>.

The consultation process in the context of workpackage 4 of Metalog intended to test and verify the applicability, validity and relevance of the previously developed Logistics Qualifications Framework (LQF) among its target groups. The objective was to identify the potential impact and possible gaps of the LQF in order to ensure that all needs of the target groups were taken into account within the final version.

This report includes first the initial testing plans describing national evaluation strategies for each partner country. They refer to the application of three different evaluation methods: national and in-company workshops, expert interviews and a web-based survey. The results of these methods applied to the individual context of each partner country are the core element of this report. The national partners were free in identifying the core results of their evaluation efforts. For this reason, the evaluation design as well as the presentation of its results can slightly differ between the single countries. An overall conclusion is placed in the end of this report in order to give hints to the consideration of the evaluation results and to possible consequences for the main product of Metalog – the Logistics Qualifications Framework.

## 2 Methodology

For the evaluation of the Logistics Qualification Framework (LQF) which had been developed in WP3 of the Metalog project, three different methods were prepared which were applied according to the needs and possibilities of the respective national context of the partner countries. These methods included:

### \_\_\_ National and in-company workshops

The first method suggested for WP4 was the conduct of national and in-company workshops. The target groups to be invited to the workshops consisted of interview partners that had already been contacted in the course of the work process analysis of WP3, additional members of companies from the logistics sector, potential members of the Metalog advisory board, specific departments of the chambers and other interest groups, sectoral networks in transports and logistics and training providers. 3s provided a template for an invitation letter to the workshops (see Annex 1) and preparatory material, which was sent to the experts in advance of their participation in the workshops. It consisted of a presentation of the Logistics Qualifications Framework (see Annex 2), the key questions for the workshop (see Annex 3), Metalog dissemination material and future perspectives in regard of the Metalog experts' network and the usage of the LQF.

For the workshops it was recommended to gather between 5 and 10 participants with a moderator and a note taker. The overall duration of the workshop was expected to make up to approx. 3 hours, including an agenda point which was dedicated to the additional aim of building up a Metalog experts-network. The proposed agenda for the workshops consisted of an introduction into the Metalog project and the LQF, a discussion of the LQF (the fields of competency, the work processes and their level-classifications), and the chance of networking among the participants towards the end of the event

All partners who organised a workshop were asked to provide a short summary (1-2 pages) describing the event (date, duration and place of the workshop; number of participants; names of participants with signatures), its schedule, a short summary of the main points of discussion and photos. The comments, corrections and amendments to the Metalog Logistics Qualifications Framework could be reported in different ways, each to serve as a basis for the revision of the LQF.

### \_\_\_ Expert interviews

As an alternative to the workshops, it was also possible to conduct expert interviews. By adding this method to the method-set of the evaluation, the chance of gaining additional partners for the discussion of the LQF was opened up for national partners and therefore it broadened the basis for gaining possible addressees of the evaluation process. It was recommended to conduct between 5 and 10 expert interviews via phone or face-to-face. In advance the interview partners were again provided with background information to the Metalog project and with an invitation letter for participating in the expert interview. Preparatory material was sent to the potential interviewees in advance (presenting the LQF and the interview guidelines with key questions). The interviews were designed to take between 30 and 45 minutes on average.

The national partners were asked to send transcript of the interviews and the documentation of the feedback.

#### \_\_\_ Web-based survey

Additionally, a web-based survey was included into the set of methods for the evaluation of the LQF. By considering a similar set of questions as the workshops and the expert interviews, the web-based survey was throughout planned, run and analysed by the workpackage leader 3s (see Annex 5). The project partners were asked to invite participants of their national contexts.

The key questions (also used in the workshops and expert interviews) consisted of general questions, referring to European efforts in making qualifications comparable, and specific questions dealing in detail with the newly developed Logistics Qualifications Framework (see Annex 3). The general questions related to the following points: the personal opinion of the expert when it comes to the advantages of a Qualifications Frameworks in general and in the logistics sector in particular, the challenges faced by a useful application of the LQF, the field in which the LQF could be used successfully or national and international institutions/contact persons/companies that should be approached in order to disseminate the existence and usability of a Logistics Qualifications Framework.

Specific questions concentrated on the 10 main work processes of the Metalog Work Processes (see Annex 6) and the experts were asked for possible amendments and corrections. For each work process and its steps of competency the logistics specialists were asked whether they wanted to add/clarify.

## 3 National consultation plans

The national consultation plans as they were set in the beginning of the evaluation work explain the steps and activities planned in the initial phase of WP4 for the national contexts of the partner countries. Overall, the big majority of the planned activities were executed. A detailed description of the activities conducted can be found in chapter 4 of this report.

### 3.1 National consultation plan Austria

The Austrian national consultation plan consisted of the conduct of a national in-company workshop which should be organised by the project partner 'Lagermax'. Furthermore, additional feedback to the LQF should be collected via expert interviews and a web survey.

### 3.2 National consultation plan France

AFT planned to conduct one national workshop and re-check the LQF via interview material already available from the work in WP3. Apart from that, further feedback should be collected via expert interviews and a web survey.

### 3.3 National consultation plan Germany

The German Metalog project partner DEKRA also organised one national workshop in Munich. Partner 'Arbeit und Leben' planned for consultations of training providers. Finally, expert interviews and a web survey were included into the consultation plan.

### 3.4 National consultation plan Italy

The Italian project partner ITL also planned to carry out a national workshop, to re-check the LQF with interview material already available from WP3 and to organise expert interviews and a web survey.

### 3.5 National consultation plan Hungary

The University of Pannonia planned to collect further feedback by making interviews and by running an in-company web survey.

## 4 National Results

Based on the national testing plans presented in chapter 3 of this report, the national partners conducted the evaluation in the partner countries. A detailed overview of the activities can be taken from the following table:

Table 1: Activities conducted by national partners in the evaluation phase

Country	Activities conducted*	Responsible partners
Austria	NW, EI, WS	3s research laboratory (3srl); Lagermax
France	NW, EI, WS	AFT
Germany	NW, EI, WS	DEKRA; Arbeit und Leben, Hamburg; ITB; perspektive 3
Italy	NW, EI, WS	ITL
Hungary	???	PE

\*National Workshop (NW), Expert Interviews (EI), Inviting national experts to participate in the Web Survey (WS)

### 4.1 Results from national workshop

In this chapter, the results of the evaluation work within WP4 are presented in relation to the partner country and the individual method used. Many results strongly refer to details of the LQF. In this regard some comments are made in the conclusions of this report. Occasionally, there are striking differences in regard of the grade of detail and the extent of description of the results. These differences are due to the fact that the national partners adapted the evaluation methods to the national contexts and the expertise of the consulted experts. So the results are sometimes of more general, sometimes of more detailed character.

#### 4.1.1 National workshop results - Austria

The Austrian in-company workshop took place at the project partner Lagermax' site in Salzburg. It included an intensive discussion among 5 Lagermax managers and specialised workers. The discussion produced concrete results addressing the questions raised for the whole evaluation process:

Ad question 1 and 21

— The classification and assessibility of professional niveaus becomes simpler, also the comparability and the orientation.

Ad question 3 and 42

— There is a risk of levelling down by trying to implement a standardized level.

— A potential barrier are the different VET systems in the membership countries (like apprenticeship systems/dual VET systems vs. theoretical VET systems) with diverse forms of job positions and the lack of political support.

1(cf. Annex 3) What are from your point of view the advantages of a Qualifications Framework in general? What are from your point of view the advantages of a Qualifications Framework in the logistics sector?

2 (cf. Annex 3) From the perspective of the transport and logistics sector in your country, where do you see potential barriers or threats for a useful application of a Qualifications Framework in general? From the perspective of the transport and logistics sector in your country, which challenges are there for a useful application of a Qualifications Framework in the logistics sector?

Ad question 53

If the LQF is good and practice-oriented, it could be of use in all suggested fields.

Ad question 6 (national organisations to contact to disseminate the LQF)<sup>4</sup>

Chambers of Industry and Commerce

Chamber of Labour

Trade Unions

Central Association of Freight Forwarders (Zentralverband der Spediteure)

Federal Logistics Association-BVL (Bundesvereinigung Logistik Österreich)

Association for Network Logistics-VNL (Verein Netzwerk Logistik)

Universities in the field of logistics (e.g. Donau-Universität Krems, Fachhochschule Steyr etc.)

Vocational schools for the professions 'forwarding agent' (Speditionskaufmann/Speditionskauffrau) and 'forwarding logistician'(SpeditionslogistikerIn)

Institute for Transport and Logistics Management, Vienna University of Economics and Business

FIATA

European Commission

Ad question 7 and 85

In practical terms the work processes are applicable although one needs to get used to them. During the workshop it turned out that the participating staff thought them to be over-detailed. The allocation to the different levels is very much sector-related and company-oriented.

#### 4.1.2 National workshop results - France

The French national workshop was hosted by AFT with four participants. One participant was a logistics warehouse manager, two were logistics trainers and the fourth one was employed in an HR department of the logistics sector.

Agenda of the French national workshop:

Welcome

Presentation of the Metalog project

Presentation and discussion of the fields of competency

Summary

Discussion of the 10 work processes and their allocated levels

Summary

Outlook on future project developments (enhancement of LQF and network building)

Most relevant observations and comments of the national workshop:

**3** (cf. annex 3): In which fields would you apply a Qualifications Framework / in which fields could an LQF be of use? Eg.a. recruiting personnel from abroad? b. sending existing personnel to training abroad? c. recruiting personnel at home? d. training of personnel at home?

**4** (cf. annex 3): Which national and international institutions/contact persons/companies etc. would you approach in order to disseminate the existence and usability of a Logistics Qualifications Framework?

**5** (cf. annex 3): (Description of the 10 work processes of the LQF) Do you find the 10 work processes of the LQF and the levels (according to the levels of the EQF) applicable or do you want to add/change something?

- \_\_\_ Lack of knowledge of EU transparency tools (EQF)
- \_\_\_ Difficulty grasping the usefulness of a European Qualification framework
- \_\_\_ Industry participants not sensitive to potential shortage in labour market
- \_\_\_ Organisational: why not discuss the identified work processes before tackling the competency fields?
- \_\_\_ Difficulty understanding and accepting the gradient of competencies (from left to right),
  - \_\_\_ e.g. how is « compile goods into loading units » more complex than « uses scanners for identification of stocks... »
- \_\_\_ Trouble understanding how a work process can be referenced to more than one level
- \_\_\_ Willing to join the network of Logistics skills

#### 4.1.3 National workshop results - Germany

DEKRA conducted the German consultation workshop in the framework of the Transport and Logistics Fair in Munich on 6 May 2015, Munich. The workshop was divided into three elements, the main element being a symposium at 2 pm. 100 stakeholders of the sector were invited to this symposium, the number of stakeholders that participated in the workshop then amounted to 25.

The symposium and the surrounding workshop elements were used to interview stakeholders in the framework of the consultation process of WP4.

*Workshop Part I – 12.30 – 2 pm: Participants: Dr. Littig, Prof. Dr. Spöttl, Prof. Schröder*  
*Workshop Part II – 3 – 5 pm: Participants: approx. 10 participants of the symposium*

The guiding questions of the discussion of both workshops were:

- \_\_\_ How can we (re-) gain attractiveness of logistics professions?
- \_\_\_ How can we find the right skilled workers for concrete positions?
- \_\_\_ How can the practice of initial and further training be moved closer to the actual requirements of the day-to-day working practice?
- \_\_\_ Which competences are required in the future?

It became apparent that a sectoral qualifications framework has a predominantly theoretical use. Even though there is a clear relation to the sector, it is important for individuals to be able to assign their own qualifications to a level themselves. This should be considered in the guidelines. The introduction of the German Qualifications Framework is not considered very helpful, individuals mostly perceive it as a number on the certificate.

Two issues dominated the discussion:

- \_\_\_ There are many semi- and unskilled workers in the logistics sector. It is important to create ownership and participation of trainings and to highlight career paths.
- \_\_\_ The key term Logistics 4.0 becomes increasingly important as logistics appears to be a key sector for digitalisation. It is crucial to identify possible changes and necessary qualification requirements at an early stage and to help employees, specifically older ones, on the way.

*Workshop III – 9 am to 11 am*

The workshop leaders conducted targeted interviews with company and organisation representatives that had been identified as key persons for questions of competence development in logistics:

Jürgen Roth, DSLV  
Prof. Bernecker, FH Heilbronn  
Rolf Henrich, Lobster SCM  
INET Logistics GmbH  
ECR Solutions Servicegesellschaft

The following subjects were predominant in the debate:

- \_\_\_ the demand for low-skilled labour will decrease more and more in this sector.
- \_\_\_ international mobility of employees is not a major issue in qualification
- \_\_\_ qualification frameworks are largely unknown
- \_\_\_ qualification requirements of the future will mostly be located in the higher education sector
- \_\_\_ particular skills deficits are found in the area of ICT skills.

*Conclusion:*

The discussions and interviews have had a concrete influence on further activities in the project. It became apparent that the work towards a qualifications framework has to be characterised by practical examples to be understood by end users. The developments in the framework of Logistics 4.0 can be used to highlight the importance of SQFs and anticipation of future skills. The event was received very positively by DEKRA and the final conference will be communicated in the entire organisation.

#### 4.1.4 National workshop results - Italy

In Italy, the Test of the first products elaborated within Metalog project, and especially the assessment of the new Logistics Qualification Framework was performed using all the methods and tools developed in the general Guidelines for the Work Package Implementation.

As established by the Guidelines, in Italy, a national consultation workshop was hosted in the ITL's Offices in Piacenza, where the project is mostly implemented and where a great number of stakeholders are located thanks to the 3 logistic park of the Province of Piacenza. Moreover, Piacenza was as the city (in the Emilia Romagna region) for the development of higher training initiatives related to Transport and Logistics (ITS Piacenza – Higher Technical Institute on Sustainable Mobility). In this territory the link between the Labour Market and the local/regional VET system is highly developed and it is possible to interview experts belonging to different fields and specialization, but always with a view on the Logistics and Transport Sector, from an industrial, political or educational point of view.

The range of professionals that were consulted guaranteed a wide and complete analysis of the Logistics Qualification Framework and helped in the development of a tool that has to be understandable and friendly for all the categories of stakeholders. The

national/regional consultation workshop was more addressed to companies, as it seemed easier to involve managers and high skilled workers in a discussion than in an individual interview. The point of view of companies is often very focused on the company activities of the speaker, while the involvement of more companies guarantees to agree on common points and aspects.

Also specific interviews with experts were conducted individually in order to deepen some specific issues, more related to training and educational aspects. Different categories of experts were involved, representing organizations and institutions with different aims, target and mission. It was important, in this case, to catch the different points of view of stakeholders, as they might be the first users for the implementation and dissemination and because each opportunity has to be assessed separately, also the processes on which these institutions operate differ a lot.

