DOCUMENT RESUME

ED 398 437 CE 072 315

AUTHOR Papaionnou, Skevos; Patsatzis, N.
TITLE Training in the Motor Vehicle Repair and Sales Sector in Greece. Report for the FORCE Programme.
INSTITUTION European Centre for the Development of Vocational Training, Berlin (Germany).
REPORT NO ISBN-92-826-9159-4
PUB DATE 94
NOTE 77p.
AVAILABLE FROM UNIPUB, 4611-F Assembly Drive, Lanham, MD 20706-4391; 800-274-4888; fax: 301-459-0056 (Catalogue No. HX-83-94-911-EN-C: 8 European Currency Units).
PUB TYPE Reports - Research/Technical (143)

EDRS PRICE MF01/PC04 Plus Postage.
DESCRIPTORS *Auto Mechanics; Case Studies; *Continuing Education; Educational Needs; Foreign Countries; Job Skills; *Job Training; Labor Needs; *Motor Vehicles; Postsecondary Education; Program Effectiveness; Program Evaluation; *Sales Occupations; Secondary Education; Vocational Education
IDENTIFIERS *Greece

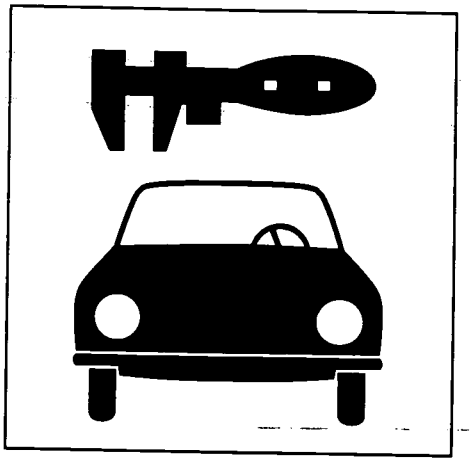
ABSTRACT

A study listed and analyzed the vocational training and continuing training systems for staff in the motor vehicle repair and sales sector in Greece. Heavy taxation on motor vehicles led to difficulty in replacing vehicles that resulted in a very high demand for vehicle repairs, which, in conjunction with the ambiguous legislation governing the operation of the repair shops, led to the establishment of a huge number of small vehicle repair shops that operated in a traditional way, and in many cases, without operating licenses. After May 1993, legislation made it difficult for most vehicle repair shops to survive since they would not have the appropriate license. Legislation laid down the requirements for practicing the occupation of motor mechanic. About 72,110 staff were employed in the sector: 60,370 in motor vehicle repair and maintenance repair shops, and the remaining 11,800 in motor vehicle retail companies. The demand for continuing training due to the impact of rapid technological developments resulted in underemployment, unemployment, or departure from the field of older traditional technicians. Initial study was offered by private and state schools. Four firms were involved in the case studies: VIAMAX A.V.E.E. (Rover); D. Nafpliotis E.P.E. (Peugeot); M. Triantafyllou E.E. (Opel); and Sinopoulos Service E.P.E. Case studies described the company, continuing training policy, and evaluation/applicability to other companies. The survey confirmed the urgent need for radical reform of the education system. (Contains 21 references.) (YLB)

FORCE
FORMATION CONTINUE EN EUROPE
European Commission

GREECE
REPORT

MOTOR VEHICLE REPAIR AND SALES SECTOR



GR

Drawn up by **University of Crete** and **Association of Car Importers and Agents**
coordinated by **ITB, DTI** and **CEDEFOP.**
TASK FORCE – Human Resources, Education, Training and Youth.

MOTOR VEHICLE REPAIR AND SALES SECTOR

TRAINING IN THE MOTOR VEHICLE REPAIR AND SALES SECTOR IN GREECE

REPORT FOR THE FORCE PROGRAMME

drawn up by
Skevos Papaionnou, N. Patsatzis
University of Crete, sociology department,
Association of Car Importers and Agents

1993

First edition, Berlin 1994
Published by:
CEDEFOP — European Centre for the Development of Vocational Training,
Jean Monnet House, Bundesallee 22, D-10717 Berlin
Fax 49-30 + 88 41 22 22
Tel. 49-30 + 88 41 20 · Telex 18 41 63 eucen d
The Centre was established by Regulation (EEC) No 337/75
of the Council of the European Communities

Cataloguing data can be found at the end of this publication.

Luxembourg: Office for Official Publications of the European Communities, 1994

ISBN 92-826-9159-4

Printed in the United Kingdom

FORCE

Formation continue en Europe
Commission of the European Communities
TASK FORCE
Human Resources, Education, Training and Youth
Rue de la Loi, 200; B-1049 Bruxelles

THE IDEA FORCE

The future economic strength and the potential for social progress of the European Community depends on a consistent impovement in the competence and qualifications of its 132.000.000 labour force. Better continuing vocational training is one of the essential conditions for the success of the Single Market 1993.
The European Commission is determined to support and give fresh impetus to the efforts which companies throughout the Community are making to improve continuing training.
FORCE is the European Community's action programme for the development of continuing vocational training. It is focussed on companies, especially on small and medium-sized companies. It involves trainers and training bodies, employer and union representatives - everyone concerned with improving the competence of the labour force.

WHAT DOES FORCE OFFER?

FORCE promotes working partnerships in continuing training between companies, training bodies, public authorities and social partners.
These will include: supporting continuing training innovation through a European transnational network, an exchange programme, transnational and transfrontier pilot projects and projects concerned with the evolution of qualifications; assuring closer policy co-operation between Member States by evolving a common statistical means of analysing what is being done in terms of continuing training, through regular analysis of relevant contractual policy and collective agreements, and through enquiries into sectoral needs; supporting the establishment of regional consortia and transnational continuing training partnerships which specialise in transferring exemplary good practice to economically weak regions.

JOINING

You can take part in the FORCE network and apply for financial assistance to join its innovation and transfer exchanges and projects if you are:
a large, medium-sized or small company, a training body working with industry or commerce, an employer or trade union body, a training or human resource expert or manager.
Through FORCE you can help improve continuing training in your company, sector or local labour market. At the same time you can help to contribute to the improvement and availability of continuing training – and thus to shaping the European Community.

CEDEFOP

European Centre for the Development of Vocational Training
Jean Monnet House, Bundesallee 22, D-10717 Berlin

Institutional status

CEDEFOP is an autonomous body, independent of the departments of the Commission of the European Communities, but its task and activities are closely integrated with those of the Commission, to which the Centre contributes its technical and scientific expertise.

Working guidelines for the Centre are laid down by its Management Board, whose members represent the EC Commission (3), trade unions (12) employers' organizations (12) and governments (12). The Management Board decides on the Work Programme, draws up and approves budgets and adopts the Annual Report.

The members of the Management Board are appointed by the organizations they represent and remain in office for two years. The chairmanship of the Board changes each year.

Institutional tasks

- **Information:**
In the field of vocational training, information is one of the Centre's vital tasks. Its documentation service and a constantly updated bibliographical database receive information from a network of national correspondents, and the information is then made available to a very wide audience, in part via highly sophisticated computerized channels. Its carefully planned publishing policy also ensures that the Centre's voice is heard on major issues in the field of vocational training. It produces its own regular publications (»Vocational Training«, »CEDEFOP flash« and »CEDEFOP flash special«) and occasional publications such as research reports, monographs and manuals.

- **Research:**
CEDEFOP, as a centre for the promotion and coordination of research within the Community, provides support in the form of information, expertise and encouragement for the planning and implementation of vocational training initiatives in Member States. In so doing it serves as a focus for innovation.

Consultation:
CEDEFOP, as an organization supporting the Commission, has the task of promoting a concerted approach to vocational training problems. It takes every opportunity to promote and encourage training.

ACKNOWLEDGEMENTS

This survey was conducted as part of the FORCE Community Programme and particularly the European sectoral surveys on continuing vocational training plans.

The aim of this survey, which was carried out in Greece as well as in the other EC Member States, was to list and analyze the vocational training and continuing training systems for staff in the motor vehicle repair and sales sector.

On a European level, scientific responsibility for this sectoral survey was assigned to a four-member central research team comprising Prof. Dr. F. Rauner, Senior Lecturer S. Papaioannou, K. Olesen and O. H. Ferret, under the supervision of the Institut für Technik und Bildung of the University of Bremen. Coordination on a European level was undertaken by the European Centre for the Development of Vocational Training (CEDEFOP), it secured the technical assistance for the preparation, implementation and assessment of the sectoral surveys.

On a national level, scientific responsibility was assigned by the Bremen Institute to Senior Lecturer Skevos Papaioannou of the Sociology Department of the University of Crete.

The two researchers who were proposed by the social partners with the approval of the Ministry of Labour are Senior Lecturer Skevos Papaioannou, proposed by GSEE (Geniki Synomospondia Ergaton Ellados – Greek Confederation of Labour), and Dr. Nikos Patsatzis, Director of the Association of Car Importers and Agents; proposed by SEV (Syndesmos Ellinikon Viomichanion – Federation of Greek Industries).

Coordination on a national level was undertaken by ELKEPA (Elliniko Kentro Paragogikotitas – Greek Centre for Productivity); it promoted the cooperation of the interested parties and companies in carrying out the survey, and it also organized the necessary meetings, both for the initial briefing and for the evaluation of the survey.

The procedure adopted in selecting the case studies and implementing and structuring the "national sectoral survey" was based on specifications elaborated by the central research team for all the sectoral surveys in the EC Member States.

On the basis of this procedure, the area for examination was initially defined by grouping the motor vehicle repair and sales companies to ensure that this listing was compatible with those of the other Member States. The main features of the sector were then analyzed on the basis of the primary statistics which were gathered by the shared service offices of the motor vehicle repair shops and car sales establishments.
Particular emphasis was placed on the legislation governing the operation of repair shops and the vocational training of their staff. The analysis of the main characteristics of the staff was considered necessary for purposes of subsequent evaluation of the vocational training/continuing training of staff.

Finally, the survey on the vocational training/continuing training of staff in the motor vehicle repair and sales sector is mainly of a qualitative nature, with particular emphasis on the shortcomings in the sector examined. For a more detailed, quantitative survey of the sector, the data on the training/skills upgrading of a statistically representative sample of the motor vehicle repair and sales companies must be processed and evaluated.

This survey is, moreover, felt to be extremely necessary and urgent for a sector which is so important to the Greek economy.

When carrying out this survey, the researchers encountered serious difficulties because of the lack of any major, systematic surveys in this sector, the lack of systematic statistics, and the fact that the existing data were only partly reliable.

The authors wish to express their gratitude to the shared service offices of the repair shops, and to the private skills-upgrading bodies, for their support in this research.

Particular thanks is due to

SEAA (Syndesmos Episkevaston Antiprosopon Aftokiniton -Association of Motor Vehicle Repairers and Agents),

OVEAM V.E. (Omospondia Viotechnon Episkevaston Aftokiniton kai Michanimaton Voreiou Ellados – Federation of Car and Machinery Repairers of Northern Greece),

OVEAME (Omospondia Episkevaston Aftokiniton kai Michanimaton Ellados – Federation of Car and Machinery Repairers of Greece),

SIDKA (Syllogos Idioktiton Diagnostikon Kentron Aftokiniton – Association of Owners of Car Diagnosis Centres)

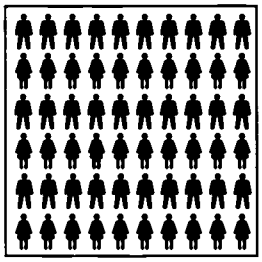
for providing important statistical data and, finally, to all those who played a part in the research work by completing the questionnaires, by giving lengthy interviews and by submitting their comments and criticisms.

7

CONTENTS

PART 1:

SECTORAL CONTEXT



1. **General description and definition**
2. **Structure and chief characteristics**
3. **Legislation on operation of motor vehicle repair and distribution companies**
4. **Analysis of the staff**
5. **Changing conditions and their effects on requirements for specialization and training of staff**
6. **Initial and continuing training of staff**

1. GENERAL DESCRIPTION AND DEFINITION

The motor vehicle sector in Greece consists mainly of companies importing new and second-hand vehicles, motor vehicle retailers, and companies offering after-sales service. This last category includes the motor vehicle repair and maintenance repair shops, companies selling new and second-hand spare parts, and companies repairing motor vehicle accessories. In Greece, there is no domestic production of passenger cars, apart from some industrial assembly units which are small by European standards.

Over the last two decades, industrial activity in the field of the manufacture of chassis and bodywork for heavy goods vehicles and buses has been particularly important. This activity is now in decline, mainly because of the policy which the government has followed with regard to this category of vehicle.

This survey aims to give a nationwide picture of the characteristics of these motor vehicle companies, with particular emphasis on the main features of the staff employed, especially their vocational training and skills upgrading.

A necessary preliminary for this survey was, first of all, the definition of the sector and its grouping into categories of employment and size of company. This made it possible to list the individual characteristics and the problems presented by each category of company. This grouping also allows comparison of this survey with the corresponding surveys simultaneously being carried out in other EC Member States, so that conclusions can be drawn on a European level.

The first basic grouping of companies in the motor vehicle sector, according to the legislation which governs their operation, is as follows:

A. Motor vehicle sales departments or repair shops belonging to subsidiaries of the car manufacturers.

B. Motor vehicle sales departments or repair shops belonging to import companies (agents).

C. Authorized sales companies or repair shops belonging to the import companies' network.

D. Independent motor vehicle repair shops.

E. Independent companies trading in new and second-hand motor vehicles.

The second grouping classifies the companies into categories according to the number of staff:

I. 1 to 4 staff.
II. 5 to 9 staff.
III. 10 to 19 staff.
IV. 20 to 50 staff.
V. 50 or more staff.

As can be seen in the first grouping, this survey does not include companies trading in spare parts or the import activity of official agents. Companies engaged in the repair and distribution of two-wheeled vehicles and agricultural machinery are also excluded. These limitations have been set in line with the specifications of the Community "FORCE" Programme, within the scope of which the present survey was carried out.

The main source of information for this national survey is the primary data gathered by the various shared service offices of the motor vehicle distribution, sales and repair companies.

On the basis of the first grouping, companies in the motor vehicle sales and repair sector are distributed as shown in table 1.1.

As can be seen, the majority of the repair shops are independent companies. The importers have a negligible number of private repair shops (categories A, B), i.e. their network consists mainly of authorized repair shops (category C).

The large number of car retailers are divided roughly equally between those which are independent dealers in new and second-hand motor vehicles (category E) and those which belong to the network

Table 1.1 – Distribution of different type of firms in the repair and distribution sector

Type	Category	Repair shops %	Showrooms %
A	Subsidiaries of car manufacturers (controlled by car manufacturers)	0	0.1
B	Exclusive agents of car manufacturers (independent but linked to car manufacturers)	0.4	2.3
C	Authorized repair shops or car dealers (independent but linked to exclusive representatives)	9.6	43.3
D	Non-authorized car repair shops (independent repair shops)	90.0	
E	Non-authorized car dealers (independent car sales companies)		54.3
	Total	100	100

of importers (agents) of new motor vehicles (categories A, B, C).

Tables 1.2 and 1.3 give the percentage distribution by size of motor vehicle sales and repair companies.

It is worth noting the importers' showrooms (category B) are small or medium-sized. The majority of the authorized representatives (category C) have showrooms with less than 4 staff. As can be seen from the quite adequate sample of showrooms selected for the survey, there are no car retailers or importers' retail departments in Greece which have more than 20 members of staff. Although there are no corresponding details for the independent companies trading in second-hand vehicles and re-selling new vehicles (category E), it is estimated that these companies are comparable in size to those mentioned above.

As can be seen from table 1.3, the majority of importers' private repair shops (agents – category B) employ 20 – 50 people. On the other hand, both the authorized (category C) and independent (category D) repair shops are small businesses, most of which do not have more than 9 members of staff.

Table 1.2 – Distribution by size of company in the car sales sector
(based on a representative sample of 618 showrooms: 14% of the total)

Type	Category	I 1 to 4 %	II 5 to 9 %	III 10 to 19 %	IV 20 to 50 %	V over 50 %
A	Subsidiaries of car manufacturers (controlled by car manufacturers)	N/A	N/A	N/A	N/A	N/A
B	Exclusive agents of car manufacturers (independent but linked to car manufacturers)	51	4	45	0	0
C	Authorized car dealers (independent but linked to exclusive agents)	94	6	0	0	0
E	Non-authorized car dealers (independent car sales companies)	N/A	N/A	N/A	N/A	N/A
	Mean value	92	5.6	2.4	0	0

Table 1.3 – Distribution by size of company in the repair sector
(based on a representative sample of 7042 repair shops: 36% of the total)

Type	Category	I 1 to 4 (%)	II 5 to 9 (%)	III 10 to 19 (%)	IV 20 to 50 (%)	V over 50 (%)
A	Subsidiaries of car manufacturers (controlled by car manufacturers)	N/A	N/A	N/A	N/A	N/A
B	Exclusive agents of car manufacturers (independent but linked to car manufacturers)	10.5	21	21	37	10.5
C	Authorized repair shops (independent but linked to exclusive agents)	49	46	5	0	0
E	Non-authorized car repair shops (independent repair shops)	59.8	38.4	1.8	0	0
	Mean value	58.9	38.8	2.2	0.1	0

2. STRUCTURE AND CHIEF CHARACTERISTICS

2.1 Historical development

As we have already mentioned, Greece is not a car manufacturing country. For reasons which are linked with its historical and economic development and its development options, particularly after the Second World War, the conditions were not created for the promotion of technological and economic activity in the car manufacture field. This, of course, falls within a more general policy and concept of the industrialization of the country, in many sectors of heavy industry. The dependent economic and, especially, industrial development of Greece hindered the development of technology and applications which would have led to a restructuring of the productive system, comparable to that of other European countries. On the other hand, the dependent, retail-oriented nature of the Greek economy favours commerce and the service sector rather than manufacturing activity.

Table 2.1

	1988	1989	±%	1990	±%	1991	±%
• Passenger cars							
Registration new cars	57,666	85,645	49	115,314	35	167,737	45
(of which locally assembled)	8,721	9,037	4	12,943	43	12,999	0
Registration imported-second-hand cars	18,377	16,669	-9	17,091	3	9,207	-16
Total passenger car registrations	75,043	102,314	35	132,405	29	176,944	34
Imported second-hand car market share	24%	18%		13%		5%	
Amount for new and second-hand cars (US $ thousands)	388,784	607,845	56	1,047,018	72	1,637,224	56
Amount per unit (US $ thousands)	8,742	7,097	5	9,080	28	9,761	7
Public income from SC Tax (Drs millions)	76,102	116,155	53	139,000	20	162,555	17
Public income from each PC sold (average) Drs.	1,000,776	1,135,280	13	1,049,809	-8	918,680	-12
Public income in Drs from each US $ exported	196	191	-2	133	31	99	-25
• Commercial vehicles							
Registrations new LGV	19,318	25,539	32	28,912	13	26,862	-7
Registrations second-hand LGV	7,368	8,417	14	7,340	-13	5,597	-24
Registrations new HGV	349	575	65	495	-14	627	27
Registrations second-hand HGV	7,194	7,414	3	7,300	-2	6,412	-12
Buses	450	800	78	971	21	1,052	8
Total CV registrations	34,697	42,746	23	45,018	5	40,550	-10
Imported second-hand CV market share	42	37		33			30
Amount for commercial vehicles (US $ thousands)	250,000	382,055	53	482,834	26	513,198	6
Amount per unit (US $*000)	7,772	8,938	15	10,725	20	12,656	18
Public income from SC Tax ± 25% (millions)	8,983	16,693	75	24,901	59	17,364	30
Public income from each GV sold (average)	388,528	324,719	-16	553,145	70	428,213	-23
Public income in Drs. from each US $	36	41	14	52	26	34	-34
• Spare parts							
Amount for spare parts (US $ thousands)	364,274	427,883	17	568,406	33	455,000	-20
Spare part amount share versus PC and LGV	36	30		27		17	
Public income from Import Tax (up to '89) (millions)	14,659	11,248	-23	0	-100	0	
Public income in Drs. from each US $	40	26	-35	0	-100	0	
Note: Imported second-hand spare parts are not included in the figures							
• Financial totals							
Total vehicle registrations (PC & LGV & HGV)	110,772	145,060	31	177,423	22	217,494	23
Total amount expenses (US $ thousands)	1,003,058	1,417,783	41	2,098,258	48	2,605,422	24
Total public income (millions)	99,743	143,096	43	163,901	15	179,919	10
Total public income in Drs from each US $	99	101	1	78	-23	69	-12

Note no. 1: Official amount values do not include the values for CKD sets to be assembled locally. These values are estimated.

The motor vehicle repair and sales sector in Greece has a number of special features which, in addition to the above, are due mainly to the policy pursued by the government at any given time in respect of motor vehicles, since these have always been a source of government revenue.

Table 2.1 shows the total numbers of passenger cars and goods vehicles sold during the last four years, and the public income from duties and special consumer tax.

Public income from SC

In 1991, the government collected about 180 billion drachmas from the import of motor vehicles and spare parts. This will be the only reason for retaining the Special Consumer Tax in Greece over the next few years, despite pressure from the EC to bring this into line with Community legislation, which only sanctions the existence of Value-Added Tax as a feature of the European Single Market.

This heavy taxation on motor vehicles has led, at least in the last 15 years, to very high purchase prices compared with other European countries. Largely because of this, Greek motorists keep their cars for a very long time and also because it has been very difficult to replace them. So the Greek fleet of vehicles is the most antiquated in the EC, with vehicles which are now, on average, about 10 years old.

This difficulty in replacing vehicles has resulted, predictably enough, in a very high demand for vehicle repairs and, of course, an increase in air pollution due to high exhaust emissions.

This high demand for repairs to old vehicles, in conjunction with the ambiguous legislation governing the operation of the repair shops, has led to the establishment of a huge number of small vehicle repair shops which have been operating in a traditional way and, in many cases, without operating licences.

At the same time, the very low rate of replacement of vehicles due to their high purchase price, in conjunction with the import of a large number of sec-

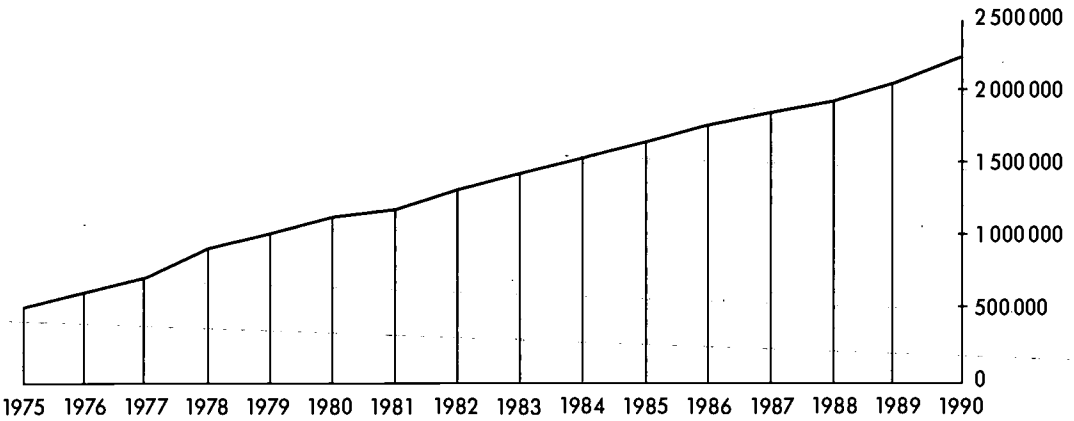
Table 2.2 – Passenger cars (PCs) on the road (Reference date 31.12.91)

Age	Year of construction	PCs in circulation	share of total (%)	5 years age group	progressive total (%)
1	1991	167,737	9.91		9.91
2	1990	115,083	6.80		16.71
3	1989	85,388	5.04		21.75
4	1988	57,435	3.39		25.15
5	1987	50,248	2.97	475,891	28.12
6	1986	73,917	4.37		4.37
7	1985	94,867	5.60		9.97
8	1984	81,593	4.82		14.80
9	1983	78,961	4.67		19.46
10	1982	102,176	6.04	431,514	25.50
11	1981	76,613	4.53		4.53
12	1980	65,371	3.86		8.39
13	1979	105,782	6.25		14.64
14	1978	130,164	7.69		22.33
15	1977	107,706	6.36	485,636	28.70
16	1976	63,339	3.74		3.74
17	1975	53,220	3.14		6.88
18	1974	37,789	2.23		9.12
19	1973	34,236	2.02		11.14
20	1972	33,369	1.97	221,953	13.11
21	1971	26,674	1.58		1.58
22	1970	19,110	1.13		2.71
23	1969	12,641	0.75		3.46
24	1968	8,274	0.49		3.94
25	1967	4,692	0.28	71,391	4.22
26	1966	3,141	0.19		0.19
27	1965	1,193	0.07		0.26
28	1964	1,837	0.11	6,171	0.37
	Total	1,692,556	100.00		

ond-hand vehicles, has meant that Greece, of all countries in Europe, has the highest rate of increase of vehicles on the road.

are steadily on the increase and now amount to 23% of the fleet of passenger cars, as table 2.4 shows.

Table 2.3 – Rate of increase of vehicles on the road between 1975 and 1990



In 1990 the Greek Government, finding that more than 75% of the photochemical pollution of Athens was due to the exhaust fumes of conventional petrol-run passenger cars, gave financial incentives to consumers to promote catalyst technology and replace the old pollution-generating vehicles. These financial incentives mainly involved a reduction of the Special Consumer Tax charged on the purchase price of a vehicle, for purchases accompanied by simultaneous withdrawal of an old pollution-generating vehicle.

A reduction in air pollution and a reduction in the average age of the fleet from 11.1 years in 1990 to 9.9 in 1991, are positive consequences of this policy. Table 2.2 shows the age distribution of passenger cars on the road on 31.12.91, i.e. a year after the introduction of the government's anti-pollution policy. It is important to emphasize that only 28% of the Greek fleet was in the age bracket which was the average for the other European countries.

At the close of the second and final year of enforcement of the withdrawal policy, a total of about 300,000 old pollution-generating vehicles have now been withdrawn. Cars with catalytic converters

However, the enforcement of these government measures to renew the fleet of vehicles and promote catalytic technology had the negative effect of sparking off the crisis which is now facing the repair sector; this sector lacked the necessary experience and training to keep up with developments in vehicle technology. Financial collapse is particularly likely in the case of small independent vehicle repair shops. On the one hand, their main clientele, i.e. owners of old cars, has decreased considerably, and on the other hand, many of them fall short of the strict operating requirements which will be in force in Greece from May 1993 (see chapter 3).

2.2 Structure of the motor vehicle distribution and repair sector

2.2.1 Import, distribution and sale of motor vehicles

It is estimated that in 1992 about 197,000 new passenger cars were sold in Greece, of which 93% were imported and the remaining 7% were produced by a Greek car-assembly plant.
In the case of light goods vehicles, the corresponding estimates give a figure of about 27,000 new vehicles, of which 6% were assembled in Greece.

Table 2.4 – Fleet share of "clean" passenger cars (PCs)

		Clean passenger cars			Convent. cars	
Year[1]	fleet of PCs	annual registr. of "clean" cars[2]	total	share of "clean" PCs (%)	total	share of convent. PCs (%)
1992	*1,777,295*	*194,898*	*412,363*	*23.20*	*1,364,932*	*76.80*
1991	1,692,556	160,114	217,465	12.80	1,475,091	87.20
1990	1,649,935	55,351	57,351	3.40	1,592,584	96.60
1989	1,532,859	1,650	2,000	0.00	1,530,859	100.00
1988	1,437,734	350	350	0.00	1,437,384	100.00

[1] For 1992, the quoted figures given are a forecast.
[2] "Clean" cars are fitted with three-way catalytic converters.

