

BSR Survey: Human Capacity Building in Transport Operations

Evaluation Report

26.04.2012

Introduction

The current survey (BSR Survey II) was conducted as part of the operational task 4.2 of the TransBaltic project - "Capacity Building in Transport Operations" - during January-April 2012.

The **aim** of the survey was to obtain an overview of the **driving forces, challenges and needs for action** with regard to human capacity building in the transport sector as seen by the TransBaltic project partners / associated partners and other relevant stakeholders in the Baltic Sea Region.

The survey concerned various modes of **freight transport**, including sea, road, rail, inland waterways, and harbour logistics. The air transport was not in focus of this survey.

Prior assumptions

The organizers of the survey relied on the following assumptions:

- In light of the increasing transport volumes and the existing potential for development, the demand for labour in the Baltic Sea Region (BSR) will grow and **green transport strategies** will play a crucial role for the advancement and competitiveness of the BSR.
- These strategies have to ensure not only economic, environmental and logistic sustainability but also **social sustainability**. This is the only way for the companies in the BSR region to satisfy the demand for qualified labour. Their further development and competitiveness will result from this approach.
- Future changes in the BSR's transport sector and the measures of human capacity building will primarily be determined by the following factors: demographic situation, globalisation and market segmentation, logistics and transport networks, labour and environmental regulations, technological innovations and new services, as well as the changing nature of jobs.



Project part-financed
by the European Union
(European Regional Development Fund)



Methodology

The survey preparation included an extensive desk research and consultations with the relevant TransBaltic project partners and other experts in the field of transport operations and logistics. The preparation further included pre-tests, particularly as part of the BSR Survey I that had been conducted earlier in 2011.

The data was collected via a **questionnaire survey** that was electronically distributed among the TransBaltic project partners / associated partners, their networks and other relevant stakeholders in all BSR countries (Germany, Poland, Sweden, Estonia, Latvia, Lithuania, Denmark, Finland, Norway and Russia), which had been identified within the preparation phase.

The relevant stakeholders (potential respondents that received the questionnaire) included:

- employers associations
- trade unions and trade union associations
- regional networks and sub-regional associations (NGOs)
- state agencies
- educational and research institutions
- other (e.g. public-private partnerships and chambers of commerce).

The questionnaire consisted of **6 parts (A-F)**. Part A) contained questions on **transport operations in general** and parts B) to E) covered **different modes of transport**. Part F) dealt with the **harbour logistics cluster** in connection with the TransBaltic operational task 5.4 - "Competence Management System in Port Logistics".

Each part of the questionnaire included **24 questions** that were grouped in **4 main categories** concerning:

- I. Future demand for labour
- II. Future employment conditions
- III. Future framework for human resources
- IV. Additional questions - either related to the future demand / use of Information and Communication Technologies (ICT) in the transport sector, or intended for clarification / explanation of prior answers (to the questions in the first three categories).

Questions (01) to (21) were formulated in a similar fashion and provided 3 possible response options: **very important / important / not important**.

Taking account of all three options, the current evaluation summarizes the responses marked as 'important' and 'very important'.

Questions (22) to (24) asked for specification / explanation of the prior responses, and for further relevant information sources.

The questionnaire survey was complimented by follow-up telephone interviews with the respondents, when it was necessary to clarify inconsistencies, specify the answers or ask for contacts of further potential respondents.

Definitions

In the following, the main terms and concepts referred to in the questionnaire are defined.

- flexicurity = is an integrated strategy for enhancing, at the same time, flexibility and security in the labour market. It attempts to reconcile employers' need

for a flexible workforce with workers' need for security - confidence that they will not face long periods of unemployment (as defined by the European Commission)

- gender = refers here to raising awareness about equal treatment of men and women in the work context
- employee support = refers to the financial and other support of further training / education or other opportunities for employees by the management
- diversity = refers to a diversified staff composition (e.g. ethnic origin, gender, age, education, disability)
- employee participation = means including members of staff into decision-making processes and / or capital share
- work-life-balance = is a concept that allows a proper combination of work (career) and private life (health, leisure, family, and spiritual development)
- CSR / Corporate Social Responsibility = is a concept whereby companies integrate social and environmental concerns in their business operations and in their interaction with other stakeholders on a voluntary basis (as defined by the European Commission)
- EQF / European Qualifications Framework = serves as a translation device to make national qualifications more readable across Europe, promoting workers' and learners' mobility between countries and facilitating their lifelong learning.