Moreover, thanks to the different experiences gained by ITL on all the aspects of the logistics and transport sector, some specific observations were made by ITL staff to the Logistics Qualification Framework. Experiences and projects related to transport and warehousing operations, infrastructures and intermodality, regional and national policies concerning Education and Training in this sector allowed ITL to assess both the descriptors (Knowledge, Skills, and Competences) and the Work Processes and their organization in levels within the LQF.

The Italian national workshop was held at the ITL office in Piacenza and attended by 6 persons plus members from the ITL staff. The participants were workers and managers related to several types and categories of companies belonging to different industrial sectors. What they all had in common was the field of activity in the logistics and transport field. The aim was to provide a wide comprehensive but common view of the companies' opinion. Logistics operations within a third party logistic provider are characterized by dynamics and procedures different from those of a manufacturing company, so the assessment of processes might be different as the assessment of competency level. The workshop aimed to assess and understand these different perspectives, at the same identifying common issues and needs.

All the participants (see Tab.1) were involved in the management and implementation of logistics activities, such as warehousing, transport organization, supply chain organization, packaging. Moreover the greater part of participants had a transport (and logistic) education and background.

Before the meeting, the participants were provided with all the documentation useful for establishing an active discussion on the content of the project. Furthermore, the project brochure and a business card was handed to all the participants. The workshop also meant an opportunity for assessing networking activities between companies, projects, training providers and experts, public bodies' representatives, and associations.

The following summary shows the content of the Italian national workshop:

- \_\_\_ Introduction
- \_\_\_ The EU training policies (EQF, ECVET, Mobility)
- \_\_\_ A Sectoral Qualification Framework
- \_\_\_ Presentation of the project
- \_\_\_ The Metalog Project
- \_\_\_ The Logistics Qualification Framework
- \_\_\_ Open Discussion (on the basis of the “questions” included in the Guidelines)
- \_\_\_ Summary of the discussion
- \_\_\_ Networking
- \_\_\_ Metalog Final Conference
- \_\_\_ Dissemination activities

ITL introduced the Leonardo Da Vinci programme and the Metalog project explaining the technical context of the workshop. In particular, the auditorium was informed about the main concepts of the EQF and the basic meaning of a Sectoral Qualification Framework. In order to correctly assess the LQF, it was necessary to deeply understand the meaning of a Qualification Framework, the levels composing the framework and, in particular, how Italian degrees/education paths or working positions correspond to the EQF levels composing the LQF. According to the invited participants, this was very useful for allowing a comparison between the Italian organization/hierarchy within companies and the competences/activities allocated by the Metalog partners to the various levels of the LQF.

After the overview of all the concepts involved in the consultation workshop, the discussion of the organizational levels within the LQF and their correspondence with the organization of professionals and workers within transport and logistics companies, or logistics and transport departments of manufacturing companies started. From the beginning of the discussion, according to several experts, it seemed clear that in general the activities allocated in the LQF should be shifted to higher levels, meaning that the work processes of the LQF were thought to be “undervalued”. This can be due to specific Italian characteristics of the VET system that is not considered to be on the same level of the traditional Education System.

The participants agreed with the description of the levels and their organization in competences, although some comments and suggestions for possible changes were discussed and proposed. Some specific technical keywords were suggested in order to reduce the “variability” of activities and support the assessment of the skills by the companies, as well as by training institutions.

Moreover, some general comments were given, with reference to the use of the LQF in the Logistic Sector. The LQF was described as clearly useful and very interesting for companies becoming aware of the fact that within the VET system (public sector) “something” was moving in order to enhance the mobility and the transparency of qualifications. The supply of medium professionals specialized for the sector is still weak, at least in Italy, and needs to be enforced. Usually, lower positions/levels are filled by workers with a higher level of education and graduated in different scientific and economic fields. According to the participants, the mobility of workers is

however a process that has to be realized with the inclusion of many and different conditions, both on social and economical level. Surely, the LQF would be a relevant support in case of recruiting personnel from abroad, because it guarantees a comparison between different workers, qualifications, and countries. But the great question was how to recognize and certify the competences. Some companies raised the question whether the certificates were „trustworthy“ and how these competences are being assessed and how this assessment could be easily done by a company?

The workshop participants agreed on the description of the competences/work processes of the LQF but when the question was raised of how to assess these competencies, a common agreement was hard to find. The participants commented that workers should be assessed separately and individually, but the aims of the EQF and LQF were seen to be different. The solution was clearly seen in mutual trust among companies or among companies and schools/training providers.

No significant potential barriers were identified by the participants, on the opposite the LQF was described as a support for companies but economic and social barriers were seen. At the same time, mobility was not felt to be a real and concrete opportunity both for workers and companies. It was also suggested to add an inventory to the LQF.

The following list describes suggestions for changes or for adding things in the LQF level structure that came up during the workshop:

\_\_\_ Add an inventory

\_\_\_ EQF level 2, work process 1 ('Pick and pack orders'): this work process could be put to level 3 because in Italy the EQF level 2 is lower than the mandatory education. There are no workers on level 2 in Italy, at least in the business sector

\_\_\_ #5 ('Control and administrate goods and shipment'): this subject partly belongs to EQF level 3 but much more to EQF level 4

\_\_\_ #6 ('Draw up offers and prepare contracts, supervise customer-relations'): this absolutely does not belong to EQF level 4 but it should be considered to be on level 5 when one looks at the template, but if one considers the economic aspect on the management level, then one should take into consideration to also include higher EQF levels. From a management point of view, the definition of an offer, the supervision of contracts, the establishment of contracts with customers and suppliers has to be performed by management levels (6th, 7th or 8th EQF level).

\_\_\_ #8 ('Deal with insurances and customs procedures'): should be considered as EQF level 5 at least, because insurance and customs procedures usually require a higher level of technical preparation.

\_\_\_ #9 ('Enhance the efficiency and range of services offered by company'): due to the strategic aspect of this work process, the level might be increased to level 7 of the EQF (or at least to level 6). As an alternative, the work process activity could be described in a more operational way, so it complies with key performance indicators.

\_\_\_ #10 ('Plan and schedule resources'): This work process is more related to the EQF level 6 and could be differentiated according to the context of the activity such as planning and scheduling small resources, „close“ the daily operations or plan and schedule resources at company department/company or service level.

The following table shows a brief list of the main work processes for each EQF level and the position/title of the worker, with reference to the typical organizational levels of logistics companies in Italy.

Table 2: main work processes with reference to the typical organizational levels

EQF Level	Main Work Process	Title
LEVEL 3	pick, pack, store, load, handle	Warehouse Operator/Picker
LEVEL 4	prepare administrative docs	Staff for Administration
LEVEL 5	implement the contract/order	Operating Officer
LEVEL 6	coordinate the contract/order	Operating Officer for KPI
LEVEL 7	manage the contract/order	Operating Manager
LEVEL 8	contracts negotiation – budget forecasts – verify achievement of KPI	Branch/Company Manager

Specific words to be added in the WPA titles:

\_\_\_ Inventory (level 3 and 4)

\_\_\_ KPI (level 6-7)

## 4.2 Results expert interviews

### 4.2.1 Results expert interviews - Austria

The Austrian project consortium organised 5 interviews with experts from the logistics sector.<sup>6</sup> Each one had an expertise in the management of a logistics department. The interviews were done on the phone and lasted about 30 minutes on average. The interviewees received an e-mail in advance with the Logistics Qualification Framework Work Processes (WPs) and allocations to the EQF in addition with interview guidelines.

All of the five Austrian interview partners were not familiar with the idea of a European or national qualifications framework and stated that they had not had the time to read the guidelines informing about its goals and principles. This meant that question 1, 2, and 3 could only be answered rather superficially or not at all, since the interviewees did not feel capable of giving proper answers. After a short introduction into the matter, the experts remarked, that they thought the idea of recruiting EU-wide in the future and using the LQF for this purpose could be an advantage. Several people stated that recruiting people for basic jobs within the logistics sector like warehouse workers/logistics workers on an international/EU level did not seem practical because of the low wages in this sector and the language problems. When it comes to commercial/administrative jobs, the interviewed experts thought an LQF to potentially be quite useful for recruiting activities. When asked in which fields a Qualifications Framework or LQF could be of use, the experts thought that sending existing personnel for trainings abroad only seemed realistic for upper management positions but not for basic warehouse positions.

<sup>6</sup> Cf. Annex 6: List of experts in national workshops and interviews –AT, FR, DE, IT, HU.

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*“The Austrian company Zumtobel already recruits for professionals in the electrical engineering sector in Spain because of massive shortage of skilled workers. They put ads in the papers and were successful. But whether we can do that in the logistics sector I do not know. Freight forwarding is a broad field, it does not only consist of logistics but also of transport & logistics. I am not sure whether you would be able to find the right personnel on an international level but it is the right approach to go for it. Borders are open, people are allowed to work within the European Union – so this makes sense.”*

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## Feedback to the 10 work processes of the LQF

Apart from one interviewee 4 from 5 interviewed logistics experts made the same general remark when it comes to the 10 work processes of the LQF with its fields of competency. They suggested to separate the description of work processes of the more physical work of warehouse workers (LagerlogistikerIn, LagerarbeiterIn) from the administrative and commercial ones. To them it made no sense to mix these competences in one matrix because they stated they are too completely different jobs with different job profiles. The warehouse men/women for example get an order, search for the goods and have to pack them for shipping whereas the administrative/commercial logistics specialists are in the office checking the order for a shipment on the computer, servicing customers and mostly concentrate on the organisational and commercial processes in logistics. The four interviewed logistics managers also remarked, that the LQF matrix “confused” them because they had tried to find certain Austrian logistics job profiles within the matrix which was not possible because of the mix of more physical, assistive jobs with administrative/commercial ones. E.g. the majority of the interviewees described the work processes 1 to 4 competences mostly of warehouse workers followed by work processes mostly done by administrative/commercial staff.

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*“Administrative and storage competences are mixed within the matrix which is confusing to me because these are two different work processes that do interact via interfaces but should be described separately. So what is prepared by the staff members in the office has to be realized in the warehouse. On the one hand there are rather ‘simple’ work processes done by the warehouse employees (like stocking and stock removal), on the other hand there are the administrative tasks.”*

*“In Austria job offers within the logistics sector are described according to logistics professions or vocational educations that exist. A manager needs other administrative and commercial competences than a warehouse worker, so you cannot put them all together in one matrix because the matter is too complex.”*

*“What is a warehouse worker expected to know? Loading and unloading of lorries, accepting and storing goods, document or scan the goods, have simple computer knowledge. He/she has to pick stocks, put them together for the shipping or return goods. The person in the administration in the office is trained in a completely different way. He/she is not supposed to be able to drive a forklift. I am the head of the logistics department but I am not working on an operative basis all the time, I have to find solutions for the operative area. The manager does customer services, controls logistics processes, coordinates the flow of goods, fills in statistics, meets quality standards, and checks the stock. From my point of view the matrix has no real structure, the central idea is missing, and everything is vague.”*

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It seems that in Austria the bigger a logistics company is, the more separated the work processes of warehouse workers and administrative/commercial staff are. Four experts were managers of rather big logistics departments and these four were not happy with the matrix. The fifth logistics manager had a completely different opinion. It turned out that he was running a rather small logistics department where the warehouse workers were also involved in administrative/commercial work processes. So this expert was absolutely fine with the work processes of the LQF because according to him they fitted the tasks done by his staff.

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*“I think the matrix looks very practical, it shows the everyday jobs in logistics. Maybe it is not 100% complete but as a manager I find myself, my own job description in it. I understand the content.”*

*“Our logistics centre is not very big, so my warehouse workers also have to fulfil commercial tasks. I cannot afford a commercial department which means that my logistics people have to mix these two competences. So my logistics workers are better qualified than the ordinary logistics worker. The operating and the commercial business has to be done by my workers but I can imagine that bigger logistic centres are separating these two competences. “*

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## Specific feedback to the Work Processes (WP) of the LQF

Point 1 (‘Pick and pack orders’) and point 2 (‘Receive and transfer goods and document it’):

\_\_\_ were accepted by the interviewed experts as being ‘okay’ and ‘fine’.

Point 3 (‘Transload, repack, store and retrieve goods’):

\_\_\_ one expert stated that the third paragraph of the second column (‘keeps track of goods’ movements’) is not a competence required from a warehouse logistician (Lagerlogistiker).

Point 4 (‘Ship orders’):

\_\_\_ was also commented to be okay.

Point 5 (‘Control and administrate goods and shipment’):

\_\_\_ It was stated that the work process in column 2, paragraph 2 (‘issues and checks invoices and receipts...’) is usually not done by the administrative employees but by people from the bookkeeping department.

\_\_\_ Paragraph 1 of column 2 (‘practices logistics controlling, for example ensures the tracking of goods, checks and documents the bill of lading’): Here a comment was made that “the tracking of goods” does not belong to the subject of controlling. It is done by the transport management as well as paragraph 3 (‘coordinates and controls all services provided’).

\_\_\_ Column 1, paragraph 5 (‘Knows and applies incoterms’): It was stated that this work process is not done by warehouse logisticians but belongs to the sales area or transport management.

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*“This is a competence ‘nice to have’ but a warehouse man does not care whether the distributor or the customer pays.”*

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\_\_\_ Column 3, paragraph 1 (‘carries out payments and dunning procedures’). This was said to make no sense because this work process is done by the bookkeeping department or automatically but on no terms it is a competence required within logistics.

Point 6 (‘Draw up offers and prepare contracts, supervise customer relations’):

\_\_\_ was described as consisting of purely commercial work processes applying to a group manager or the legal department. An ‘ordinary administrator’ in logistics (LogistiksachbearbeiterIn) for example would not do any ‘cost calculations’, therefore the expert suggested to move ‘carries through the cost-calculation’ to column 2.

Point 7 (‘Organize and implement the shipment and storage of goods’):

\_\_\_ column 1, paragraph 3 (‘compiles lists and schedules’): This work process was described as not being specific enough and that it belongs in the next column on the management level. Another expert stated this work process as “not being described clearly enough”.

\_\_\_ Column 2, paragraph 1 (‘practices economic thinking and efficiency (making use of opportunities to consolidate consignments into larger lading units’) was commented as being ‘strange’. One expert said, that in warehouse logistics (Lagerlogistik) one is dependent on the customer, meaning on the order of a customer. So this work process was said to be done by the transport organisation and not by warehouse logistics. The expert suggested to separate transport work processes from logistics work processes and underlined that transport competences don’t belong to warehouse logistics competences.