Table 2.5 gives the total number of vehicles on the road in Greece, taking 1991 as the reference year.

Table 2.5 – Greek fleet of cars (Reference date 31.12.91)

Category of vehicles	Fuel	Units	Fleet share %	Units progressiv	Fleet share progressive %
Passenger cars	petrol	1,692,556	68.40	1,692,556	68.40
Light goods vehicles	petrol	611,554	24.70	2,304,110	93.10
Heavy goods vehicles	diesel	148,148	6.00	2,452,258	99.10
Buses	petrol/diesel	22,529	9.00	2,474,787	100.00
Total 4 wheel vehicles		2,474,787	100.00	2,474,787	100.00
Motorcycles (over 50cc)	petrol	265,549	9.70	2,740,336	9.70
Total		2,740,336	100.00	2,740,336	100.00

Imports of second-hand vehicles have declined, particularly in recent years because of the government's anti-pollution policy. It is estimated that in 1992, 7,775 second-hand vehicles were imported, i.e. 3.8% of the market, and 8,175 light goods vehicles, i.e. 23% of the market.

New passenger cars and light goods vehicles are imported and distributed by 50 commercial companies. These importers (category B) are independent of foreign car manufacturers but are under contract as exclusive agents. The exceptions are two import companies, Fiat Auto Hellas and Mercedes Benz Hellas, which are subsidiaries (category A) of the corresponding car manufacturers. All the importers have nationwide networks of showrooms, spare parts departments and repair shops for the sale and servicing of cars.

The network of showrooms consists mainly of independent authorized car sales companies (dealers – category C). These companies work with the importers on the basis of free-trade rules: their main obligation is the exclusive retail sale of the vehicles from the importer.

A number of these independent dealers in the networks have a vertical structure, i.e. in addition to a showroom, they have spare parts sales and vehicle repair departments.

The importers (agents) belong to the "Syndesmos Eisagogeon -Antiprosopon Aftokiniton" ("Association of Car Importers and Agents"), which is a member of the International Organization of Motor Vehicle Manufacturers (OICA).

This situation of exclusive and selective distribution of vehicles is laid down in Council Regulation 123/85/EEC (18.1.85) concerning "the application of Article 85 paragraph 3 of the Treaty to certain categories of agreement on motor vehicle distribution and pre-sales and after-sales customer service". This regulation expires on 30 June 1995.

Second-hand vehicles are imported by about 2,500 independent commercial companies, which are not part of the network of importers (agents). These commercial companies are also engaged in the re-sale of new vehicles which they buy from the network of authorized dealers. Representation of independent car dealers is at a local level, through the first tier of organization, i.e. associations. Thus, in Athens, the "Association of Car Dealers" represents about 500 companies.

Table 2.6 – Distribution of car retailers

Type	Category	Number of showrooms
A	Subsidiaries of car manufacturers (controlled by car manufacturers)	5
B	Exclusive agents of car manufacturers (independent but linked to car manufacturers)	109
C	Authorized car dealers (independent but linked to exclusive agents)	1,992
E	Non-authorized car dealers (independent car sales companies)	2,500
	Total	4,606

Spare parts businesses are not included

In spite of the fact that there is a greater number of independent car sales companies (category E), the turnover of the network of importers is much greater because more than 90% of the imported vehicles are new and are distributed by the agents' retail departments and the authorized showrooms of their networks (categories B and C).

This uneven distribution in sales of new and second-hand motor vehicles has been particularly marked in the last two years because of the government's above-mentioned anti-pollution policy of promoting new vehicles with catalytic converters on the Greek market. Within the scope of this policy, and with the aim of reducing the heavy import of old second-hand vehicles (a circumstance which was one

of the major contributory factors to air pollution in the last decade), the government is holding the taxation of these vehicles at a specially high level to discourage their import. Thus, many of the independent companies importing and selling second-hand vehicles (category E) have been facing and continue to face particular financial problems. In this situation, the shared service offices of the independent dealers are pressing the government for equal tax treatment of imported new and second-hand vehicles. For this to succeed, a basic requirement is that the second-hand vehicles should be in good condition and, in particular, that they should be equipped with new catalytic technology.

On the other hand, some of the importers (agents) are faced with the serious possibility of a future shrinkage in their commercial activities because the number of subsidiaries of car manufacturers in Greece is expected to increase. What has already begun to emerge clearly, not only in Greece but in all the EC Member States, is the intention of car manufacturers to set up subsidiaries, which will not enter into competition with the agents, but will use the existing organized network. It should, however, be emphasized that this does not apply to those Greek businesses which have a modern vertical structure, with showrooms and spare-parts and service departments throughout Greece. It is clear, then, that the car manufacturers themselves are likely to act as agents on the Greek market only in cases of deficient organization or general malfunction of the importer (agent).

2.2.2 Repair and maintenance of motor vehicles

The after-sales servicing of vehicles, i.e. repair and maintenance, is supported by repair shops which are grouped on the basis of the legal form under which they operate, as mentioned above in chapter 1, i.e.:

a. Repair shops belonging to subsidiaries of car manufacturers.
b. Repair shops belonging to importers (agents).
c. Authorized repair shops of the networks of importers.
d. Independent motor vehicle repair shops.

In the case of category C in particular, it should be noted that the cooperation of the authorized repair shop with the importer (agent) is determined by the two parties according to the criteria of free trade and legitimate competition. Within the scope of this cooperation, the agent undertakes to assist the repair shop by:

- providing customers;
- securing the exclusive rights of the repair shop to a defined geographical area;
- providing initial and continuing training;
- supplying equipment (technical manuals etc.).

The authorized repair shop, in turn, should:

- provide an improved standard of service to the customer,
- uphold the good name of the agent's vehicles, and
- repair only vehicles which it represents.

Independent motor vehicle repair shops are represented at the first tier of organization, i.e. by associations, according to their speciality. On the second tier of organization, independent repair shops are represented by three different federations:

- the Panhellenic Federation of Car and Machinery Repairers (POVEAM),
- the Federation of Car and Machinery Repairers of Greece (OVEAME),
- the Federation of Car and Machinery Repairers of Northern Greece (OVEAM V.E.).

The latter two federations are represented worldwide by the European Committee for Motor Trades and Repairs (C.E.C.R.A.).

The fragmented representation on the second tier, due to inability to reach a common policy, leads to considerable difficulty in defending their views.

Only some of the authorized repair shops (amounting to about 10%) belong to the above-mentioned federations.

Table 2.7 – Distribution of vehicle maintenance and repair shops

Type	Category	Number of Repair shops
A	Subsidiaries of car manufacturers (controlled by car manufacturers)	5
B	Exclusive agents of car manufacturers (independent but linked to car manufacturers)	65
C	Authorized repair shops (independent but linked to exclusive agents)	1,710
D	Non-authorized repair shops (independent repair shops)	16,024
	Total	17,804

Special components-repair companies are not included

Table 2.8 shows the geographical distribution of the repair shops in Greece. The heavy concentration in the greater Athens area is due to the fact that half the Greek fleet of vehicles is on the road there.

Table 2.8 – Geographical distribution of the repair shops in Greece

A/A	Territory	Type B	Type C	Type D1	Type D2	Type D3
1	Athens	44	479	5640	0	80
2	Etoloakarnani	0	27	184	0	120
3	Argolis	0	31	159	0	0
4	Arkadia	0	20	0	0	220
5	Arta	0	27	142	0	0
6	Achaia	0	51	0	0	520
7	Viotia	0	24	196	0	0
8	Grevena	0	10	0	50	0
9	Drama	0	20	0	300	0
10	Dodekanissa	0	41	64	0	0
11	Evros	0	24	0	350	0
12	Evia	0	27	208	0	0
13	Evritania	0	7	0	0	0
14	Zacynthos	0	24	0	0	160
15	Ilia	0	31	117	0	0
16	Imathia	0	24	0	150	0
17	Heraclion	3	31	283	0	0
18	Thesprotia	0	10	0	0	0
19	Salonica	14	82	688	2,500	0
20	Ionnina	0	34	146	0	0
21	Kavala	0	24	0	160	0
22	Karditsa	0	27	0	0	0
23	Kastoria	0	20	0	80	0
24	Corfu	0	34	162	0	0
25	Cefalonia	0	7	0	0	70
26	Kozani	0	20	146	200	0
27	Korinthos	0	27	131	0	0
28	Caclades	0	54	0	0	0
29	Kilkis	0	7	0	50	0
30	Lakonia	0	24	0	0	180
31	Larisa	3	41	206	150	0
32	Lasithion	0	10	0	0	0
33	Lesvos	0	20	105	0	0
34	Lefkas	0	14	0	0	70
35	Magnesia	0	37	0	220	0
36	Messinia	0	24	0	0	0
37	Xanthi	0	17	0	100	0
38	Pella	0	17	0	70	0
39	Pieria	0	14	0	150	0
40	Preveza	0	20	128	0	0
41	Rethymno	0	27	86	0	0
42	Rodopi	0	20	0	180	0
43	Samos	0	14	0	0	0
44	Serres	0	17	300	200	0
45	Trikala	0	24	117	0	0
46	Fthiotis	0	34	198	0	0
47	Florina	0	7	0	50	0
48	Chania	0	27	209	0	0
49	Halkis	0	24	0	0	0
50	Chalkidiki	0	10	0	140	0
51	Chios	0	24	0	0	0
	Total	65	1,710	9,675	5,100	1,420

Type C: 10% of these repair shops also belong to the D (D1+D2+D3) category

Type D1: General car repair shops (independent) belonging to the Panhellenic Federation of Car and Machinery Repairers (POBEAM)

Type D2: General car repair shops (independent) belonging to the Federation of Car and Machinery Repairers of Northern Greece (OBEAM B.E.)

Type D3: General car repair shops (independent) belonging to the Federation of Car and Machinery Repairers of Greece (OBEAME)

Many of the above-mentioned vehicle repair shops have no repair shop operating licence. Most of them have a provisional operating licence which expires in May 1993, while there are few repair shops which have an indefinite licence under Presidential Decree 78/88 relating to "determination of the terms and conditions for establishing and operating motor vehicle, motorcycle and moped maintenance and repair shops, and the procedure for granting licences for their establishment and operation", as amended by Presidential Decree 416/91 (see chapter 3). This state of affairs is due to the lack of legislation on the operation of repair shops; this has been the situation in Greece for many years (until the enactment of Law 1575/85 relating to "requirements for pursuance of the occupation of car, motorcycle and moped mechanic, and terms of operation of repair shops for such vehicles"). Thus, many small repair companies were set up without any specifications as to their operation, either as regards the necessary infrastructure of the premises and equipment, or as regards specialist staff. It is anticipated that most of them will close down in future because they will be unable to meet the requirements arising from the introduction of electronic technology in vehicles.

Because of this anarchic situation in the field of vehicle repair, the Chamber of Commerce and Industry and the National Statistical Service were unable to gather statistics on the large number of repair businesses in the sector or the vocational training of the staff employed by them. The primary sources of most of the statistics presented in this survey are the above-mentioned representative federations, and the Association of Car Importers and Agents.

2.2.3 Statistics of the Greek car market

The Greek passenger car market showed a considerable upturn in 1991, mainly because of the government's anti-pollution policy, i.e. the financial incentives for replacing old pollution-generating vehicles. This increase in sales was in the region of 45% in relation to the 1990 figure, and is indeed the largest in Europe. The Greek market's share of the total EC car sales was 1.3%, i.e. 169,000 units. In 1992 there was a further increase in sales of passenger cars, which is estimated at about 17% as compared with 1991 sales. It is estimated that about 197,000 new passenger cars were sold in 1992 (see table 2.9).

In 1991, sales of light goods vehicles fell by approx. 7%, following the downward trend for light goods vehicles in Europe. For 1992 there was a smaller downward trend of about of 2.3%, and total sales of new light goods vehicles were in the region of 27,000 units.

Table 2.9 – European passenger car markets

Country	Month = December					YTD = December – YTD				
	December 1990	Market share of total	December 1991	Market share of total	±% difference 91/90	December – YTD 1990	Market share of total	December – YTD 1991	Market share of total	±% difference 91/90
W. Germany	232,480	29.8%	225,000	27.6%	-3.2%	3,040,783	23.0%	4,160,208	30.8%	36.8%
Italy	144,800	18.6%	158,658	19.4%	9.6%	2,348,172	17.7%	2,340,403	17.3%	-0.3%
France	161,200	20.7%	165,461	20.3%	2.6%	2,309,136	17.4%	2,031,274	15.0%	-12.0%
Great Britain	62,800	8.1%	59,948	7.3%	-4.5%	2,008,934	15.2%	1,594,073	11.8%	-20.7%
Spain	64,820	8.3%	69,718	8.5%	7.6%	982,305	7.4%	881,887	6.5%	-10.2%
Belgium + Lux.	26,200	3.4%	24,269	3.0%	-7.4%	507,904	3.8%	503,018	3.7%	-1.0%
Holland	9,566	1.2%	11,012	1.3%	15.1%	502,671	3.8%	491,928	3.6%	-2.1%
Portugal	12,030	1.5%	22,354	2.7%	85.8%	212,680	1.6%	228,251	1.7%	7.3%
Greece	9,487	1.2%	16,286	2.0%	71.7%	115,314	0.9%	169,000	1.3%	46.6%
Ireland	1,350	0.2%	1,201	0.1%	-11.0%	83,103	0.6%	68,652	0.5%	-17.4%
Denmark	3,100	0.4%	3,827	0.5%	23.5%	80,913	0.6%	83,852	0.6%	3.6%
Total EC	727,833	93.3%	757,734	92.9%	4.1%	12,191,915	92.1%	12,552,546	92.9%	3.0%
Switzerland	16,900	2.2%	19,733	2.4%	16.8%	322,974	2.4%	313,766	2.3%	-2.9%
Austria	13,123	1.7%	15,505	1.9%	18.2%	288,636	2.2%	304,776	2.3%	5.6%
Sweden	13,502	1.7%	15,205	1.9%	12.6%	229,941	1.7%	187,710	1.4%	-18.4%
Finland	5,213	0.7%	4,623	0.6%	-11.3%	139,093	1.1%	92,671	0.7%	-33.4%
Norway	3,220	0.4%	2,957	0.4%	-8.2%	61,860	0.5%	54,100	0.4%	-12.5%
Total W. Europe	779,791	100.0%	815,757	100.0%	4.6%	13,234,419	100.0%	13,505,569	100.0%	2.0%

Sales of imported second-hand vehicles (passenger cars and light goods vehicles) showed a decline of about 60% in 1991 and occupied a 7% share of the market. The corresponding share in 1992 is expected to remain the same.

The share of the various manufacturers in the Greek market for passenger cars and light goods vehicles is shown in tables 2.10 and 2.11 below.

1.

Table 2.10 – December 91 new passenger car registrations YTD/month

	Result total GR market (year)						167,737				Number of territories entered	
	Result total GR market (month)						15,023					
	% of annual registrations						9%					
	Result total Athens market (year)						88,550					
	Athens percentage of total market (year)						52.8%					out of
	Result total Athens market (month)						8,794				50	50
	Athens percentage of total market (month)						58.5%					
Make	Total GR[1] YTD	%	Athens[1] YTD	%	Territories[1] YTD	%	Total GR[2] %		Athens[2] %		Territories[2] %	
1. Nissan	16,893	10.1	8,693	9.8	8,200	10.4	1,563	10.4	950	10.8	613	8.3
2. Fiat	15,311	9.1	8,292	9.4	7,019	8.9	1,286	8.6	781	8.9	505	6.9
3. Toyota	14,756	8.8	8,357	9.4	6,399	8.1	1,065	7.1	617	7.0	448	6.1
4. Renault	10,796	6.4	5,511	6.2	5,285	8.7	730	4.9	396	4.5	334	4.5
5. Opel	9,199	5.5	3,221	3.6	5,978	7.5	882	5.9	373	4.2	509	6.9
6. Alfa Romeo	8,966	5.3	4,506	5.1	4,460	5.8	703	4.7	435	4.9	268	3.6
7. Mazda	8,377	5.0	4,842	5.5	3,535	4.5	563	3.7	330	3.8	233	3.2
8. Hyundai	8,090	4.8	4,058	4.6	4,032	5.1	671	4.5	350	4.0	321	4.4
9. Ford	7,020	4.2	3,505	4.0	3,515	4.4	728	4.8	399	4.5	329	4.5
10. BMW	6,615	3.9	3,697	4.2	2,918	3.7	750	5.0	457	5.2	293	4.0
11. Citroen	6,206	3.7	3,155	3.6	3,051	3.9	924	6.2	548	6.2	376	5.1
12. Peugeot	6,188	3.7	2,974	3.4	3,214	4.1	788	5.2	419	4.8	369	5.0
13. Volkswagen	5,447	3.2	2,745	3.1	2,702	3.4	286	1.9	163	1.9	123	1.7
14. Seat	4,914	2.9	2,952	3.3	1,962	2.5	659	4.4	436	5.0	223	3.0
15. Mercedes	4,830	2.9	2,779	3.1	2,051	2.5	267	1.8	174	2.0	93	1.3
16. Suzuki	4,710	2.8	2,993	3.4	1,717	2.2	366	2.4	255	2.9	111	1.5
17. Rover	4,377	2.6	2,678	3.0	1,699	2.1	425	2.8	272	3.1	153	2.1
18. Audi	3,884	2.3	1,458	1.6	2,426	3.1	188	1.3	83	0.9	105	1.4
19. Lada	3,770	2.2	1,988	2.2	1,782	2.3	572	3.8	327	3.7	245	3.3
20. Skoda	3,765	2.2	2,206	2.5	1,559	2.0	406	2.7	237	2.7	169	2.3
21. Honda	3,573	2.1	2,408	2.7	1,165	1.5	262	1.7	196	2.2	66	0.9
22. Mitsubishi	2,931	1.7	1,539	1.7	1,392	1.8	224	1.5	140	1.6	84	1.1
23. Lancia	2,443	1.5	1,330	1.5	1,113	1.4	263	1.8	161	1.8	102	1.4
24. Subaru	1,345	0.8	562	0.6	783	1.0	76	0.5	40	0.5	36	0.5
25. Daihatsu	1,183	0.7	657	0.7	526	0.7	97	0.6	51	0.6	46	0.6
26. Lada Niva	1,089	0.6	697	0.8	410	0.5	119	0.8	77	0.9	42	0.6
27. Zastavia	634	0.4	448	0.5	186	0.2	119	0.8	93	1.1	26	0.4
28. Volvo	226	0.1	174	0.2	52	0.1	26	0.2	22	0.3	4	0.1
29. Saab	97	0.1	81	0.1	16	0.0	10	0.1	8	0.1	2	0.0
30. Lotus	20	0.0	19	0.0	1	0.0						
31. Polski	18	0.0	6	0.0	12	0.0						
32. Jaguar	15	0.0	15	0.0			2	0.0	2	0.0		
33. Maserati	13	0.0	12	0.0	1	0.0	1	0.0	1	0.0		
34. Isuzu	10	0.0			10	0.0						
35. Wartburg	6	0.0	6	0.0								
36. Dacia	5	0.0			5	0.0						
37. Porsche	3	0.0	2	0.0	1	0.0						
Others	12	0.0	2	0.0	10	0.0	2	0.0	1	0.0	1	0.0
Total	167,737	100	88,550	100	79,187	100	15,023	100	8,794	100	6,229	100
	100%		52.9%		47.2%		100%		59%		49%	

[1] As of December '91

[2] Total registrations for the month of December '91, only.

Table 2.11 – December 91 new LGV registrations YTD month

	min	max	December 91
Result total GR market (year)	26,862	26,862	Number of
Result total GR market (month)	1,599	1,599	territories
% of annual registrations	6%	6%	entered
Total Athens market (year)	7,088	7,088	
Athens percentage of total market (month)	26.4%	26.4%	
Total Athens market (month)	475	475	50 of 50
Athens percentage of total market (month)	29.7%	29.7%	

Make	Total GR[1] YTD	%	Athens[1] YTD	%	Territories[1] YTD	%	Total[2] Greece	%	Total[2] Athens	%	Total[2] territories	%
1 Nissan	6,453	24.0	1,599	22.6	4,854	24.5	428		108	22.7	320	28.5
2 Toyota	5,029	18.7	789	11.1	4,240	21.4	242		44	9.3	198	17.6
3 Mits	2,761	10.3	628	8.9	2,133	10.8	106		31	6.5	75	6.7
4 Fiat	2,674	10.0	1,165	16.4	1,509	7.6	304		140	29.5	164	14.6
5 Volkswagen	2,425	9.0	801	11.3	1,624	8.2	110		24	5.1	86	7.7
6 Ford	2,023	7.5	631	8.9	1,392	7.0	112		47	9.9	65	5.8
7 Mazda	2,007	7.5	366	5.2	1,641	8.3	79		12	2.5	67	6.0
8 Isuzu	1,073	4.0	178	2.5	895	4.5	74		13	2.7	61	5.4
9 Polski FSO	550	2.0	162	2.3	388	2.0	20		11	2.3	9	0.8
10 Zastava	420	1.6	103	1.5	317	1.6	2				2	0.2
11 Suzuki	317	1.2	136	1.9	181	0.9	9		1	0.2	8	0.7
12 Land Rover	270	1.0	164	2.3	106	0.5	15		8	1.7	7	0.6
13 Renault	251	0.9	121	1.7	130	0.7	10		3	0.6	7	0.6
14 Lada Autom.	141	0.5	60	0.8	81	0.4	4		1	0.2	3	0.3
15 Dacia	86	0.3	43	0.6	43	0.2	6				6	0.5
16 Peugeot	73	0.3	20	0.3	53	0.3	2		1	0.2	1	0.1
17 Daihatsu	57	0.2	26	0.4	31	0.2	13		7	1.5	6	0.5
18 Skoda	52	0.2	21	0.3	31	0.2	52		21		31	2.8
19 Subaru	51	0.2	17	0.2	34	0.2	1		1	0.2		
20 Wartburg	50	0.2	5	0.1	45	0.2	4				4	0.4
21 Opel	27	0.1	11	0.2	16	0.1						
22 Mercedes	20	0.1	16	0.2	4	0.0	6		2	0.4	4	0.4
23 Seat	7	0.0	5	0.1	2	0.0						
24 Fiat Iveco	5	0.0	5	0.1	1	0.0						
25 Chevrolet	4	0.0	3	0.0	3	0.0						
26 Hyundai	3	0.0			2	0.0						
27 Namco Pony	2	0.0										
28 AMC Jeep												
29 Citroen	31	0.1	13	0.2	18	0.1						
Total	26,862	100	7,088	100	19,774	100	1,599	100	475	100	1,124	100
	100%		26%		74%		100%		30%		70%	

[1] As of December '91
[2] Total registrations for the month of December '91, only

Of the 16,893 Nissan passenger cars which were sold on the Greek market, 13,088 were assembled in Greece by the Greek TEOKARAVEE car assembly plant. This figure represents 7.8% of the 1991 market.

Table 2.12 gives the forecast for sales of new cars in 1992.

Table 2.12 – Forecast '92 PC annual market results by make

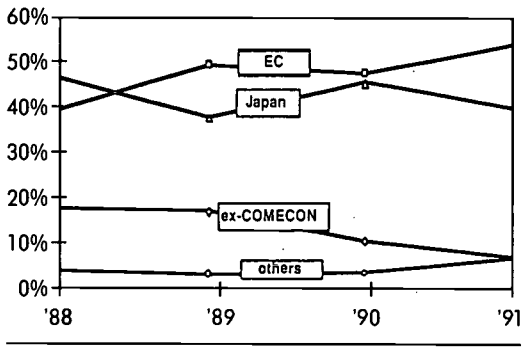
Forecast total GR market (year)		min. 196,825	max. 199,778
Make	Total GR market 31 Dec. '92	%	Differ
Total year (forecast)	196,826 100%	100	
1 Nissan	18,058	9.2	
2 Fiat	17,117	8.7	-941
3 Toyota	15,418	7.8	-1,699
4 Citroen	11,452	5.8	-3,966
5 Opel	11,417	5.8	-34
6 Peugeot	11,092	5.6	-326
7 Ford	10,738	5.5	-354
8 Renault	9,884	5.0	-854
9 BMW	9,046	4.6	-837
10 Hyundai	8,885	4.5	-161
11 Volkswagen	7,765	3.9	-1,120
12 Mazda	7,617	3.9	-147
13 Seat	7,126	3.6	-492
14 Alfa Romeo	6,754	3.4	-372
15 Suzuki	6,414	3.3	-340
16 Skoda	5,708	2.9	-705
17 Lada	5,573	2.8	-135
18 Rover	5,431	2.8	-142
19 Honda	4,980	2.5	-451
20 Audi	3,348	1.7	-1,632
21 Mercedes	3,186	1.6	-162
22 Lancia	3,147	1.6	-39
23 Mitsubishi	2,128	1.1	-1,019
24 Subaru	1,562	0.8	-567
25 Daihatsu	1,337	0.7	-224
26 Zastava	979	0.5	-358
27 Volvo	402	0.2	-577
28 Saab	189	0.1	-213
Others	71	0.0	

As can be seen from the above table, Nissan vehicles assembled in Greece hold the largest market share (9.2%), as in previous years. This is due to the particular competitiveness of these vehicles, which are offered at attractive selling prices because of the low production cost and special tax conditions enjoyed by these vehicles as a means of protecting domestic production.

It is also worth noting that although the Greek economy is in recession, and the country is undergoing a period of austerity, cars which are classed in the luxury category, at a correspondingly high price, such as BMW and Mercedes, hold a large share of the market, about 6.5%. This phenomenon is obviously linked with the symbolic value of "upward mobility" which is attributed to owners of such cars, and also with the huge volume of black-market activity (about 45% of the national product).

In 1991, motor vehicles of Community origin gained the greater share of the market, reaching 58%, as can be seen in table 2.13. There has been a significant increase in the market share of motor vehicles from "third" countries ("others"), which is due to the dynamic entry of Korean vehicles onto the market.

Table 2.13 – Passenger car market shares by origin



The 50 importers (agents) have a total of about 430 billion drachmas of working capital, of which about 180 billion drachmas are invested. Equity exceeds 110 billion drachmas. In 1991, turnover was in the region of 460 billion drachmas.

3. LEGISLATION ON OPERATION OF MOTOR VEHICLE REPAIR AND DISTRIBUTION COMPANIES

3.1 Requirements for operation of repair shops

The terms and requirements for the establishment and operation of maintenance and repair shops for motor vehicles, motorcycles and mopeds are laid down by Presidential Decree 78 of 25.2.1988 and its amendment of 10.9.91 (Presidential Decree 416).

The basic requirements laid down in this legislation relate to the location of the repair shops and the specifications for the buildings, and, more particularly, for the roof, floor, drainage, windows and doors, communication between floors, inclined surfaces, lighting, ventilation, heating, inspection pit and lifting mechanisms, and also fire safety. The working areas and equipment in the repair shops are also specified.

These enactments give particular emphasis to the sites where the repair shops are set up, and their working areas, as described in greater detail below.

Location of repair shops

The basic specifications for the establishment of a repair shop are as follows:

- The building which is to house the new repair shop may not be in an area where the establishment or re-establishment of repair shops is prohibited by the town-planning regulations in force at the time.

- The building which is to house the new repair shop must have the working area stipulated by law, with a minimum ceiling height of 2.7 metres from the floor, sanitation areas, a store room and a special compartment for storing staff clothing.

- There must not be a bus stop or stopping-point for other means of transport within a distance of 10 metres.

The establishment and operation of a repair shop are prohibited in the following instances:

- If it is immediately adjacent to a school, nursery, old people's home, hospital or clinic.

- If the buildings or sites which are intended for the establishment of repair shops face on to church ground or public spaces (e.g. a square, green, pavement).

- If there are fuel pumps, or manholes to fuel tanks and their ventilation shafts at a distance of less than 15 metres.