Survey Results

Overall, **14 respondents** from **13 organisations** and **5 BSR countries** participated in the survey. The country representation and institutional affiliations are summarized below:

Institutions represented:

8 educational or research institutions
3 employers associations

1 regional network (NGO)
1 public-private partnership
1 chamber of commerce

Trade unions / trade union associations and state agencies were not among the respondents.

Countries represented (number of responses per country):

Germany (6) Poland (3) Sweden (2) Estonia (2) Finland (1)

None of the contacted organizations in Latvia, Lithuania, Denmark, Norway and Russia responded to the survey.

In the following, both quantitative and qualitative results of the survey are summarized.

A) Transport operations (in general): 13 Responses	
I. future demand for labour	

Categories	01 more youth?	02 more women?	03 more elder labour?	04 more foreign labour?	05 more blue collar staff?	06 more white collar staff?	07 more specialists?		
very important	7	3	3	3	2	-	7		
important	6	3	4	5	3	9	5		
total	13	6	7	8	5	9	12		
II. future employment conditions									
Categories	08 more competence?	09 more mobility?	10 more flexicurity?	11 more gender?	12 more employee support?	13 more diversity?	14 more networking?	15 more employee participation?	16 more work-life-balance?
very important	8	5	6	3	4	-	3	1	5
important	5	5	7	4	6	7	9	9	7
total	13	10	13	7	10	7	12	10	12
III. future framework for human resources									
Categories	17 more social protection?		18 more social dialogue?		19 more Corporate Social Responsibility?		20 more European Qualification Framework?		
very important	1		2		3		5		
important	8		9		9		6		
total	9		11		12		11		
IV. Additional questions									
21 More Information and Communication Technologies / ICT...									
Categories	... skills for labour?			...facilities for employees?			...instead of human personnel?		
very important	6			-			-		
important	6			12			6		
total	12			12			6		

22 Explanations for the boxes marked “very important”.

More youth and elder labour

All 13 respondents identified more youth as very important or important for the future demand for labour in the transport sector in general. The main factors in support of this argument were the current demographic developments (with an ageing work force in combination with low inflow of staff) and at the same time the growing unemployment of the younger (potential) workers. While the demand for elder labour seems to be less urgent, several suggestions to engage elder workers for a longer period of time were made as a response to the demographic change.

More women

Only 6 respondents (46%) identified more women as important or very important for the future demand for labour. Some suggested that the number of women is generally very low due to the existing risks (health and safety) and requirements (physical force) in transport operations as well as the absence of structural conditions (especially work-life balance) that could have attracted more women into the sphere. The change of the structural conditions is thus seen as the main prerequisite for a greater employment of women in transport, whereas the requirement of physical force currently disappears in many sectors due to computerization and automatization of transport operations.

More foreign labour

Generally, attracting more foreign labour (both from the other EU member states and third countries) is seen as a way to address problems resulting from the demographic change. The demand however seems to vary depending on the transport modes. Already now, more and more non-EU citizens are required and employed in the spheres of IT, engineering and sea transport.

More blue collar and white collar staff

The responses vary significantly depending on the specific sector and country of the respondents. An overall trend for the whole transport sector of the BSR can hardly be established.

More specialists

12 out of 13 respondents identified more specialists as very important or important for the future demand for labour. With transport and logistics operations becoming more and more complex, a deeper specialisation of staff is required. Yet, at the same time, some spheres of transport operations, especially at the strategic level (according to the EQF), rather require generalists, who have an overview of the whole situation and can create synergies.

More competence

8 out of 13 respondents (62%) consider more competence as very important and the other 5 (38%) as important for the future employment conditions. This is explained by the increasing complexity of the transport operations and the growing competition on the labour market, which will require adjustment of staff by developing competence. There is a demand for more competence for both specialists and generalists at all employment levels. The need for life-long-learning will be vital.

More mobility

Generally, the growing competition on the logistics and transport market is expected to require more mobility of labour. However, according to the follow-up interviews, whether more mobility is needed, depends on how one defines mobility. Mobility conceived as the movement from one place to another in the process of carrying passengers or goods is especially problematic for long-distance sea and road transport (as it provides for a greater psychological pressure and less work-life balance than it is the case in the short-distance transport). Mobility defined as moving to a different country with the company or a branch office would have different implications.