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*“My suggestion would be to separate transport logistics competences from competences in warehouse logistics. Then within warehouse logistics separate commercial/administrative (e.g. logistics administrator, team leader, manager) competences from operative ones (e.g. picker<sup>7</sup>, forklift operator<sup>8</sup>, shift leader<sup>9</sup>).”*

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Point 8 (‘Deal with insurance and customs procedures’):

\_\_\_ was commented by all experts as a work process that is either done by a special insurance or customs department or it is outsourced to a service provider or a freight forwarder<sup>10</sup> because these are very complex matters (both insurances and customs) with a lot of responsibility involved.

\_\_\_ Column 3 (‘takes over responsibility for insurance and compliance with customs procedures’) was also stated as not being correct either as well as ‘Liaises with customers, banks and suppliers’ because it is not done by people of logistics departments.

<sup>7</sup> KommissioniererIn.

<sup>8</sup> GabelstaplerfahrerIn.

<sup>9</sup> SchichtleiterIn.

<sup>10</sup> SpediteurIn.

— Paragraph 1 of column 1 ('applies the customs procedures and regulations') and paragraph 2 ('complies with basic health and safety regulations') were described as a very difficult subject because there are huge differences within the European Union in this field. Goods from China may need different documents in Spain than in Austria or elsewhere in the EU meaning that an ordinary logistics administrator will be in trouble when it comes to knowing all the customs or health regulations.

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*“Our logistics centre is not very big, so my warehouse workers also have to fulfil commercial tasks. I cannot afford a commercial department which means that my logistics people have to mix these two competences. So my logistics workers are better qualified than the ordinary logistics worker. The operating and the commercial business has to be done by my workers but I can imagine that bigger logistic centres are separating these two competences.”*

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Point 9 ('Enhance the efficiency and range of services offered by company'):

— Column 1, paragraph 1: ('evaluates own and other companies offers'): here it was remarked that an administrator (SachbearbeiterIn) in logistics does only evaluate the offers of the company but not the ones from others.

Point 10 ('Plan and schedules resources'):

— Colum 2: here it should be added 'deals with legal frameworks'.

— The first column consists of work processes that are usually done by the team leader but not by warehouse workers. These are commercial competences done by administrators.

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*“The operative work processes within logistics are done by pickers (KommissioniererInnen), people who pack goods and the shift leader controls this process. The way this matrix is written is not right, because nobody could fulfil these competences in real life. They would either be overqualified or under qualified. It does not work this way. I would not be able to use this matrix for recruitment purposes because the existing job profiles within logistics are mixed up and therefore make no sense.”*

*“What am I supposed to do with this matrix? If I am looking for a person in logistics in Austria, I either look for a warehouse worker or an administrative position, but this matrix mixes these two competences.”*

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## Conclusion

The majority of the experts was not satisfied with the LQF matrix because they shared the opinion that it would not be applicable for recruitment in its current version. The main problem was seen in the mix of work processes of warehouse workers and work processes done by administrative and commercial staff. These managers of logistics departments of different sizes all over Austria were convinced that the matrix has to describe the existing Austrian job profiles within the logistics sector and could not imagine that a more general description could make sense on a European level. Nevertheless, parts of the work processes described, e.g. point 1, 2, and 3 were accepted and commented as 'realistic'. None of the interviewed logistics managers felt

capable of commenting the second part of the LQF that is the allocation of the 10 logistics work processes to the European Qualifications Framework (EQF) levels.

#### 4.2.2 Results expert interviews - France

##### Expert Interviews/ Web Survey

- \_\_ 2 interviews conducted
  - \_\_with Deputy Director of pedagogical institute
  - \_\_with a warehouse operations trainer
- \_\_ Web survey launched nationally towards nearly 30 stakeholders
- \_\_ Possibility of extending web survey invitation to AFT's European network of stakeholders

##### Expert Interviews/Main Comments

##### Regarding the general key questions

- \_\_ Belief that a LQF should be designed and developed by social partners (although it was explained that for research purposes it was good that the Metalog LQF was scientifically developed by academics)
- \_\_ The LQF is seen as a way of measuring the abilities of people recruited from abroad or trained after prior training from abroad
- \_\_ Question: what will be the benchmark the LQF or the existing qualifications = which should adapt to the other ?

##### Regarding the specific key questions

- \_\_ Would not quite have identified the exact same work processes nationally, but agree the Metalog list is consistent from a European perspective
- \_\_ Are not used to the EQF and are not used to using the exact same descriptors
- \_\_ Insufficient taking into consideration mid-management work processes
- \_\_ Would like to see further explanation of the gradient of the fields of competencies
- \_\_ Willing to join the network of Logistics skills

### 4.2.3 Results expert interviews – Germany

The German Metalog project partners were able to organize two personal interviews. One interviewee was the head of a department of a forwarding and logistics company and owned a Bachelor's Degree in Logistics from a professional vocational college. The other one was a coordinator for internal affairs and a trained management assistant in the wholesale and foreign trade sector, specialized on foreign trade.

The following table shows concrete suggestions for optimizing or adapting the descriptions of the Work Processes and Fields of Competency (Version 6) within the Metalog LQF expressed by the interviewed experts:

Work Processes	Fields of competency V6		
	He/she...		
<b>1. Pick and pack orders</b>	<ul style="list-style-type: none"> <li>– picks stocks, knowing warehouse system and locations</li> <li>– uses scanners for identification of stocks, amounts, locations etc.</li> <li>– takes pictures for documentation</li> <li>– practises „cling filming“ (belongs to medium column) →</li> <li>– maintains order in the warehouse</li> <li>– calculates (add this competence)</li> </ul>	<ul style="list-style-type: none"> <li>– picks stocks using picking lists and applying principles like FIFO or LIFO (belongs to left column) ←</li> <li>– packs goods and deliveries</li> <li>– complies with basic health and safety regulations (belongs to left column) ←</li> <li>– checks pallets and goods for damage</li> </ul>	<ul style="list-style-type: none"> <li>– compile goods into loading units</li> <li>– uses storage equipment and transport equipment, e.g. floorborne vehicles</li> <li>– uses in-house software</li> <li>– keeps contact with drivers</li> <li>– reports problems</li> <li>– takes decisions on pallet types to use</li> <li>– In one WPA:...picks small goods like screws manually and labels handwritten</li> <li>– applies calculations (add this competence)</li> </ul>
<b>2. Receive and transfer goods and document it</b>	<ul style="list-style-type: none"> <li>– knows documentation procedures for incoming goods</li> <li>– re-labels incoming goods</li> <li>– handles scanners</li> <li>– maintains order in the warehouse</li> </ul>	<ul style="list-style-type: none"> <li>– checks delivery against documentation, e.g. using the information on master labels and packing lists</li> <li>– checks if delivery is undamaged and free from vermin</li> </ul>	<ul style="list-style-type: none"> <li>– performs quality and quantity conformity inspection</li> <li>– records damaged packages and takes pictures</li> <li>– detects and reports anomalies /</li> </ul>

Work Processes	Fields of competency V6		
	He/she...		
		<ul style="list-style-type: none"> <li>– accepts goods and documents it using tally sheets and/or software</li> <li>– notes special characteristics for storage, e.g. “non-stackable”</li> <li>– transports goods to company-internal destination, knowing the warehouse system and proper storage areas</li> <li>– complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>– faults in goods received</li> <li>– uses storage equipment and transport equipment, e.g. floorborne vehicles</li> <li>– uses in-house software</li> </ul>
<p><b>3. Transload, repack, store and retrieve goods</b></p>	<ul style="list-style-type: none"> <li>– knows the warehouse system and its storage requirements</li> <li>– unpacks and sorts goods</li> <li>– is able to carry through documentation procedures in the warehouse</li> <li>– <b>handles scanners (belongs to middle column) →</b></li> <li>– maintains order in the warehouse</li> <li>– <b>knows functionality of a scanner (add this competence)</b></li> </ul>	<ul style="list-style-type: none"> <li>– <b>distinguishes physical quantities and types of cargo for proper storage in the warehouse (belongs to left column) ←</b></li> <li>– stores goods efficiently and as required in consideration of the warehouse system</li> <li>– carries out checks (inventory, counts, etc.), keeps track/documentation of goods’ movements, monitors product flows and stock levels</li> <li>– <b>communicates well and efficiently with co-workers and su-</b></li> </ul>	<ul style="list-style-type: none"> <li>– evaluates availability, tracing and status of goods to answer requests of internal / external customers</li> <li>– works in a customer-orientated manner</li> <li>– uses storage equipment and transport equipment, e.g. floorborne vehicles</li> <li>– uses in-house software</li> </ul>



Work Processes		Fields of competency V6	
	He/she...		
		<p><b>pervisors (belongs to right column)</b></p> <ul style="list-style-type: none"> <li>– complies with basic health and safety regulations</li> </ul>	
<b>4. Ship orders</b>	<ul style="list-style-type: none"> <li>– practises documentation procedures in outgoing goods</li> <li>– maintains order in the warehouse</li> </ul>	<ul style="list-style-type: none"> <li>– labels, marks, secures and seals deliveries in accordance with regulations and statutory stipulations</li> <li>– loads, stows delivers in means of transport in accordance with accompanying documentation</li> <li>– complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>– uses in-house software</li> <li>– uses storage equipment and transport equipment, e.g. floorborne vehicles</li> </ul>
<b>5. Control and administrate goods and shipment</b>	<ul style="list-style-type: none"> <li>– fulfils and performs administrative tasks</li> <li>– applies charges and prices</li> <li>– practices documentation and verification of goods movements and tasks</li> <li>– knows the company's controlling and documentation procedures</li> <li>– knows and applies Incoterms</li> <li>– complies with basic health and safety regulations</li> <li>– knows legal requirements</li> <li>– respects envi-</li> </ul>	<ul style="list-style-type: none"> <li>– practices logistics controlling, for example: ensures the tracking of goods, checks and documents the bill of lading</li> <li>– issues and checks invoices and receipts, for example from haulage contractors</li> <li>– coordinates and <b>controls all services provided – (what does this mean?)</b></li> <li>– <b>liaises with customers (very general)</b></li> <li>– <b>documents the process in databases, e.g. SAP or warehouse man-</b></li> </ul>	<ul style="list-style-type: none"> <li>– carries-out payments and dunning procedures</li> <li>– collaborates in the calculation of costs and returns in commercial control procedures</li> <li>– identifies and defines cargo with regard to destination of routes and goods</li> <li>– records company related statistical data</li> </ul>



Work Processes	Fields of competency V6		
	He/she...		
	environmental aspects	<b>agement software (duplication? cf. #7, right column, last paragraph)</b>	
<p><b>6. Draw up offers and prepare contracts, supervise customer-relations</b></p>	<ul style="list-style-type: none"> <li>- carries through the cost-calculation</li> <li>- applies customer complaint regulations</li> <li>- complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>- calculates prices, i.e. calculates and verifies elements that constitute the cost of a complex logistical service,</li> <li>- processes customer complaints and notices claims and arranges for settlement</li> <li>- communicates and liaises with customers regarding offers and complaints</li> </ul>	<ul style="list-style-type: none"> <li>- manages negotiations with customers</li> <li>- stipulates and supervises contracts</li> <li>- collaborates in the calculation of costs and returns and in commercial control procedures</li> </ul>
<p><b>7. Organize and implement the shipment and storage of goods</b></p>	<ul style="list-style-type: none"> <li>- knows legal requirements</li> <li>- respects environmental aspects</li> <li>- prepares documentation for goods transported</li> <li>- compiles lists and schedules</li> <li>- complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>- practices economic thinking and efficiency (making use of opportunities to consolidate consignments into larger loading units)</li> <li>- communicates effectively and co-ordinates people involved in the logistics chain and goods' movements, e.g. contacts the haulage contractor, when goods are ready to be handed over</li> </ul>	<ul style="list-style-type: none"> <li>- conceives and implements transport solutions</li> <li>- organizes shipping of goods to final destinations by air, sea and land; for example: chooses the mode of shipping, compares offers from different hauliers</li> <li>- takes into account legal, environmental and economic concerns</li> <li>- controls and monitors the cooperation of persons and institutions involved in</li> </ul>

Work Processes		Fields of competency V6	
	He/she...		
			<p>the logistics chain</p> <ul style="list-style-type: none"> <li>– designs, directs and coordinates all operations needed to organize international freight transport</li> <li>– documents the process in databases, e.g. SAP or warehouse management software (duplication?, cf. #5, medium column, last paragraph)</li> </ul>
<p><b>8. Deal with insurances and customs procedures</b></p>	<ul style="list-style-type: none"> <li>– applies the customs procedures and regulations</li> <li>– complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>– procures insurances for services rendered</li> <li>– takes into account customs legislation and regulations governing cross-border trade</li> <li>– ensures a „Z-number“ for export</li> </ul>	<ul style="list-style-type: none"> <li>– takes over responsibility for insurance and compliance with customs procedure</li> <li>– issues the customs documents</li> <li>– represents the client when dealing with customs</li> <li>– liaises with customers, banks and suppliers</li> </ul>
<p><b>9. Enhance the efficiency and range of services offered by company</b></p>	<ul style="list-style-type: none"> <li>– evaluates own and other companies offers</li> <li>– complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>– knows relevant parts of the logistics market</li> <li>– identifies and evaluates service offers on the transport and logistics market</li> <li>– optimises time and cost of transport</li> <li>– develops offers</li> <li>– practices self-organisation</li> </ul>	<ul style="list-style-type: none"> <li>– practices initiative</li> <li>– applies basic research methodologies</li> <li>– monitors the market and plays an active role in enhancing the range of services offered by their company</li> <li>– assists in creating networks to consolidate, dispatch</li> </ul>

Work Processes	Fields of competency V6		
	He/she...		
			and deliver goods – assists in the development of logistics concepts, using conceptual thinking – takes part in projects regarding the business operations, e.g. the harmonization of different logistics areas
<b>10. Plan and schedule resources</b>	– schedules the personnel (short-time) – schedules resources, e.g. floor-borne vehicles – complies with basic health and safety regulations	– practices store management – medium-term planning of personnel	– conducts personnel talks

Additionally, the following remarks were made by the interviewees:

- \_\_\_ Unclear: are the processes (Prozessabläufe) coordinated (aufeinander abgestimmt)? Do they correspond with each other? What follows what (Was baut aufeinander auf)?
- \_\_\_ Are the three columns representing Knowledge, Skills, and Competences?
- \_\_\_ From work process #5 onwards commercial competences are described
- \_\_\_ Work process #9 applies to the head of the department and higher
- \_\_\_ Exchange work process # 5 and #6, put #7 before #6, remove #8 and put it in the middle column with #7
- \_\_\_ In Germany a forwarding agent (kaufmännischer Angestellter) is also able to do the overall organization and has the skill of creating documents (Dokumente erstellen)
- \_\_\_ I would adjust the headline according to the results if that is possible: Change “EQF in Transport & Logistics” into “EQF as an example of Supply Chain management processes”.
- \_\_\_ All processes from page 15 onwards have been sorted out rather correctly according to the rising niveau levels of the EQF. The descriptors mostly have only been described and allocated to the processes.
- \_\_\_ EQF-Level 4, point 8 (“Deal with insurance and customs procedures.”): this belongs more to point 7 (“organize and implement the shipment and storage of goods”). Keep “Customs procedures” in point 8 as an extra point.