- If the building intended for the establishment of repair shops also contains premises above and below, and if the regulations of the multi-storey building prohibit the setting up or operation of such an establishment.

Working areas of repair shops

Repair shops for the repair of motor vehicles, motorcycles and mopeds, must have a minimum working area which is specified as follows:

- For general repair shops engaged in the repair and maintenance of engines, gearboxes, differentials, fuel systems, exhaust, steering, and brake systems, transmission, suspension, cooling and lubrication systems: minimum working area 100 square metres for passenger cars and light goods vehicles, and 120 for heavy goods vehicles or buses.

- For repair shops engaged in the:
  repair and maintenance of electrical systems, instruments and equipment, and electrical wiring generally, or

  repair and maintenance of any type of brake system, or

  repair, adjustment and maintenance of petrol pumps and nozzles of vehicles, or

  repair and inspection of carburettors, or

  installation, repair and adjustment of tachographs, taximeters and various other instruments, or

  repair and maintenance of any type of suspension system, or

  repair and maintenance of any type of exhaust system, or

  repair and maintenance of any type of engine cooling system, or

  wheel repairs, or

  repair and maintenance of motorcycles and mopeds,

  the stipulated minimum working area is 40 square metres.

- For repair shops engaged in the repair and maintenance of bodywork, and also repair shops engaged in painting and maintenance, the minimum working area is:

  passenger vehicles: 60 square metres
  goods vehicles: 120 square metres
  buses: 120 square metres
  motorcycles and mopeds: 30 square metres.

- For repair shops engaged in the installation, repair and maintenance of equipment and accessories for supplying and operating vehicle engines with liquid gas: minimum working area 70 square metres. In repair shops of this category, there must not be any underground area or basement. Underground inspection pits are also prohibited.

- For repair shops which undertake repairs in more than one of the above categories (except the category of the preceding paragraph) which for safety reasons must not be combined with others: the minimum working area is set at 60% of the total of the minimum areas for the individual categories.

The procedure for issuing repair shop operating licences is determined by the same Presidential Decrees. Penalties for offenders and conditions for continuing the operation of already existing repair shops are also specified.

Repair shops which fulfil all the above conditions are issued a repair shop establishment licence which is valid for two years and can be extended for a further two years.

Repair shops which do not meet the above conditions receive a temporary operating licence which expires on 26.5.93
At this point, it should be mentioned that on the basis of data collected by shared service offices, it is estimated that:

- About 10% of all the repair shops have an establishment or operating licence of indefinite duration, i.e. they fulfil the above-mentioned conditions for establishing and operating a repair shop;
- About 83% of all the repair shops have a temporary operating licence which expires on 26.5.93.;
- About 7% of all the repair shops have no operating licence.

Against this background, it is obvious that most vehicle repair shops will find it difficult to survive after May 1993 if, pursuant to this Law, the government prohibits the operation of repair shops which do not have the relevant licence.

3.2 Requirements for practising the occupation of motor mechanic

Law 1575 (2.12.1985) lays down the requirements for practising the occupation of vehicle, motorcycle and moped mechanic. For the supervision and execution of repair and maintenance of the above types of vehicle, a occupational licence is required in conformity with the requirements of this Law.

Categories of occupational licence
The categories of occupational licence are as follows:

1. Motor mechanic
2. Electrical technician
3. Brake system mechanic
4. Petrol pump mechanic
5. Carburettor mechanic
6. Instrument technician
7. Suspension mechanic
8. Exhaust system (silencer) mechanic
9. Radiator mechanic
10. Bodywork mechanic
11. Paintwork technician
12. Wheel mechanic
13. Liquid gas vehicle appliance mechanic
14. Motorcycle and moped mechanic

Qualifications for obtaining licences
Occupational licences are issued to persons who have reached the age of 18, provided that they have the following specialist qualifications:

- Certificate from a Technical Lykeion (TEL) in the mechanical or electrical engineering sector, or other equivalent school.
- Certificate from a Technical and Vocational School (TES) in the mechanical engineering section of the vehicle engine or internal combustion engine department, for intermediate technical and vocational training.
- Certificate from a Secondary Technical School in the department of vehicle foremen which has been abolished, or from another equivalent school.
- Certificate from a Basic Technical School in the motor mechanics' department or engineering department, or from a corresponding Basic Training School of OAED [Organismos Apascholisis Ergatikou Dynamikou – Organization for Manpower Employment].
- Certificate from the OAED centres and vocational training schools in the field of automotive engineering.

For all the above categories of technician, previous employment in a vehicle repair shop is also a requirement. The duration of this previous employment varies, according to the type of certificate, between 1 and 4 years.

Previous employment before the person concerned reached the age of 15 will not be taken into account.

Previous employment
- In the case of graduates, their period of practical experience in a repair shop during their studies is regarded as previous employment.
- The following are also regarded as previous employment: employment in equivalent repair shops of the state, legal entities under public law and companies and organizations in the public sector, and
- Employment in corresponding repair shops abroad.

The authenticity of employment certificates which are compulsorily issued by the employer is confirmed by the work supervisor.

Examination of candidates
The licences stipulated by Greek legislation are issued by the Ministry of Transport and Communications after the candidates have taken oral and practical examinations.
Graduates of the following schools are given a professional licence without having to sit an examination:

- Those who have a mechanical engineer's or shipbuilding engineer's degree from a University (AEI) in Greece or equivalent abroad, are given the occupational licence of a "Certified Automotive Engineer".

- Those who have a degree from a Technical Higher Education Institution (TEI) or college (assistant engineers, KATE [Kentro Anoteras Technikis Ekpaidefseos – Centre for Secondary Technical Education], ASETEM [Anotera Scholi Ekpaideftikon Technologon Michanikon – Higher School of Technology and Mechanical Engineering Lecturers], SELETE [Scholi Ekpaideftikon Leitourgon Technikis kai Epangelmatikis Ekpaidefsis – School for Teachers of Technical and Vocational Training]) as mechanical engineers, electrical engineers and automotive engineers, or a diploma from an equivalent school in Greece or abroad, are given the professional licence of a "Technologist – Automotive Engineer".

Occupational rights of licence-holders

Licence-holders undertake and carry out, in a responsible manner, the maintenance and repair of motor vehicles, motorcycles and mopeds according to the rules of the trade, as follows:

- A motor mechanic carries out the maintenance and repair of the engine, gearbox, differential, fuel system, exhaust and steering systems (including the wheel balance), brake system, transmission to the drive wheels, suspension, and cooling and lubrication systems of motor vehicles, motorcycles and mopeds.

- An electrical technician carries out the maintenance and repair of the electrical systems, instruments and equipment and, in general, the electrical wiring of motor vehicles, motorcycles and mopeds.

- A brake system mechanic carries out the maintenance and repair of all types of brake systems of motor vehicles, motorcycles and mopeds.

- A fuel pump mechanic carries out the maintenance, repair and adjustment of the pumps and nozzles of motor vehicles.

- A carburettor mechanic carries out the maintenance, repair and adjustment of carburettors of motor vehicles, motorcycles and mopeds.

- An instrument technician carries out the maintenance, repair and adjustment of speedometers, taximeters and related instruments of motor vehicles, motorcycles and mopeds.

- A suspension mechanic carries out the maintenance and repair of all types of suspension systems of motor vehicles, motorcycles and mopeds.

- An exhaust system (silencer) mechanic carries out the maintenance and repair of all types of exhaust system of motor vehicles, motorcycles and mopeds.

- A radiator mechanic carries out the maintenance and repair of all types of radiator system of the engines of motor vehicles, motorcycles and mopeds.

- A bodywork mechanic carries out the maintenance and repair for all types of bodywork of motor vehicles, motorcycles and mopeds.

- A paintwork mechanic carries out the painting of motor vehicles, motorcycles and mopeds.

- A wheel mechanic carries out the maintenance and repair and balancing of the wheels of motor vehicles, motorcycles and mopeds.

- A liquid gas appliance mechanic undertakes the installation, maintenance and repair of accessories for supplying and operating engines with gas or pressurized fuels.

- A motorcycle and moped mechanic undertakes the maintenance and repair of the mechanical and electrical accessories and other equipment of motorcycles and mopeds.

Holders of the occupational licence of a "Certified Automotive Engineer" or "Technologist – Automotive Engineer", i.e. graduates of university and higher education respectively, undertake all the above types of work.

In repair shops with a staff of 25 to 30 people the work is, by law, compulsorily supervised by Certified Automotive Engineers or Technologists – Automotive Engineers. In a repair shop with a staff of more than 35, supervision is exclusively by Certified Automotive Engineers.

At this point it must be stressed that Greek legislation does not specify a category of technician for the electronic systems and anti-pollution technology of motor vehicles. When these categories were established by Law 1575, i.e. in 1985, the new electronic technology had not yet been developed in motor vehicles. Since then, however, in line with recent rapid developments, the government has had to specify these categories.

3.3 Employment contracts and working hours

In car sales and repair companies, use is made of permanent employment contracts, and more rarely fixed-term contracts, and in exceptional cases the labour legislation (Article 648 onwards of the Civil Code). The most common form of contract, i.e. the permanent contract, is applied on the basis of the relevant labour legislation.

Part-time employment is rare because the intense competition and the need to be ready to deal with the various problems call for specialist full-time work by permanent staff.

On the basis of the legislation in force, working hours fall into three categories:

a. Working hours specified on the basis of Presidential Decree 27-6/4.7.1932 Article 1 and Law 1037/71

b. Working hours fixed by Collective Agreement or Arbitration Judgement

c. Working hours fixed by Private Agreement (contractual)

In repair shops and sales showrooms, the working hours of category b. are usually applied, i.e. those fixed by the National General Collective Labour Agreement of 13.3.1986, which stipulates 40 working hours per employee per week.

These 40 hours are divided into 5 days per week, between the hours of 7.30 a.m. and 5 p.m.

Many car sales businesses and repair shops are open on Saturdays. Indeed, after the recent legislative amendment (1992), which allows greater flexibility in the working hours of commercial establishments according to circumstances and geographical location, motor vehicle repair shops may also operate on Sundays.

These working hours, although generally accepted, lead to considerable problems during the midday public rest hours; these have been set by Greek legislation between the hours of 2.30 and 5 p.m. (for the period from 1.10 to 31.3) and 3 and 5.30 p.m. (for the period from 1.4 to 30.9). These problems stem from the fact that many of the repair shops situated in residential areas fail (as mentioned above) to meet the operating requirements, e.g. they lack soundproofing.

Finally, it must be said that the enforcement of the provisions of Laws 1568/85 relating to the health and safety of staff and 1567/88 relating to the staff committees, and the ratification of the 135th international labour contract, have contributed substantially to the improvement of working conditions, although they are not systematically enforced.

3.4 Legislative framework of vocational training

The need to create a system of vocational training in Greece was identified quite early – about the middle of the last century. However, it was not until 100 years later that the first substantial legislative regulation on technical vocational training was passed. This legislative regulation, circa 1959, did not herald the creation and enforcement of a system of vocational training corresponding to the nation's social and economic needs. Despite the numerous legislative regulations which have ensued, the much desired reform of technical vocational training has, to this day, not been implemented.

The laws and decrees listed below form the basic legislative framework for vocational training in Greece:

- Legislative Decree (N.D.) 3971 of 1959 relating to "technical and vocational training, organization of secondary training, and administration of education"
- Legislative Decree (N.D.) 3973 of 1959 relating to "unification and coordination of the administration of vocational training"
- Legislative Decree (N.D.) 580 of 1970 relating to "the supervisory and training personnel, auxiliary laboratory personnel, and administrative and auxiliary personnel of basic and secondary vocational schools, and certain organizational provisions"
- Legislative Decree (N.D.) 581 of 1970 relating to "the administration of a school for teachers of vocational and technical training"
- Legislative Decree (N.D.) 652 of 1970 relating to "centres for secondary technical education"
- Legislative Decree (N.D.) 789 of 1970 relating to "organization of the school for teachers of vocational and technical training"
- Law 309 of 1976 relating to "organization and administration of general education"
- Law 576 of 1977 relating to "organization and administration of secondary and higher technical and vocational training"
- Law 1304 of 1982 on "scientific and pedagogical guidance and administration in general and secondary technical and vocational training, and other provisions"
- Law 1404 of 1983 relating to "the structure and operation of technological training institutes"
- Law 1566 of 1985 relating to "the structure and operation of primary and secondary education, and other provisions"
- Law 1836 of 1989 relating to "the promotion of employment and vocational training, and other provisions"
- Law 2009 of 1992 relating to "the national system of vocational education and training, and other provisions"

As regards the latest legislative regulation of 1992, further information is given in the next chapter.

4. ANALYSIS OF THE STAFF

The data presented in this chapter in connection with the staff employed in motor vehicle sales and repair companies were gathered by their shared service offices, taking 1992 as the reference year. There are no data relating to the previous years, but only estimates based on the general picture of the sector.

Number of staff in the sales and repair sector

About 72,110 staff are currently employed in businesses in the sector in question: 60,370 of them in motor vehicle repair and maintenance repair shops, and the remaining 11,800 in motor vehicle retail companies. In addition to this number of staff, about 4,000 people are employed in the import and administrative activities of the importers (agents), and about 3,770 people in private and authorized spare parts retail establishments. Table 4.1 gives a breakdown of the number of staff in spare parts repair and retail companies only, since these are the object of the present survey.

motor vehicle repair sector, a fact which is confirmed by the current estimates of all the shared service offices of the repair shops, as presented at the first briefing session.

In the vehicle retail sector, the number of staff is considerably smaller and is more or less equally divided between the networks of the importers (categories A, B and C) and the independent dealers in new and second-hand vehicles (category E).

Table 4.2 gives the average number of staff in the repair shops and car retail companies.

As table 4.2 shows, the importers' repair shops are much larger than those of their network and the independent repair shops. However, as mentioned above, this number of private repair shops of import companies is particularly small. For this reason it does not affect the average number of staff in businesses in the repair sector, for which the final figure is 3.4 persons per repair shop.

Table 4.1 – Number of staff in the repair and sales sector

Type	Category	Number of employees in the repair shops	Number of employees in the showrooms
A	Subsidiaries of car manufacturers (controlled by car manufacturers)	115	43
B	Exclusive agents of car manufacturers (independent but linked to car manufacturers)	1,652	887
C	Authorized repair shops or car dealers (independent but linked to exclusive agents)	8,503	5,062
D	Non-authorized repair shops (independent repair shops)	50,100	
E	Non-authorized car dealers (independent car sales companies)		5,750
	Total	60,370	11,742

Not including:
administrative personnel of import companies
personnel of spare parts and special components companies

As table 4.1 shows, the majority of staff in the repair sector are personnel of independent repair shops.

At this point it should be mentioned that in 1990 the Panhellenic Federation of Car Repairers estimated the total number of repair shops of this Federation at 30,000 and the total number of its technicians at 250,000. Other figures presented in 1991 by the Technologist-Engineer P. Karabilas of the LINK company at the 1st European Congress on Training in the motor vehicle sector, put the number of repair shops at 35,000 and the number of people employed by them at 150,000. These numbers deviate considerably from those in this present survey: 17,804 repair shops and 60,370 staff. These considerable differences could be interpreted as follows:

- The above figures are not based on a national survey, but on general estimates.
- There has been considerable shrinkage in the

In car retail businesses, the difference in the average number of staff between private showrooms and authorized or independent showrooms is not particularly high.

Finally, from the average numbers of staff in the companies examined, it can be concluded that the majority are small personal or family concerns. Indeed, if we include the figures in table 4.3, which shows very low numbers of administrative staff among the total numbers of staff in the repair shops (category D), we find that in most cases the owner or manager of the repair shop is himself one of the technical staff who serve the customers. The small number of salesmen/saleswomen shown as the staff of the repair shops are engaged mainly in the sale of spare parts, which in many cases is part of the repair shop.

Table 4.2 – Average number of staff per company in the repair and sales sector

Type	Category	Repair shops	Showrooms
A	Subsidiaries of car manufacturers (controlled by car manufacturers)	23.00	8.60
B	Exclusive agents of car manufacturers (independent but linked to car manufacturers)	25.40	8.14
C	Authorized repair shops or car dealers (independent but linked to exclusive agents)	4.97	2.54
D	Non-authorized repair shops (independent repair shops)	3.10	
E	Non-authorized car dealers (independent car sales companies)		2.30
	Mean value	3.40	2.55

Not including:
administrative personnel of import companies
personnel of spare parts and special components companies

Table 4.3 – Composition of total staff

A/A	Occupational category	Type A	Type B	Type C	Type D1	D2	D3	Type E
1	Administrative personnel	N/A	4,006	N/A	N/A	700	130	N/A
2	Technical personnel	N/A	1,652	N/A	N/A	14,000	4,850	N/A
3	Salesmen/women	N/A	887	N/A	N/A	300	120	N/A
	Total	115	6,545	13,565	30,000	15,000	5,100	5,750

Type B: The data refer to the total staff in the import business - agents
Type D 1: General car repair shops (independent) belonging to the Pan Hellenic Federation of Car and Machinery Repairers (POBEAM)
Type D2: General car repair shops (independent) belonging to the Federation of Car and Machinery Repairers of Northern Greece (OBEAM B.E.)
Type D3: General car repair shops (independent) belonging to the Federation of Car and Machinery Repairers of Greece (OBEAME)

Correlation between staff and total number of vehicles

Tables 4.4 and 4.5 show the correlation between the number of staff in vehicle repair and sales companies, and the number of vehicles on the road, and annual vehicle sales, respectively.

Table 4.4 – Number of staff in relation to number of motor vehicles (reference year 1991)

Total fleet of 4-wheel vehicles	2,474,787
Total staff in repair shops	60,370
Vehicles per employee	41

Table 4.5 – Number of salesmen in relation to annual vehicle sales (reference year 1991)

4-wheel vehicles annual sales	217,403
Total showroom personnel	11,742
Sales of 4-wheel vehicles per salesman	18.52

The annual averages of vehicles on the road per technician (32.9) and vehicle sales per salesman/saleswoman (18.52) are particularly low, as can be seen from the above tables. This means that the staff in the sector in question is much greater than is actually necessary. In view of this situation, it will be necessary to take account of the under-employment of many staff, and also the difficult operation of many small companies. Of course, the fact that such small businesses continue to operate is due mainly to the fact that they are family-type businesses whose distinctive feature is that they are "self-run".

Distribution of staff by age and gender

Table 4.6 gives the distribution of the staff employed in motor vehicle repair and sales companies, by age and gender.

As can be seen from the figures for categories D2 and D3 relating to independent repair shops, the largest percentage of staff are in the age group up to 30. This is due to the nature of the services offered (heavy manual work), and also the high rate of rotation of staff from business to business and their departure from the branch.

The percentages are also high for staff in the age-group up to 20. This characteristic distribution of the staff in question can be explained as follows:

Table 4.6 – Distribution of staff by age and gender

A/A	Age	Type A %	Type B %	Type C %	D1 %	Type D2 %	D3 %
1	up to 20	N/A	10.80	5.80	N/A	40.00	20.00
2	21 to 30	N/A	31.50	50.40	N/A	50.00	20.00
3	31 to 40	N/A	24.00	25.10	N/A	6.70	30.00
4	41 to 50	N/A	18.00	11.40	N/A	2.60	20.00
5	51 to 60	N/A	12.30	5.80	N/A	0.67	10.00
6	61 to 65	N/A	2.90	1.00	N/A	0.00	0.00
7	over 65	N/A	0.50	0.50	N/A	0.00	0.00
	Total		100	100		100	100
6	Men	N/A	84.60	86.70	N/A	100	100.00
7	Women	N/A	15.40	13.30	N/A	0.00	0.00
	Total		100	100		100	100

- To obtain a occupational licence, it is not necessary to have completed many years of education at university level; a certificate from a technical vocational school is sufficient, as mentioned above in chapter 3. Consequently, young technicians complete their studies before reaching the age of 20. During their studies they also work in a repair shop because previous employment is a basic requirement for the occupational licence.

Women are not employed in the motor vehicle repair sector, as was of course to be expected. This is part of the prevailing philosophy of dividing occupations according to gender, and occupations of a "technical nature" are considered "male" occupations.

The age distribution in categories B and C differs considerably from that of category D. This is due to the fact that these categories include all the staff in private and authorized repair shops and in private and authorized car retail businesses. This also explains the presence of 13 – 15% female staff, who are all employed in car retailers' showrooms.

Specialization of repair shop technical staff

The specializations of repair shop mechanics/technicians were listed on the basis of the categories established by Greek legislation, as described in the previous chapter. These specializations, and the requirements for obtaining them, were compared with their equivalents in other EC Member States by Community Announcement 89/C 168/01 of 3.7.89.

Table 4.7 gives the percentage distribution of the technical staff of repair shops in the various categories of company, on the basis of the above-mentioned specializations.

Table 4.7 – Specialization of technical staff

A/A	Category of technicians	Type A %	Type B %	Type C %	D1 %	Type D2 %	D3 %
1	Engine repair	N/A	64.10	64.50	N/A	32.00	45.50
2	Electrical system repair	N/A	13.00	14.20	N/A	5.30	7.20
3	Brake system repair	N/A	3.30	1.10	N/A	5.30	0.80
4	Fuel pump repair	N/A	0.80	0.00	N/A	2.00	0.40
5	Carburettor repair	N/A	1.00	2.30	N/A	3.30	0.60
6	Radiator repair	N/A	0.00	0.00	N/A	1.30	0.90
7	Suspension repair	N/A	2.90	1.20	N/A	0.65	0.40
8	Exhaust pipe repair	N/A	0.00	0.00	N/A	3.30	2.90
9	Car body repair	N/A	8.30	7.40	N/A	22.30	24.70
10	Paintwork	N/A	5.80	6.10	N/A	18.00	12.50
11	Tyre repair	N/A	0.80	0.70	N/A	5.30	4.10
12	Liquid gas appliances	N/A	0.00	2.50	N/A	0.65	0.00
	Total		100	100		100	100

Type D1: General car repair shops (independent) belonging to the Pan Hellenic Federation of Car and Machinery Repairers (POBEAM)

Type D2: General car repair shops (independent) belonging to the Federation of Car and Machinery Repairers of Northern Greece (OBEAM B.E.)

Type D3: General car repair shops (independent) belonging to the Federation of Car and Machinery Repairers of Greece (OBEAME)

1.

It is important to note at this point that the largest percentage of staff come into the category of motor mechanic. The percentages for the categories of electrical technician, bodywork mechanic and paintwork mechanic are also relatively high. The low percentages in the other categories are due to the fact that a motor mechanic's occupational licence allows an employee of this category to undertake and carry out work falling within these other categories. Finally, the low percentage of liquid gas appliance mechanics is due to the small number of liquid gas-run vehicles on the road (mainly taxis).

5. CHANGING CONDITIONS AND THEIR EFFECTS ON REQUIREMENTS FOR THE SPECIALIZATION AND TRAINING OF STAFF

As has been mentioned above, the motor vehicle repair and sales sector is one of the most important branches of the Greek economy. The rapid technological development in vehicle manufacture, particularly after the end of the 1960s, and the revolution in electronics and information technology at the end of the 1970s, created new working conditions and prompted a need for new specialist knowledge and for continuous skills upgrading in line with these developments.

5.1 Effects on work organization in motor vehicle repair and distribution companies

The study of the motor vehicle repair and sales sector revealed that substantial structural changes had taken place as a consequence of the rapid technological developments of the last 20 years. Specifically, these changes have been identified in the following areas:

- The development of motor vehicle technology. For instance, the import of advanced electronic systems for checking the running of engines, exhaust treatment, suspension and other vehicle sub-systems, created new demands for know-how which traditional mechanics obviously lacked.

- The development of electronics and its applicability to vehicles enabled car manufacturers to produce extremely specialized accessories adapted to specific models of vehicle. Consequently, every vehicle now contains a large number of individual accessories and spare parts which have to be inventoried in repair shop databases to eliminate the likelihood of error during maintenance and repairs; hence the need for computerization of repair shops and further specialization in the repair of specific types of vehicle, using specialized electronic equipment for detecting and repairing faults.

- The computerization of accounting offices, warehouses and, generally, the administrative departments of vehicle distribution and repair companies, led, on the one hand, to an improvement in the services offered, and in the companies' efficiency, and, on the other hand, to a reduction in the number of jobs and increased demand for continuing training.

The above changes, which are linked with technological developments, have resulted in a permanent financial crisis for many small businesses, if not their actual disappearance. This is worsening to the extent that it is almost impossible for these small companies to fill the know-how gap with continuing training activities because of their cost.

5.2 Effects on training/continuing training

The impact of the rapid technological developments appears to be causing severe problems even in so-called developed countries which have systematic, organized initial and continuing training. This problem is all the more acute for countries like Greece because the system of general education and vocational training is deficient in some ways, and there is no systematic continuing vocational training which would, to some extent, allow rapid readjustment to new conditions.

A characteristic example of the deficiencies of the training system in the vehicle repair sector has been mentioned in chapter 3. The government has not yet legally established, or organized at the level of initial vocational training, the category of vehicle electronics technician.

Nevertheless, it has been found, within the scope of this survey, that the importers and their network of authorized repair shops, and also some of the small independent repair shops, are making special efforts to continually upgrade the skills of their staff in electronic technology and computing.

5.3 Effects on staff

For a large proportion of staff, particularly the older, traditional technicians, the demand for continuing training, arising from the above-mentioned changes in working conditions, has resulted in their underemployment, unemployment, or departure from this particular area of employment. This finding is borne out by the age breakdown of the staff given in chapter 4, where there is an obvious shortage of staff in higher age-groups.

5.4 Effects on competition and commercial relations

The car manufacturers and importers have already adapted to the new conditions in the field of vehicle sales and repairs. Following the criteria of competitiveness, they are promoting vehicle specialization and specialist vehicle maintenance, imposing rules for operation upon the market rules which it is beyond the powers of most small, traditional repair shops to comply with. For this reason, and also in view of government support which is, in practice, negligible, it is more than likely that during the 1990s a large number of repair shops will close down. At the same time there is a continuing tendency towards concentration of the remaining, better organized repair shops in the importers' networks.

6. INITIAL AND CONTINUING TRAINING OF STAFF

6.1 Initial vocational training of staff

Initial vocational training for staff in motor vehicle repair shops is offered by private and state schools. The description of vocational training in this area of specialization, presented in this chapter, is based to a large extent on the monograph by S. Stavrou, "Vocational Training in Greece". The shared service offices of the repair shops were the source of information for the statistics relating to the repair shop staff.

The vocational training of future vehicle mechanics/technicians commences after they have reached the age of 15, and after they have completed their 9-year compulsory general education. The following options are open to those interested in undergoing vocational training in specialist areas connected with vehicle maintenance and repair:

- Enroling in Integrated Comprehensive Lykeions (EPL),
- Enroling in Technical and Vocational Schools (TES),
- Enroling in Technical and Vocational Lykeions (TEL),
- Attending the OAED Apprenticeship Schools,
- Enroling in a private vocational training school,
- Attending intensive courses of intensive training and education.