More flexicurity

© ma-co + SEP / TRANSBALTIC / Task 4.2: (Human) Capacity Building in Transport Operations

More flexicurity is identified as important or very important by all 13 respondents. Combining both flexibility and security of the labour market, the concept appears to be vital for the development of social sustainability in transport operations. Growing problems with the unemployment of young people as well as weakening market position of elder people will enforce suitable adjustments in social policy of governments in finding balance between flexibility and security.

23 For which employment levels this is especially relevant? (with reference to question 22)

- (a) Strategic level X
- (b) Planning / Coordination level X
- (c) Operative level (all according to EQF) X

Generally, it is impossible to reveal differentiated trends, as the responses identified as very important were marked for all employment levels.

24 Are you aware of any sources / studies that provide an in-depth analysis of the subject of (HUMAN) CAPACITY BUILDING IN TRANSPORT OPERATIONS? (please provide references)

No additional sources were provided by the respondents.

B) Sea Transport: 10 Responses

I. future demand for labour

Categories	01 more youth?	02 more women?	03 more elder labour?	04 more foreign labour?	05 more blue collar staff?	06 more white collar staff?	07 more specialists?
very important	6	1	-	3	3	1	5
important	4	3	6	4	3	6	4
total	10	4	6	7	6	7	9

II. future employment conditions

Categories	08 more competence?	09 more mobility?	10 more flexicurity?	11 more gender?	12 more employee support?	13 more diversity?	14 more networking?	15 more employee participation?	16 more work-life-balance?
very important	5	5	5	1	2	-	1	1	4
important	4	4	5	3	7	8	7	6	6
total	9	9	10	4	9	8	8	7	10

III. future framework for human resources

Categories	17 more social protection?	18 more social dialogue?	19 more Corporate Social Responsibility?	20 more European Qualification Framework?
very important	3	2	3	1

important	6	7	6	8
total	9	9	9	9
IV. Additional questions				
21 More Information and Communication Technologies / ICT...				
Categories	... skills for labour?	...facilities for employees?	...instead of human personnel?	
very important	4	1	2	
important	5	8	4	
total	9	9	6	

22 Please explain the boxes marked “very important”.

Future demand for labour

Concerning the future demand for labour, the most important issues appear to be the need for **more youth**, **more foreign labour** and **more specialists**. Similar to the trends identified for the transport sector in general (Section A), this is mainly explained by the need to cope with the demographic change, especially in view of the shortage of personnel on ship, e.g. nautical and technical officers. The problem is proposed to be solved by attracting and educating / specializing more young workers and employing more qualified workers from abroad, which is partly already being done in the sea transport that is regarded as the most internationalized among the transport modes.

Future employment conditions

For the future employment conditions, **more flexicurity** and **more work-life balance** are prioritized by all 10 respondents, whereas **more competence** and **more mobility** are marked as important or very important by 9 out of 10 survey participants. Similarly to the other transport modes, increasingly complex transport labour market will require adjustment of staff by developing competence through further education and training in the maritime sector. Both flexicurity and mobility are regarded as indispensable for the future transport operations in view of the growing competition on the market. The demand for more work-life balance often appears to be in contradiction with the requirement for more staff mobility particularly in the sea transport (long distances, etc.). Yet, the need for more work-life balance is seen as one of the main factors for attracting new employees into the sphere (especially young workers) and thus addressing the problem with the shortage of personnel.

Future framework for human resources

9 out of 10 respondents regard all listed categories - **more social protection**, **more social dialogue**, **more corporate social responsibility** and **more EQF** - as important or very important for the future framework for human resources in the sea transport. The supporting arguments reflect the same trends as identified above (see section A).

ICT

As in the case of all other transport modes, ICT skills and facilities are regarded as crucial for a more efficient sea transport operation. At the same time, some of the respondents suggest a greater reliance on the ICT as a way to relieve the growing shortage of personnel in the maritime sector (i.e. using ICT as a substitute for traditional manpower).

23 For which employment levels is this especially relevant? (Please refer to question 22 and explain your answers)

- (a) Strategic level X
- (b) Planning / Coordination level X
- (c) Operative level (all according to EQF) X

Generally, it is impossible to reveal differentiated trends, as the responses identified as very important were marked for all employment levels.

24 Are you aware of any sources / studies that provide an in-depth analysis of the subject of (HUMAN) CAPACITY BUILDING IN TRANSPORT OPERATIONS? (please provide references)

No additional sources were provided by the respondents.