- \_\_\_ There are duplications in the niveau levels (what about the grey parts – what do they mean?). E.g. “Organize and implement the storage of goods” (point 7) – Level 4 and level 5, but they should be differentiated more clearly, e.g. by using a job description within the company. For example: level 4: “Selling forwarding services (position of a freight forwarder (Speditionskaufmann/Teamleader))” and level 5: “Planning and design /guidance (Anleitung) on customer optimized handling of shipments (Position of a head of department / branch manager (Niederlassungsleiter))”.
- \_\_\_ Level 3 and 4 are addressed in the headline and suitable for our forwarding businesses (“Spedis”). I have no idea whether this works overseas like in the UK (ask Shane?).

#### 4.2.4 Results expert interviews - Italy

Individual interviews were mainly done with training experts in the field of transport and logistics, representing some important organisations on local and national level: training providers, universities, schools. Moreover, every expert was representing institutions belonging to different educational fields, therefore with different aims, objectives, methods, and points of view.<sup>11</sup>

The following remarks were made by the interviewed experts:

- \_\_\_ a Qualification Framework is useful for all business sectors because it provides advantages on different levels like on:
  - educational and training level: it provides a clear overview of the competencies requested in each level, supporting the planning of the training offer and also benchmarking the real needs of the companies
  - labour market level: it supports the classification and categorization of professionals, the definition of contracts and agreements
  - social level: it avoids possible disparities among workers
  - economic level (competitiveness): it supports policies, especially in education and training, it enhances the quality of the training and workers, increasing the efficiency of companies
- \_\_\_ there are no potential barriers for the application of an LQF, because it clearly helps the companies as well as public bodies to organize labour market and training activities. In addition to the suggested fields that are quite important (recruiting/sending training personnel), one of the main reasons for using and establishing an LQF is the continuous updating of the training offer by training providers and by the state. An LQF in which companies continuously express their needs in terms of knowledge, skills and competences would be the target of the training providers at different levels.
- \_\_\_ the LQF could be a very interesting tool for Italy especially because there is still a need of wider recognition of logistics as one of the most important business ac-

<sup>11</sup> See annex 7 for information on the interviewed experts (name, function, organisation, sectoral background).

tivities. Especially for warehouse activities there is a great need of regulatory actions in order to avoid inequality and exploitation.<sup>12</sup>

- an LQF in which every worker/employee could find „his/her place/position“ within a company in relation to his/her work contract would enhance the legality and structuring of the whole sector. There are no potential barriers but the challenge surely is to be able to transfer the LQF to the public decision makers considering that in Italy on the one hand the regions are in charge of VET and on the other national laws and regulations are decided on governmental level in the State-Regions-Conference.<sup>13</sup>
- one challenge is to update the LQF continuously in order to be able to express training needs and to represent the actual labour market. The levels within the professional profiles (jobs) should be linked corresponding to each level. Even if acting as an indicator it would be helpful for workers/trainers for categorizing them.
- a typical training and education for different levels (initial training, second level VET, higher training, practice) should be indicated.
- with reference to the LQF, the work process ‚Pick and pack orders‘ (level 2) should be shifted to level 3. In general the levels of some work processes should be increased, e.g. for administrative activities.
- if only the Italian VET system from level 3 to level 5 is considered, the work processes should be included in these three levels. But since the LQF has to represent all partner countries, the work processes can be kept as they are, but an additional note concerning Italy would be necessary.

The following table shows the re-allocation of work processes according to the Italian system for education and training without the university system. On the right, the official qualification title according to the Italian system is shown.

The correct categorization (for Italy) of WPs and levels would be the following one:

Table 3: Corrected categorization of work processes

EQF Level	Work Processes	Qualification Title
LEVEL 3	1,2,3,4	Certificate of Operator
LEVEL 4	5,6	Diploma of Technician
LEVEL 5	7,8,9,10	Diploma of Higher Technician

- in order to make the LQF clearer, the meaning of “field of competencies” should be explained.
- change the title of the following work processes:
  - new title of #2: ‚Handle incoming goods and information‘.
  - new title of #4: ‚Handle outgoing goods and information – handle shipping goods and related information‘.
- define two alternatives for the work processes that are belonging to different levels according to the competence, the autonomy and the complexity of the operations and the job environment: e.g. ‚Draw up offers and prepare contracts, super-

<sup>12</sup> During the last years in Piacenza different strikes influenced the activities of some important Global Logistics Players.

<sup>13</sup> An involvement of the main public body, the Emilia Romagna Region, would not be enough for a clear recognition of the LQF. For applying the LQF, a sort of „class action“ would be necessary involving first of all the regional authorities but also the sectoral associations (e.g. AILLOG).

wise customer relations' is partly an administrative and partly a management issue. Negotiations and in particular supervision are management aspects while the drawing up of offers and contracts (practically) can be done by administrative/low technical staff. An idea might be to define two sub-levels for some work processes, identifying one "administrative" level (document preparation) and one management level (definition of the content of the documents). The same is true for the work process #8 ('Deal with insurance and customs procedures') and partly for work process #7 ('Organize and implement the shipment of goods'). Dealing with customs procedures is a task for logistics experts and transport workers on management level while the drawing up of the necessary documentation for customs is more an administrative issue.

- \_\_\_ merge work processes 1,2,3, and 4 into one main work process. Separate work process 5 in more than one work process
- \_\_\_ change the title of work process number 9: e.g. 'Analyze key performance indicators and service offers'.
- \_\_\_ move work process 1 to level 3 together with the work processes 2,3, and 4.
- \_\_\_ with reference to level 9 and 10, describe the field of competency more detailed. A reference should be made to KPI (the identification and analysis of KPI is a pillar for the efficiency of logistics and transport companies. Employees on management level have to strongly comply with them). Point 9 and 10 should also assess the availability of innovations (e.g. for storage or handling) and the elaborations of specific solutions and problem solving techniques of specific companies' activities. There are many issues in logistic and transport companies that are not predictable and not manageable in the usual way through WMS<sup>14</sup> or other innovative tools.

## Conclusion

The LQF had a relevant value for all the experts and stakeholders involved in the consultation process, because in general it creates advantages for the education and training system and policies related to it, for the labour market and its organization, for the workers and trainees from a social point of view and for the companies, increasing their efficiency and overall competitiveness (economic aspects). Potential barriers were not identified, even if the process of inclusion and adoption of an LQF is not seen as easily and rapidly feasible, because many public bodies are involved from the lower to the upper level (government level), but also different countries and different labour and VET systems. This shows one of the main aspects and at the same time challenges of the LQF: the homogeneity of the LQF among different countries and different VET systems. Considering the Italian VET system and also the Italian organizational ways within transport and logistics companies, the LQF identified by the Metalog partners seems to be not very well calibrated. The Work Processes that were categorized according to the EQF levels are lower in comparison to the Italian business organization. So some WPs should be allocated to higher levels than in the actual version. Furthermore, if the LQF is related to VET only, it should be focused only on 3 levels, from the 3<sup>rd</sup> to the 5<sup>th</sup>, that represent the Italian VET system for what concerns the logistics and transport sector. To find a homogenous framework for all the EU countries will be one of the main challenges.

<sup>14</sup> Warehouse Management Systems.

When looking at the LQF in detail, some proposals were made by the experts involved, both in the workshop and the interviews. One of the most important points was to clearly include and differentiate the management level from the administrative level, not only in terms of allocation of work processes but also within the same WPs that might be interpreted as “double-levels” WPs. One sub-level for the administrative tasks of the WP, one sub-level focus for the management activities.

EQF Level	Main Work Processes	Title
LEVEL 3	pick, pack, store, load, handle	Warehouse Operator/Picker
LEVEL 4	prepare administrative docs	Staff for Administration
LEVEL 5	implement the contract/order	Operating Officer
LEVEL 6	coordinate the contract/order	Operating Officer for KPI
LEVEL 7	manage the contract/order	Operating Manager
LEVEL 8	contracts negotiation – budget forecasts – verify achievement of KPI	Branch/Company Manager

#### 4.2.5 Results expert interviews - Hungary

The managers interviewed were not aware of EQF and ECVET system however they had some experiences on the Austrian and German qualifications. Since the main obstacle of economic development in the region the participants welcomed the potential mobility during training and employment.

## 5 Web Survey

Apart from the national workshops or expert interviews that were undertaken by the Metalog project membership countries, the project consortium decided to additionally implement a websurvey among companies in order to reach a higher number of experts and representatives to have a broader approach in the evaluation of the LQF. In the following, the detailed results of the web-survey is presented:

### 5.1 Results Web survey

11 experts took part in the web-survey of which a big majority used the German version of the survey. The results are summarised on the following pages.

1. What are, from your point of view, the advantages of a Qualifications Framework in general?

Better transparency among European qualifications	9
Facilitation of recruiting from abroad	5
Facilitation of sending learners abroad	6
Intensifying the mobility of European workers	5

2. What are, from your point of view, the specific advantages of a Qualifications Framework in the logistics sector?

- \_\_\_ more international transparency and recognition of qualification
- \_\_\_ benchmark and best practice in the field of supply-chain-management
- \_\_\_ especially in the logistics sector, you have the chance to operate internationally and to make contacts abroad. With a qualifications framework, it would be easier to work abroad and to be employed in different countries under the same circumstances and conditions.
- \_\_\_ communication between different company locations is simplified because the Work Processes are designed uniformly. Currently there are a lot of communication problems within clearance (der Abfertigung) between company locations abroad because many colleagues abroad only deal with one step of the logistics chain and special competences are often missing.
- \_\_\_ You can recruit in the workers sector (im gewerblichen Bereich) with a better focus
- \_\_\_ this comparison and contrast allows all users to have the same opportunities all over Europe. All workers in the sector can know the same and broaden their field of work.
- \_\_\_ transparency when it comes to European qualifications is improved.

3. Where do you see potential barriers or threats for a useful application of a Qualifications Framework in general?

- An introduction of unified standards, the comprehensibility of standardized Work Processes.
- The open mindedness of foreign users. The benefit has to be transparent. Possible differences in markets (Marktunterschiede?) that create different qualifications.
- To illustrate the different training niveaus and directives of each country in one joint framework.
- It is hard to adjust all European countries to the Qualifications Framework because there are different school graduation models and training paths in many countries and they influence the niveau of the employee.
- In our opinion, the challenge will come when we have to equate qualifications, using the legislation. The main problem is that the legislation is likely to be different by each country. We should equate certain laws.
- to find suitable personnel
- to abstract special demands

4. Which challenges are there for a useful application of a Qualifications Framework in the logistics sector?

- long-term attachment to the company – internal and external trainings – future prospects
- different internal Work Processes
- in order to be able to use the Qualifications Framework, you have make it known within each company
- to map different training niveaus and directives of the different countries into one unified framework, especially because there are so many different companies and types/forms of logistics trainings.

5. In which fields would you apply a Qualifications Framework / in which fields an LQF could be of use?

Recruiting workers from abroad	9
Sending existing personnel to training abroad	7
Recruiting personnel at home	7
Training of personnel at home	6

6. Please specify whether (the area where) you would apply it in your own work environment:

- transshipment (Umschlag)/ warehouse
- introduction of the dual training system to locations abroad
- in the area of national recruitment

- \_\_\_ in the training and further training sector – job rotation approach
- \_\_\_ it would be very helpful in our country if we had these tools. It would enable us to professionalize the sector, which would allow projects to expand knowledge of workers, and we could give them the possibility of obtaining certifications, like vocational training qualifications. And we think this is a very good tool.
- \_\_\_ for recruiting employees abroad.
- \_\_\_ in forwarding and logistics trainings and for warehouse logistics as well as for certain jobs in retail.
- \_\_\_ in warehousing

7. The LQF distinguishes between 10 main work processes in the field of transport and logistics. Please give your opinion to the single work processes as they are formulated in the current version.

***1. Pick and pack orders***

- \_\_\_ Picks goods (kommissioniert) according to picking list (Kommissionierliste) or with IT-support (e.g. scanner, pick by voice, pick by light)
- \_\_\_ Not relevant because many forwarders (Speditionen) do not have their own warehouse but do the picking and packing in the harbour. Makes sense for warehouse logisticians (Lagerlogistiker) but not for merchants who offer forwarding & logistics services; and if the learning objective is just to visit the warehouse
- \_\_\_ A better headline would be: „Accept and store goods-
- \_\_\_ Better headline: Accepting and storing goods

***2. Receive and transfer goods and document it***

- \_\_\_ Should be changed into: „Accept, identify and store goods“.

***3. Transload, repack, store and retrieve goods***

- \_\_\_ Instead of „retrieve“ (entnehmen): „pick“ (auslagern/picken)
- \_\_\_ Or in German „kommissionieren!“

***4. Ship orders***

- \_\_\_ Please define „maintains order in the warehouse“ more precisely

***5. Control and administrate goods and shipment***

- \_\_\_ Please define „applies charges and prices“ more precisely

***6. Draw up offers and prepare contracts, supervise customer-relations***

- \_\_\_ Contracts are drawn up by the management. No administrator deals with that subject.

***7. Organize and implement the shipment and storage of goods***

- \_\_\_ For many forwarders (Spediteure) the handling of shipping orders (Versandaufträgen) and the storage of goods is not relevant.

\_\_\_ Add: complies (befolgt) with the regulations concerning the shipment of dangerous goods and substances.

### ***8. Deal with insurances and customs procedures***

\_\_\_ Here, two complex matters were combined. Customs procedures, yes, but insurance only according to Incoterm (according to the department). It would be better to separate these two fields.

### ***9. Enhance the efficiency and range of services offered by company***

\_\_\_ The improvement of efficiency should be an individual point.

\_\_\_ Learning objective = to know the range of services. „Enhancing“ („verbessern“ im Deutschen) has a negative touch.

### ***10. Plan and schedule resources***

#### ***The following work process should be added:***

\_\_\_ Receive packed goods (in Verpackung) and do the loading („Ware in Verpackung übernehmen und verladen“)

8. For each work process, **fields of competency** have been developed.

#### ***1. Pick and pack orders***

\_\_\_ FIFO and LIFO<sup>15</sup> are warehouse principles and not directly connected with picking (kommissionieren). The person who picks is not in direct contact with the drivers but only with the shift leader (Schichtführer), it is him/her who communicates with the office.