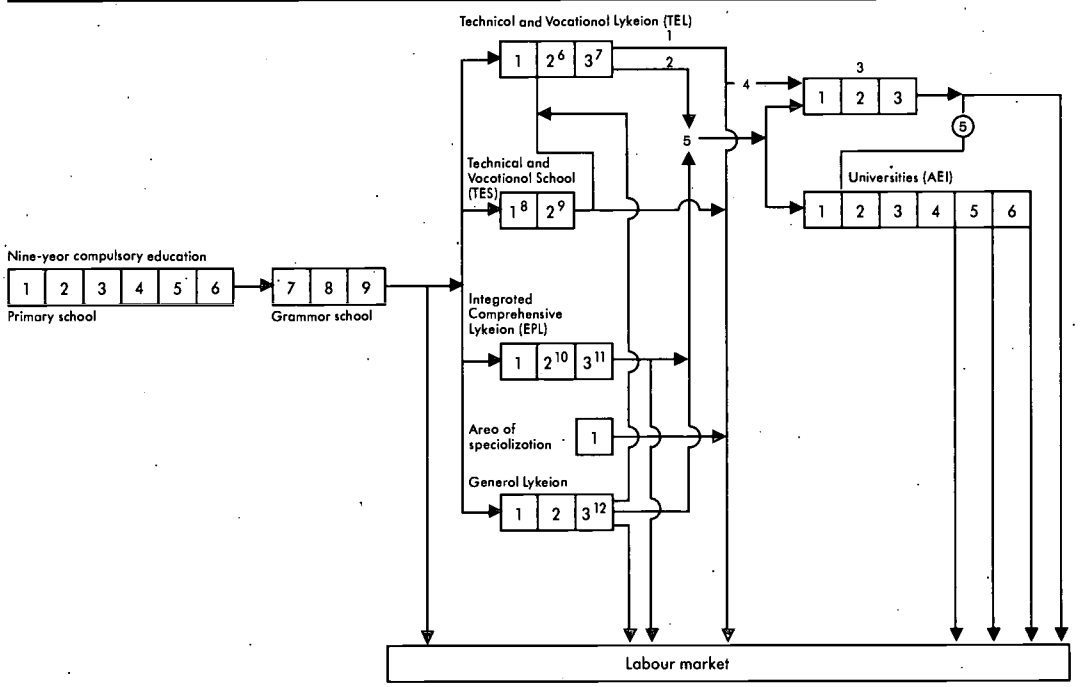
The vocational training provided is either formal or informal. A training procedure leading to a state-recognized certificate is classified as "formal". Informal training courses provide the necessary skills for the labour market without being coupled with a corresponding certificate.

The above options are interconnected as shown in table 6.1.

Integrated Comprehensive Lykeions (EPL)
Integrated Comprehensive Lykeions are at present operating as "experimental Lykeions" and are therefore very few in number. Their aim is to form an organic link between general and vocational education, and the courses last 3 – 4 years.

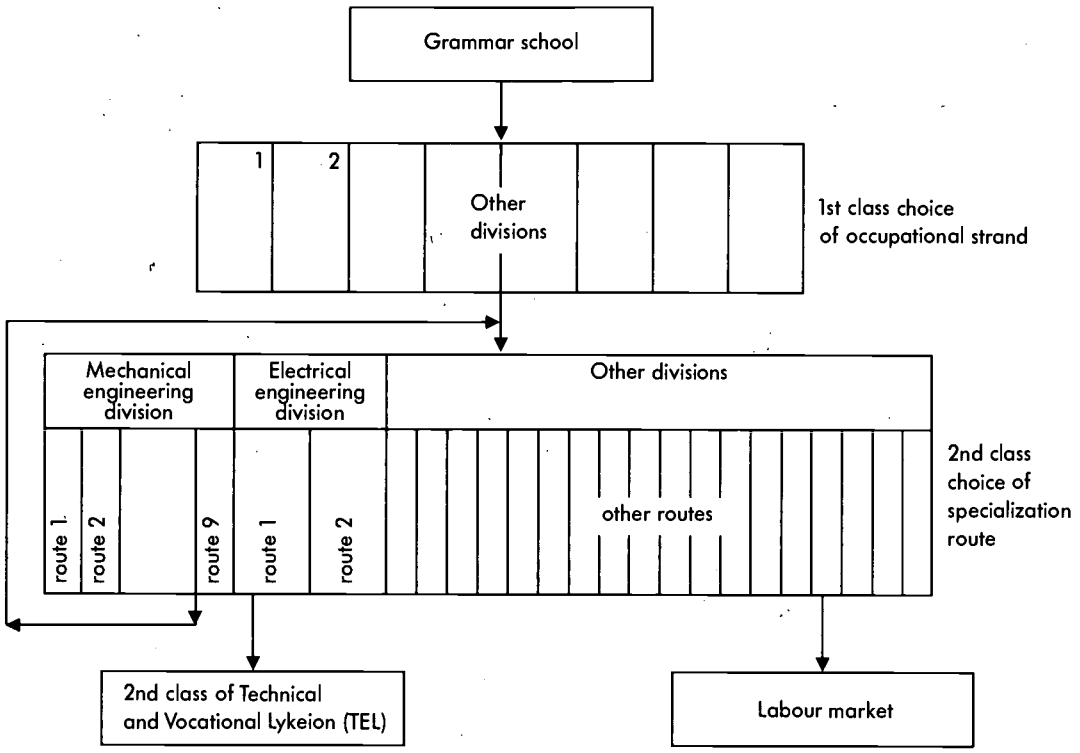
The first class is uniform for all students. The second class consists of study cycles corresponding to categories of related occupations. For the vehicle repair sector, those who are interested can attend the

Table 6.1 – Structure of the Greek educational system



[1] with certificate
[2] with combination
[3] Technical Higher Education Institution (TEI)
[4] selection by grading
[5] selection by competition
[6] selection of sector of occupations
[7] selection of area of specialization or selection of combination (A, B, D)
[8] selection of occupational strand
[9] selection of specialization route in the occupational strand
[10] selection of study cycle
[11] ...n of branch of study cycle or selection of combination (A, B, C, D)
[12] ...n of combination (A, B, C, D)

Table 6.2 – Structure of TES



[1] Mechanical engineering division
[2] Electrical engineering division

following courses:

- Engine technology
- Electrical and electronic technology

The third class offers prospective students two possible paths:

- A course to prepare them to continue their studies with examinations at the higher education level (Technical Higher Education Institutions – TEI) or university level (Universities -AEI)

- A vocational preparation course in:
  Mechanical engineering
  Electrical engineering

After completion of a three-year course at an Integrated Comprehensive Lykeion (EPL), students have the following basic options:

- Continuing their studies with examinations in higher education;

- Continuing their studies in tertiary education, in the case of those who have attended the vocational preparation course and have obtained good marks;

- Entering the labour market without any specialization;

- Certificate of basic vocational training;

- Occupational certificate of specialization, provided that they have been concurrently occupied in the area of specialization corresponding to their course.

Technical and Vocational Schools (TES)
The aim of Technical and Vocational Schools is to enable students to consolidate the knowledge they have gained at grammar school (from 12 to 14 years old) and become competent to practice a certain specialist occupation. For the repair sector, the relevant groups of specializations at these schools are:

- Mechanical engineering;
- Electrical engineering;
- Electronics.

The structure of, and links between, Technical and Vocational Schools are given in table 6.2.

The period of study at Technical and Vocational Schools is two years. Young staff have the option of attending the corresponding night schools for a total of three years.

In the second year of study, those interested in the motor vehicle repair sector select and attend a specialist course to obtain their qualification.

Graduates of Technical and Vocational Schools have the necessary qualification to enter the labour market. At the same time, they are given the option

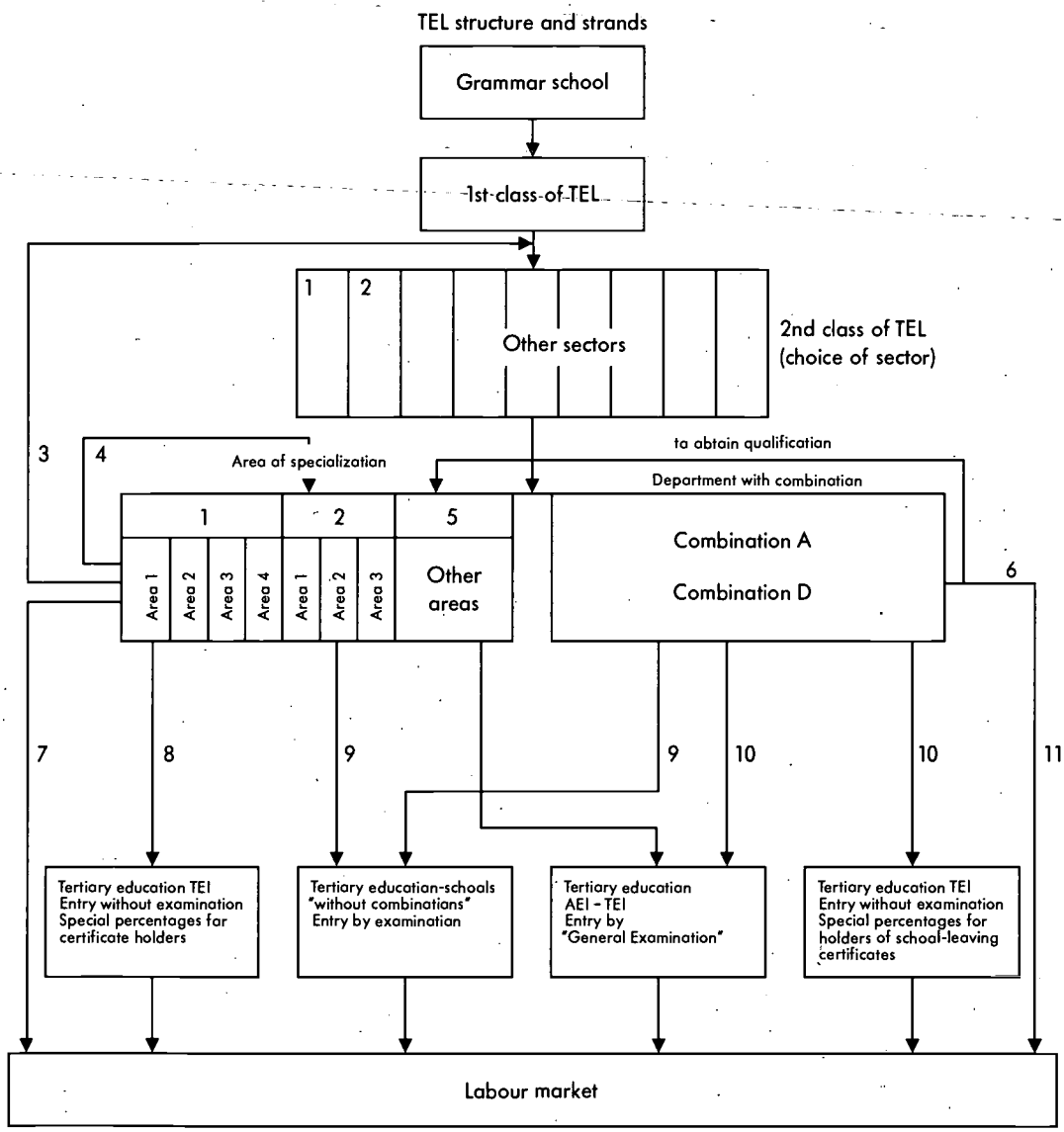
of enroling in the second class of Technical and Vocational Lykeions (TEL) without sitting an examination.

Technical and Vocational Lykeions (TEL)
Technical and Vocational Lykeions include, among others, two general departments for those interested in employment in the motor vehicle repair sector:

- Mechanical engineering department and
- Electrical engineering department.

Students at TELs receive general and specialist education so that they gain the necessary technical, occupational knowledge. The normal period of study is three years. The corresponding period in night-school TELs is four years.

Table 6.3 – Structure of the technical and vocational schools



[1] Mechanical engineering sector
[2] Electrical engineering sector
[3] Change in sector of occupations
[4] Change in area of specialization
[5] Other sectors
[6] 3rd class of TEL
Choice of area of specialization or area of combination
[7] With qualification
[8] Without examination
[9] With examination
[10] With "General Examination"
[11] Without qualification

1.

In their third year of study, TEL students have the option of selecting and attending a specialist course which belongs to the strand they chose in their second year of study.

After completing their studies at TELs, graduates have the following options:

- practising the occupation for which they have qualified,
- obtaining a second specialist degree, or
- continuing their studies in higher education.

OAED Apprenticeship
An apprenticeship with the Organization for Manpower Employment (OAED) of the Ministry of Labour combines theoretical instruction with practical work experience. The present form of the OAED Apprenticeship was established by the statutes of Law 1346 of 1983 and Law 1566 of 1985 (see chapter 3.4).

In their first year of apprenticeship, the students attend theoretical classes and workshops. In the second year, alternance training commences, i.e. 4 days' work per week in companies, and one day of training at an Apprenticeship Centre or at Centres for Technical and Vocational Training [Kentro Technikis kai Epangelmatikis Katartisis – KETEK] of OAED.

Until 1985, apprenticeship was an informal type of training. Since 1985, Apprenticeship Certificates have been recognized as equivalent to certificates from Technical and Vocational Schools (TES).

The period of study at Apprenticeship Centres or KETEKs of OAED is 4 – 6 half-years. During the apprenticeship, OAED undertakes to find vacancies for practical work for those employed by companies.

In these companies, the apprentices sign an employment contract and are paid during their training at a rate commencing at 50% and ultimately reaching 100% of the minimum daily wage of an unskilled worker. Their medical care and hospital treatment are covered through OAED and the companies.

The OAED Apprenticeship categories in the motor vehicle maintenance and repair sector are:

- Motor vehicle electrical technician,
- Motor vehicle engine mechanic,
- Bodywork mechanic,
- Internal combustion engine mechanic.

Private Technical and Vocational Training Schools

Until about the mid-1970s, the government system of vocational training was unable to cover existing needs. For this reason, those interested in vocational training turned to private schools. These schools enjoyed considerable prestige, mainly in the 1960s. In 1970, about 75% of students in technical and vocational training were studying at private schools.

With a few exceptions, the private vocational schools offered students a low level of education. Since the mid-1970s, when the state education system began, the upgrading of these schools has been in decline. In the academic year 1990/91, private technical vocational schools accounted for only 14.6% of the total; they were attended by 15.4% of the total number of students in technical vocational schools.

OAED intensive training and education courses
The intensive training and education courses for staff of repair shops are offered by OAED, often in collaboration with agencies of other ministries. They offer informal vocational education, i.e. education which does not lead to a formal certificate. These courses are held at the KETEKs, in companies' in-house schools under the supervision of OAED, and in mobile OAED units.

Institutes of Vocational Training (Institouta Epangelmatikis Katartisis – IEK)
In 1992 the government founded the Organization for Vocational Education and Training (Organismos Epangelmatikis Ekpaidefsis kai Katartisis – OEEK) with the goal of creating a national system of formal vocational education.

The main aims of OEEK are the:

- organization and operation of the Institutes of Vocational Training (IEK);
- supervision of private IEKs;
- implementation of the aims of the National System of Vocational Education and Training

The education offered at IEKs for motor mechanics is aimed at those applicants who are graduates of TESs and TELs, and equivalent schools without recognized formal and substantial qualifications, and at the unskilled staff and "self-trained" mechanics. The IEK courses vary in length between 1 and 5 half-years (depending on the specialist field and the level of education of the young person or adult concerned). The corresponding certificates are issued after rigorous examinations. A particular aim is European recognition or regulation of these certificates so that the certificate-holders are able to practise their occupation freely in other Member States.

Fifteen government IEKs "of an experimental nature" are now in operation in Greece.

6.2 Educational level of the staff

Table 6.4 shows the level of education of staff in motor vehicle repair and sales companies. The figures were obtained by processing the primary data collected by the shared service offices of these companies.

The initial vocational training was offered to the staff through the schools mentioned in the previous chapter, and through other schools which have since been abolished, i.e.:

- the "Basic Vocational Schools" which have been replaced by the TESs, and
- the "Secondary Vocational Schools" which have been replaced by the TELs.

Table 6.4 – Educational level of staff

Type Education level	A %	B %	C %	D1 %	D2 %	D3 %
Self training	N/A	17.50	13.70	N/A	50.00	35.00
Primary education	N/A	6.80	1.60	N/A	0.00	0.00
Secondary education	N/A	46.80	45.00	N/A	0.00	0.00
Initial vocational training	N/A	17.80	25.70	N/A	49.00	62.00
Higher education	N/A	0.40	7.80	N/A	1.00	2.00
Highest education (university)	N/A	10.70	6.10	N/A	0.00	1.00
Postgraduate	N/A	0.00	0.10	N/A	0.00	0.00
Total		100	100		100	100

The percentage of staff in the repair sector who have had initial vocational training is clearly apparent in the D categories of company, i.e. in independent repair shops.

In categories B and C, the combined educational level of repair shop staff and car showroom staff is given.

It appears, then, that the percentage of repair shop staff who have undergone initial vocational training varies between 49% and 62%. The remaining staff consists mainly of "self-trained" mechanics. These percentages of initial vocational training are particularly small, for reasons directly connected with the organization of the vocational training system in Greece. This is a relatively new system, since, as mentioned in the previous section (6.1), it went into full operation in the mid-1970s. This means that "self-trained" mechanics are in the minority, and are the oldest staff in the sector.

In companies of types B and C, the percentages for educational level differ considerably from those of type D. This is due to the fact that in categories B and C, the repair shop staff and car showroom staff are given as a combined figure.

Consequently, the staff of repair shops and retail companies has undergone:

- to a large extent, average secondary education from grammar schools and General Lykeions;
- to a very small extent, initial vocational training, from 17.8% to 25.7%, this means that it is mainly the staff of car sales establishments who have some form of education other than vocational training.

6.3. Continuing training in Greece

In Greece, there is at present no organized system of continuing training. The continuing training provided through training bodies or companies' in-house schools, with auxiliary financing from state or Community funds, currently functions "like the fire brigade", as S. Stavrou notes in his monograph. In other words, this continuing training operates on an ad hoc basis to cover, intermittently, a range of knowledge and skills which under normal circumstances should have been provided by the initial vocational training system.

In the companies examined, continuing vocational training is provided mainly by the following bodies:

- ELKEPA (Greek Centre for Productivity),
- EOMMECh (Greek Organization of Small and Medium-Scale Manufacturing Companies and Crafts),
- IVEPE (Institute of Industrial Skills Upgrading), which operates through the Inter-Company Association of SEV (Association of Greek Industrialists),
- GSEE (Greek Confederation of Labour),
- OAED (Organization for Manpower Employment),
- EEDE (Greek Association of Business Management),
- TEE (Greek Technical Chamber of Commerce),
- The shared service offices of the motor vehicle repair companies (POVEAM – Panhellenic Federation of Car and Machinery Repairers, OVEAME – Federation of Car and Machinery Repairers of Greece, OVEAM V.E. – Federation of Car and Machinery Repairers of Northern Greece), and by
- the private educational bodies.

The relevant skills upgrading courses are geared to:

- the age of the participants,
- the employment situation,
- the educational level.

These courses concentrate mainly on training the administrative staff of companies. The number of continuing training courses is relatively limited.

Inter-company continuing training applies mainly to import companies (agents) which are subsidized by the European Community Fund, usually through

OAED. These companies train the staff of private repair shops and sales departments, and the staff of authorized repair shops and car sales companies. It should be mentioned at this point that OAED financing for inter-company continuing training is provided only for those members of staff who have an employment contract with these companies. In other words, the continuing training of staff of companies in the network is not subsidized.

Small independent repair shops occasionally offer continuing training, but only if they identify specific needs, e.g. for familiarization and training in new technologies. In such cases, the staff of these companies are trained provided that:

- the company is financially in a position to support the training of the personnel, and
- a relevant subsidized course is organized and provided by the above-mentioned bodies.

There have been very few cases where a shared service office of independent repair shops has organized continuing training seminars for the staff. The main reason for this is that the shared service offices are unable to access the relevant EC funds which are granted for this purpose. The federation of repair shops say there is a lack of information on the funds which are provided for continuing training and on the relevant procedures for securing them (see chapter 7). More specifically, they say the government has excluded the federations from the financing which is provided by the European Community Fund, through OAED, for continuing training.

Finally, special mention should be made of efforts in the field of continuing training by POVEAM. It has recently held seminars which were attended by about 1,500 motor mechanics, electrical technicians and bodywork mechanics in the Attica region.

6.4 Continuing training of staff of motor vehicle sales and repair companies

Import companies – Motor vehicle agents (categories A and B) -Network of authorized companies (category C)

There is a considerable shortage of specialist staff in occupations connected with the car manufacturing sector. For this reason, staff required by motor vehicle manufacturing agents in Greece usually acquire their specialist skills on-the-job or are recruited away from similar businesses.

For vehicle importers/agents, staff are not appointed en masse but as individuals, on an ad hoc basis. Specialist training after recruitment does not follow any special programme of initial vocational training along the lines of theoretical instruction or practical work. Normally a newly appointed employee is given instruction and at the same time is integrated into the procedure for providing services, under the care and supervision of his responsible superior.

Alongside the initial training after recruitment, import businesses (categories A and B) provide inter-company training for the staff of their repair shops and sales departments. At the same time, they offer continuing vocational training for the staff of the authorized companies in the networks.

The main aim of vocational training in these companies is *to increase the specialist skills of their staff and to keep them at a high level of training.* Most of the training courses concentrate on familiarization with new vehicle technology such as catalytic converters, electronic ignition etc. This need arose from the sudden inrush into Greece of vehicles with catalytic converters, with specialized electronic equipment for each model. The initial vocational training for mechanics was inadequate for the technical support of these vehicles because this is a relatively new technology for which the government has not yet created the corresponding legally established categories of technician. Efforts are being made to upgrade the skills of the technical staff of repair shops in these respects, through the Institutes of Vocational Training (IEK). As mentioned above, they were set up in 1992 and are operating, for the present, experimentally.

At the same time, there is the secondary aim of training the management staff in information technology, and staff in the other departments (sales, spare parts) in computerization, as a response to the keen competition and new demands of the market.

The members of staff are selected for continuing training according to the following criteria:

- the employee's specialist work
- the training requirements for the specialized job
- the employee's personality and suitability
- changes in the technology of the product with which the specialist employee is concerned
- changes in the legislation governing the employee's job
- competition

The continuing training courses provided by the import companies for their repair shop staff are based on the corresponding car manufacturers' courses and adapted to Greek conditions. These courses are held either on the premises of the import companies or in the repair shops, or on the premises of the car manufacturers abroad.

The continuing training of management and sales staff takes place outside the company, in collaboration with state or private training bodies, such as those mentioned in the previous section (6.3).

Tables 6.5, 6.6, 6.7, 6.8 and 6.9 show a typical continuing training course which was held in 1991 by the import company VIAMAX A.E. (agents for ROVER in Greece) for its staff and the staff of the authorized companies in its network.

Table 6.10 shows the participation of staff in the continuing training courses which were organized between 1983 and 1992 by the import companies for their staff (Category B) and for the staff of the authorized repair shops and car retailers.

Table 6.5 – Training of warehousemen in modern warehouse organization

Course	Theory (hours)	Practice (hours)
Warehouse organization	75	255
Applied management	25	30
Health and safety	5	15
Total hours	100	300

Table 6.6 – Training of vehicle and spare parts salesmen/women

Course	Theory (hours)	Practice (hours)
Introduction to interpersonal communication	15	45
Sales techniques	25	75
Negotiating techniques	15	45
Customer relations	5	15
Analyzing customer details	20	60
Applied management	5	15
Health and safety	15	15
Total hours	100	270

Table 6.7 – training of accountants and assistant accountants

Course	Theory (hours)	Practice (hours)
General accounting	40	120
Tax documentation	20	60
Value-added tax	15	45
Financial analysis	10	30
Applied management	10	15
Health and safety	5	30
Total hours	100	300

Table 6.8 – Training of computer operators

Course	Theory (hours)	Practice (hours)
Introduction to computing	8	15
Hardware	12	45
Software	16	45
Operating system (DOS)	24	75
Word processing	20	60
Introduction to IBM S/38	20	60
Total hours	100	300

Staff participation is on the increase, starting from less than 5% of the total staff of the companies and rising to more than 33% of staff in private repair shops and sales departments, and more than 20% of staff in authorized repair shops and sales companies in the networks.

Table 6.9 – Training of motor vehicle engine mechanics

Course	Theory (hours)	Practice (hours)
Gearboxes and differentials	15	45
Electronics in the suspension and brake systems	10	30
Electronic fault diagnosis units	15	45
Vehicle geometry and steering systems	10	30
Combustion – fuel – exhaust	4	12
Environmental pollution and current legislation	4	13
Catalytic converters and new technology	12	35
Engines and fuel systems	19	56
Vehicle dynamics	4	13
Tyres and wheel rims	7	21
Total hours	100	300

The participation of staff from authorized companies is generally lower than that of staff in the import companies. One of the reasons for this may be that the OAED subsidy is granted only for continuing training of staff who are in a dependent relationship of employment in the company. In other words, the government in this case subsidizes the import companies to upgrade the skills of their own staff only. The continuing training of the staff of the authorized companies in the networks is financed by the import companies themselves.

Table 6.10 – Participants in continuing training as a percentage of total staff

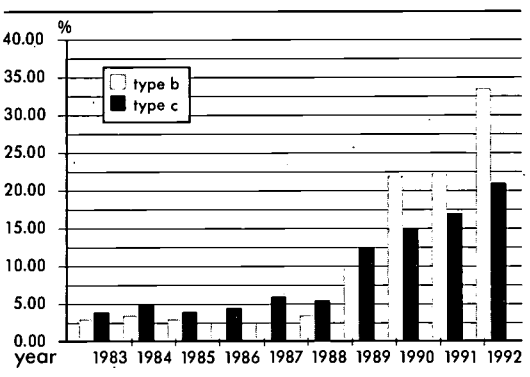


Table 6.11 – Mean value of days per year and employee

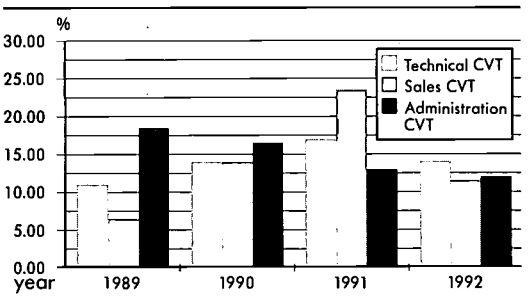
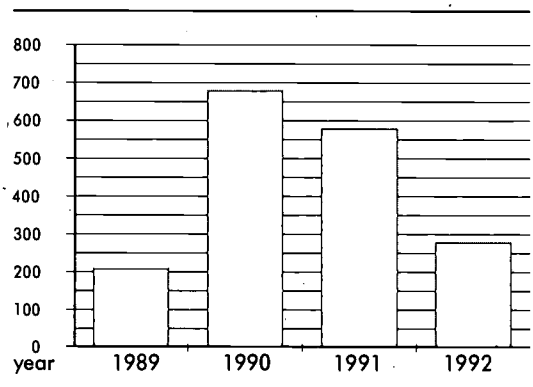


Table 6.11 shows the annual average number of days of training per employee. The figures refer to the total number of participants in the import companies' continuing training programmes.

The average number of days of training was particularly high in 1991. Technical training in that year was more than 17 days per trainee, and sales training exceeded 23 days. This may be due to the fact that this was the year in which the government introduced financial incentives for the replacement of old, pollution-generating vehicles with new ones with anti-pollution technology. This gave rise to a huge demand for technical training in this new technology. At the same time, these financial incentives by the government took the form of reduced Special Consumer Tax (E.F.K.) imposed on the purchase of new vehicles with catalytic converters, with correspondingly lower selling prices. This led to an increase in vehicle sales and intensified competition. Increased training for personnel working in private and authorized retail establishments was therefore thought necessary and was provided.

The cost per participant of the continuing training courses is shown in table 6.12.

Table 6.12 – Mean cost of continuing training per participant (drs. 1000)



The costs, which vary between 200,000 and 680,000 drachmas per participant, are not particularly high and are considered satisfactory for Greek conditions. The peak in 1990 is due to the reasons mentioned above. A considerable part of the costs were covered by a grant from the European Community Fund through OAED (Ministry of Labour).