C) Inland Water Transport: 5 Responses

I. future demand for labour

Categories	01 more youth?	02 more women?	03 more elder labour?	04 more foreign labour?	05 more blue collar staff?	06 more white collar staff?	07 more specialists?
very important	1	-	2	-	1	-	2
important	3	-	2	2	3	4	3
total	4	0	4	2	4	4	5

II. future employment conditions

Categories	08 more competence?	09 more mobility?	10 more flexicurity?	11 more gender?	12 more employee support?	13 more diversity?	14 more networking?	15 more employee participation?	16 more work-life-balance?
very important	2	2	2	-	1	1	1	-	1
important	2	2	2	-	3	2	3	4	3
total	4	4	4	0	4	3	4	4	4

III. future framework for human resources

Categories	17 more social protection?	18 more social dialogue?	19 more Corporate Social Responsibility?	20 more European Qualification Framework?
very important	-	1	-	-
important	4	4	4	4
total	4	5	4	4

IV. Additional questions

21 More Information and Communication Technologies / ICT...

Categories	... skills for labour?	...facilities for employees?	...instead of human personnel?
very important	2	-	1
important	3	4	2
total	5	4	3

22 Please explain the boxes marked “very important”.

The response to section C (Inland Water Transport) of the questionnaire was very limited, which is also due to the fact that in some of the BSR countries this mode of transport is almost non-existent. Thus, 5 of the survey respondents were from Poland (3) and Estonia (2), where this is particularly the case.

Due to such limited response, it is hardly possible to identify specific trends for the inland water transport, which would significantly differ from the other transport modes in the BSR.

23 For which employment levels is this especially relevant? (Please refer to question 22 and explain your answers)

- (a) Strategic level
- (b) Planning / Coordination level
- (c) Operative level (all according to EQF) X

The responses marked very important specifically apply for the operative level.

24 Are you aware of any sources / studies that provide an in-depth analysis of the subject of (HUMAN) CAPACITY BUILDING IN TRANSPORT OPERATIONS? (please provide references)

No additional sources were provided by the respondents.

D) Rail Transport: 9 Responses

I. future demand for labour

Categories	01 more youth?	02 more women?	03 more elder labour?	04 more foreign labour?	05 more blue collar staff?	06 more white collar staff?	07 more specialists?
very important	-	-	1	-	1	-	3
important	8	1	6	3	7	7	5
total	8	1	7	3	8	7	8

II. future employment conditions									
Categories	08 more competence?	09 more mobility?	10 more flexicurity?	11 more gender?	12 more employee support?	13 more diversity?	14 more networking?	15 more employee participation?	16 more work-life-balance?
very important	5	2	2	-	2	-	1	-	1
important	4	5	6	2	5	6	5	8	7
total	9	7	8	2	7	6	6	8	8
III. future framework for human resources									
Categories	17 more social protection?		18 more social dialogue?		19 more Corporate Social Responsibility?		20 more European Qualification Framework?		
very important	1		-		1		3		
important	7		7		8		6		
total	8		7		9		9		
IV. Additional questions									
21 More Information and Communication Technologies / ICT...									
Categories	... skills for labour?			...facilities for employees?			...instead of human personnel?		
very important	4			-			1		
important	5			6			5		
total	9			6			6		

22 Please explain the boxes marked “very important”.

Future demand for labour

Concerning the future demand for labour, the most important issues appear to be the need for **more youth**, **more blue collar staff** and **more specialists** (8 out of 9 respondents marked these categories as important or very important). The demand for more youth is explained by the need to cope with the increasing shortage of personnel due to the demographic situation (in the ‘old’ EU member states) and migration of potential employees to the other sectors or countries (in the ‘new’ EU member states). The current ‘overemployment’ of elder workers, who would soon retire, and the limited inflow of young generation into the rail transport sector (that is perceived as non-prestigious) is particularly seen as problematic in Poland.

The problem is proposed to be solved by improving the image of the sector (e.g. through more social security and work-life balance) to attract both more young unspecialized and more educated / specialized workers. Employment of more qualified workers from abroad is not seen as an option for the rail transport, unlike in the case of the sea transport operations.

Future employment conditions

Regarding the future employment conditions, **more competence** is clearly prioritized by all 9 respondents in view of the growing complexity of transport operations and competition on the market (similarly to the other transport modes). The other categories marked as important or very important by at least 7 out of 9 respondents include more mobility, more flexicurity more employee support, more employee participation and more work-life balance. While the demand for more mobility is driven by the market, the further identified categories are suggested to be key factors for increasing attractiveness of the sector.