\_\_\_ This is not very relevant for us. We follow the guidelines of the chamber of commerce: a) Explain performance (Leistungen) in warehouse logistics. b) Describe ways of warehouse organization, describe the warehouse system that is used by the training enterprise (Ausbildungsbetrieb). c) Illustrate work processes within the warehouse and integrate them into logical sequences. d) Differentiate goods according to storage facilities. e) Use warehouse documentation. f) Record stock data and monitor its transmission (Weiterleitung) within the transport chain.

\_\_\_ Warehouse logistics (§4 Nr. 5.2) a) tap market information (Marktinformationen erschließen).

#### ***2. Receive and transfer goods and document it***

\_\_\_ Reports defective goods to the customer. Asks for instructions from the customer before accepting defective goods (fehlerhafte Ware).

#### ***3. Transload, repack, store and retrieve goods***

\_\_\_ Stores goods according to instructions (e.g. refrigerated goods, dangerous goods etc.). Keeps goods in orderly condition during storage. Insures goods, e.g. according to client's orders

<sup>15</sup> Wikipedia: „FIFO and LIFO methods are accounting techniques used in managing inventory and financial matters involving the amount of money a company has tied up within inventory of produced goods, raw materials, parts, components, or feed stocks. These methods are used to manage assumptions of cost flows related to inventory, stock repurchases (if purchased at different prices), and various other accounting purposes.“ Online: [https://en.wikipedia.org/wiki/FIFO\\_and\\_LIFO\\_accounting](https://en.wikipedia.org/wiki/FIFO_and_LIFO_accounting). (17.07.2015).

#### 4. *Ship orders*

\_\_\_ Cargo security of goods

\_\_\_ Packs goods and combines goods into bigger loading units. Uses suitable packaging materials like cardboard boxes, stretch foil or pallets, also according instructions.

#### 5. *Control and administrate goods and shipment*

#### 6. *Draw up offers and prepare contracts, supervise customer-relations*

\_\_\_ Complaints are dealt with by the head of department as well as negotiations with customers. This is not done by an administrator (Sachbearbeiter).

#### 7. *Organize and implement the shipment and storage of goods*

\_\_\_ Difference to work process 4 is unclear.

#### 8. *Deal with insurances and customs procedures*

#### 9. *Enhance the efficiency and range of services offered by company*

\_\_\_ The process description does not match the competence fields. He/she does not enhance the range of services but controls and monitors according to commercial principles.

\_\_\_ Executes suitable post calculations; carries out assessments of costs and benefits.

#### 9. *Plan and schedule resources*

10. Among the work processes, the LQF distinguishes between **levels** according to the levels of the **European Qualifications Framework**. The European Qualifications Framework basically consists of eight qualification levels. Each of these levels is described by the learning outcomes descriptors "knowledge", "skills" and "competence" necessary in order to reference a qualification to a specific level. On the EQF level 1 is the lowest and level 8 the highest qualification level. Generally it can be said that skilled worker qualifications are usually referenced to the levels 3 and 4.

No	Work Processes	Results
Level 1		
Level 2	1 Pick and pack orders	
Level 3	2 Receive and transfer goods and document it	
	3 Transload, repack, store and retrieve goods	
	(1) Pick and pack orders	
	4 Ship orders	
	5 Control and administrate goods and shipment	

	6	Draw up offers and prepare contracts, supervise customer-relations	
Level 4	7	Organize and implement the shipment and storage of goods	7 Organise and implement the shipment and storage of goods: Keep at level 4 (1x); Move up to level 6 (1x)
	8	Deal with insurances and customs procedures	8 Deal with insurance and customs procedures: Move down to level 2 (1x); Move up to level 5 (1x)
	(6)	Draw up offers and prepare contracts, supervise customer-relations	(6) Draw up offers and prepare contracts, supervise customer relations: Move up to level 5 (2x)
Level 5	(7)	Organize and implement the shipment and storage of goods	
	9	Enhance the efficiency and range of services offered by company	
	10	Plan and schedule resources	
Level 6	(9)	Enhance the efficiency and range of services offered by company	(9) Enhance the efficiency and range of services offered by company: Move up to level 8 (1x)
	(10)	Plan and schedule resources	(10) Plan and schedule resources: Move up to level 7 (1x)
Level 7			
Level 8			

## Background Information

### 11. Your country:

Austria	5
France	0
Germany	4
Hungary	1
Italy	0
Other (Spain)	1

### 12. Type of your organisation (please tick):

Transport and logistics company	8
Special interest group in transport and logistics	1
Policy organisation in transport and logistics	0
Policy organisation in questions of European qualifications	0
Other (Service and Transport Federation (Trade Union))	1

### 13. Your position in your organisation

Management	6
Administration	0
Specialised worker	1
Expert in qualifications	3
Policy maker	0
Other (Manager of European Projects)	1

14. One aim of the Metalog project is to build up an expert-network in the field of transport and logistics. Members of this network will be invited to European events (e.g. the Metalog final conference) and consulted for their experts' opinion of recent developments in the field. Cooperation and exchange between the participating experts will be one major task of the experts-network.

I want to be part of the European experts-network.

Yes	6
No	5

The personal data of the contact persons are stored at 3s.

## 6 Conclusions

The results of the evaluation of the project METALOG's main product, the Logistics Qualifications Framework (LQF), are of rather diverse nature and therefore have to be treated differently. From the the workpackage leader's point of view, there are three different types of results:

- \_\_\_ results on details of the LQF (e.g. placing specific work processes on a different EQF-level)
- \_\_\_ results on more general aspects of the LQF (e.g. integrating additional work processes)
- \_\_\_ results on the general scope of the LQF

In regard of these different types, different reactions are recommended: The revision work that can be conducted in the rest of the project's lifetime can most probably consider the results on the details of the LQF. These amendments would mostly include slight changes in the formulation or in the positioning of single work processes within the LQF. In respect of those results which address more general aspects of the LQF, it is recommended to balance carefully the advantages and disadvantages of a more extensive amendment of the LQF. The current version of the LQF is the result of a coherent and comprehensible work of integration of different sources. Changes like e.g. adding or deleting a work process or focussing the work processes on a specific target group could imbalance the LQF in its current form. However, if it is decided by the partner responsible for the work on the LQF, also more severe changes can still be made within the project's lifetime. Results referring to the scope of the LQF (e.g. that a separation between the logistics employees with more general and administrative duties and those with more logistics expertise) should be included into the comments within the final report of the Metalog project. The resources of this project do not allow extensive work of revision which meets the quality requirements set by project consortium. It would rather be recommended to base a follow-up project on these more general inputs.

A further challenge for the revision work based on the evaluation of the LQF in WP4 has to be addressed: Many comments placed by different national experts will contradict each other and therefore raise more questions than they might answer. In these cases it is recommended to only address those contradictory comments where the responsible partner for revising the LQF can clearly assess their consequences. Only where it is clear whether the inclusion of one or the other comment will be in favour of the comprehensiveness and understand ability of the LQF, a final decision of how to deal with these contradictions should be made. All additional discussion points which show coherent arguments for both sides – in favour and against a specific argument – should be highlighted in the final report of the project, however, not be considered in the final product. As final comment, the work package leader of WP4 has to say thank you to the project partners for their contributions to the evaluation work. It turned out to be a well decided approach to adapt the consultations plans and methods to the individual national contexts. The results – as differentiated and contradictory as they might be – will improve the quality of the LQF – within this project lifetime and in future efforts.

## 7 Annex

### Annex 1: Invitations to expert interview and web survey

#### 1.1 Template for invitation to national workshops

  
xx.xx.2015

Subject: Your insight is needed:  
**Discussing and evaluating the (draft) Logistics Qualifications Framework**

Dear **Addressee**,

There is a lot to be done in order to bring more transparency in the field of qualification all over Europe. By speaking the same language across national borders in regard of qualifications, **recruitment processes** of appropriate **candidates from abroad** can be enhanced and **mobility programs** can be initiated.

See, e.g. an introductory video to recruiting all over Europe here: [https://www.youtube.com/watch?v=f\\_oNruODGyl](https://www.youtube.com/watch?v=f_oNruODGyl)  
or an introductory video to European standards in teaching and training: <https://www.youtube.com/watch?v=k5x3PBO73BY>  
To learn more about European developments in transport and logistics visit: <http://www.euvetsupport.eu/>

The METALOG project intends to develop a Europe-wide **Logistics Qualifications Framework (LQF)** and to lay grounds for the development of a European stakeholder network on qualifications within transport and logistics.

To learn more about Metalog visit <http://project-metalog.eu>.

Based on numerous work process analyses carried out in logistic companies in the project partner countries between November and December 2014, a **first draft** of a Logistic Qualifications Framework has been developed. As a result of close observation and documentation of the individual work tasks, 10 core work processes common across companies and countries were identified – together with related fields of competency and the respective levels of the European Qualifications Framework.

We would highly appreciate your participation in the following workshop where practitioners and experts from the sector will discuss and evaluate the preliminary version of the LQF:

**Place: xxxxxxxx**  
**Date: xxxxxxxx**  
**Duration: approximately 2 hours**

At the workshop you will learn more about the project, discuss our preliminary results (the draft LQF) and meet other relevant stakeholders from the transport and logistics sector of our region.

The program of the workshop will include:

- Introduction to the project Metalog and the draft LQF
- Discussion of the LQF
- Outlook to the future Metalog project
- Informal exchange between participants

We would be pleased if you accepted our invitation and could contribute to a needed and very up-to-date discussion. In case of your participation you will receive preparatory information in advance.

Please let us know your answer by **xx.xx.2015** by referring to this contact:

**Name**

**telephone**

**E-Mail**

We are looking forward to your answer.

Yours sincerely,

**Xxxx**

representing the entire Metalog project team

## 1.2 Template for invitation to expert interviews



xx.xx.2015

Subject: Your insight is needed:  
**Discussing and evaluating the (draft) Logistics Qualifications Framework**

Dear **Addressee**,

There is a lot to be done in order to bring more transparency in the field of qualification all over Europe. By speaking the same language across national borders in regard of qualifications, **recruitment processes** of appropriate **candidates from abroad** can be enhanced and **mobility programs** can be initiated.

See, e.g. an introductory video to recruiting all over Europe here: <https://www.youtube.com/watch?v=afNv0DGvI>  
or an introductory video to European standards in teaching and training: <https://www.youtube.com/watch?v=5k3P8QF3BY>  
To learn more about European developments in transport and logistics visit: <http://www.euvetsupport.eu/>.

The METALOG project intends to develop a Europe-wide **Logistics Qualifications Framework (LQF)** and to lay grounds for the development of a European stakeholder network on qualifications within transport and logistics.

To learn more about Metalog visit <http://project-metalog.eu>.

Based on numerous work process analyses carried out in logistic companies in the project partner countries between November and December 2014, a **first draft** of a Logistic Qualifications Framework has been developed. As a result of close observation and documentation of the individual work tasks, 10 core work processes common across companies and countries were identified – together with related fields of competency and the respective levels of the European Qualifications Framework.

We would highly appreciate your participation in an expert interview to discuss this preliminary version of the LQF and to collect further valuable input out of the praxis of transport and logistics.

*Interview: **personal/via telephone***  
*Date: please suggest one or several convenient dates*  
*Duration: approximately 40 minutes*

During the interview you will learn more about the project and discuss our preliminary results (the LQF). You will receive some basic information prior to the interview.

We would be pleased if you accepted our invitation and could contribute to a needed and very up-to-date discussion. Please let us know your answer by **xx.xx.2015** by referring to this contact:

Name	telephone	E-Mail
------	-----------	--------

We are looking forward to your answer.

Yours sincerely,

**Xxxx**  
representing the entire Metalog project team

## 1.3 Template for invitation to web survey



xx.xx.2015

*Subject: Your insight is needed:*

**Discussing and evaluating the (draft) Logistics Qualifications Framework**

Dear **Addressee**,

There is a lot to be done in order to bring more transparency in the field of qualification all over Europe. By speaking the same language across national borders in regard of qualifications, **recruitment processes** of appropriate **candidates from abroad** can be enhanced and **mobility programs** can be initiated.

See, e.g. an introductory video to recruiting all over Europe here: [https://www.youtube.com/watch?v=f\\_aNruODGyI](https://www.youtube.com/watch?v=f_aNruODGyI)  
or an introductory video to European standards in teaching and training: <https://www.youtube.com/watch?v=45x3PBQf3BY>  
To learn more about European developments in transport and logistics visit: <http://www.euvetsupport.eu/>.

The METALOG project intends to develop a Europe-wide **Logistics Qualifications Framework (LQF)** and to lay grounds for the development of a European stakeholder network on qualifications within transport and logistics.

To learn more about Metalog visit <http://project-metalog.eu>

Based on numerous work process analyses carried out in logistic companies in the project partner countries between November and December 2014, a **first draft** of a Logistic Qualifications Framework has been developed. As a result of close observation and documentation of the individual work tasks, 10 core work processes common across companies and countries were identified – together with related fields of competency and the respective levels of the European Qualifications Framework.

We would highly appreciate your participation in a web-based survey to collect further valuable input from practitioners and experts in transport and logistics.

*Web-based survey: **URL***

*Valid until: **Date***

*Duration: approximately 20 minutes*

We would be pleased if you accepted our invitation and could contribute to a needed and very up-to-date discussion by answering this survey. You will receive the information needed when during your responding process.

Yours sincerely,

**Xxxx**  
representing the entire Metalog project team

## Annex 2: Presentation of the Logistics Qualifications Framework

See pdf-excerpt at the end of this document.

## Annex 3: Leading questions for all 3 evaluation methods

### General questions

1. What are, from your point of view, the advantages of a Qualifications Framework in general?
2. What are, from your point of view, the advantages of a Qualifications Framework in the logistics sector?
3. From the perspective of the transport and logistics sector in your country, where do you see potential barriers or threats for a useful application of a Qualifications Framework in general?
4. From the perspective of the transport and logistics sector in your country, which challenges are there for a useful application of a Qualifications Framework in the logistics sector?
5. In which fields would you apply a Qualifications Framework / in which fields an LQF could be of use? E.g.:
  - a. Recruiting personnel from abroad
  - b. Sending existing personnel to training abroad
  - c. Recruiting personnel at home
  - d. Training of personnel at home
6. Which national and international institutions/contact persons/companies etc. would you approach in order to disseminate the existence and usability of a Logistics Qualifications Framework?

### Specific questions

7. The Qualifications Framework distinguishes between 10 main **work processes**:
  1. Pick and pack orders
  2. Receive and transfer goods and document it
  3. Transload, repack, store and retrieve goods
  4. Ship orders
  5. Control and administrate goods and shipment
  6. Draw up offers and prepare contracts, supervise customer-relations
  7. Organize and implement the shipment and storage of goods
  8. Deal with insurances and customs procedures
  9. Enhance the efficiency and range of services offered by company
  10. Plan and schedule resources

Do you find them applicable or do you want to add/change something?