Independent repair shops (category D) and vehicle sales businesses (category E)

In independent repair shops there is, as a rule, no systematic continuing training. Despite the fact that the continuing training of staff in the repair shops is a crucial factor in their survival in a time of rapid technological development and particularly fierce competition, inter-company continuing training is limited, mainly because of the inadequate financial resources of these small repair shops. The owners of these repair shops have long been aware of the importance of this training and are making considerable efforts, even through the associations or federations representing them. The result so far has not been satisfactory. It is limited to attendance of a very small number of seminars which are held by these collective bodies or by the public and private training bodies mentioned above.

For independent vehicle sales companies, there are no statistics relating to continuing training of their staff. This is because the Association of Car Salesmen, which is based in Athens and represents about 500 independent car sales companies, did not respond to the researchers' request for details on this matter, and did not attend the first briefing session which was held by ELKEPA, the coordinator for this survey in Greece. Nevertheless, in the course of talks with the chairman of this association, it was disclosed that the independent car sales and retail companies do not offer any continuing training.

6.5 Role of social partners in continuing training

The social partners are represented in the motor vehicle sector through first-tier or second-tier trade-union bodies. The main collective bodies of employers and staff are:

For employers
- The Association of Car Importers and Agents (SEAA),
- The Association of Car Salesmen (SEA),
- The Panhellenic Federation of Car and Machinery Repairers (POVEAM),
- The Federation of Car and Machinery Repairers of Greece (OVEAM E),
- The Federation of Car and Machinery Repairers of Northern Greece (OVEAM V.E.),
- The Union of Engine Reconditioning Mechanics of Attica.

For staff
- The Greek Confederation of Labour (GSEE),
- The Panhellenic Federation of Metalworkers,
- Staff committees in relatively large companies.

The initial information which was collected by the various bodies mentioned above, and from individual companies on the social partners' participation in continuing training, leads to the following conclusions:

- The social partners have now grasped the crucial importance of continuing training for the survival of the Greek economy in general and the companies examined in particular.

- The efforts of the collective bodies of employers are concentrated on securing funding from the European Community Fund, and on putting constant pressure on the government to upgrade the system of initial and continuing vocational training.

- The role of staff on a general collective level is at present focused on negotiation of the employer's contribution to vocational training of staff. This contribution appeared for the first time in the general collective agreement of 1988 on a scale of 0.2% of the overall payroll. The present negotiations between SEV (the Association of Greek Industries) and GSEE (the Greek Confederation

of Labour) are likely to lead to an increase of this percentage to 0.5%.

- On an inter-company level, the staff opinion is usually expressed within the "staff committee". Provision for this is made in Article 12 of Law 1767/1988 relating to "staff committees" on continuing training.
- In small repair shops, the staff express their opinion only in an advisory and not a decision-making capacity. As a rule they are not organized within trade unions. Decisions regarding continuing trading are taken by the manager of the repair shop, who is normally the owner.

THIS PAGE INTENTIONALLY LEFT BLANK

1. VIAMAX A.V.E.E.

Size of company: III

Make of vehicle: Rover

Category of vehicle: A, B, C

Type of company: B

VIAMAX A.V.E.E. is a typical case of a company in the motor vehicle import, distribution, sales and service sector.

It was established in 1956 and employs a total of 679 people directly and indirectly in the authorized companies of its network. It is a member of the Association of Car Importers and Agents.

This company has developed a continuing training system adapted to both the training needs of its staff and the demands of competition on the Greek market.

The continuing training of the staff is undertaken mainly in the company's training centre. The number of participants in the training courses is increasing every year, and the results of the continuing training are considered particularly satisfactory if the upward trend in the company's sales is taken into account.

The information presented in this survey was kindly provided by the company itself in the form of completed questionnaires and in personal interviews with the general manager and managing director, the personnel manager and the staff representative.

1. General description of the company

1.1 Basic details of the company

VIAMAX A.V.E.E. is a commercial company. It is engaged mainly in the import, distribution and sale of motor vehicles and spare parts. Another area of this company is after-sales service, i.e. maintenance and repair of the vehicles it sells.

VIAMAX A.V.E.E. was established in 1956, initially as a bodywork repair company, and is based in Peristeri, Attica (suburban area of Athens). In 1987 it was converted from a manufacturing company to a commercial company and reduced its staff from 1,750 to about 300. It now has 296 staff. 26 people are employed in its repair shops and 9 people as salesmen/women in the showrooms. The company has 2 privately owned repair shops and 2 showrooms, one of each in Athens and Salonica. The staff in the authorized showrooms and repair shops number 193 and 190 people respectively.

This company also supports the sales and after-sales service of its vehicles through a nationwide network of 36 authorized showrooms and 39 authorized repair shops[1].

VIAMAX A.E., as official and exclusive agent (see EEC Regulation 123/85), imports, distributes and sells Rover passenger cars, DAF and Landrover goods vehicles and DAF and BOVA buses.

In 1991, VIAMAX A.V.E.E., with equity capital of dr. 7,260 million (3.63 million USD) and a turnover of dr. 18,968 million (9,484 million USD), had the following total sales, by type of vehicle and market share:

Passenger cars	4,416	Market percentage	2.7%
Goods vehicles	537	Market percentage	1% (light) 9% (heavy)
Buses	15	Market percentage	3%

1.2. Brief background to the company and its present development strategy

In 1947 the main shareholder of the present VIAMAX A.V.E.E. became the agent of Mercedes-Benz in Greece. In 1956 he founded the company VIAMAX A.V.E.E., which in 1960 extended its activity to the development and construction of bodywork for goods vehicles and buses with the collaboration of Mercedes-Benz. The following twenty years were a landmark for the company, which, with the extension of its installations to Salonica and Larisa, emerged as a pioneer in Greece in the manufacture and sale of the above-mentioned vehicles. The company was involved in further important export activity in the Middle East. In 1980, at the time of its greatest upturn, it employed 2,600 people.

In 1981, the company discontinued its cooperation with Mercedes-Benz, which founded a subsidiary in Greece, Mercedes-Benz-Hellas, which took over as agent for the passenger cars and also took over the stock of spare parts. 750 staff of VIAMAX A.V.E.E. moved to Mercedes-Benz Hellas.

In 1983, a year of major changes in the heavy vehicles market in Greece, the company faced a very severe crisis, with the result that it suspended its manufacturing activity and laid off 1,300 staff.

In 1987, VIAMAX A.V.E.E was converted from a manufacturing to a commercial company acting as exclusive agent for passenger cars, goods vehicles and buses.

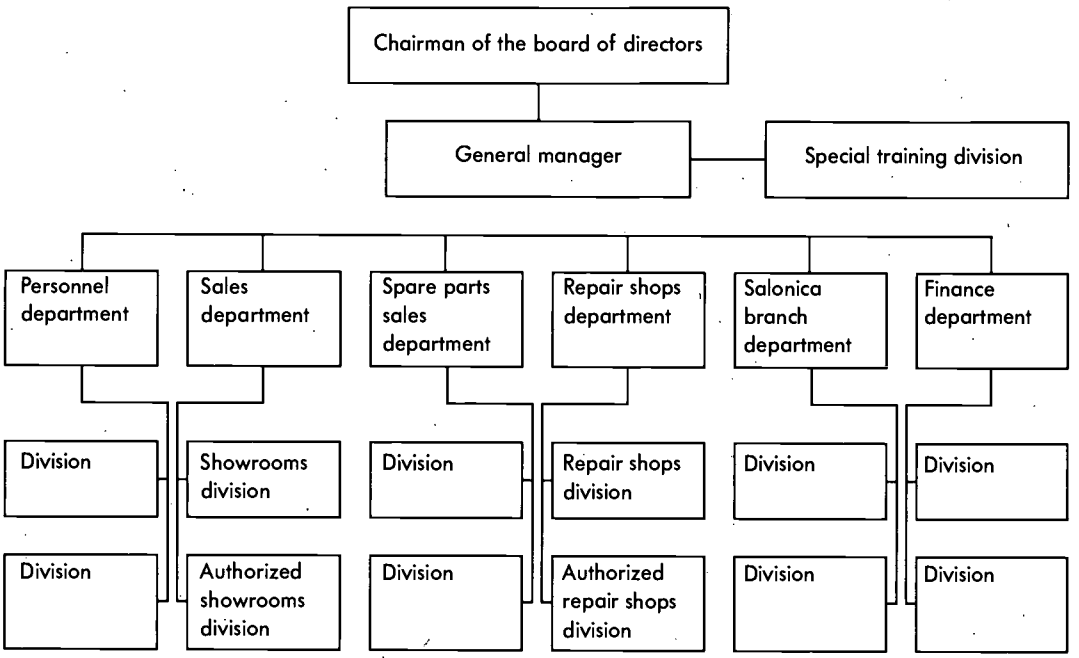
1.3 Structure of the company

As already mentioned, VIAMAX A.V.E.E. has two privately owned repair shops, each of which is headed by a responsible technician with intermediate technical and vocational knowledge. His responsibilities relate to the technical inspection of imported vehicles intended for sale.

There is a similar form of organization in the two privately owned showrooms which belong administra-

[1] "Authorized showrooms and repair shops" are independent private companies (usually individuals or limited liability companies) which are under contract with the import company (e. g. VIAMAX A.V.E.E.), their main contractual obligation being the exclusive sale or repair of the motor vehicles of the above-mentioned company. At the same time the import company, which is also the general exclusive agent, attends to the continuing vocational skills upgrading of the staff of these companies.

Table 1 – Organizational structure of the company



tively to the company's sales department. In each showroom, a responsible salesperson with secondary general training is in charge.

The company has a special training division staffed by two mechanical engineers and two junior engineers who cover the training of all the technical and authorized repair shops. Overall responsibility for the training procedures and development of continuing training/training courses in the company lies with the personnel manager.

The authorized repair shops and authorized showrooms are, as mentioned above, relatively independent companies, and their owners are usually in charge of them. As can be seen in the organization chart of the company, the repair shop and sales departments have their respective divisions controlling these authorized businesses.

1.4 Staff of the company

Composition of the workforce by occupational categories

Table 2 – Composition of the total workforce of the company by broad occupational categories

Occupational group	Number of staff
1. Management	9
2. Administrative staff	119
3. Technical staff	16
4. Car salesmen/women	14
5. Spare parts salesmen/women	26
6. Others	112
Total	296

The main activity of the company is the import and distribution of the vehicles to the network of showrooms. For this reason, the administrative staff greatly outnumber the salesmen/women and technicians. The general group of "others" includes attendants, drivers, cleaners, warehousemen and others in auxiliary jobs.

It is worth noting that hardly any of the staff in the privately owned and authorized repair shops have had systematic vocational training.

Categories of technical staff

The technical staff of the privately owned and authorized repair shops fall into the following categories [2]:

The staff listed in table 6 for privately owned and authorized repair shops are employed in a total of 41 repair shops, of which 39 are for general repairs, one is a body repair shop and one is a vehicle painting repair shop. The authorized repair shops employ an average of 5 people each.

No foreign nationals are employed in VIAMAX A.V.E.E.

Working conditions and pay system

In VIAMAX A.V.E.E. use is made of permanent employment contracts, and more rarely fixed-term contracts, and in exceptional cases the works contract (Article 648 onwards of the Civil Code). The most common form of contract, i.e. the permanent contract, is applied on the basis of the relevant Labour Legislation.

On the basis of the legislation in force, working hours fall into three categories:

[2] These categories are defined by Law 1975/85 of 1985 "relating to requirements for the operation of a repair shop".

Quantitative development of the workforce

Table 3 – Development of the workforce[1] in the privately owned and authorized repair shops and the corresponding showrooms from 1987 until now

Year	Repair shops	Showrooms	Authorized repair shops	Authorized showrooms
1987	18	9	205	125
1988	15	9	225	126
1989	20	9	175	147
1990	26	9	187	160
1991	26	9	190	183
1992	26	9	190	193

[1] The development of staff refers to the repair shops and showrooms for passenger cars only, which are the company's main commercial item.

Distribution of staff by age and gender

Table 4 – Distribution of staff by age and gender in the company as a whole, and in the company's privately owned and authorized showrooms

Age	Company	Private repair shops shops	Auth. repair shops	Sales division	Auth. showrooms
up to 20	2	–	14	–	12
21-30	74	3	120	2	76
31-40	83	18	36	2	60
41-50	81	3	15	3	10
51-60	49	2	5	2	23
61-65	6	–	–	–	7
66+	1	–	–	–	5
Total	296	26	190	9	193
Men	228	22	190	9	149
Women	68	4	–	–	44

Level of education of the workforce

Table 5 – Staff's level of education in the company as a whole, and in the company's privately owned and authorized repair shops and privately owned and authorized showrooms

Category	Company	Private works[1]	Auth. repair shops	Sales div.	Auth. showrooms
Self-training	11	3	58		32
Secondary training	228	2	127	6	79
Vocational training			5		
One year					7
Two years	7				9
Three years	9				12
Higher ed. (TEI)	15				25
University (AEI)	20			3	29
Postgraduate studies	6				
Total	296	5	190	9	193

[1] These figures refer only to mecanics/technicians in privately owned repair shops and not to their total number of staff, which is 26.

a. Working hours specified on the basis of Presidential Decree 27-6/4.7.1932 Article 1 and Law 1037/71,
b. Working hours fixed by Collective Agreement or Arbitration Judgment,
c. Working hours fixed by Private Agreement (contractual).

2.

Table 6 – Categories of technical staff

Category of mechanic/technician	Private repair shops No. of staff	Auth. repair shops No. of staff
1. Engine mechanic	2	124
2. Elec. technician	1	21
3. Brake systems		
4. Petrol pumps		
5. Carburettor		
6. Radiators		
7. Suspension		
8. Exhaust		
9. Bodywork	1	19
10. Paintwork	1	10
11. Wheels (vulcanizer)		
12. Liquid gas appliances		
13. Other		16
Total	5	190

In the company's repair shops and sales showrooms, the working hours of category b) are applied, i.e. those fixed by the National General Collective Labour Agreement of 13.3.1986, which stipulates 40 working hours per week. The 40 hours are divided into 5 days per week, from 7.30 a.m. to 3.30 p.m.

Part-time employment in the company is rare because the intense competition and the need to be ready to deal with the various problems call for specialist full-time work by permanent staff.

The enforcement of the provisions of Laws 1568/85 relating to health and safety of staff and 1567/88 relating to the staff committees, and the ratification of the 135th international labour contract, have contributed substantially to the improvement of working conditions.

The wages in the company are as follows:

- The management staff receive dr. 500,000 to 600,000 gross, i.e. ECU 1,985 to 2,380
- The assistant management staff receive dr. 350,000 to 400,000, i.e. ECU 1,390 to 1,590
- Heads of divisions receive dr. 250,000, i.e. ECU 990
- On the basis of the National General Collective Agreement, staff receive dr. 4,500 to 6,500 per working day, i.e. ECU 18 to 26.

In addition to the above wages, the company applies a system of secondary pay related to the staff's productivity.

The labour market for specialist technical staff, and criteria for employment
On the Greek labour market, there is a considerable shortage of specialist workers in occupations connected with the motor vehicle manufacturing sector. For this reason, the technical staff required by the car manufacturers' agents in Greece usually receive specialist training within each company after they have been recruited in the specific technology of each type of vehicle or are recruited away from other similar companies.

The main criteria for selection and employment of staff in this company are:

- Theoretical training
- Experience
- Knowledge of at least one foreign language
- Dress and appearance
- Good references

2. The company's continuing training policy

2.1 Historical development and present state of training/continuing training

For a number of years, the company, realizing the particular importance of specialist vocational training and continuing training of the staff with a view to implementing the objects of the company, has been training its staff and the staff of the authorized repair shops. This last point is in fact a contractual term of cooperation between the company and the independent companies of its network.

The continuing training and the technical continuing training of trainers and senior technical staff of the company is carried out mainly in collaboration with the car manufacturer by private training bodies at the headquarters of the company or abroad, as the case may be.

The technical continuing training of staff of the company and authorized repair shops is carried out at the company's training centre by the staff in the special training division. This special training division has been created within the last few years and is under the authority of the general manager, as the organization chart of the company shows. At this point it is worth emphasizing that VIAMAX A.V.E.E. is one of the very few companies in the sector which has its own training centre.

As for the continuing training of the administrative, sales and other staff, this takes place outside the company in collaboration with training organizations such as ELKEPA (Elliniko Kentro Paragogikotitas -Greek Centre for Productivity). The personnel manager is responsible for the continuing training of these members of staff.

Of particular interest is the broadening of continuing vocational training which VIAMAX A.V.E.E. introduced in 1987, when it was converted, as mentioned above, from a manufacturing to a commercial company.

Aims of continuing training
The main aim of continuing training in VIAMAX A.V.E.E. is *to train staff in specialist skills and keep them in a high level.* Proper support of the company's products calls for specialization mainly in the technical sector. Special importance is attached to

training and briefing in new vehicle technology such as catalytic converters, electronic ignition etc.

At the same time, a secondary aim is the training of management staff in informatics, and the staff of the other divisions (sales, spare parts and repair shops) in computing, as a response to the intense competition and new demands of the market.

Initial vocational training

In companies which are exclusive agents of car manufacturers, such as VIAMAX A.V.E.E., staff are not appointed en masse, but individually and on an ad hoc basis. This company, which is organized in a traditional way, has no special programme of initial vocational training, along the lines of theoretical instruction and practical work. However, a newly appointed employee, in the division to which he belongs, is constantly updated, while acting under the care and supervision of the responsible head of division and other colleagues.

Organization of continuing training, and the staff's role

VIAMAX A.V.E.E. has been organizing continuing training courses since 1989. As a rule, the continuing training, as mentioned above, takes place mainly in the company's training centre during working hours. It is compulsory for the technical staff in the privately owned and authorized repair shops.

Interest in continuing training is expressed mainly by staff in the accounting offices because of continual amendments to tax legislation, and by all the motor mechanics/technicians at all levels of training.

It should also be noted that the staff play a part in decision-making as regards continuing training. This is laid down in the provisions of Article 12 of Law 1767/1988 relating to the staff committees.

Staff participation in the various areas of continuing training

Table 7 – Number of staff in VIAMAX A.V.E.E. and the authorized companies of its network who have taken part in continuing training courses from 1985 onwards

Year	Number of participants from the company	Number of participants from the auth. companies
1985		20
1986		20
1987		25
1988		32
1989	20	36
1990	63	43
1991	77	48
1992	90	72

Table 8 – Areas of continuing training as percentages of total training time. The figures are for 1989 onwards

Year	Technical training %	Administrative training %	Sales training %	Other training %
1989	40	20	20	20
1990	25	21	25	29
1991	21	36	26	17
1992	18	14	22	46

Table 9 – Duration of each area of training, as an average number of hours per staff member per year

Year	Technical training %	Administrative training %	Sales training %	Other training %
1989	100	100	100	100
1990	400	400	400	400
1991	400	400	400	400
1992	300	300	300	300

Cost of continuing training

As table 10 shows, there is considerable financial support from the European Community through OAED [Organismos Apascholisis Ergatikou Dynamikou – Organization for Manpower Employment] for the continuing training of the staff of VIAMAX A.V.E.E. It should be mentioned at this point that OAED subsidizes the continuing training courses only for participating mechanics/technicians who have an employment contract with the company. This means that the cost of continuing training for the mechanics/technicians of the authorized companies of the network is borne exclusively by VIAMAX A.V.E.E.

Table 10 – Participants in training courses in 1991

year	Cost of continuing training (dr.)	VIAMEX A.V.E.E.'s share of participation[1] (%)
1988		
1989	19,000,000	100
1990	100,700,000	25
1991	91,088,000	25
1992	97,000,000	25

[1] The remaining percentage was covered by the European Community Fund through OAED

2.

2.2 Development of the organizational structure of the vocational training/ continuing training system

The special training division of VIAMAX A.V.E.E. was set up in 1988. Since then it has developed as follows:

1988 1 person
1989 2 people
1990 3 people
1991 4 people
1992 5 people

This special division is headed by the company's personnel manager, who bears sole responsibility for the training of the staff at VIAMAX A.V.E.E. The other four people are two mechanical engineers and two junior engineers who cover the training of all the mechanics/technicians of the privately owned and authorized repair shops.

Criteria for course selection
The course is selected by the personnel manager after agreement with the heads of the various divisions and in cooperation with the selected trainer according to the following criteria:

- The curriculum which should cover the required area of knowledge
- The topical nature of the material
- The qualifications of the teaching staff
- The cost of the course, and the probable joint organizing body

Apart from the above criteria, it is important to note that there is feedback between the service provided (as a result of the continuing training) and the training course. The feedback in the form of customer requirements influences the design of the training courses and, more generally, the continuing training policy of VIAMAX A.V.E.E. It should also be noted that the exclusive aim of the continuing training courses, particularly those aimed at technical staff, is specialization.

Criteria for selection of staff for training
The staff who are to participate in continuing training courses are selected according to the following criteria:

- the employee's specialized work
- the training requirements for the specialized job
- the employee's personality and suitability
- changes in the technology of the product dealt with by the staff member
- changes in the legislation governing the employee's job
- the competition

2.3 Effects of new technologies

The introduction of electronic technology in vehicles has inevitably meant that the repair shops have had to be organized and equipped accordingly. The staff give a lot of thought to specialization and show a consistent interest in it. The training is not covered by the programmes of OAED or the European Community Fund.

The introduction of computers in recent decades in Greece has had a positive effect on working conditions. Data processing is easier and quicker. The staff of VIAMAX A.V.E.E. are favourably disposed towards the computerization of the company.

2.4 Social partners' role in shaping continuing training policy

In the company, there has always been an organized body representing the staff. The staff are now represented by the following collective bodies:

- Association of White-Collar and Manual Workers of VIAMAX A.V.E.E. and M.K. FOSTIROPOULOS A.E.

- Staff committee of VIAMAX A.V.E.E.

Before 1987, there were a number of conflicts. After 1987, when the company converted from a manufacturing to a commercial company and reduced its staff, all these conflicts disappeared. Indeed, since the staff committee was set up, the company management has been working smoothly with the staff representatives.

Continuing training is a matter of interest both to the staff and to their collective representative bodies. The younger members of staff are particularly interested in continuing training.

2.5 Description of the main continuing training courses

The continuing training courses are planned on an annual basis. Alterations are made from time to time. Exceptional situations are dealt with by specialized seminars with various training bodies. At the end of the training procedure, the continuing training course is evaluated on the basis of:

- The trainees' answers to specific written questions
- Work performance, which is assessed by the heads of the divisions
- Customer response to each situation

The training courses include a theoretical part and practical work to consolidate the knowledge gained. Modern teaching aids are used.

Table 11 – Breakdown of the continuing training programmes for various categories of trainees

Category: warehousemen
Object of training: modern warehouse management

Course	Theory (hours)	Practical (hours)
Warehouse organization	75	255
Applied management	25	30
Health and safety	5	15
Total hours	100	400

Category: car and spare parts salesmen/women
Object of training: sales

Course	Theory (hours)	Practical (hours)
Introduction to interpersonal communication	15	45
Sales techniques	25	75
Negotiating techniques	15	45
Customer relations	5	15
Analyzing customer details	20	60
Applied management	5	15
Health and safety	15	15
Total hours	100	270

Category: accountants and assistant accountants
Object of training: general accounting

Course	Theory (hours)	Practice (hours)
General accounting	40	120
Tax documentation	20	60
Value-added tax	15	45
Financial analysis	10	30
Applied management	10	15
Health and safety	5	30
Total hours	100	300

Category: computer operators
Object of training: programming/computing

Course	Theory (hours)	Practice (hours)
Introduction to computing	8	15
Hardware	12	45
Software	16	45
Operating system (DOS)	24	75
Word processing	20	60
Introduction to IBM S/38	20	60
Total hours	100	300

Category: Motor mechanics

Course	Theory (hours)	Practice (hours)
Gearboxes and differentials	15	45
Electronics in the suspension and brake systems	10	30
Electronic fault diagnosis units	15	45
Vehicle geometry and steering systems	10	30
Combustion – fuel – exhaust	4	12
Environmental pollution and current legislation	4	13
Catalytic converters and new technology	12	35
Engines and fuel systems	19	56
Vehicle dynamics	4	13
Tyres and wheel rims	7	21
Total hours	100	300

3. Detailed presentation of an authorized repair shop in VIAMAX A.V.E.E. network

3.1 General description of the company

3.1.1 Basic details of the authorized repair shop

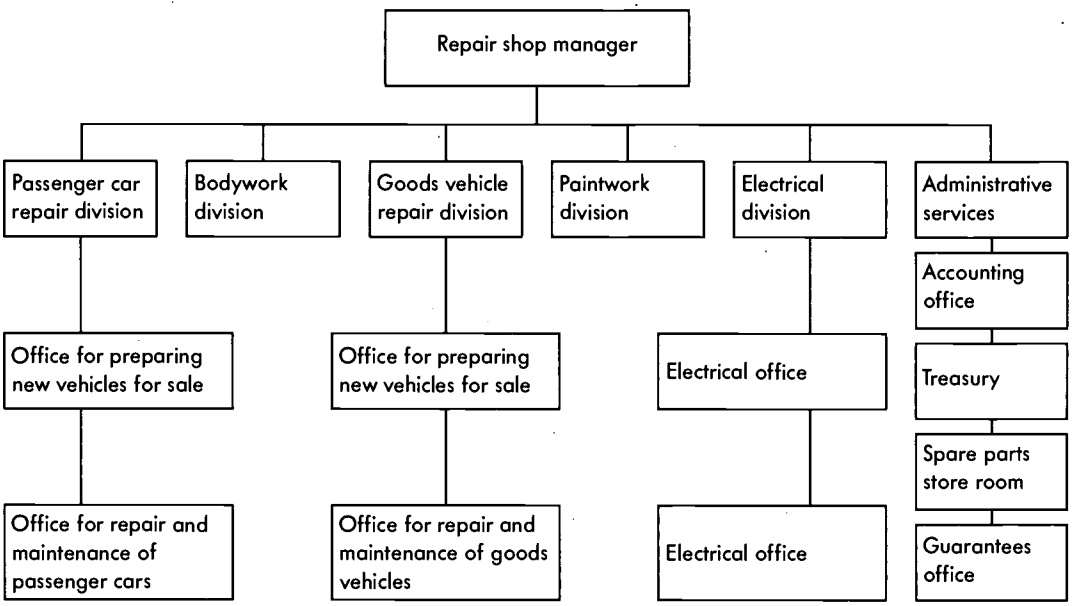
The company named "S.P.S. SERVICE E.P.E." is an authorized repair shop in the network of the import company VIAMAX A.V.E.E. Its legal form is that of a limited liability company

The repair shop was established in 1987 and is housed on VIAMAX premises with a total area of 6,000 square metres, in Peristeri, Attica (suburban zone of Athens). It is engaged in the repair and maintenance of passenger cars and goods vehicles which are imported by VIAMAX A.V.E.E., i.e. ROVER passenger cars and DAF goods vehicles. The company has a total staff of 62 people, of whom 57 are technical staff and the remaining 5 administrative.

The turnover of vehicles is about 14,500 a year, of which 70% are passenger cars and 30% goods vehicles.

3.1.2 Structure of the authorized repair shop

Table 12 – Organizational structure of the authorized repair shop "S.P.S. service E.P.E."



3.1.3 Staff of the authorized repair shop

Composition of the workforce by category

Table 13 – Total workforce of the authorized repair shop by broad occupational groups

Occupational group	Number of staff
1. Management	1
2. Administrative staff	4
2. Technical staff	57
Total	62

Quantitative development of the workforce

Table 14 – Development of the technical workforce from 1988 up to the present day

Year	Workforce
1987	
1988	35
1989	42
1990	52
1991	58
1992	57

The upward trend in the workforce is due to an increase in sales of new vehicles in recent years and hence an increase in the turnover of the authorized repair shop.