Future framework for human resources

While all listed categories appear to be of importance, the demand for **more corporate social responsibility** and **more EQF** is prioritized by all 9 respondents. Introduction of the EQF is seen as a way not only to enhance cross-country mobility of workers, but also to increase the VET and competence standards particularly in the ‘new’ EU member states.

ICT

More ICT skills for employees are regarded as very important or important by all 9 respondents, whereas ICT facilities for or instead of personnel appear to be less relevant. Generally, the use of new technologies is associated with the increased interoperability and efficiency of the rail transport.

23 For which employment levels is this especially relevant? (Please refer to question 22 and explain your answers)

- (a) Strategic level X
- (b) Planning / Coordination level X
- (c) Operative level (all according to EQF) X

Generally, it is impossible to reveal differentiated trends, as the responses identified as very important were marked for all employment levels.

24 Are you aware of any sources / studies that provide an in-depth analysis of the subject of (HUMAN) CAPACITY BUILDING IN TRANSPORT OPERATIONS? (please provide references)

No additional sources were provided by the respondents.

E) Road Transport: 11 Responses									
I. future demand for labour									
Categories	01 more youth?	02 more women?	03 more elder labour?	04 more foreign labour?	05 more blue collar staff?	06 more white collar staff?	07 more specialists?		
very important	5	1	1	-	4	-	5		
important	6	1	5	5	5	7	5		
total	11	2	6	5	9	7	10		
II. future employment conditions									
Categories	08 more competence?	09 more mobility?	10 more flexicurity?	11 more gender?	12 more employee support?	13 more diversity?	14 more networking?	15 more employee participation?	16 more work-life-balance?
very important	6	4	7	-	2	-	1	1	4
important	4	4	3	4	6	7	6	7	7
total	10	8	10	4	8	7	7	8	11
III. future framework for human resources									
Categories	17 more social protection?		18 more social dialogue?		19 more Corporate Social Responsibility?		20 more European Qualifications Framework?		
very important	2		2		2		2		
important	7		9		9		8		
total	9		11		11		10		
IV. Additional questions									
21 More Information and Communication Technologies / ICT...									
Categories	... skills for labour?			...facilities for employees?			...instead of human personnel?		
very important	2			1			1		
important	6			9			5		
total	8			10			6		

22 Please explain the boxes marked “very important”.

Future demand for labour

The prior identified trend with regard to the need for **more youth** is also true for the road transport (all 11 respondents consider it important or very important) in view of the same reasons as indicated in section A. Similarly to the situation in the rail transport sector, **more specialists** and **more blue collar staff** are also among the priorities for the road transport. Shortage of drivers due to their emigration to the other EU member states is regarded as problematic particularly in Poland.

Future employment conditions

For the future employment conditions, **more work-life balance**, **more competence** and **more flexicurity** are prioritized by at least 10 out of 11 respondents. The arguments in support of this prioritization generally repeat the ones identified in section A.

Future framework for human resources

While all listed categories appear to be of importance, the demands for **more social dialogue** and **more corporate social responsibility** are prioritized by all 11 respondents. With regard to the former, this suggests that currently only limited possibilities for social dialogue in road transport exist in at least four of the BSR countries (according to the respondents). Concerning the demand for more corporate social responsibility, it is associated with the necessity to compensate for the negative impact of the road transport on the environment, society and human beings.

ICT

By contrast to the other transport modes, in the case of the road transport the majority of the respondents prioritize ICT facilities for employees over the ICT skills. Specific facilities (such as route planning, parking facilities, etc.) seem to be of particular importance and are suggested to make road transport more efficient. ICT skills will be especially relevant for planning and coordination of transport, as well as operative levels. Operative level will require quick and flexible responses (also to be taken “on site”), not possible without help of ICT tools. At the same time, efficient coordination between all actors involved in transport operations will become a critical factor, while planning horizons will shorten. Managing this will also require dedicated ICT tools and skills in using them.

23 For which employment levels is this especially relevant? (Please refer to question 22 and explain your answers)

- (a) Strategic level X
- (b) Planning / Coordination level X
- (c) Operative level (all according to EQF) X

Generally, it is impossible to reveal differentiated trends, as the responses identified as very important were marked for all employment levels.

24 Are you aware of any sources / studies that provide an in-depth analysis of the subject of (HUMAN) CAPACITY BUILDING IN TRANSPORT OPERATIONS? (please provide references)

No additional sources were provided by the respondents.