8. Among the work processes, the Qualifications Framework distinguishes between several **levels** (according to the levels of the EQF):  
Do you find them applicable or do you want to add/change something?
9. For each work process, steps of competency have been developed (please note that these steps can only be related to each other within rows, not within columns).  
Do you agree with these steps or would you add/clarify any of these?

## Annex 4: Form for the web-based survey

Metalog Logo [Hyperlink to project website <http://project-metalog.eu>]

# On our way to a European Framework of Qualifications in Transport and Logistics

Making qualifications comparable throughout Europe is one of the most urgent requirements of our times, especially in the transport and logistics sectors. Because by this means, e.g. qualified workers from all over Europe can be recruited and teaching and training can be adjusted to European standards. The METALOG project [Hyperlink to project website <http://project-metalog.eu>] therefore intends to develop a Europe-wide Logistics Qualifications Frameworks and to lay grounds for the development of a European stakeholder network on qualification within transport and logistics.

Today, the METALOG project consortium can look back at an essential milestone within the project. Based on numerous work process analyses carried out in logistic companies in the project partner countries between November and December 2014, a first draft of a Logistic Qualifications Framework has been developed. As a result of close observation and meticulous documentation of the individual work tasks, 10 core work processes common across companies and countries were identified – together with related fields of competency and the respective levels European Qualifications Framework.

The applicability, validity and relevance of the Logistics Qualifications Framework are now tested, among others in this web-based survey. We now ask you to be part of this testing process and to support our development process by completing the following survey which will be online until the **xx.xx.2015**.

Thank you for your support in advance.

[Continue](#)

The LQF is meant to show all relevant work processes in the field of transport and logistics. It is closely related to the European Qualifications Framework (EQF) and therefore serves to make qualifications in Europe better comparable. Each work process shows different fields of competency which can be reached. Further down, the single elements of the LQF will be introduced in detail.

## Logistics Qualifications Framework (LQF)

Work Processes	Fields of competency			V5
	He/she...			
<b>1. Pick and pack orders</b>	<ul style="list-style-type: none"> <li>- picks stocks</li> <li>- uses scanners for identification of stocks, amounts, locations etc.</li> <li>- takes pictures for documentation</li> <li>- practises „cling filming“</li> </ul>	<ul style="list-style-type: none"> <li>- picks stocks applying principles like FIFO or LIFO</li> <li>- packs goods and deliveries</li> </ul>	<ul style="list-style-type: none"> <li>- compile goods into loading units</li> <li>- uses floor-borne vehicles</li> <li>- uses in-house software</li> <li>- takes decisions on pallet types to use</li> <li>- In one WPA:...picks small goods like screws manually and labels handwritten</li> </ul>	
<b>2. Receive and transfer goods and document it</b>	<ul style="list-style-type: none"> <li>- knows documentation procedures for incoming goods</li> <li>- re-labels incoming goods</li> <li>- handles scanners</li> </ul>	<ul style="list-style-type: none"> <li>- checks delivery against documentation, e.g. using the information on master labels and packing lists</li> <li>- checks if delivery is undamaged and free from vermin</li> <li>- accepts goods and documents it using tally sheets and/or software</li> <li>- notes special characteristics for storage, e.g. “non-stackable”</li> <li>- transports goods to company-internal destination, knowing the warehouse system and proper storage areas</li> </ul>	<ul style="list-style-type: none"> <li>- performs quality conformity inspection</li> <li>- records damaged packages and takes pictures</li> <li>- detects anomalies / faults in goods received</li> <li>- uses floor-borne vehicles</li> <li>- uses in-house software</li> </ul>	
<b>3. Transload, repack, store and retrieve goods</b>	<ul style="list-style-type: none"> <li>- knows the warehouse system and its storage requirements</li> <li>- unpacks and sorts goods</li> <li>- is able to carry through documentation procedures in the warehouse</li> <li>- handles scanners</li> </ul>	<ul style="list-style-type: none"> <li>- distinguishes physical quantities and types of cargo for proper storage in the warehouse</li> <li>- stores goods efficiently and as required in consideration of the warehouse system</li> <li>- carries out checks (inventory, counts, etc.), keeps track/ documentation of goods’ movements, monitors</li> </ul>	<ul style="list-style-type: none"> <li>- evaluates availability, tracing and status of goods to answer requests of internal / external customers</li> <li>- works in a customer-orientated manner</li> <li>- uses floor-borne vehicles</li> <li>- uses in-house software</li> </ul>	

		<ul style="list-style-type: none"> <li>product flows and stock levels</li> <li>– communicates well and efficiently with co-workers and supervisors</li> </ul>	
<b>4. Ship orders</b>	<ul style="list-style-type: none"> <li>– practises documentation procedures in outgoing goods</li> </ul>	<ul style="list-style-type: none"> <li>– labels, marks, secures and seals deliveries in accordance with regulations and statutory stipulations</li> <li>– loads, stows delivers in means of transport in accordance with accompanying documentation</li> </ul>	<ul style="list-style-type: none"> <li>– uses in-house software</li> <li>– issues getting-out permissions</li> <li>– identifies and defines cargo with regard to destination of routes and goods</li> </ul>

<p><b>5. Control and administrate goods and shipment</b></p>	<ul style="list-style-type: none"> <li>- fulfils and performs administrative tasks</li> <li>- applies charges and prices</li> <li>- practices documentation and verification of goods movements and tasks</li> <li>- knows the company's controlling and documentation procedures</li> <li>- knows and applies Incoterms</li> </ul>	<ul style="list-style-type: none"> <li>- practices logistics controlling, for example: ensures the tracking of goods, checks and documents the bill of lading</li> <li>- issues and checks invoices and receipts, for example from haulage contractors</li> <li>- coordinates and controls all services provided</li> <li>- liaises with customers</li> </ul>	<ul style="list-style-type: none"> <li>- carries-out payments and dunning procedures</li> <li>- collaborates in the calculation of costs and returns in commercial control procedures</li> <li>- records company related statistical data</li> <li>- documents the process in databases, e.g. SAP or warehouse management software</li> </ul>
<p><b>6. Draw up offers and prepare contracts, supervise customer-relations</b></p>	<ul style="list-style-type: none"> <li>- carries through the cost-calculation</li> <li>- applies customer complaint regulations</li> </ul>	<ul style="list-style-type: none"> <li>- calculates prices, i.e. calculates and verifies elements that constitute the cost of a complex logistical service,</li> <li>- processes customer complaints and notices claims and arranges for settlement</li> <li>- communicates and liaises with customers regarding offers and complaints</li> </ul>	<ul style="list-style-type: none"> <li>- manages negotiations with customers</li> <li>- stipulates and supervises contracts</li> <li>- collaborates in the calculation of costs and returns and in commercial control procedures</li> </ul>
<p><b>7. Organize and implement the shipment and storage of goods</b></p>	<ul style="list-style-type: none"> <li>- knows legal requirements</li> <li>- respects environmental aspects</li> <li>- creates, develops and closes the file for shipments</li> <li>- prepares documentation for goods transported</li> <li>- compiles lists and schedules</li> </ul>	<ul style="list-style-type: none"> <li>- practices economic thinking and efficiency (making use of opportunities to consolidate consignments into larger loading units)</li> <li>- communicates effectively and co-ordinates people involved in the logistics chain and goods' movements, e.g. contacts the haulage contractor, when goods are ready to be handed over</li> </ul>	<ul style="list-style-type: none"> <li>- conceives and implements transport solutions</li> <li>- organizes shipping of goods to final destinations by air, sea and land; for example: chooses the mode of shipping, compares offers from different hauliers</li> <li>- takes into account legal, environmental and economic concerns</li> <li>- controls and monitors the cooperation of persons and institutions involved in the logistics chain</li> <li>- designs, directs and coordinates all operations needed to organize international freight transport</li> <li>- documents the process in databases, e.g. SAP or warehouse management software</li> </ul>

<p><b>8. Deal with insurances and customs procedures</b></p>	<ul style="list-style-type: none"> <li>- knows insurance</li> <li>- applies the customs procedures and regulations</li> </ul>	<ul style="list-style-type: none"> <li>- procures insurances for services rendered</li> <li>- takes into account customs legislation and regulations governing cross-border trade</li> <li>- Ensures a „z-Nr.“</li> </ul>	<ul style="list-style-type: none"> <li>- takes over responsibility for insurance and compliance with customs procedure</li> <li>- issues the customs documents</li> <li>- represents the client when dealing with customs</li> <li>- liaises with customers, banks and suppliers</li> </ul>
<p><b>9. Enhance the efficiency and range of services offered by company</b></p>	<ul style="list-style-type: none"> <li>- evaluates own and other companies offers</li> </ul>	<ul style="list-style-type: none"> <li>- knows the logistics market</li> <li>- identifies and evaluates service offers on the transport and logistics market</li> <li>- optimises time and cost of transport</li> <li>- develops offers</li> </ul>	<ul style="list-style-type: none"> <li>- practices self-organisation and initiative</li> <li>- applies basic research methodologies</li> <li>- monitors the market and plays an active role in enhancing the range of services offered by their company</li> <li>- assists in creating networks to consolidate, dispatch and deliver goods</li> <li>- assists in the development of logistics concepts, using conceptual thinking</li> <li>- takes part in projects regarding the business operations, e.g. the harmonization of different logistics areas</li> </ul>
<p><b>10. Plan and schedule resources</b></p>	<ul style="list-style-type: none"> <li>- schedules the personnel (short-time)</li> <li>- schedules resources, e.g. floor-borne vehicles</li> </ul>	<ul style="list-style-type: none"> <li>- practices store management</li> <li>- medium-term planning of personnel</li> </ul>	<ul style="list-style-type: none"> <li>- conducts personnel talks</li> </ul>

15. What are, from your point of view, the advantages of a Qualifications Framework in general? *(Tick applying boxes – multiple ticks possible)*

- Better transparency among European qualifications
  - Facilitation of recruiting from abroad
  - Facilitation of sending learners abroad
  - Intensifying the mobility of European workers
  - Other
- Please specify:

16. What are, from your point of view, the specific advantages of a Qualifications Framework in the logistics sector?

Please specify:

17. Where do you see potential barriers or threats for a useful application of a Qualifications Framework in general?

Please specify:

18. Which challenges are there for a useful application of a Qualifications Framework in the logistics sector?

Please specify:

19. In which fields would you apply a Qualifications Framework / in which fields an LQF could be of use?

- Recruiting workers from abroad
  - Sending existing personnel to training abroad
  - Recruiting personnel at home
  - Training of personnel at home
  - Other
- Please specify:

20. The LQF distinguishes between 10 main **work processes** in the field of transport and logistics. Please give your opinion to the single work processes as they are formulated in the current version.

***1. Pick and pack orders***

In my opinion this formulation as description of a relevant work process in transport and logistics is:

applicable

totally irrelevant (should be deleted)

Should be changed in the following way:

***2. Receive and transfer goods and document it***

In my opinion this formulation as description of a relevant work process in transport and logistics is:

applicable

totally irrelevant (should be deleted)

Should be changed in the following way:

***3. Transload, repack, store and retrieve goods***

In my opinion this formulation as description of a relevant work process in transport and logistics is:

applicable

totally irrelevant (should be deleted)

Should be changed in the following way:

***4. Ship orders***

In my opinion this formulation as description of a relevant work process in transport and logistics is:

applicable

totally irrelevant (should be deleted)

Should be changed in the following way:

**5. Control and administrate goods and shipment**

In my opinion this formulation as description of a relevant work process in transport and logistics is:

applicable

totally irrelevant (should be deleted)

Should be changed in the following way:

**6. Draw up offers and prepare contracts, supervise customer-relations**

In my opinion this formulation as description of a relevant work process in transport and logistics is:

applicable

totally irrelevant (should be deleted)

Should be changed in the following way:

**7. Organize and implement the shipment and storage of goods**

In my opinion this formulation as description of a relevant work process in transport and logistics is:

applicable

totally irrelevant (should be deleted)

Should be changed in the following way:

**8. Deal with insurances and customs procedures**

In my opinion this formulation as description of a relevant work process in transport and logistics is:

applicable

totally irrelevant (should be deleted)

Should be changed in the following way:

**9. Enhance the efficiency and range of services offered by company**

In my opinion this formulation as description of a relevant work process in transport and logistics is:

applicable

totally irrelevant (should be deleted)

Should be changed in the following way:

***10. Plan and schedule resources***

In my opinion this formulation as description of a relevant work process in transport and logistics is:

applicable

totally irrelevant (should be deleted)

Should be changed in the following way:

I would like to add new work processes:

21. For each work process, **fields of competency** have been developed.

*Please note: You can only read these fields in one single line (that means for one single work process). It does not make sense to compare e.g. the third field of competency of work process 1 with the third field of competency of work process 3.*

Do you agree with the fields for each work process or would you add/clarify any of these?