Distribution of the staff by age and gender

Table 15 – Distribution of the staff by age and gender

Age	Number of staff
up to 20	8
21 to 30	37
31 to 40	11
41 to 50	3
51 to 60	3
61 to 65	
66 upwards	
Total	62
Men	61
Women	1

It is worth noting that the majority of staff in the repair shop are in the age groups up to 40. The number of female workers is unexpectedly low.

Level of training of the workforce

Table 16 – Level of training of the staff in the authorized repair shop

Category	Number of staff
1. Self-training	16
2. Secondary training	31
3. Vocational training	
3.1 One year	3
3.2 Two years	2
3.3 Three years	8
4. Higher education (TEI)	1
5. University (AEI)	1
6. Postgraduate studies	
Total	62

Categories of technical staff

The technical staff fall into the following categories:

Table 17 – Categories of technical staff

Category of mechanic/ technician	Number of mechanics/technicians
1. Motor mechanics	21
2. Electrical technicians	4
3. Brake systems	2
4. Petrol pumps	
5. Carburettors	
6. Radiators	
7. Suspension	
8. Exhaust	
9. Bodywork	10
10. Paintwork	6
11. Wheels (vulcanizer)	
12. Liquid gas appliances	
13. Workmen	12
14. Cleaners	2
Total	62

The first 12 categories are those defined by the Greek legislation (Law 1975/85) on "the requirements for the pursuance of an occupation". The lack of staff in categories 3 to 8 is justified by the fact that those in category 1 are legally entitled to carry out the work of these categories.

Working conditions

All staff members work full-time. There are no seasonal or part-time workers. The working hours are 8 a.m. to 4 p.m., Monday to Friday. No problems have been reported in connection with the working conditions.

Criteria for employment

For technical staff in repair shops, the main preconditions are theoretical technical training, experience and previous work in the area in which the new recruit is to be employed. Other basic criteria are intelligence, diligence, honesty and the employee's overall personality.

3.2 Continuing training policy of the authorized repair shop

3.2.1 Training plan at repair shop level

The authorized repair shop in question does not systematically plan the continuing training of its staff. Since it is exclusively engaged in the maintenance and repair of the vehicles which are imported and sold by VIAMAX, the vehicle technology is specialized and specific. Consequently, the technical training concerned with these vehicles is provided exclusively by VIAMAX, which is also responsible for planning the continuing training.

3.2.2 Categories of trainees and aims of continuing training

Continuing training in the authorized repair shop in question is mainly for technical staff. The aim of continuing training at present is the transfer of knowledge and experience in the individual technological development of various vehicle accessories, e.g. mechanical and electronic preparation of the combustion mixture. Another matter of particular importance for the continuing training of this repair shop is computerization.

Participation in continuing training courses from 1985 to 1992

Participation in training courses is compulsory for staff who are selected to attend them. The training courses are held during working hours, on the premises of VIAMAX.

Table 18 – Numbers of repair shop staff members who have participated in continuing training courses organized by VIAMAX since 1987, the year the repair shop was set up

Year	Number of participants
1987	3
1988	2
1989	1
1990	4
1991	1
1992	4

Table 19 – Average annual number of days of training per employee

Year	Technical training (days)	Administrative training (days)	Sales training (days)	Other training (days)
1987	5.0			
1988	4.0			
1989	5.0			
1990	3.5			
1991	3.0			
1992	3.3			

2.

Staff participation in the shaping of continuing training
The staff in the repair shop are not organized into a representative trade-union body. For this reason they do not have a direct say in shaping continuing training They can, however, request continuing training and thus, indirectly, influence the shaping of the continuing training.

Criteria for selection of the staff who are to participate in the continuing training courses
The staff who participate each year in the available continuing training courses are selected mainly on the basis of age. Young mechanics/technicians are almost always selected for continuing training, although in certain instances older staff are also selected and trained. Another basic criterion for selection of trainees is their motivation.

Evaluation of the effectiveness of the course
The effectiveness of the course is evaluated from the point of view of the trainees; they are questioned about it after completion of the course. Another criterion is the qualitative result as shown in the work of the mechanic/technician who has undergone training.

4. Evaluation/applicability to other companies

VIAMAX A.V.E.E., a typical example of a motor vehicle import, distribution, sales and service company, applies a system of continuing occupational continuing training, mainly at its training centre. The goals are to equip its staff with specialized skills and to meet the demands of competition on the Greek market. In particular, the following should be mentioned as important elements of continuing training:

- There has been an upward trend in the number of staff who undergo continuing training. In 1989, 6% of the total number of staff were trained, while in 1992 this percentage rose to 30%. Correspondingly, in the authorized companies of the network, 11% of the staff were trained in 1989, while in 1992 this percentage rose to 19%.

- In 1989, the year when cars with anti-pollution technology first appeared on the Greek market, continuing training concentrated on technical training/briefing on catalytic converters and fuel injection systems (40% of the total training time). In 1992, as can be seen from the relevant figures above, continuing training was concerned mainly with training in aspects of the computerization of accounting systems and tax legislation.

- The sum spent on continuing training in 1992 was dr. 97,000,000, or about dr. 600,000 per trainee. This sum is particularly satisfactory in the Greek context. At this point we should mention the major role played by the European Community Fund, through OAED, in financially supporting the continuing training, in spite of the fact that *the training of staff in the authorized companies is not subsidized.*

- The training course, its selection criteria, and the criteria for selecting the teaching staff do not show any particularly innovative features. Nevertheless it should be emphasized that it has been successfully adapted to Greek conditions. For this reason, VIAMAX A.V.E.E.'s programme of continuing occupational continuing training can be applied relatively easily to similar companies in the sector.

2. D. NAFPLIOTIS E.P.E.

Size of company: II

Make of vehicle: Peugeot

Category of vehicle: A

Type of company: C

The company "Demetrios Nafpliotis E.P.E." is a medium-category motor vehicle repair company authorized by Lion Hellas, official agent for the Peugeot company in Greece.

It was established in 1982 and is the successor to the Talbot repair shop of the Importex network which was established in 1979. It employs a total of nine people, and their continuing training takes place mainly in the Lion Hellas training centre in Greece. The company itself organizes various continuing training activities on its premises, e.g. English lessons and technical matters.

Cooperation with the owner and manager of the company was very good, frank and constructive. Our special thanks to him for this.

1. General description of the company

1.1 Basic details of the company

The company "Demetrios Nafpliotis E.P.E." is an authorized repair shop for Peugeot and Talbot passenger cars. It also trades in spare parts for these makes of car. It has been in operation since 1982 in the form of an authorized repair shop, and is based in Moschato, Attica. The company employs a total of 9 people.

In addition to running the general repair shop, the company takes part in the organization of car races, where its participation takes the form of technical support.

The company, on its own initiative, has developed a computing system and data bank for systematically recording and monitoring the cars repaired.

The company has a strict hierarchy, in which the owner/manager has absolute authority over all decisions and control over all activities. The staff are not organized into a trade union, nor would the owner want them to be.

Staff remuneration is well above the level stipulated by law, but the owner has the right to request certain "sacrifices" from the staff without, of course, any extra pay.

Unfortunately it was not possible to have extensive discussions with the staff of the company.

1.2 Brief background to the company and its present development strategy

From its establishment in 1982 until now, the company has not had any serious fluctuations in its development. One reason for this is probably the fact that it had previously existed as a repair shop since 1979.

Although its turnover seems to be quite satisfactory, there is general anxiety and insecurity about the future, for the following reasons:

- Cooperation with the importer/agent is not considered absolutely secure.
- The constant changes in technology are seen as negative, since they entail a constant struggle to keep up with them. The problem persists despite ongoing training.

This, among other things, is a serious obstacle to mapping out a development strategy for the company.

The technological changes, such as the application of new technologies to motor vehicles, and also the computerization of the departments, have shaped the company's development in terms of its administrative organization and work organization, and have also established the continuing training of the personnel as a necessity.

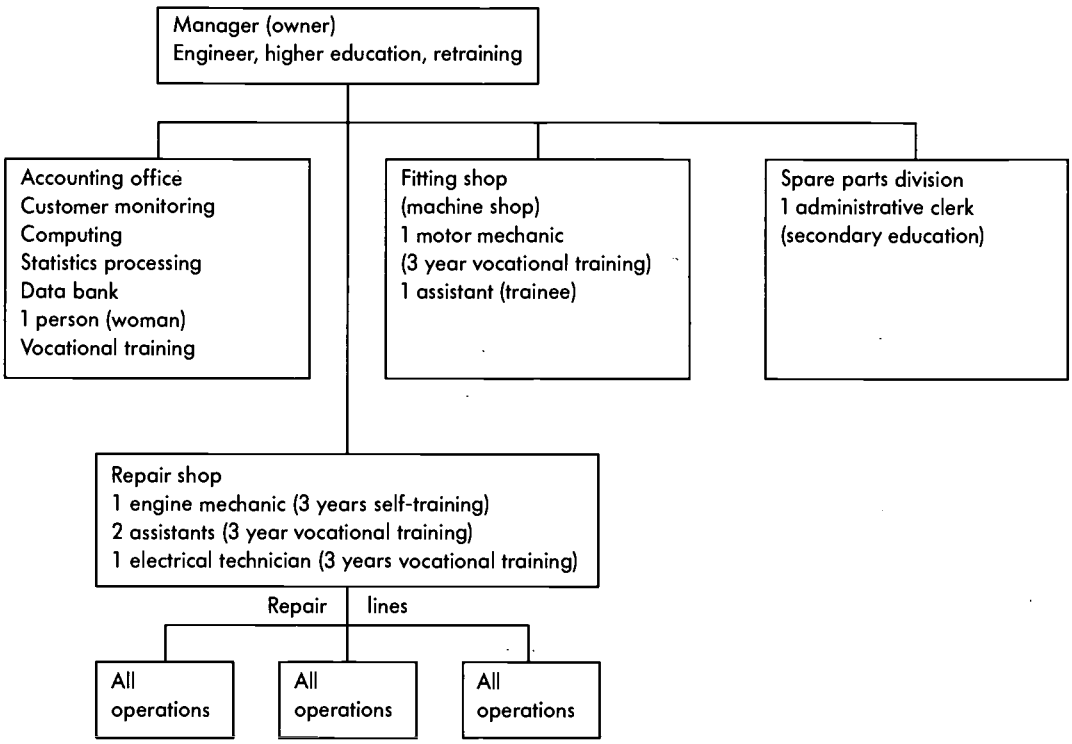
1.3 Structure of the company

The organizational structure of the company provides for a clear separation of powers and responsibilities and ensures that absolute authority and control are in the hands of the owner/manager, who has the final say on all decisions.

The computer and data bank handle the volume of data required for constant monitoring of the vehicles repaired, spare parts, and also the work and the staff who carried it out. A system of in-house consultations (once a week), in which any problems that have arisen – particularly technical ones – are discussed, ensures that operations are kept under control, helps to forestall difficulties, and contributes to continuing training.

The manager/owner is from the navy (Chief Officer), retrained in America, and attends training for one month each year at the Peugeot plants in France.

Table 1 – Organizational structure of the company



1.4 Staff of the company

Composition of the workforce by occupational category

Table 2 – Composition of the total workforce of the company, in broad occupational groups

Occupational group	Number of staff
1. Management	1
2. Administrative staff	1
3. Technical personnel	6
4. Spare parts salesmen/women	1
5. Others	–
Total	9

Quantitative development of the workforce

Table 3 – Development of the company's workforce from 1987 until now

Year	Workforce
1987	11
1988	9
1989	9
1990	9
1991	9
1992	9

The reduction in the workforce in 1988 was due to the introduction of a computing system and modernization of operations. More specifically, all the work in the accounting office and spare parts division is done by computer, while the use of diagnostic and other instruments in the repair shop has increased output and reduced the number of staff.

Table 4 – Distribution of the staff by age and gender

Age	Private repair shop (Number of staff)
up to 20	2
21 to 30	6
31 to 40	1
41 to 50	
51 to 60	
61 to 65	
66 upwards	
Total	9
Men	8
Women	1

The age distribution of the staff is worth noting since they are all under 40. The only woman is employed in what is regarded as "typical" women's work.

Level of training of the workforce

Table 5 – The level of training of the staff in the company's repair shop

Category	Private repair shop (Number of staff)
1. Self-training	
2. Secondary training	1
3. Vocational training	
3.1 One year	1
3.2 Two years	
3.3 Three years	6
4. Higher education (TEI)	1
5. University (AEI)	
6. Postgraduate studies	
Total	9

The majority of the staff have had as much as three years' vocational training, which is significant, given that this is not the norm for this sector.

Categories of technical staff

Table 6 – Technical staff of the privately owned repair shop are classed in the following categories[1]

Category of mechanic/ technician	Private repair shop (Number of staff)
1. Engine mechanics	5
2. Electrical technicians	1
3. Brake systems	
4. Petrol pumps	
5. Carburettors	
6. Radiators	
7. Suspension	
8. Exhaust	
9. Bodywork	
10. Paintwork	
11. Wheels (vulcanizer)	
12. Liquid gas appliances	
13. Other	
Total	6

[1] These categories of qualification are defined by Law 1975/85 "relating to requirements for the operation of a repair shop".

The qualifications of the staff correspond to the work carried out in the repair shop. Furthermore, as the manager pointed out, there is a 90% chance that staff can replace each other, as far as the technical repair shop is concerned. In other words, almost all of them can do every kind of work.

Working conditions and remuneration system

As mentioned above, there is an absolute hierarchy in the company, with total authority in the hands of the manager/owner. This strict organization helps to keep the company functioning smoothly. We would imagine, however, that it leads to a feeling of oppression and discontent among the staff – a factor which we were unable to verify or confirm. Officially, the General Collective Agreements are enforced, but the wages actually paid exceed those stipulated by law. This can be seen in the following table:

Table 7 – Working conditions and remuneration system

Category of employee	Weekly wage stipulated by law (gross) (dr.)	Weekly wage paid (gross) (dr.)	Difference (dr.)
1. Admin. staff	31,000	44,000	+13,000
2. Mechanics/ technicians	26,000	37,500	+11,500
3. Assistants	22,000	32,000	+10,000

In addition to the wages as shown in table 7, if the turnover from spare parts exceeds dr. 3,000,000 in 15 working days, 2% of the turnover is distributed equally among the staff.

Also, in addition to the regular insurance, there is group insurance of all the staff (accident – life – hospital care) for dr. 10,000,000 per employee.

In the event of dismissal or voluntary departure, the employee is compensated in line with the statutory provisions.

The staff are not paid a bonus if they have to work overtime or at weekends or on shifts. According to the owner, this does not happen often.

Working hours are from 8.30 a.m. to 5 p.m. with a half-hour break. The staff leave does not exceed 20 days and is granted mainly in summer.

The staff are not organized into a trade union, and are represented only by the GSEE (Geniki Synomospondia Ergaton Ellados – Greek Confederation of Labour). The owner does not in any case want the staff in his repair shop to be members of a collective trade union body. Relations between management and staff are on a personal level; this does not allow collective action. The various problems are solved by direct talks between manager and employee. All the staff work full-time. The company does not employ any foreign nationals.

Labour market for specialist technical staff and criteria for employment

The labour market for specialist technical staff presents particular problems. In addition to a serious shortage, there is a relatively high rate of departure from the occupation and mobility between companies.

For this reason, and also because the manager/owner wishes to "mould" his staff himself, he prefers to take on young, relatively inexperienced people whom he then trains himself.

In order to be accepted for a job, there is no need for previous experience, knowledge of a foreign language or even references.

The criteria for selection and employment of staff in this company are:

- General, theoretical technical/vocational training
- Interest, curiosity
- Education at State Vocational Schools (e.g. the Sivitanidios School).[2]

The final selection is made at the end of a four-month period during which the applicant is on probation without pay. This four-month trial period is also a period of (re)training (as we shall see in greater detail in the chapter on training/continuing training).

2. The company's continuing training policy

2.1 Existence of a training plan or training courses at repair shop level

There is no long-term continuing training plan at repair shop level. Attempts are being made within the repair shop, but these are oriented towards solving particular problems as they arise. The agent/importer appears to have a long-term plan, but the company in question does not seem to be aware of it or to play any part in shaping it.

2.2 Link between training courses and demand

The matching of continuing training courses to demand is not very good, or at any rate is not influenced by the company itself because the available continuing training courses are determined by the agent. There is of course a choice, but only among those courses which are on offer.

2.2.1 Analysis of the quality requirements

The company does not analyze quality requirements, either overall or for different groups of staff.

2.2.2 Relationship of quality requirements to training courses

Since there is no analysis of requirements, the relationship between the needs for skills/knowledge and the continuing training courses is not very well-defined.

2.2.3 Historical development of training strategy from 1987 to 1992 and training practice

The owner/manager attaches extreme importance to initial and continuing training for himself and his staff. Every year without fail from 1988 until now, he himself has been attending continuing training courses for trainers for one month at the Peugeot plants in France, and 7 days' training on specific aspects of racing cars.

As mentioned above, the trial period of 4 months for staff is essentially a period of initial/continuing training. These 4 months include:

- Aspects of organization and behaviour at the workplace
- Learning about tools and their use
- Training in lubricants, which are given special emphasis
- Training in diagnostic checking devices
- Theory, based on technical manuals specifically for Peugeot models
- Practical work with car accessories
- Training in spare parts management

After these 4 months, the employee progresses to practical application/customer service, at which point he begins to receive pay. Although he works/collaborates with an experienced colleague for 4 months – after the initial 4 months – his real training is through contact with customers.

After the end of these 8 months, he begins to serve customers by himself, on the basis of a questionnaire which he learns by heart. The final selection is then based on his work performance.

Every year, 2-3 mechanics/technicians in turn receive 4 weeks' training at Lion Hellas (agent), generally on Peugeot models, with particular emphasis on the electronic technology in the car. In collaboration with Bosch, Michelin and Technotest, outside working hours (usually on Saturdays), there is 4 hours' continuing training on the injection system, braking, and diagnostic devices.

The staff are also given English lessons for 4 months a year, 4 hours a week. Every Thursday, outside working hours, there is a "training consultation" in which they discuss any problems that have arisen, and collectively try to find solutions.

The company takes part in the organization of car races, in which the staff participate (compulsorily) as a technical support team. This participation, and the staff's performance during the races, take the form of a continuing training exercise and test.

2.2.4 Categories of trainee and training objectives

Categories of trainee

The continuing training is designed for all staff, with some emphasis on the technical members.

Access to continuing training

All these training activities are compulsory for the staff of the company.

Staff participation in continuing training courses

Table 8 shows the number of staff of the company who took part in continuing training programmes from 1983 onwards:

[2] There is a lack of confidence in private technical and vocational schools.

Table 8 – Staff participation in continuing training courses

Year	Number of participants
1983	3
1984	3
1985	3
1986	3
1987	3
1988	4
1989	4
1990	4
1991	5
1992	5

In relation to the total number of staff, the participation in continuing training is considerable and has been on the increase since 1988. This reflects the particular emphasis which the owner/director places on continuing training, and the staff's obligation to participate.

Table 9 – Areas of continuing training as percentages of total training time

Year	Technical training %	Spare parts %
1983	95	5
1984	95	5
1985	95	5
1986	95	5
1987	95	5
1988	95	5
1989	95	5
1990	95	5
1991	95	5
1992	95	5

For the last 10 years the continuing training emphasis has consistently been on technical training.

Objectives of continuing training
The main objective of continuing training for the company is to enable staff to meet the demands of their work.

Staff's role in continuing training
The continuing training requirements are shaped by everyday practice, but the owner/manager has the final word and the staff are required to take part in continuing training courses. The manager bears full responsibility for this.

Criteria for course selection
The manager selects the continuing training courses on the basis of the statistics for breakdowns, changes in technology, and the frequency with which cars are returned because of faulty repair.

The company is also required to participate in continuing training organized by the agent, since this plays a part in the evaluation of the company. In all cases, priority is given to a combination of theory and practice.

Criteria for selection of staff for training
Staff are selected for continuing training courses on the basis of the gaps in their knowledge and their training requirements, but all the staff are trained in turn.

Criteria for evaluation/success of the continuing training course
The success of a continuing training course is evaluated according to the staff's performance, in terms of the ease with which they handle the cars, how they deal with faults, how they repair them, and their approach to technical problems. Furthermore, the manager is in direct contact with the trainers of the agent or of the company where the continuing training takes place.

Diversification of training courses as a consequence of the impact of new technologies
The introduction of electronic technology in vehicles has led to readaptation by the company. However, there are no particular problems because the technical team of the repair shop already has a great deal of experience in technical support for racing cars.

Besides, with computerization, there has been an improvement in working conditions and the operating conditions in the repair shop.

Long-term planning and objectives of continuing training
The staff will have to be trained in the development of vehicle technology in order to understand the changes in certain accessories and their operation, and the reasons for these changes. This training will have a positive effect on customer service because the employer will be in a position to provide a high standard of work and to deal with all the customer's enquiries.

The social partners' role in shaping continuing training policy
As we have mentioned above, the staff in this company are not organized. The owner/manager is solely responsible for continuing training policy.

Cost of continuing training, and continuing training bodies

Table 10 – Cost, time distribution and participation of the company

Year	Cost of continuing training (dr.)	Company participation (dr.)	Company participation (%)
1988	3,500,000	1,940,000	55.43
1989	3,500,000	1,940,000	55.43
1990	3,500,000	1,940,000	55.43
1991	3,500,000	1,940,000	55.43
1992	3,500,000	1,940,000	55.43

According to the manager/ owner, his company has spent at least dr. 2,500,000 each year since 1988, while Lion Hellas has been contributing about Dr. 1,000,000. The dr. 560,000 difference revealed by the above table is a sum which is spent in exceptional cases, but it is not a planned expenditure and therefore it does not appear in table 10.

Both the total cost of continuing training, which is particularly high, and the company's own participation must be seen in the Greek context in general and in the context of this sector in particular.

3. Evaluation/applicability to other companies

The evaluation of the continuing training of the motor vehicle repair company "Demetrios Nafpliotis E.P.E." was far from straightforward for the two authors/ researchers, who unfortunately arrived at different conclusions. The views of both the authors are therefore presented, on the grounds that they will provide the central research team with a basis for discussion which will enable them to draw their own conclusions.

Senior Lecturer S. Papaioannou's evaluation:

The company "Nafpliotis E.P.E." appears to have seen "the writing on the wall" as regards the need for continuing training. The Lion Hellas company, in which participation in continuing training activities is mandatory, has certainly contributed to this.

Although the owner/ manager sees no problems as regards changes in technology, we believe that the lack of a specific strategy and systematic training/ continuing training policy, based on anticipation of the forthcoming technical developments and strategies of the car manufacturers, will sooner or later lead to problems in companies of this kind.

In the short term, the link with such a car producing and importing company provides protection and security for companies like "Nafpliotis E.P.E.", but at the same time there is an underlying apprehension and anxiety about the future. This is connected with the unpredictability of the car manufacturer/ import company's strategy and policy. The possibility of withdrawal of the authorization – which is not mere fantasy – hangs over such companies like the "sword of Damocles".

This state of dependency does not leave much margin for developing initiatives, seizing on opportunities and mapping out strategies and policies with a future.

This dependency certainly influences employer-employee relations. The staff's continuing training options are the absolute prerogative of the employer. The staff are not in a position to develop their own personal planning strategy which would make them competitive on the labour market and strengthen their position in negotiating the sale of their labour.

Formally and quantitatively the staff's participation in continuing training is quite satisfactory. However, it is not possible to make a real qualitative evaluation in a survey of this kind.

The company does not systematically analyze requirements, nor does it have a systematic continuing training plan.

The continuing training courses are developed and provided by the agents.

Dr. N. Patsatzis' evaluation:

The company "D. Nafpliotis E.P.E." is a special case of a small authorized repair shop in the network of an official motor vehicle agent.

Evaluation of the figures and statistics which have been presented leads to the general conclusion that this company has an up-and-running training system with technical and financial support from the official agent, Lion Hellas. In special instances of training which arise from the particular needs of the repair shop, the company aims to train staff at its own expense. In particular, the following points should be emphasized:

- The upward trend in the number of trainees per year. In recent years, 55% of the total staff have been trained each year – one of the highest percentages which have been recorded in all the repair shops in the repair sector.
- The average cost of continuing training per trainee per year is dr. 700,000, an especially satisfactory sum in the Greek context.
- The continuing training courses are developed exclusively by the official Peugeot agent (Lion Hellas) and the private training bodies.
- The training consultation which is held every week in the company is rated favourably. This consultation is a rare initiative for companies of this size.
- The continuing vocational training has had a positive effect on the occupational development of the staff. According to the owner, two people, who left the company to find better jobs, were promoted from technicians to senior engineers as a result of the experience they had gained and their continuing vocational training.

At this point the company in question should be evaluated not only on the basis of the statistics but also on the basis of the more general impression created by the interview with the owner. At the same time, this evaluation should take account of the specific designation of the company, i.e. the fact that it is an *authorized repair shop*.

The cooperation between this authorized company – a typical example – and the official agent is determined by both parties on the basis of free trade and fair competition. In the context of this cooperation, the importer/ agent undertakes to support the repair shop by:

- securing clients

- ensuring the exclusive rights of the repair shop in a defined geographical area
- providing initial/continuing training free of charge
- providing equipment (technical manuals etc.)

The authorized repair shop should, in turn:

- provide an improved standard of customer service
- uphold the "good name" of the agent's cars
- repair only that agent's cars

Thus, within the scope of these general terms of cooperation, the agent, as can be seen from the above statistics, takes care of a large part of staff training. This need arises from the specialized nature of the work (specific models of car), which ultimately calls for specialized training. At the same time, the importer/agent does not oblige the company "D. Nafpliotis E.P.E.", or any authorized company, to train its staff on matters which it deems necessary.

In fact, the company "D. Nafpliotis E.P.E." trains its staff independently of the importer/agent when the owner considers this necessary and, of course, when it is financially possible. According to the owner, the staff do not participate in this decision on the nature and duration of the supplementary training.

Lastly, we may conclude that the company "D. Nafpliotis E.P.E." does not have a long-term continuing training plan because of:

- The uncertainty which exists generally on the motor vehicle repair market. This uncertainty is due mainly to the government's policy on motor vehicles (frequent changes in vehicle taxation) and the ambiguous legislation governing the operation of repair shops.
- Limited experience and knowledge on matters of continuing training planning and implementation.

3. M. TRIANTAFYLLOU E.E.

Size of company: III

Make of vehicle: Opel

Category of vehicle: A

Type of company: C

The company "M. Triantafyllou & SIA E.E." is an authorized OPEL car repair shop. It was founded in 1985 and has been authorized since 1987.

It employs a total of 17 people and their continuing training takes place mainly at the General Motors (G.M.) training centre in Greece. The continuing training of the staff is carried out mainly by G.M. The company gives the general impression of a systematically organized unit, with carefully maintained premises and an increasing turnover.

Our cooperation with the owner/manager was excellent and frank. He put forward ideas and proposals concerning the entire sector. We would like to express our sincere thanks to him for the advice he offered and for the open and generally constructive exchange.

1. General description of the company

1.1 Basic details of the company

The company "M. Triantafyllou & SIA E.E." is a repair shop for the repair of engines and electrical and electronic equipment, with a body shop, paintworks and spare parts sales division. In other words, it is a general repair shop. Its legal form is that of a public limited company (E.E. – Eterorrythmi Etairia).

It has been in operation as an authorized repair shop since 1987. Prior to that it operated as an independent repair shop from 1985 onwards. The company is located on the boundary of Kallithea and Moschato and employs a total of 17 people. It repairs Opel passenger cars exclusively. From 1985 to 1992 the capital was dr. 2,500,000, the invested capital dr. 40,000,000, and the turnover dr. 120,000,000, comprising 60% spare parts and 40% repairs. The company serves about 4,500 customers a year and has a complete computer system and data bank for systematically recording and monitoring the cars repaired, services provided, and the staff performance.