F) Harbour Logistics Cluster: 11 Responses									
I. future demand for labour									
Categories	01 more youth?	02 more women?	03 more elder labour?	04 more foreign labour?	05 more blue collar staff?	06 more white collar staff?	07 more specialists?		
very important	5	-	1	-	3	1	7		
important	6	5	5	5	5	8	4		
total	11	5	6	5	8	9	11		
II. future employment conditions									
Categories	08 more competence?	09 more mobility?	10 more flexicurity?	11 more gender?	12 more employee support?	13 more diversity?	14 more networking?	15 more employee participation?	16 more work-life-balance?
very important	6	3	6	-	2	-	3	2	1
important	5	6	5	3	5	5	6	6	7
total	11	9	11	3	7	5	9	8	8
III. future framework for human resources									
Categories	17 more social protection?		18 more social dialogue?		19 more Corporate Social Responsibility?		20 more European Quali-fications Framework?		
very important	2		2		1		1		
important	7		9		9		10		
total	9		11		10		11		
IV. Additional questions									
21 More Information and Communication Technologies / ICT...									
Categories	... skills for labour?			...facilities for employees?			...instead of human personnel?		
very important	4			2			3		
important	7			5			5		
total	11			7			8		

22 Please explain the boxes marked “very important”.

Future demand for labour

The prior identified trends with regard to the need for **more youth** and **more specialists** are also true for port logistics (all 11 respondents mark these two categories as important or very important) in view of the same reasons as indicated in section A (i.e. demographic change and personnel shortage, as well as growing complexity of the logistics sphere). The need for more blue and white collar staff is prioritized by 8 respondents, whereas the demand for more women and foreign labour appears to be less relevant. Some, however, suggest that with the increasing computerization of port logistics, a greater employment of women in the sector (especially at the strategic and planning levels, but also at the operative level) could be a response to the possible lack of personnel.

Future framework for human resources

More competence and **more flexicurity** are among the key priorities for the future framework for employment in port logistics, followed by the demands for more mobility, more networking and more work-life balance (prioritized by 8 out of 11 respondents). The demand for more qualified and competent logisticians appears to be most pressing at the planning and operative levels. The reasoning indicated in section A (transport sector in general) also applies to the field of port logistics.

Future framework for human resources

While all listed categories appear to be of importance, the demands for **more social dialogue** and **more EQF** are prioritized by all 11 respondents. With regard to the former, this suggests *inter alia* that the current possibilities for social dialogue in port logistics are either limited or not satisfactory. Concerning the demand for more EQF, it is associated with the possibility to improve VET and competence standards particularly in the ‘new’ EU member states.

ICT

More ICT skills for employees at all levels are regarded as very important or important by all 11 respondents, while ICT facilities for or instead of human personnel also appear to be relevant. Generally, the use of new technologies is considered to be essential for the efficiency of the port handling process (storage planning, AGVs, etc.).

23 For which employment levels is this especially relevant? (Please refer to question 22 and explain your answers)

- (a) Strategic level X
- (b) Planning / Coordination level X
- (c) Operative level (all according to EQF) X

It is impossible to reveal differentiated trends for each of the categories. Some of the identified trends are indicated above (see point 22).

24 Are you aware of any sources / studies that provide an in-depth analysis of the subject of (HUMAN) CAPACITY BUILDING IN TRANSPORT OPERATIONS? (please provide references)

No additional sources were provided by the respondents.

Implementation Difficulties and Recommendations

A major complication occurred during the implementation phase of the BSR Survey II was the limited response (a response rate of only 15%). This is despite the extensive preparatory work (including the BSR Survey I as a test phase and compiling of a comprehensive list of contacts) and regular email and telephone follow-up with each of the potential respondents.

The results of the survey are therefore not necessarily representative for the whole Baltic Sea Region and can only help indicate certain general trends, as responses are missing for several BSR countries and institutional categories that were identified as relevant for the survey in advance.

The main recommendation resulting from this would be to follow-up the current survey with a comprehensive study on human capacity building in the BSR, which would incorporate both a large-scale quantitative survey and an in-depth qualitative (interview-based) component, as it was originally envisaged during the planning phase of the TransBaltic project. The study could use the results of the BSR Survey II, including the established contacts with experts in the sphere, as its point of departure. A further recommendation would be to create a BSR-wide network comprising experts, social partners and other interested stakeholders, who would be committed to the conduct of the study.