Work Processes		Fields of competency		V5
	He/she...			
<b>1. Pick and pack orders</b>	<ul style="list-style-type: none"> <li>- picks stocks</li> <li>- uses scanners for identification of stocks, amounts, locations etc.</li> <li>- takes pictures for documentation</li> <li>- practises „cling filming“</li> </ul>	<ul style="list-style-type: none"> <li>- picks stocks applying principles like FIFO or LIFO</li> <li>- packs goods and deliveries</li> </ul>	<ul style="list-style-type: none"> <li>- compile goods into loading units</li> <li>- uses floor-borne vehicles</li> <li>- uses in-house software</li> <li>- takes decisions on pallet types to use</li> <li>- In one WPA:...picks small goods like screws manually and labels handwritten</li> </ul>	

For the fields of competency of this specific work process I would change this:

Work Processes		Fields of competency		V5
	He/she...			
<b>2. Receive and transfer goods and document it</b>	<ul style="list-style-type: none"> <li>- knows documentation procedures for incoming goods</li> <li>- re-labels incoming goods</li> <li>- handles scanners</li> </ul>	<ul style="list-style-type: none"> <li>- checks delivery against documentation, e.g. using the information on master labels and packing lists</li> <li>- checks if delivery is undamaged and free from vermin</li> <li>- accepts goods and documents it using tally</li> </ul>	<ul style="list-style-type: none"> <li>- performs quality conformity inspection</li> <li>- records damaged packages and takes pictures</li> <li>- detects anomalies / faults in goods received</li> <li>- uses floor-borne vehicles</li> </ul>	

Work Processes		Fields of competency		V5
	He/she...			
		<ul style="list-style-type: none"> <li>– sheets and/or software</li> <li>– notes special characteristics for storage, e.g. “non-stackable”</li> <li>– transports goods to company-internal destination, knowing the warehouse system and proper storage areas</li> </ul>	<ul style="list-style-type: none"> <li>– uses in-house software</li> </ul>	

For the fields of competency of this specific work process I would change this:

Work Processes		Fields of competency		V5
	He/she...			
<b>3. Transload, repack, store and retrieve goods</b>	<ul style="list-style-type: none"> <li>– knows the warehouse system and its storage requirements</li> <li>– unpacks and sorts goods</li> <li>– is able to carry through documentation procedures in the warehouse</li> <li>– handles scanners</li> </ul>	<ul style="list-style-type: none"> <li>– distinguishes physical quantities and types of cargo for proper storage in the warehouse</li> <li>– stores goods efficiently and as required in consideration of the warehouse system</li> <li>– carries out checks (inventory, counts, etc.), keeps track/ documentation of goods’ movements, monitors product flows and stock levels</li> <li>– communicates well and efficiently with co-workers and supervisors</li> </ul>	<ul style="list-style-type: none"> <li>– evaluates availability, tracing and status of goods to answer requests of internal / external customers</li> <li>– works in a customer-orientated manner</li> <li>– uses floor-borne vehicles</li> <li>– uses in-house software</li> </ul>	

For the fields of competency of this specific work process I would change this:

Work Processes		Fields of competency		V5
	He/she...			
<b>4. Ship orders</b>	<ul style="list-style-type: none"> <li>– practises documentation procedures in outgoing goods</li> </ul>	<ul style="list-style-type: none"> <li>– labels, marks, secures and seals deliveries in accordance with regulations and statutory stipulations</li> <li>– loads, stows delivers in means of transport in accordance with accompanying documentation</li> </ul>	<ul style="list-style-type: none"> <li>– uses in-house software</li> <li>– issues getting-out permissions</li> <li>– identifies and defines cargo with regard to destination of routes and goods</li> </ul>	

For the fields of competency of this specific work process I would change this:

Work Processes		Fields of competency		V5
	He/she...			

Work Processes		Fields of competency		V5
	He/she...			
<b>5. Control and administrate goods and shipment</b>	<ul style="list-style-type: none"> <li>- fulfils and performs administrative tasks</li> <li>- applies charges and prices</li> <li>- practices documentation and verification of goods movements and tasks</li> <li>- knows the company's controlling and documentation procedures</li> <li>- knows and applies Incoterms</li> </ul>	<ul style="list-style-type: none"> <li>- practices logistics controlling, for example: ensures the tracking of goods, checks and documents the bill of lading</li> <li>- issues and checks invoices and receipts, for example from haulage contractors</li> <li>- coordinates and controls all services provided</li> <li>- liaises with customers</li> </ul>	<ul style="list-style-type: none"> <li>- carries-out payments and dunning procedures</li> <li>- collaborates in the calculation of costs and returns in commercial control procedures</li> <li>- records company related statistical data</li> <li>- documents the process in databases, e.g. SAP or warehouse management software</li> </ul>	

For the fields of competency of this specific work process I would change this:

Work Processes		Fields of competency		V5
	He/she...			
<b>6. Draw up offers and prepare contracts, supervise customer-relations</b>	<ul style="list-style-type: none"> <li>- carries through the cost-calculation</li> <li>- applies customer complaint regulations</li> </ul>	<ul style="list-style-type: none"> <li>- calculates prices, i.e. calculates and verifies elements that constitute the cost of a complex logistical service,</li> <li>- processes customer complaints and notices claims and arranges for settlement</li> <li>- communicates and liaises with customers regarding offers and complaints</li> </ul>	<ul style="list-style-type: none"> <li>- manages negotiations with customers</li> <li>- stipulates and supervises contracts</li> <li>- collaborates in the calculation of costs and returns and in commercial control procedures</li> </ul>	

For the fields of competency of this specific work process I would change this:

Work Processes		Fields of competency		V5
	He/she...			
<b>7. Organize and implement the shipment and storage of goods</b>	<ul style="list-style-type: none"> <li>- knows legal requirements</li> <li>- respects environmental aspects</li> <li>- creates, develops and closes the file for shipments</li> <li>- prepares documentation for goods transported</li> <li>- compiles lists and schedules</li> </ul>	<ul style="list-style-type: none"> <li>- practices economic thinking and efficiency (making use of opportunities to consolidate consignments into larger loading units)</li> <li>- communicates effectively and co-ordinates people involved in the logistics chain and goods' movements, e.g. contacts the haulage contractor, when goods are ready to be handed over</li> </ul>	<ul style="list-style-type: none"> <li>- conceives and implements transport solutions</li> <li>- organizes shipping of goods to final destinations by air, sea and land; for example: chooses the mode of shipping, compares offers from different hauliers</li> <li>- takes into account legal, environmental and economic concerns</li> <li>- controls and monitors the cooperation of persons and institutions involved in the logistics chain</li> <li>- designs, directs and coordinates all operations needed to organize international freight transport</li> <li>- documents the process in databases, e.g. SAP or warehouse management software</li> </ul>	

For the fields of competency of this specific work process I would change this:

Work Processes		Fields of competency		V5
	He/she...			

Work Processes		Fields of competency		V5
	He/she...			
<b>8. Deal with insurances and customs procedures</b>	<ul style="list-style-type: none"> <li>- knows insurance</li> <li>- applies the customs procedures and regulations</li> </ul>	<ul style="list-style-type: none"> <li>- procures insurances for services rendered</li> <li>- takes into account customs legislation and regulations governing cross-border trade</li> <li>- Ensures a „z-Nr.“</li> </ul>	<ul style="list-style-type: none"> <li>- takes over responsibility for insurance and compliance with customs procedure</li> <li>- issues the customs documents</li> <li>- represents the client when dealing with customs</li> <li>- liaises with customers, banks and suppliers</li> </ul>	

For the fields of competency of this specific work process I would change this:

Work Processes		Fields of competency		V5
	He/she...			
<b>9. Enhance the efficiency and range of services offered by company</b>	<ul style="list-style-type: none"> <li>- evaluates own and other companies offers</li> </ul>	<ul style="list-style-type: none"> <li>- knows the logistics market</li> <li>- identifies and evaluates service offers on the transport and logistics market</li> <li>- optimises time and cost of transport</li> <li>- develops offers</li> </ul>	<ul style="list-style-type: none"> <li>- practices self-organisation and initiative</li> <li>- applies basic research methodologies</li> <li>- monitors the market and plays an active role in enhancing the range of services offered by their company</li> <li>- assists in creating networks to consolidate, dispatch and deliver goods</li> <li>- assists in the development of logistics concepts, using conceptual thinking</li> <li>- takes part in projects regarding the business operations, e.g. the harmonization of different logistics areas</li> </ul>	

For the fields of competency of this specific work process I would change this:

Work Processes	Fields of competency			V5
	He/she...			
<b>10. Plan and schedule re-sources</b>	<ul style="list-style-type: none"> <li>– schedules the personnel (short-time)</li> <li>– schedules resources, e.g. floor-borne vehicles</li> </ul>	<ul style="list-style-type: none"> <li>– practices store management</li> <li>– medium-term planning of personnel</li> </ul>	<ul style="list-style-type: none"> <li>– conducts personnel talks</li> </ul>	

For the fields of competency of this specific work process I would change this:

22. Among the work processes, the LQF distinguishes between **levels** according to the levels of the **European Qualifications Framework**. The European Qualifications Framework basically consists of eight qualification levels. Each of these levels is described by the learning outcomes descriptors "knowledge", "skills" and "competence" necessary in order to reference a qualification to a specific level. On the EQF level 1 is the lowest and level 8 the highest qualification level. Generally it can be said that skilled worker qualifications are usually referenced to the levels 3 and 4.

No.	Work Processes	EQF descriptors (condensed) (K: knowledge; S: skills; C: competence)	
Level 1		C: Work or study under <b>direct supervision</b> in a structured context K: Basic general knowledge S: Basic skills required to carry out <b>simple tasks</b>	
Level 2	1 Pick and pack orders	C: Work under <b>supervision</b> with some autonomy K: Basic factual knowledge of a field of work or study S: Basic cognitive and practical skills, <b>use relevant information</b> , solve <b>routine problems</b> using simple rules and tools	<input type="checkbox"/> I agree with all work processes allocated to that EQF-level <input type="checkbox"/> I would move the following work process to a lower level: <input type="text"/> <input type="checkbox"/> I would move the following work process to a higher level: <input type="text"/>
Level 3	2 Receive and transfer goods and document it 3 Transload, repack, store and retrieve goods (1) Pick and pack orders 4 Ship orders 5 Control and admin-	C: <b>Responsibility for completion</b> of tasks; adapt own behaviour K: Knowledge of facts, principles, processes in a field of work S: A range of cognitive and practical skills required to accomplish tasks and solve problems by <b>selecting and applying basic methods, tools, materials and information</b>	<input type="checkbox"/> I agree with all work processes allocated to that EQF-level <input type="checkbox"/> I would move the following work process to a lower level: <input type="text"/> <input type="checkbox"/> I would move the following work process to a higher level: <input type="text"/>

		istrate goods and shipment		
		6 Draw up offers and prepare contracts, supervise customer-relations		
Level 4	7	Organize and implement the shipment and storage of goods	C: <b>Supervise the routine work of others</b> , some responsibility for the evaluation and improvement of work K: Factual and theoretical knowledge in broad contexts within a field of work	<input type="checkbox"/> I agree with all work processes allocated to that EQF-level <input type="checkbox"/> I would move the following work process to a lower level: _____
	8	Deal with insurances and customs procedures	S: A range of cognitive and practical skills required to <b>generate solutions to specific problems</b>	<input type="checkbox"/> I would move the following work process to a higher level: _____
	(6)	Draw up offers and prepare contracts, supervise customer-relations		
Level 5	(7)	Organize and implement the shipment and storage of goods	C: <b>Management and supervision</b> in contexts of work where there is <b>unpredictable change</b> ; review and <b>develop performance</b> of self and others	<input type="checkbox"/> I agree with all work processes allocated to that EQF-level <input type="checkbox"/> I would move the following work process to a lower level: _____
	9	Enhance the efficiency and range of services offered by company	K: Comprehensive, specialised, factual and theoretical knowledge within a field of work and an awareness of the boundaries of that knowledge	<input type="checkbox"/> I would move the following work process to a higher level: _____
	10	Plan and schedule resources	S: A comprehensive range of cognitive and practical skills required to <b>develop creative solutions to abstract problems</b>	
Level 6	(9)	Enhance the efficiency and range of services offered by	C: <b>Responsibility for decision-making</b> in unpredictable work contexts and for <b>managing professional development</b> of	<input type="checkbox"/> I agree with all work processes allocated to that EQF-level

company (10) Plan and schedule resources	individuals and groups K: Advanced knowledge of a field of work or study, involving a critical understanding of theories and principles S: Advanced skills, <b>mastery and innovation</b> , required to <b>solve complex and unpredictable problems</b> in a specialised field of work	<input type="checkbox"/> I would move the following work process to a lower level: <input type="checkbox"/> I would move the following work process to a higher level:
Level 7	C: Manage and transform work or study contexts that are complex, unpredictable and require <b>new strategic approaches</b> ; take responsibility for contributing to professional knowledge and practice and/or for <b>reviewing the strategic performance of teams</b> K: <b>Highly specialised knowledge</b> , some of which is at the forefront of knowledge in a field of work or study, as the basis for original thinking and/or research <b>Critical awareness</b> of knowledge issues in a field and at the interface between different fields S: Specialised problem-solving skills required in <b>research and/or innovation</b> in order to develop new knowledge and procedures and to integrate knowledge from different fields	<input type="checkbox"/> I agree with all work processes allocated to that EQF-level <input type="checkbox"/> I would move the following work process to a lower level: <input type="checkbox"/> I would move the following work process to a higher level:
Level 8	C: Demonstrate substantial authority, innovation, autonomy, scholarly and professional integrity and sustained commitment to the <b>development of new ideas or processes at the forefront of work</b> or study contexts including research K: Knowledge at the most advanced frontier of a field of work or study and at the <b>interface between fields</b> S: The most advanced and specialised skills and techniques, including synthesis and evaluation, required to solve critical problems in <b>research and/or innovation</b> and to extend and <b>redefine existing knowledge</b> or professional	<input type="checkbox"/> I agree with all work processes allocated to that EQF-level <input type="checkbox"/> I would move the following work process to a lower level: <input type="checkbox"/> I would move the following work process to a higher level:

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practice

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## Background Information

23. Your country:

- Austria
- France
- Germany
- Hungary
- Italy
- Other

Please specify:

24. Type of your organisation (please tick):

- Transport and logistics company
- Special interest group in transport and logistics
- Policy organisation in transport and logistics
- Policy organisation in questions of European qualifications
- Other

Please specify:

25. Your position in your organisation

- Management
- Administration
- Specialised worker
- Expert in qualifications
- Policy maker
- Other

Please specify:

26. One aim of the Metalog project is to build up an experts-network in the field of transport and logistics. Members of this network will be invited to European events (e.g. the Metalog final conference) and consulted for their experts' opinion of recent developments in the field. Cooperation and exchange between the participating experts will be one major task of the experts-network.

I want to be part of the European experts-network.

*With giving your confirmation, your personal data (but not your answers in this survey) will be made visible to the other members of the experts-network.*

Yes

Yes: Your organisation:  
Your name:  
Your E-Mail address:

No


*Your organisation/company will be named as supporting expert and as participant of our experts-network.*

27. Irrespective of the fact whether you will be part of the experts-network, you can receive our project newsletter and therefore be informed about the further developments of Metalog.

Your organisation:  
Your name:  
Your E-Mail address:


Thank you very much for your support of our work on a  
**European Framework of Qualifications in Transport and Logistics**

If you have decided to be part of our experts-network or to obtain our newsletter we will keep you informed about the further development of the Metalog project.