The hierarchical structure of the company is strict. However, it does provide for extended powers, responsibilities and independent decision-making by the heads of the three departments (repair shops, body repairs, administrative services).

The staff of the company are not organized in a trade union. Trade union activity seems to be a matter of indifference to the owner, but he did express some reservations about it.

Remuneration is well above the level stipulated by law. This, however, should be set against the fact that the owner/manager has certain "claims" which he does not negotiate.

The fact that the staff are not organized in a trade union prevented us from contacting them and hearing their views.

1.2 Brief background to the company and its present development strategy

The company "M. Triantafyllou & SIA E.E." was established in 1985 and became an authorized repair shop in 1987.

The company shows an increase in turnover and at the same time a decrease in its workforce. This seemingly paradoxical situation is due to the introduction of modern equipment and the modernization of work procedures and the company generally.

The company seems to be coping with the difficulties associated with changes in technology without any overly traumatic effects, and is managing to adapt successfully. This is largely due to the drive and vigour of the young owner/manager, with his very broad and multi-faceted education and training combined with openess to new ideas and concepts.

The company's development strategy is closely linked with the systematic monitoring of developments, which is reflected in the priority given to ongoing technical/vocational training.

1.3 Structure of the company

The organizational structure of the company shows a detailed and clear division of labour, powers and responsibilities, which ensures control by the general manager and the heads of the various departments.

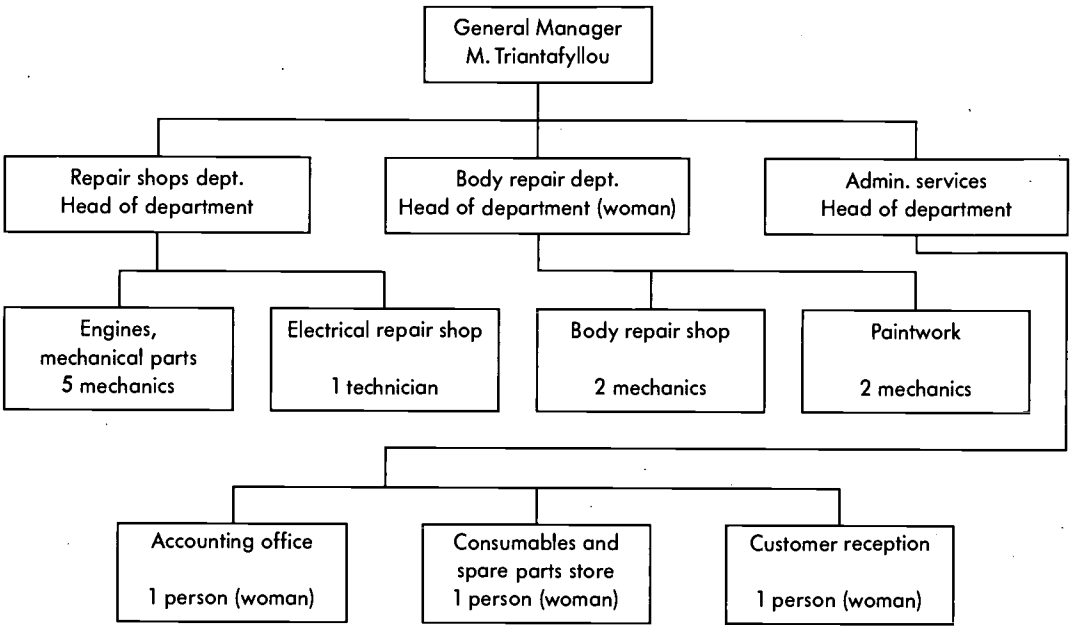
According to the owner/manager, the responsible heads of departments have full authority and responsibility for their sections, so that it is not necessary for them to be present in person. We were able to verify this during our lengthy visit to the company (about 5 hours of discussion with the owner/manager), during which there was no disturbance or interruption to our conversation, while work continued as normal.

With the help of a modern computer system and data bank, everything is monitored and checked in detail, and linked to individual, specific staff. The case histories of cars, the staff who carried out the repairs, the type of repair, the time taken, the costing etc. are data which enable the manager to be in complete control and know who is responsible for what. It is no coincidence that the manager has very extensive knowledge of business psychology, organization, management, marketing, data processing etc.

Particular importance is attached to customer relations and customer reception. There is therefore a special department for this purpose.

There is a clear division of functions and jobs, with a corresponding division of the specialized skills of the staff.

Table 1 – Organizational structure of the company



It is characteristic of the company that the members of staff are relatively young and that the number of women in responsible positions is reasonably satisfactory, although they do not escape the traditional "women's jobs".

1.4 Staff of the company

Composition of the workforce by job categories

Table 2 – Composition of the company's workforce as a whole, in broad occupational groups

Occupational group	Number of staff
1. Management	2
2. Admin. staff	3
3. Technical staff	12
Total	17

Quantitative development of the workforce

Table 3 – Development of the technical staff in the privately owned repair shop from 1987 until now

Year	Workforce
1987	14
1988	12
1989	10
1990	8
1991	10
1992	12

The reduction in the workforce between 1987 and 1990 is due to the modernization of the company (computer, modern equipment, organization, electronic diagnosis systems etc.). The increase in staff from 1990 onwards is due to the steady increase in turnover.

Distribution of the staff by age and gender

Table 4 – Distribution of the staff by age and gender in the company as a whole

Age	Private repair shop (Number of staff)
up to 20	4
21 to 30	7
31 to 40	4
41 to 50	2
51 to 60	
61 to 65	
66 upwards	
Total	17
Men	13
Women	4

It is worth noting that the majority of the staff are relatively young and that there is a relatively satisfactory number of women.

Level of training of the workforce

Table 5 – Level of training of the staff in the company as a whole

Category	Private repair shop (Number of staff)
1. Self-training	1
2. Secondary training	3
3. Vocational training	
3.1 One year	
3.2 Two years	2
3.3 Three years	10
4. Higher education (TEI)	1
5. University (AEI)	
6. Postgraduate studies	
Total	17

The overwhelming majority of the staff have undergone lengthy vocational/technical training. This is a particularly important factor since it is not the norm in the motor vehicle repair sector.

The composition of the workforce from the point of view of basic vocational/technical training, as can be seen from the above table, is particularly satisfactory. However, the training background of the owner/manager is especially interesting: secondary training, training in computer programming at ELKEPA (Elliniko Kentro Paragogikotitas – Greek Centre for Productivity) for two years, School of Business Studies (private) for 3 years, ASOEE (Anotati Scholi Ikonomikon kai Emporikon Epistimon – University College of Economic and Business Science) for one year only, and seminars in sales promotion and sales psychology. He speaks three languages – Italian, English and French – and has wide experience in technical matters because from 1985 to 1991 he was head of production in the Opel plant in Greece.

Categories of technical staff

Table 6 – Technical staff of the privately owned repair shop are classed in the following categories[1]

Category of mechanic/ technician	Private repair shop (Number of staff)
1. Motor mechanics	6
2. Electrical technicians[2]	1
3. Brake systems	
4. Petrol pumps	
5. Carburettors	
6. Radiators	
7. Suspension	
8. Exhaust	
9. Bodywork	3
10. Paintwork	2
11. Wheels (vulcanizer)	
12. Liquid gas appliances	
13. Other	
Total	12

[1] These categories of specialization are defined by Law 1975/85 "relating to requirements for the operation of repair shops".

[2] The lack of qualifications in categories 3-8 is justified by the fact that an employee in category 1 is legally entitled to carry out the work of these categories.

The woman employed in spare parts had previous training as a hairdresser and the woman on reception as a nurse.

The above specialized skills, in terms of both category and number, correspond to the work carried out in the repair shop.

Working conditions and remuneration

This company, as we have mentioned above, has a relatively centralized system of management, although the heads of the various departments are relatively independent in their decision-making, as regards both the work carried out and the appointment of new members of staff.

Employee/manager relations appear to be on a personal level, avoiding collective forms of settlement of problems that arise.

The workplace and jobs are systematically and properly organized to facilitate working procedures and ensure safety and absence of health risks to the staff (for instance, all the premises are surprisingly clean, even the body repair and paintwork section!). Officially, the General Collective Agreements are enforced, but the wages actually paid exceed those stipulated by law, with individual adjustments. Table 7 shows the wages which are paid:

Table 7

Category of employee	Wages paid per month (NET)(dr.)
1. Heads of repair shops	250,000
2. Admin. staff	100,000 – 120,000
3. Bodywork mechanics, painters	170,000
4. Electrical technicians	160,000
5. Motor mechanics	110,000
6. Assistant bodywork mechanics, painters	90,000

The staff receive 14 months' salary annually. Advance payment of wages is also possible. There is no extra pay for overtime or shift work (if these are necessary). The working hours are from 8.15 a.m. to 4.45 p.m., with a half-hour break, Monday to Friday (the law stipulates a 40-hour, 5-day week, with working hours from 7.30 a.m. to 5 p.m.). The staff leave is flexible and varies from one week to one month.

The staff are not organized into a trade union and are represented only by the GSEE (Geniki Synomospondia Ergaton Ellados – Greek Confederation of Labour). The owner expressed indifference towards trade-union activity among the staff, but the impression was that he would not welcome it.

The staff's relations with the owner/manager appear to be good and are for the most part personal and direct, and this contributes to quick problem-solving and also to the owner/manager's direct control of the situation.

The owner/manager's special training and experience in matters of company and staff management are directly reflected in the company, since everything functions according to plan and without difficulties.

All the staff work full-time. The company does not employ any foreign nationals.

The labour market for specialist technical staff and criteria for employment
In the opinion of the owner/manager, the labour market for specialist technical staff presents many problems. Most of the people who are available on the job market are young, without a high level of training. For this reason, workers with general occupational experience are given preference, and are supported and trained in the repair shop.

The main criteria for the selection and employment of staff are:

1. Character
   1a. Honesty
   1b. Diligence
2. Adaptability
3. Vocational training
   3a. Theoretical
   3b. Self-training/practical
4. References (but these do not play a decisive part)
5. Appearance, especially in sales and customer reception

The applicants undergo probation for 1 week to 10 days on normal pay. The final selection is made by the owner/director, following a proposal from the head of the relevant department.

2. The company's continuing training policy

2.1 Existence of a training plan or training courses at repair shop level

The company in question does not systematically plan the continuing training of the repair shop staff. Continuing training takes place on an ad hoc basis, with the aim of providing training in specific technical problems which arise during repair work. The main continuing training body is the Opel agent in Greece, which follows the continuing training plan of the corresponding German car manufacturer.

2.2 Link between training programmes and demand

The main continuing training body, the Opel agent in Greece, offers a series of seminars, from which the manager of the repair shop can select those which his staff are to attend. The Opel continuing training courses are adapted to the repair needs of the relevant vehicles.

2.2.1 Analysis of the quality requirements

The company does not analyze quality requirements, either overall or for different groups of staff.

2.2.2 Relationship of quality requirements to training programmes

Since there is no analysis of training requirements, there is correspondingly no systematic connection between the necessary skills/knowledge and the continuing training courses.

2.2.3 Historical development of training strategy from 1987 to 1992 and training practice

The company's interest in continuing training is reflected in frequent participation in continuing training courses by the owner/manager himself and his staff.

Since 1987, when the company became an authorized repair shop, staff members have attended continuing training courses, particularly those organized by General Motors, the main continuing training body.

Although there was initially some resistance on the part of the staff to participation in continuing training courses, it was then established by contract and made compulsory for those who are selected to participate. The training takes place in working hours, and the staff receive regular pay. The continuing training time per person is in the region of 15 days.

2.2.4 Categories of trainee and training objectives

Continuing training is aimed mainly at the company's technical staff. The main objectives for the company are to upgrade the mechanics'/technicians' skills to improve the standard of service and also to reduce the time spent on each repair job. Customer satisfaction is also achieved in this way.

Access to continuing training
Continuing training is compulsory for the staff who are selected to attend the continuing training courses.

Staff participation in continuing training courses (1985 -1992)

Table 8 – Number of staff in the company who have taken part in continuing training courses since 1985

Year	Number of participants from the company
1985	none
1986	none
1987	2
1988	3
1989	4
1990	4
1991	5
1992	6

Participation in continuing training courses is relatively satisfactory in relation to the total number of staff and certainly shows a significant upward trend.

Table 9 – Areas of continuing training as percentages of the total training time

Year	Technical training	Administrative training	Spare parts training	Other training
	%	%	%	%
1987	80	20		
1988		100		
1989		100		
1990	80	20		
1991	80	20		
1992	90		10	

Although the emphasis was mainly on questions of management until 1989, from 1990 onwards there was a shift to technical continuing training. This seems to be linked, firstly, with the need to apply a computerized system of organization to the company, and secondly, with the radical technical changes in motor vehicles.

Table 10 – Duration of training as an average number of days per employee

Year	Average duration of training (days)
1987	20
1988	20
1989	17
1990	15
1991	15
1992	6

Staff's role in continuing training
Staff members may voice an opinion but, as mentioned above, participation is compulsory.

Criteria for course selection
The continuing training programmes which staff are to attend are selected by the manager together with the heads of the departments. Everyday experience and specific technical problems play an important part in the selection process.

What should certainly be mentioned here is that the company's participation, as an authorized repair shop, in the courses offered by G.M. is compulsory. However, it is free to chose from among the courses on offer.

Criteria for selection of staff for training
Staff members are selected for continuing training courses on the basis of their previous work experience, the confidence they place in the company, and their training requirements in relation to their actual capabilities.

Criteria for evaluation/success of the continuing training course
The trainee staff are systematically monitored during their training through contacts with the Training Centre of G.M. On completion of training, there is a systematic discussion with the trainee, in which the training performance of the particular employee is ascertained.

Diversification of training courses as a consequence of the impact of new technologies
The effects of the new technologies on the company are reflected at three levels:

- Reorganization of administration and accounting
- Technical equipment and reorganization of workplaces
- Continuing training for readaptation of the staff's knowledge and skills

The company was computerized in 1987, when software was purchased and used to organize the store room and accounting office. In 1992 an internal network was installed.

According to the manager, computerization did not cause a problem, but helped to solve problems related to organization, management, customer service etc.

Electronic vehicle technology did not cause problems to staff because the basic requirements were met and the relevant literature was accessible.

Long-term planning and objectives of continuing training
There is no long-term continuing training planning. Planning takes place year by year.

In the owner/manager's opinion, there is an urgent need – in addition to initial and continuing vocational training – to generally raise the staff's level, especially in matters of communication, social skills and behaviour. Continuing training and a general raising of standards, socially and culturally, are therefore necessary. In his opinion, this will contribute to an improvement in the working atmosphere, customer relations etc. He is particularly concerned about this matter but does not know how to deal with it.

This finding is, in our opinion, extremely important because it relates to the well-known problem of the alienation of technical and vocational training and continuing training from the general human, socio-political and cultural sphere.

The social partners' role in shaping continuing training policy
Continuing training policy in the company is shaped exclusively by the owner/manager with the assistance of the heads of the departments. The staff, as we have mentioned, are not organized into a union, and they are not involved in this.

Description of the main continuing training courses
In 1991, staff members of the company attended continuing training courses in the following subjects

Table 12 – Types of staff who have participated in training since 1987, content of the courses and training hours

1991 Training programme of General Motors (Greece)

Subject of seminar		Participants	Dates	Duration
A.1.	Basic principles of electrical engineering and electronic systems	Engineers and electricians	25-28/2	4 days
A.2.	Basic principles of electrical engineering and electronic systems	Engineers and electricians	15-18/2	4 days
B.1.	Tech-1, Multec and Multec-M. Description, diagnosis and repair instructions	Motor mechanics	11-14/3	4 days
B.2.	Tech-1, Multec and Multec-M. Description, diagnosis and repair instructions	Motor mechanics	5-8/10	4 days
C.1.	Multec and Multec-M	Motor mechanics	17-18/2	2 days
C.2.	Multec and Multec-M	Motor mechanics	19-20/2	2 days
C.3.	Multec and Multec-M	Motor mechanics	4-5/12	2 days
D.1.	Motronic ML 4.1/M 1.5. Description, diagnosis and repair instructions	Motor mechanics	27-30/5	4 days
D.2.	Motronic ML 4.1/M 1.5. Description, diagnosis and repair instructions	Motor mechanics	18-20/11	4 days
E.1.	AF14/20 automatic gearbox (description, operation and repair instructions for the Kadett/Vectra gearbox)	Motor mechanics	1-4/4	4 days
F.1.	R 25 automatic gearbox (description, operation and repair instructions for the Omega gearbox)	Motor mechanics	17-18/4	2 days
G.1.	F13-5 (description, operation and repair instructions for the gearbox of frontwheel drive models)	Motor mechanics	23-24/3	2 days
H.1.	Fuel supply system (Weber 32 TL carburettor, Pierburg 2E 3 carburettor)	Motor mechanics	14-16/5	3 days
I.1.	A.B.S. (description, diagnosis and repair instructions)	Motor mechanics	7-8/2	2 days
I.2.	A.B.S. (description, diagnosis and repair instructions)	Motor mechanics	4-5/5	2 days
I.3.	A.B.S. (description, diagnosis and repair instructions)	Motor mechanics	30-31/10	2 days
J.1.	Multi-Info display central door locking alarm system (description, diagnosis and repair instructions)	Motor mechanics	19-21/10	3 days
J.2.	Multi-Info display central door locking alarm system (description, diagnosis and repair instructions)	Motor mechanics	26-28/11	3 days
K.1.	Basic principles of operation of the four-stroke engine	Motor mechanics	23-24/9	2 days
K.2.	Basic principles of operation of the four-stroke engine	Motor mechanics	25-26/9	2 days
L.1.	Tech-1	Motor mechanics	2-3/10	2 days

(run by General Motors):
- Multec and Multec-M, 2 days
- Multi info display central door locking alarm system (description, diagnosis and repair instructions), 3 days
- Basic principles of the functioning of a 4-stroke engine, 2 days
- Tech-1, 2 days

3. Evaluation/applicability to other companies

Evaluation of the continuing training of the "M. Triantafyllou & SIA E.E." motor vehicle repair company was not at all straightforward for the two authors/researchers; they unfortunately arrived at different conclusions. The views of both authors are, therefore, presented on the grounds that they will provide the central research team with a basis for discussion and will enable them to draw their own conclusions.

Prof. S. Papaioannou's evaluation:
The company "Mr. Triantafyllou & SIA E.E." is an economically sound company, organized and operating in a relatively satisfactory way.

The management of the company has recognized the significance of continuing training and – most importantly – general cultural and social education.

Nevertheless, we believe that the inability to develop a continuing training strategy and policy – a result of the company's general operating conditions and, more particularly, its dependence on the manufacturing company – has negative consequences on the company's prospects. This dependence, which manifests itself in a specific, one-sided specialization in the company's products, contributes to the company's relative insecurity, and to the staff's lack of choice as regards their individual planning, since they are entirely dependent on the owner/manager's choices. This can only lead to them becoming subservient, depriving them of the ability to express their needs and wishes, and limiting their opportunities to seek jobs which they would prefer or their ability to negotiate with the employer for better work and pay conditions.

Dr. N. Patsatzis' evaluation:
The company "M. Triantafyllou & SIA E.E." is a typical case of an authorized repair shop in the network of an official motor agent. The company's cooperation with the official agent is set in the same framework as that presented in Case Study No. 2 on the company "D. Nafpliotis".

Evaluation of the figures and statistics which have been presented leads to the general conclusion that this company is an economically sound company which is operating in a relatively satisfactory way. The company has a continuing training system *with the exclusive financial support of the official agent of G.M. in Greece*. Specifically, it should be mentioned that:

- The continuing training of staff commenced in 1987, when the company was authorized by G.M. in Greece.
- The number of trainees per year is on the increase. In 1992 six people were trained, i.e. 35% of the total workforce; this is one of the highest percentages which have been recorded in all the repair shops in the motor vehicle repair sector.
- The continuing training courses which are now being implemented are developed exclusively by GM's official agent. Participation by the company's staff is compulsory. The manager of the company, together with the heads of the departments, selects the courses which the staff members are to attend.
- The staff of the company is not organized in a trade union and is not involved in the planning of continuing training.
- The manager/owner of the company "M. Triantafyllou & SIA" sees the need for a more general upgrading of the level of the staff, in the context of a long-term continuing training plan. However, this plan is difficult to implement because, as the manager/owner points out, there is no known method of putting it into effect.

Finally, it should be said that the cooperation of the company, as an authorized repair shop, with the official agent of G.M. has had a favourable effect on the company's prospects, as reflected in the upward trend which we observed.

4. SINOPOULOS SERVICE E.P.E.

Size of company: II

Make of vehicle: various

Category of vehicle: A

Type of company: D

The company "Sinopoulos Service E.P.E." is an independent car repair shop. The company, which is a general repair shop (except bodywork), repairs about 1,200 vehicles of every make per year. The repair shop was established in 1973 as a General Partnership and in 1984 was converted into a limited company. It employs 5 people, and their continuing training is carried out on the initiative of the company, both "in-house" and in groups of companies.

As an independent repair shop, it appears to be in a very difficult situation, in contrast with the other cases which we have examined. Although the repair shop specialized in Rover cars, it is at present unable to work exclusively with this make. The need to extend its operations to all makes causes enormous problems and risks, and makes it difficult to fill the knowledge gaps through continuing training courses. This is, of course, all the more difficult because of differences in car technology. It has also led to a shortfall in experience and specialist knowledge, particularly in relation to the new technologies, so that the repair shop is unable to undertake repairs of vehicles with new technology.

At the same time, the "withdrawal system for old vehicles", which was enforced by the government[1], poses a serious threat to the survival of the company, and also – according to the manager – to that of many other unauthorized repair shops. The company lost more than 350 customers, who withdrew their vehicles from circulation, but did not bring their newly purchased vehicles for service because they are compulsorily fitted with the new technology.

In the view of the owner-manager – which is in no way exceptional – there is keen competition between the authorized and unauthorized repair shops, and also a particularly bad relationship with the manufacturers and importers. "The authorized repair shops would prefer us not to exist," the manager told us.

Generally speaking, the case of the company "Sinopoulos Service E.P.E." raises a number of serious questions regarding the existence and operation of the overwhelming majority of repair shops, which are independent in Greece. This is because, apart from the internal difficulties of adapting to new technologies (the authorized repair shops, of course, are also faced with these difficulties, but can handle them more easily), the repair shops find themselves excluded, as it were, from the sources of information and knowledge relating to these technologies.

1. General description of the company

1.1 Basic details of the company

The company "Sinopoulos Service E.P.E." is a general motor vehicle (excluding bodywork) repair shop for all makes, but works mainly with Rover. It has been working in the form of an independent repair shop since 1973 and in a different legal form since 1984.

The company's head office is in Nea Smyrni and employs a total of 5 people. The company has privately-owned premises of 400 sq.m. for the repair shop and 300 sq.m. for store rooms and offices, with a capital investment of dr. 25,000,000 and a turnover of dr. 10,000,000 per year, exclusively from the work carried out.

The company is not computerized, and its system of organization and management is not strict and rigid, but flexible and "human". Of the 5 staff, two are father (former manager) and son (present manager). Relations between the staff in the repair shop are direct and personal.

Remuneration is higher than the level stipulated by law, and overtime is also paid.

1.2 Brief background to the company and its present development strategy

The company was founded in 1973 by Sinopoulos the father, who until then had been a chief engineer at Rover. In 1984 it changed its legal form, and Sinopoulos the son became manager; he is a civil engineer with a licence to pursue the occupation of automotive engineer.

For the reasons we mentioned in the Introduction, the company gradually entered a difficult phase which it seems unable to overcome easily, at least for the present. As we mentioned in the Introduction, the effects of technological development on the company are particularly unfavourable. Apart from the problems of "withdrawal", there are other problems arising from the electronic technology which is specific to each model, since the company does not have all the necessary machinery. According to the manager, it is true that they do not have it, but this – he claims – is because "some people are not selling it".

The technological developments, and the application of new technologies in recent years, have had a major effect on – as we shall see in table 1 – the organization, operation and, generally, the existence of the company in question.

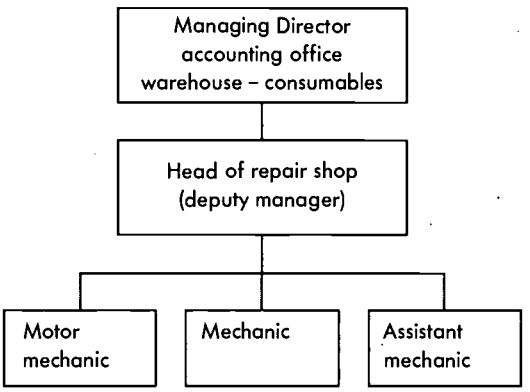
1.3 Structure of the company

Because of the small number of staff and the fact that the manager is related to the deputy manager, and because both take part in the repair work to the same extent as the others, relations are direct and personal and the various problems are settled without complicated procedures. Essentially, the repair

[1] "Withdrawal" is a government measure whereby owners of old cars can hand them in to a special department for wrecking, and in return are entitled to purchase another car, with new technology, at a considerable reduction in taxation and, hence, a reduced price.

2.

Table 1 – Organizational structure of the company



shop functions as a team, without strict hierarchies and in an atmosphere of cooperation and understanding.

1.4 Company staff

Composition of the workforce by job categories

Table 2 – Composition of the company's workforce as a whole, in broad occupational groups

Occupational group	Number of staff
1. Management	2
2. Technical staff	3
Total	5

In practice, all five members of the company are technical staff.

Quantitative development of the workforce

Table 3 – Development of the workforce of this company from 1987 until now

Year	Workforce
1987	7
1988	7
1989	6
1990	5
1991	5
1992	5

The reduction in the workforce is due to the reduction in the repair shop's turnover. Even now, there are periods of underemployment.

Distribution of the staff by age and gender

Table 4 – Distribution of the workforce by age and gender in the company as a whole

Age	Company repair shop (Number of staff)
up to 20	1
21 to 30	
31 to 40	3
41 to 50	
51 to 60	
61 to 65	1
66 upwards	
Total	5
Men	5
Women	–

In this case the relatively low age of the majority of the staff is characteristic.

Level of training of the workforce

Table 5 – Level of training of the staff in the company's repair shop

Category	Company repair shop (Number of staff)
1. Self-training	1
2. Secondary training	1
3. Vocational training	
3.1 One year	
3.2 Two years	
3.3 Three years	2
4. Higher education (TEI)	
5. University (AEI)	1
6. Postgraduate studies	
Total	5

The staff's level of training is relatively high.

It is worth noting that although the repair shop carries out all these types of work apart from bodywork, all the staff have the same qualification. This is of course permitted by the above-mentioned law.

Categories of technical staff

Table 6 – Technical staff of the privately owned repair shop are classed in the following categories[1]

Category of mechanic/ technician	Company repair shop (Number of staff)
1. Motor mechanics	5
2. Electrical technicians	
3. Brake systems	
4. Petrol pumps	
5. Carburettors	
6. Radiators	
7. Suspension	
8. Exhaust	
9. Bodywork	
10. Paintwork	
11. Wheels (vulcanizer)	
12. Liquid gas appliances	
13. Other	
Total	5

[1] These categories of specialization are defined by Law 1975/85 "relating to requirements for the operation of a repair shop".

Working conditions and pay system
In spite of the financial difficulties encountered by the company, the working conditions are quite satisfactory. The working hours in the repair shop are from Monday to Friday, 8 a.m. to 4.30 p.m., with a half-hour break at midday. Remuneration is higher than the level stipulated by law, as table 7 shows:

Table 7 – Working conditions and pay system

Category of staff	Monthly wage Stipulated by law (gross)	Monthly wages paid gross (dr.)	NET (dr.)
1. Mechanics/ technicians	104,000	270,000	180,000
2. Assistants	88,000	150,000	100,000

The staff are paid 14 times a year. They are also paid extra for all their overtime at the rate of dr. 2,500 per hour. It is estimated that each employee receives about dr. 40,000 per month in tips. Also of interest from the point of view of remuneration is the fact that the employer bears the full costs for staff insurance.