If you have questions and feedback on this web-based survey, please contact our partner 3s research laboratory: Sigrid Nindl ([nindl@3s.co.at](mailto:nindl@3s.co.at)) or Viktor Fleischer ([fleischer@3s.co.at](mailto:fleischer@3s.co.at))

If you have questions and feedback on the Metalog project and its general approach, please contact DEKRA as the project coordinator: Simone Ludl ([Simone.Ludl@dekra.com](mailto:Simone.Ludl@dekra.com))

Metalog Logo [Hyperlink to project website <http://project-metalog.eu>]

Your Metalog Team

## Annex 5: LQF version 6 – basis for evaluation

Work Processes	Fields of competency			V6
	He/she...			
<b>1. Pick and pack orders</b>	<ul style="list-style-type: none"> <li>– picks stocks, knowing warehouse system and locations</li> <li>– uses scanners for identification of stocks, amounts, locations etc.</li> <li>– takes pictures for documentation</li> <li>– practises „cling filming“</li> <li>– maintains order in the warehouse</li> </ul>	<ul style="list-style-type: none"> <li>– picks stocks using picking lists and applying principles like FIFO or LIFO</li> <li>– packs goods and deliveries</li> <li>– complies with basic health and safety regulations</li> <li>– checks pallets and goods for damage</li> </ul>	<ul style="list-style-type: none"> <li>– compile goods into loading units</li> <li>– uses storage equipment and transport equipment, e.g. floor-borne vehicles</li> <li>– uses in-house software</li> <li>– keeps contact with drivers</li> <li>– reports problems</li> <li>– takes decisions on pallet types to use</li> <li>– In one WPA:...picks small goods like screws manually and labels handwritten</li> </ul>	
<b>2. Receive and transfer goods and document it</b>	<ul style="list-style-type: none"> <li>– knows documentation procedures for incoming goods</li> <li>– re-labels incoming goods</li> <li>– handles scanners</li> <li>– maintains order in the warehouse</li> </ul>	<ul style="list-style-type: none"> <li>– checks delivery against documentation, e.g. using the information on master labels and packing lists</li> <li>– checks if delivery is undamaged and free from vermin</li> <li>– accepts goods and documents it using tally sheets and/or software</li> <li>– notes special characteristics for storage, e.g. “non-stackable”</li> <li>– transports goods to company-internal destination, knowing the warehouse system and proper storage areas</li> <li>– complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>– performs quality and quantity conformity inspection</li> <li>– records damaged packages and takes pictures</li> <li>– detects and reports anomalies / faults in goods received</li> <li>– uses storage equipment and transport equipment, e.g. floor-borne vehicles</li> <li>– uses in-house software</li> </ul>	
<b>3. Transload, repack, store</b>	<ul style="list-style-type: none"> <li>– knows the warehouse system and its storage requirements</li> </ul>	<ul style="list-style-type: none"> <li>– distinguishes physical quantities and types of cargo for proper storage in the ware-</li> </ul>	<ul style="list-style-type: none"> <li>– evaluates availability, tracing and status of goods to answer requests of internal / ex-</li> </ul>	

Work Processes		Fields of competency		V6
	He/she...			
<b>and retrieve goods</b>	<ul style="list-style-type: none"> <li>– unpacks and sorts goods</li> <li>– is able to carry through documentation procedures in the warehouse</li> <li>– handles scanners</li> <li>– maintains order in the warehouse</li> </ul>	<ul style="list-style-type: none"> <li>house</li> <li>– stores goods efficiently and as required in consideration of the warehouse system</li> <li>– carries out checks (inventory, counts, etc.), keeps track/ documentation of goods' movements, monitors product flows and stock levels</li> <li>– communicates well and efficiently with co-workers and supervisors</li> <li>– complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>ternal customers</li> <li>– works in a customer-orientated manner</li> <li>– uses storage equipment and transport equipment, e.g. floor-borne vehicles</li> <li>– uses in-house software</li> </ul>	
<b>4. Ship orders</b>	<ul style="list-style-type: none"> <li>– practises documentation procedures in outgoing goods</li> <li>– maintains order in the warehouse</li> </ul>	<ul style="list-style-type: none"> <li>– labels, marks, secures and seals deliveries in accordance with regulations and statutory stipulations</li> <li>– loads, stows delivers in means of transport in accordance with accompanying documentation</li> <li>– complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>– uses in-house software</li> <li>– uses storage equipment and transport equipment, e.g. floor-borne vehicles</li> </ul>	
<b>5. Control and administrate goods and shipment</b>	<ul style="list-style-type: none"> <li>– fulfils and performs administrative tasks</li> <li>– applies charges and prices</li> <li>– practices documentation and verification of goods movements and tasks</li> <li>– knows the company's controlling and documentation procedures</li> <li>– knows and applies Incoterms</li> <li>– complies with basic health and safety</li> </ul>	<ul style="list-style-type: none"> <li>– practices logistics controlling, for example: ensures the tracking of goods, checks and documents the bill of lading</li> <li>– issues and checks invoices and receipts, for example from haulage contractors</li> <li>– coordinates and controls all services provided</li> <li>– liaises with customers</li> <li>– documents the process in databases, e.g.</li> </ul>	<ul style="list-style-type: none"> <li>– carries-out payments and dunning procedures</li> <li>– collaborates in the calculation of costs and returns in commercial control procedures</li> <li>– identifies and defines cargo with regard to destination of routes and goods</li> <li>– records company related statistical data</li> </ul>	

Work Processes		Fields of competency		V6
	He/she...			
	<ul style="list-style-type: none"> <li>regulations</li> <li>– knows legal requirements</li> <li>– respects environmental aspects</li> </ul>	SAP or warehouse management software		
<b>6. Draw up offers and prepare contracts, supervise customer-relations</b>	<ul style="list-style-type: none"> <li>– carries through the cost-calculation</li> <li>– applies customer complaint regulations</li> <li>– complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>– calculates prices, i.e. calculates and verifies elements that constitute the cost of a complex logistical service,</li> <li>– processes customer complaints and notices claims and arranges for settlement</li> <li>– communicates and liaises with customers regarding offers and complaints</li> </ul>	<ul style="list-style-type: none"> <li>– manages negotiations with customers</li> <li>– stipulates and supervises contracts</li> <li>– collaborates in the calculation of costs and returns and in commercial control procedures</li> </ul>	
<b>7. Organize and implement the shipment and storage of goods</b>	<ul style="list-style-type: none"> <li>– knows legal requirements</li> <li>– respects environmental aspects</li> <li>– prepares documentation for goods transported</li> <li>– compiles lists and schedules</li> <li>– complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>– practices economic thinking and efficiency (making use of opportunities to consolidate consignments into larger loading units)</li> <li>– communicates effectively and co-ordinates people involved in the logistics chain and goods' movements, e.g. contacts the haulage contractor, when goods are ready to be handed over</li> </ul>	<ul style="list-style-type: none"> <li>– conceives and implements transport solutions</li> <li>– organizes shipping of goods to final destinations by air, sea and land; for example: chooses the mode of shipping, compares offers from different hauliers</li> <li>– takes into account legal, environmental and economic concerns</li> <li>– controls and monitors the cooperation of persons and institutions involved in the logistics chain</li> <li>– designs, directs and coordinates all operations needed to organize international freight transport</li> <li>– documents the process in databases, e.g. SAP or warehouse management software</li> </ul>	
<b>8. Deal with insurances and</b>	<ul style="list-style-type: none"> <li>– applies the customs procedures and regula-</li> </ul>	<ul style="list-style-type: none"> <li>– procures insurances for services rendered</li> </ul>	<ul style="list-style-type: none"> <li>– takes over responsibility for insurance and</li> </ul>	

Work Processes		Fields of competency		V6
	He/she...			
<b>customs procedures</b>	<ul style="list-style-type: none"> <li>tions</li> <li>– complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>– takes into account customs legislation and regulations governing cross-border trade</li> <li>– ensures a „Z-number“ for export</li> </ul>	<ul style="list-style-type: none"> <li>– compliance with customs procedure</li> <li>– issues the customs documents</li> <li>– represents the client when dealing with customs</li> <li>– liaises with customers, banks and suppliers</li> </ul>	
<b>9. Enhance the efficiency and range of services offered by company</b>	<ul style="list-style-type: none"> <li>– evaluates own and other companies offers</li> <li>– complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>– knows relevant parts of the logistics market</li> <li>– identifies and evaluates service offers on the transport and logistics market</li> <li>– optimises time and cost of transport</li> <li>– develops offers</li> <li>– practices self-organisation</li> </ul>	<ul style="list-style-type: none"> <li>– practices initiative</li> <li>– applies basic research methodologies</li> <li>– monitors the market and plays an active role in enhancing the range of services offered by their company</li> <li>– assists in creating networks to consolidate, dispatch and deliver goods</li> <li>– assists in the development of logistics concepts, using conceptual thinking</li> <li>– takes part in projects regarding the business operations, e.g. the harmonization of different logistics areas</li> </ul>	
<b>10. Plan and schedule resources</b>	<ul style="list-style-type: none"> <li>– schedules the personnel (short-time)</li> <li>– schedules resources, e.g. floor-borne vehicles</li> <li>– complies with basic health and safety regulations</li> </ul>	<ul style="list-style-type: none"> <li>– practices store management</li> <li>– medium-term planning of personnel</li> </ul>	<ul style="list-style-type: none"> <li>– conducts personnel talks</li> </ul>	

## Level-structure of a sector related qualification framework in logistics – draft, V2

No.	Work Processes	EQF descriptors (condensed)
K: knowledge S: skills C: competence		
Level 1		C: Work or study under <b>direct supervision</b> in a structured context K: Basic general knowledge S: Basic skills required to carry out <b>simple tasks</b>
Level 2	1 Pick and pack orders	C: Work under <b>supervision</b> with some autonomy K: Basic factual knowledge of a field of work or study S: Basic cognitive and practical skills, <b>use relevant information</b> , solve <b>routine problems</b> using simple rules and tools
Level 3	2 Receive and transfer goods and document it 3 Transload, repack, store and retrieve goods (1) Pick and pack orders 4 Ship orders 5 Control and administrate goods and shipment 6 Draw up offers and prepare contracts, supervise customer-relations	C: <b>Responsibility for completion</b> of tasks; adapt own behaviour K: Knowledge of facts, principles, processes in a field of work S: A range of cognitive and practical skills required to accomplish tasks and solve problems by <b>selecting and applying basic methods, tools, materials and information</b>
Level 4	7 Organize and implement the shipment and	C: <b>Supervise the routine work of others</b> , some

		storage of goods	responsibility for the evaluation and improvement of work
	8	Deal with insurances and customs procedures	
	(6)	Draw up offers and prepare contracts, supervise customer-relations	K: Factual and theoretical knowledge in broad contexts within a field of work S: A range of cognitive and practical skills required to <b>generate solutions to specific problems</b>
Level 5	(7)	Organize and implement the shipment and storage of goods	C: <b>Management and supervision</b> in contexts of work where there is <b>unpredictable change</b> ; review and <b>develop performance</b> of self and others
	9	Enhance the efficiency and range of services offered by company	
	10	Plan and schedule resources	K: Comprehensive, specialised, factual and theoretical knowledge within a field of work and an awareness of the boundaries of that knowledge S: A comprehensive range of cognitive and practical skills required to <b>develop creative solutions to abstract problems</b>
Level 6	(9)	Enhance the efficiency and range of services offered by company	C: <b>Responsibility for decision-making</b> in unpredictable work contexts and for <b>managing professional development</b> of individuals and groups
	(10)	Plan and schedule resources	K: Advanced knowledge of a field of work or study, involving a critical understanding of theories and principles S: Advanced skills, <b>mastery and innovation</b> ,

	required to <b>solve complex and unpredictable problems</b> in a specialised field of work
Level 7	<p>C: Manage and transform work or study contexts that are complex, unpredictable and require <b>new strategic approaches</b>; take responsibility for contributing to professional knowledge and practice and/or for <b>reviewing the strategic performance of teams</b></p> <p>K: <b>Highly specialised knowledge</b>, some of which is at the forefront of knowledge in a field of work or study, as the basis for original thinking and/or research <b>Critical awareness</b> of knowledge issues in a field and at the interface between different fields</p> <p>S: Specialised problem-solving skills required in <b>research and/or innovation</b> in order to develop new knowledge and procedures and to integrate knowledge from different fields</p>
Level 8	<p>C: Demonstrate substantial authority, innovation, autonomy, scholarly and professional integrity and sustained commitment to the <b>development of new ideas or processes at the forefront of work</b> or study contexts including research</p> <p>K: Knowledge at the most advanced frontier of a field of work or study and at the <b>interface be-</b></p>

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**tween fields**

S: The most advanced and specialised skills and techniques, including synthesis and evaluation, required to solve critical problems in **research and/or innovation** and to extend and **redefine existing knowledge** or professional practice

## Annex 6: List of experts in national workshops or interviews (AT, FR, DE, IT, HU)

	Name of expert	Function	Organisation	Sector/Organisational Field	National Workshop	Interview	Country
1-5	5 employees	managers and specialised workers of a transport & logistics company	Lagermax, Salzburg	Transport & Logistics	X		AT
6	Harry Matzl	Head of Division Logistics Services, Centre Albern, Vienna	SCHENKER & CO AG	Transport & Logistics		X	AT
7	Helmut Beneschek	Head Logistics Services Centre	SCHENKER & CO AG, Geschäftsstelle Linz, Upper Austria	Transport & Logistics		X	AT
8	Alexander Hopfer	Head Logistics Services Centre	SCHENKER & CO AG, Geschäftsstelle Graz, Styria	Transport & Logistics		X	AT
9	Jürgen Longhi	Head of Contract Logistics/SCM, Borders/Customs	SCHENKER & CO AG, Vorarlberg	Transport & Logistics		X	AT
10	Manfred Enengel	Head Logistics Services / SCM	SCHENKER & CO AG, , Klagenfurt, Carinthia	Transport & Logistics		X	AT
11	Workshop participant 1	logistics warehouse manager			X		FR
12	Workshop participant 2	Logistics trainer		Logistics	X		FR
13	Workshop participant 3	Logistics trainer		Logistics	X		FR
14	Workshop participant 4	Employed in an HR department within the logistics sector		Logistics	X		FR
15	Interviewpartner 1	Head of Department for Forwarding		Transport & Logistics		X	DE

		and Logistics with a Logistics Bachelor from a professional vocational college- trained forwarding agent					
16	Interviewpartner 2	Coordinator of internal affairs, trained management assistant in wholesale and foreign trade, specialised in foreign trade		Wholesale & foreign trade		X	DE
17	Paolo Cantù	SC manager	LTP SpA	Mechanical	X		IT
18	Simone Bruschi	Transport & Warehouse Technician	CEVA Logistics	Transport & Logistics	X		IT
19	Andrea Dalia	Transport & Warehouse Technician	Nage SpA	Transport & Logistics	X		IT
20	Nicolò Scalmani	Warehouse Assistant/Operator	Formec Biffi SpA	Food Industry	X		IT
21	Miruna Bira	Packaging Supervisor	Formec Biffi SpA	Food Industry	X		IT
22	Luca Lanini	Professor and Director	Sacro Cuore Catholic U. IST Cesena	University / ITS		X	IT
23	Carlo Merli	CEO	APM Terminals, Intermodal Operator	??		X	IT
24	Francesca Timpano	Professor Vice Major	Sacro Cuore Catholic U., Municipality of Piacenza	Mechanical		X	IT
25	Alberto Preti	President	ENLoCC (ITL)	European Network of Logistics Competence Centres		X	IT
	To be extended						