The staff's relations with the owner/manager appear to be good. There is, indeed, a kind of solidarity and a common desire to bring the company out of the crisis. If it continues it will, of course, mean insecurity for everyone. All the staff are working full-time. The company does not employ any foreign nationals.

The labour market for specialist technical staff and the criteria for employment
In the owner/manager's opinion, there are no highly experienced mechanics, but there are young people working as assistants who need to upgrade their skills.

The main criteria for selecting staff for employment are:

- Character
- Theoretical training
- References
- Attitude to young mechanics
- Social skills
- Appearance
- Foreign language

Those who are selected for employment are paid from the first day.

2. The company's continuing training policy

2.1 Existence of a training plan or training courses at repair shop level[2]

There is no systematic plan or training course at repair shop level. The training activities are of an ad hoc nature and cover needs which arise during work.

2.2 Link between training courses and demand

As has been mentioned above, we cannot speak of a training plan. Response to demand is short-term as the problems arise. The provision of training courses is likewise unplanned and does not always correspond to the needs of the repair shops.

2.2.1 Analysis of the quality requirements

There is no analysis of the necessary knowledge and skills, in the systematic sense of the term.

2.2.2 Relationship between quality requirements and training courses

There is no straightforward relationship between quality requirements and continuing training plan, as there is neither a plan nor a systematic analysis of the necessary knowledge and requirements.

2.2.3 Historical development of training strategy from 1987 to 1992 and training practice

The particular interest of the company in continuing training, which is revealed by the staff's frequent participation in training courses, takes on special significance bearing in mind that:

[2] The questions relating to the structure of continuing training, the continuing training centres and the content of continuing training in the case of this repair shop – as an independent repair shop, whose employees go for continuing training when this is offered by a continuing training body – are not relevant, and the corresponding chapter has therefore not been prepared. The continuing training is paid for by the repair shop itself.

- The company bears the full costs of participation in continuing training activities, and
- The company is facing considerable financial difficulties.

On the other hand it can be assumed that it is precisely these difficulties, in conjunction with the rapid technological developments and the need for repairs to all kinds of vehicle, which mean that participation in continuing training courses is of prime importance for the survival of the company. The company's staff have been taking part in continuing training courses since 1988, and indeed are doing so at an increasing rate, as the table at the end of this survey shows. Participation in continuing training courses takes place during staff members' spare time.

2.2.4 Categories of trainee and training objectives

Categories of trainee
All the staff undergo training. No women, foreign nationals or people with disabilities are employed in the repair shop.

Access to continuing training
Participation in continuing training is voluntary, at the request of the staff.

Staff participation in continuing training courses (1987-1992)

Table 8 – Number of the company's staff who have taken part in continuing training since 1985

Year	Number of participants
1985	none
1986	none
1987	none
1988	3
1989	none
1990	4
1991	4
1992	2

The number of participants for 1992 includes those participating up to mid-November.

The staff's level of participation in continuing training courses is considered extremely satisfactory in relation to the total number.

Table 9 – Divisions of continuing training as percentages of the total training time

Year	Technical training (%)	Management training (%)
1988	100	
1989	–	
1990	100	
1991	100	
1992	90	10

Special priority was given to initial technical and continuing training up to 1991 and also in 1992. As we have already noted, this was due to the pressures of changing technology.

Table 10 – Duration of training, as an annual average number of days per employee

Year	Technical training	Management training
1988	2	
1989	–	
1990	6	
1991	6	
1992	12	

The time spent on continuing training courses is steadily on the increase.

Objectives of continuing training
The main objectives of continuing training for the company are to upgrade the standard of work and enable the staff to meet the requirements of the new vehicle technologies.

Staff's role in continuing training
The available continuing training courses are discussed with the staff but it is the manager who takes the final decision. Participation by staff is nevertheless voluntary.

Criteria for course selection
The continuing training courses are selected by the manager together with the staff. The requirements arising from work form the basic criterion for selection.

Criteria for selection of staff for training
There is no selection. All the staff are recommended to participate.

Criteria for evaluation/success of continuing training course
The specialized nature of the knowledge provided, and the way it is reflected in the work after the seminars, form the basis for evaluation of the available continuing training courses.

Diversification in training courses as a consequence of the new technologies
The effects of new technologies on continuing training are immediate, since they are the reason for participation in continuing training. It is, however, almost impossible for the company to fill existing or potential gaps and deficiencies by continuing training.

The social partners' role in shaping continuing training policy
Firstly, there is no systematic continuing training policy, and secondly, the staff are not organized in unions. For this reason, any negotiations with the owner/manager are personal rather than collective.

Cost of continuing training – Continuing training bodies

Table 11 – Cost of continuing training

Year	Cost of continuing training (dr.)	Company participation (%)
1988	30,000	100
1989	–	–
1990	150,000	100
1991	200,000	100
1992	Not yet known	–

Although the sums spent on continuing training are not as a rule particularly high, this is, we believe, a praiseworthy effort in relation to the company's position.

From table 11 we may conclude that the costs of each participating employee for three years amounts to about dr. 31,000 (three years because there was no continuing training in 1989, and for 1992, the cost was still unknown at the time of collecting the data).

3. Evaluation/applicability to other companies

Assessment of the continuing training of the "Sinopoulos Service E.P.E." motor vehicle repair company was not at all straightforward for the two authors/researchers, who unfortunately arrived at different conclusions. The views of both authors are therefore presented, on the grounds that they will provide the central research team with a basis for discussion and will enable them to draw their own conclusions.

Prof. S. Papaioannou's evaluation:
"Sinopoulos Service S.A." is a traditional business with serious financial difficulties arising from its inability to keep up with developments, and this in turn is linked with the legal and administrative regulations, the structure and operation of the economic sector in relation to motor vehicles, the indisputable dominance of the car manufacturers and their ability to control the sector decisively by various mechanisms, measures and policies. This company's situation is typical for many tens of thousands of independent small and medium-sized repair shops.

The company's efforts to overcome the crisis, through continuing training, is certainly a step in the right direction. However, given its nature, it is unable to bridge the gaps between the various technical developments specific to each make of vehicle.

The manager himself pointed to another solution: collective/cooperative groupings of repair shops. But there are enormous problems, both financial and in terms of location. Furthermore, a change of location entails the risk of losing clientele, in addition to the enormous expense.

This case highlights the numerous divergent interests in the motor vehicle repair/sales sector, and the danger that the entire sector will be taken over by the large car manufacturing and importing companies.

To conclude, one cannot hope to evaluate something – i.e. continuing training – which essentially does not exist in any systematic way; this is directly linked with what I have said above.

Dr. N. Patsatzis' evaluation:
The second author agrees in general with the above evaluation of the small independent company in question. He differs, however, in his assessment of the indisputable dominance of the car manufacturers and their ability to control the sector decisively by "various mechanisms, measures and policies", and in his assessment of the risk that the entire sector will be taken over by the large car manufacturing and importing companies. The second author's view on this matter is as follows:

- The foreign car manufacturers, almost without exception, have no subsidiaries in Greece, but cooperate exclusively with independent motor vehicle import and distribution companies.

- The exclusive importers have very few privately owned repair shops, and cooperate exclusively with authorized independent motor vehicle repair companies.

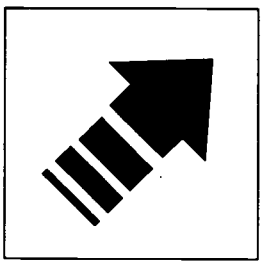
- The selection of repair shops for authorization is made mainly on the basis of the standard of customer service offered and the legal framework of the repair shop (permanent operating licence).

- Many of the independent repair shops will certainly not survive the fierce competition in the sector, for the following reasons:

  They do not meet the requirements for operation, as stipulated in Greek legislation. They are therefore operating under temporary operating licences which expire in May 1993, or are unlicensed.

  They are unable to keep up with the development of vehicle technology because they lack the necessary information and specialization. This information is supplied by the car manufacturers to the import companies, and by them to the authorized repair shops within the scope of their cooperation. Because of the intense competition, the necessary information – as in the case of companies in other commercial sectors – cannot be passed to other, independent repair shops. It is considered to be the responsibility of the government or the shared service offices to train the staff of small independent repair shops with a view to increasing their competitiveness and, ultimately, the benefit to the community as a whole.

PART 3:
TRENDS



1. Conclusions

Bibliography

CONCLUSIONS

3.

Evaluation of initial training and continuing training

This chapter presents the evaluation of the initial and continuing training in the motor vehicles sales and repair sector. This evaluation takes the form of a general assessment since it is based on:

- Bibliographical references to the overall system of vocational training in Greece
- The opinions expressed by the shared service offices of these companies at a briefing session which was held by ELKEPA within the framework of the FORCE programme, of which this national survey is a part (15.9.92).
- The initial data extracted from questionnaires sent to the companies' shared service offices. These shared service offices, which were mentioned in the previous chapter (6.5), supplied some of the necessary documents. Answers to the questionnaire were submitted to the researchers by:
  - The Association of Car Importers and Agents,
  - The Federation of Car and Machinery Repairers of Greece,
  - The Federation of Car and Machinery Repairers of Northern Greece,
  - The Association of Owners of Car Diagnosis Centres,
  - The Association of Owners of Authorized Car Repair shops.
- The researchers' personal contacts with senior staff of private continuing training bodies.
- The material gathered from four contacts with motor vehicle repair companies which were selected for study on the basis of the system of continuing training for their staff. These businesses were selected by the European Central Research Council which has the scientific responsibility for this research throughout the European Community, following a proposal by the Greek research team.

In order to draw statistical conclusions, a wider survey is needed, which will be based on questionnaires addressed to a statistically representative sample of repair shops (probably more than 1,000 repair shops), to substantiate the general conclusions presented below.

Initial vocational training

Motor vehicle repair shops employ an especially large number of "self-trained" technicians, they are old and make up about 50% of the workforce. This large proportion, unacceptable under European conditions, is due to the absence of a state system of initial vocational training in Greece until the mid-1970s.

In car sales companies, the percentage of self-trained salesmen/saleswomen is low, but at the same time there are no personnel who have undergone specialist vocational training. The staff employed there have, for the most part, general education, which varies between elementary and higher.

There are currently a great many problems in the way that initial vocational training operates, centred principally around:

- The outdated system of theoretical instruction, with textbooks, teaching materials and teaching aids geared to the models of past decades. This is revealed in the references made by the representatives of shared service offices of repair shops and senior staff of continuing training bodies to textbooks which were written in the 1960s and obviously cannot cover the needs arising from the technical development of vehicles.
- The legally established categories of technician are not adapted to today's needs for a specialized staff. Characteristic of this situation is the fact that Greek legislation has not established a category of vehicle electronics technician, a necessity which is now imposed by technological development.
- School-based vocational training in TELs, TESs and other vocational schools is mainly theoretical and is not adequately linked with practice. A characteristic comment by the shared service offices of repair shops is that apprentice mechanics/technicians with OAED (Ministry of Labour) have problems in finding a repair shop for their necessary practical work. The main reason for this is that the repair shops are unable to provide financial support for the apprentices if there is no auxiliary grant from OAED.
- There is a shortage of specialist personnel on the labour market, and hence an urgent need for training the staff once they have been recruited. The main reason for this lies in the inadequate occupational skills of vocational training graduates.

Finally, the founding in 1992 of the Organization for Vocational Education and Training (OEEK) and the Institutes of Vocational Training (IEK) which are controlled by it, justifies hopes of an upgrading of the National System of Vocational Training in the motor vehicle repair and sales sector. The first 15 IEKs have already begun to operate experimentally. However, serious reservations are expressed by the repair shop representatives as to whether graduates of vocational schools, who have inadequate formal and informal qualifications, receive substantial and satisfactory training through the IEKs.

Continuing training

Continuing training is systematic and organized mainly in the car import companies (agents) and their network of authorized repair shops and retail establishments. The companies provide continuing training for staff employed directly and indirectly by them, mainly by drawing on the car manufacturers' continuing training courses. They adapt them to the existing needs of the Greek market. In order to run the continuing training courses, they receive considerable funds from the European Community Fund; this, however, does not permit them to use these funds for training the personnel of authorized companies, but only their own personnel. Technical con-

tinuing training, especially in the first stage of employment, takes place mainly on an inter-company level. For the continuing training of management personnel and salesmen/saleswomen, they cooperate with state or private continuing training bodies.

Independent motor vehicle repair shops do not, for the most part, offer any continuing training but confine themselves to some self-financed continuing training of their staff, who, on an ad hoc basis, attend seminars organized by the shared service offices or the state and private continuing training bodies. At this point it should be noted that at the above-mentioned briefing session, the representatives of the repair shops stressed the need for continuing training and expressed their general concern about the currently prevailing conditions; this attitude was based on the following:

- The lack of information from the government about the Community funds which are made available for inter-company continuing training, and lack of openness about how these Community funds are allocated.
- Rejection of proposals which were submitted to ELKEPA by their shared service offices, concerning the continuing training of the mechanics/technicians.
- Lack of access to sources of information (technical manuals) on the new vehicle technology.

Finally, it should be noted that only a limited number of continuing training courses are offered in the motor vehicle repair sector by the government continuing training bodies.

The private continuing training bodies have been set up in recent years as a result of the need to fill the gaps existing in repair shops as regards knowledge of the new vehicle technology (e.g. catalytic converters, electronic systems for preparing the fuel mixture, etc.). So far, these continuing training bodies have been active mainly in the greater Athens area, organizing short seminars.

In the light of these findings, it can be argued that the existing urgent need for ongoing occupational continuing training in the motor vehicle repair and sales sector in Greece has been met to a very limited degree.

This survey has confirmed yet again that there is an urgent need for radical reform of the educational system, particularly the initial technical and vocational training system, and also for the establishment of a system of continuing training.

The lack of systematic initial technical and vocational training and continuing training in Greece should not be an obstacle to a critical overall assessment of initial and continuing vocational training in Europe.

It is time to re-examine the issue of the relationship between therory and practice, and between general theoretical education and technical/vocational training, i.e. the implementation of "polytechnic education" as the form of organization of educational procedures which combines broad, systematic, theoretical knowledge with technical and vocational knowledge and integrates this into a socio-political and cultural framework. This will help to overcome the increasing lack of specialization and the staff inability to adapt in a flexible manner; it will allow active, conscientious participation by staff and it will render social control effective.

BIBLIOGRAPHY

Letter from OVEAM V.E. in reply to a questionnaire concerning continuing training of staff in the motor vehicle sector, Salonica, September 1992

Letter from OVEAME in reply to a questionnaire concerning continuing training of staff in the motor vehicle sector, Patras, November 1992

Letter from SIDKA in reply to a questionnaire concerning continuing training of the staff in the motor vehicle sector, Athens, September 1992

The Greek Car Market, Monthly Information System (M.I.S.), December 1990, Association of Motor Vehicle Importers – Representatives, Athens 1990

The Greek Car Market. Monthly Information System (M.I.S.), December 1991, Association of Motor Vehicle Importers – Representatives, Athens 1991

The Greek Car Market. Monthly Information System (M.I.S.), September 1992, Association of Motor Vehicle Importers – Representatives, Athens 1992

The Greek Car Market, Information Bulletin 1989, Association of Motor Vehicle Importers – Representatives, Athens 1990

The Greek Car Market, Information Bulletin 1990, Association of Motor Vehicle Importers – Representatives, Athens 1991

The Greek Car Market, Information Bulletin 1991 Association of Motor Vehicle Importers – Representatives, Athens 1992

Survey of Environmental Protection and the Traffic Problem in Athens, Association of Motor Vehicle Importers -Representatives, September 1990

G. Georganas, N. Patsatzis, **System of Continuous Monitoring of the Discharge of Pollutants from Circulating Vehicles, through the Institution of the Exhaust Control Card (Karta Elenchou Kafsaerion – KEK)**, final edition, Applied Thermodynamics Laboratory, Aristotle University of Salonica, Athens, April 1991

Views on and Proposals for the Exhaust Control Card, memorandum of the Panhellenic Federation of Car and Machinery Repairers, to YPEChODE, Athens, March 1990

Automobile et Formation, 1st European Conference, Association Nationale pour la Formation Automobile, Strasbourg, December 1991

Comparability of vocational training qualifications between the Member States of the European Community, established pursuant to Council Resolution 85/368/EEC of 16 July 1985", Official Journal of the European Communities, 89/C 168/01, 3.7.89

Application of Article 85, Paragraph 3 of the Treaty to certain categories of agreement on distribution and before and after-sales service for motor vehicles, Council Regulation (EEC) No. 123/85, Official Journal of the European Communities, 18.1.85

Communication of Data From the Motor Vehicle Sector of the Air pollution and Noise Monitoring Department (Diefthynsi Elenchou Atmosfairikis Rypansis kai Thoryvou -EARTh) of YPEChODE, Athens, July 1992

Letter from the company VIAMAX A.E. in reply to the questionnaire for selected companies in the sectoral survey, concerning the inter-company continuing training of staff, VIAMAX A.E., Athens, August 1992

S. Stavrou, **Vocational Education in Greece**, Monograph, CEDEFOP, Greece, November 1992

Dimaras, **The Reform that didn't happen**, Vols. I-II, Ermis Publications, Athens 1986

Letter of reply from POVEAM concerning matters relating to the continuing training of staff in the motor vehicle sector, Athens, March 1993

S. Papaioannou, **Vocational training and career guidance in Greece**, Grigori Publications, Athens 1990.

CEDEFOP – European Centre for the Development of Vocational Training

Training in the motor vehicle repair and sales sector in Greece
(FORCE programme)

Skevos Papaionnou, N. Patsatzis

Luxembourg: Office for Official Publications of the European Communities

1994 – 79 pp. – 21.0 x 29.7 cm

ISBN 92-826-9159-4

Price (excluding VAT) in Luxembourg: ECU 8

Venta y suscripciones • Salg og abonnement • Verkauf und Abonnement • Πωλήσεις και συνδρομές
Sales and subscriptions • Vente et abonnements • Vendita e abbonamenti
Verkoop en abonnementen • Venda e assinaturas

BELGIQUE / BELGIE

Moniteur belge / Belgisch staatsblad
Rue de Louvain 42 / Leuvenseweg 42
1000 Bruxelles / 1000 Brussel
Tel. (02) 512 00 26
Fax (02) 511 01 84

Jean De Lannoy
Avenue du Roi 202 / Koningslaan 202
1060 Bruxelles / 1060 Brussel
Tel. (02) 538 51 69
Telex 63220 UNBOOK B
Fax (02) 538 08 41

Autres distributeurs/
Overige verkooppunten:

Librairie européenne/ Europese boekhandel
Rue de la Loi 244/Wetstraat 244
1040 Bruxelles / 1040 Brussel
Tel. (02) 231 04 35
Fax (02) 735 08 60

DANMARK

J. H. Schultz Information A/S
Herstedvang 10-12
2620 Albertslund
Tlf. 43 63 23 00
Fax (Sales) 43 63 19 69
Fax (Management) 43 63 19 49

DEUTSCHLAND

Bundesanzeiger Verlag
Breite Straße 78-80
Postfach 10 05 34
50445 Köln
Tel (02 21) 20 29-0
Fax (02 21) 202 92 78

GREECE/ΕΛΛΑΔΑ

G.C. Eleftheroudakis SA
International Bookstore
Nikis Street 4
10563 Athens
Tel. (01) 322 63 23
Telex 219410 ELEF
Fax 323 98 21

ESPAÑA

Boletín Oficial del Estado
Trafalgar, 27-29
28071 Madrid
Tel. (91) 538 22 95
Fax (91) 538 23 49

Mundi-Prensa Libros, SA
Castelló, 37
28001 Madrid
Tel. (91) 431 33 99 (Libros)
431 32 22 (Suscripciones)
435 36 37 (Dirección)
Telex 49370-MPLI-E
Fax (91) 575 39 98

Sucursal:

Librería Internacional AEDOS
Consejo de Ciento, 391
08009 Barcelona
Tel. (93) 488 34 92
Fax (93) 487 76 59

Llibreria de la Generalitat de Catalunya
Rambla dels Estudis, 118 (Palau Moja)
08002 Barcelona
Tel. (93) 302 68 35
Tel. (93) 302 64 62
Fax (93) 302 12 99

FRANCE

Journal officiel
Service des publications des Communautés européennes
26, rue Desaix
75727 Paris Cedex 15
Tel. (1) 40 58 77 01/31
Fax (1) 40 58 77 00

IRELAND

Government Supplies Agency
4-5 Harcourt Road
Dublin 2
(1) 66 13 111
(1) 47 80 645

ITALIA

Licosa SpA
Via Duca di Calabria, 1/1
Casella postale 552
50125 Firenze
Tel. (055) 64 54 15
Fax 64 12 57
Telex 570466 LICOSA I

GRAND-DUCHE DE LUXEMBOURG

Messageries du livre
5, rue Raiffeisen
2411 Luxembourg
Tel. 40 10 20
Fax 49 06 61

NEDERLAND

SDU Overheidsinformatie
Externe Fondsen
Postbus 20014
2500 EA 's-Gravenhage
Tel. (070) 37 89 880
Fax (070) 37 89 783

PORTUGAL

Imprensa Nacional
Casa da Moeda, EP
Rua D. Francisco Manuel de Melo, 5
1092 Lisboa Codex
Tel. (01) 387 30 02/385 83 25
Fax (01) 384 01 32

Distribuidora de Livros Bertrand, Ld.ª

Grupo Bertrand, SA
Rua das Terras dos Vales, 4-A
Apartado 37
2700 Amadora Codex
Tel. (01) 49 59 050
Telex 15798 BERDIS
Fax 49 60 255

UNITED KINGDOM

HMSO Books (Agency section)
HMSO Publications Centre
51 Nine Elms Lane
London SW8 5DR
Tel. (071) 873 9090
Fax 873 8463
Telex 29 71 138

ÖSTERREICH

Manz'sche Verlags- und Universitätsbuchhandlung
Kohlmarkt 16
1014 Wien
Tel. (1) 531 610
Telex 112 500 BOX A
Fax (1) 531 61-181

SUOMI/FINLAND

Akateeminen Kirjakauppa
Keskuskatu 1
PO Box 218
00381 Helsinki
Tel. (0) 121 41
Fax (0) 121 44 41

NORGE

Narvesen Info Center
Bertrand Narvesens vei 2
PO Box 6125 Etterstad
0602 Oslo 6
Tel. (22) 57 33 00
Telex 79668 NIC N
Fax (22) 68 19 01

SVERIGE

BTJ AB
Traktorvägen 13
22100 Lund
Tel. (046) 18 00 00
Fax (046) 18 01 25
30 79 47

ICELAND

BOKABUD LARUSAR BLÖNDAL
Skolavordustig, 2
101 Reykjavik
Tel. 11 56 50
Fax 12 55 60

SCHWEIZ / SUISSE / SVIZZERA

OSEC
Stampfenbachstraße 85
8035 Zürich
Tel. (01) 365 54 49
Fax (01) 365 54 11

BÅLGARIJA

Europress Klassica BK Ltd
66, bd Vitosha
1463 Sofia
Tel./Fax 2 52 74 75

ČESKA REPUBLIKA

NIS ČR
Havelkova 22
130 00 Praha 3
Tel. (2) 24 22 94 33
Fax (2) 24 22 14 84

HRVATSKA

Mediatrade
P. Hatza 1
4100 Zagreb
Tel. (041) 430 392

MAGYARORSZÁG

Euro-Info-Service
Honvéd Europa Ház
Margitsziget
1138 Budapest
Tel./Fax 1 111 60 61
1 111 62 16

POLSKA

Business Foundation
ul. Krucza 38/42
00-512 Warszawa
Tel. (2) 621 99 93, 628-26-82
International Fax&Phone
(0-39) 12-00-77

ROMÂNIA

Euromedia
65, Strada Dionisie Lupu
70184 Bucuresti
Tel./Fax 1-31 29 646

RUSSIA

CCEC
9,60-letiya Oktyabrya Avenue
117312 Moscow
Tel./Fax (095) 135 52 27

SLOVAKIA

Slovak Technical Library
Nm. slobody 19
812 23 Bratislava 1
Tel. (7) 5220 452
Fax : (7) 5295 785

CYPRUS

Cyprus Chamber of Commerce and Industry
Chamber Building
38 Grivas Dhigenis Ave
3 Deligiorgis Street
PO Box 1455
Nicosia
Tel. (2) 449500/462312
Fax (2) 458630

MALTA

Miller distributors Ltd
PO Box 25
Malta International Airport
LOA 05 Malta
Tel. 66 44 88
Fax 67 67 99

TURKIYE

Pres AS
Istiklal Caddesi 469
80050 Tunel-Istanbul
Tel. 0(212) 252 81 41 - 251 91 96
Fax 0(212) 251 91 97

ISRAEL

ROY International
PO Box 13056
41 Mishmar Hayarden Street
Tel Aviv 61130
Tel. 3 496 108
Fax 3 648 60 39

EGYPT/
MIDDLE EAST

Middle East Observer
41 Sherif St.
Cairo
Tel/Fax 39 39 732

UNITED STATES OF AMERICA / CANADA

UNIPUB
4611-F Assembly Drive
Lanham, MD 20706-4391
Tel. Toll Free (800) 274 4888
Fax (301) 459 0056

CANADA

Subscriptions only
Uniquement abonnements

Renouf Publishing Co. Ltd
1294 Algoma Road
Ottawa, Ontario K1B 3W8
Tel. (613) 741 43 33
Fax (613) 741 54 39
Telex 0534783

AUSTRALIA

Hunter Publications
58A Gipps Street
Collingwood
Victoria 3066
Tel. (3) 417 5361
Fax (3) 419 7154

JAPAN

Kinokuniya Company Ltd
17-7 Shinjuku 3-Chome
Shinjuku-ku
Tokyo 160-91
Tel. (03) 3439-0121

Journal Department
PO Box 55 Chitose
Tokyo 156
Tel. (03) 3439-0124

SOUTH-EAST ASIA

Legal Library Services Ltd
Orchard
PO Box 05523
Singapore 9123
Tel. 73 04 24 1
Fax 24 32 47 9

SOUTH AFRICA

Safto
5th Floor, Export House
Cnr Maude & West Streets
Sandton 2146
Tel. (011) 883-3737
Fax (011) 883-6569

AUTRES PAYS
OTHER COUNTRIES
ANDERE LÄNDER

Office des publications officielles des Communautés européennes
2, rue Mercier
2985 Luxembourg
Tel. 499 28-1
Telex PUBOF LU 1324 b
Fax 48 85 73/48 68 17

European Centre for the Development of Vocational Training
Jean Monnet House, Bundesallee 22, **D-10717 Berlin**
Tel: 49-30+88 41 20; Fax: 49-30+88 41 22 22; Telex: 184 163 eucen d

CEDEFOP

04 05 16

HX-83-94-911-EN-C

Price (excluding VAT) in Luxembourg: ECU 8

ISBN 92-826-9159-4

OFFICE FOR OFFICIAL PUBLICATIONS
OF THE EUROPEAN COMMUNITIES
L-2985 Luxembourg

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement (OERI)
Educational Resources Information Center (ERIC)

NOTICE

REPRODUCTION BASIS

☑ This document is covered by a signed "Reproduction Release (Blanket)" form (on file within the ERIC system), encompassing all or classes of documents from its source organization and, therefore, does not require a "Specific Document" Release form.

☐ This document is Federally-funded, or carries its own permission to reproduce, or is otherwise in the public domain and, therefore, may be reproduced by ERIC without a signed Reproduction Release form (either "Specific Document" or "Blanket").