

**TRAINING OBJECTIVES AND  
QUALIFICATION LEVELS FOR  
OCCUPATIONAL SAFETY  
REPRESENTATIVES – A CASE STUDY****A MUNKAVÉDELMI KÉPVISELŐK  
KÉPZÉSI CÉLJAI ÉS  
KÉPZETTSÉGI SZINTJE –  
ESETTANULMÁNY**LEISZTNER Péter<sup>1</sup>**Abstract**

Employee participation is essential to the effective functioning of occupational safety and health, with occupational safety representatives providing its institutionalized form. This study explores the knowledge and training levels Hungarian occupational safety and health professionals consider acceptable for these representatives, with particular emphasis on establishing a shared professional language. Using an intrinsic case study approach, the research involved ten highly qualified and experienced occupational safety professionals. Data were collected through semi-structured interviews and analyzed using qualitative content analysis. The findings indicate that intuitively defined expectations often exceed legal minimum requirements, while conscious consideration of competency levels tends to moderate them. These results highlight the importance of aligning training frameworks with both regulatory requirements and professional expectations, thereby supporting the further development of occupational safety education.

**Keywords**

workers' representative, occupational safety and health, training and educational objectives, Bloom's taxonomy, competency development

**Absztrakt**

A munkahelyi biztonság és egészségvédelem hatékony működésében meghatározó szerepet játszik a munkavállalók részvétele, amelynek intézményesített formáját a munkavédelmi képviselők jelentik. Jelen tanulmány azt vizsgálja, hogy a magyar munkavédelmi szakemberek milyen tudás- és képzési szintet tartanak elfogadhatónak a munkavédelmi képviselők esetében, különös tekintettel a közös szakmai nyelv kialakítására. A kutatás intrinsic esettanulmány módszertannal, tíz felsőfokú végzettséggel és jelentős szakmai tapasztalattal rendelkező munkavédelmi szakember bevonásával készült. Az adatgyűjtés félig strukturált interjúk segítségével történt, amelyeket kvalitatív tartomelemzésnek vetettek alá. Az elemzés a kognitív és képzési szintek mentén értelmezte az elvárásokat. Az eredmények szerint az intuitívan megfogalmazott elvárások gyakran meghaladják a jogszabályi minimumokat, ugyanakkor a szintek tudatos értelmezése mérsékli azokat. A tanulmány következtetése a munkavédelmi képzési rendszer továbbfejlesztését támogatják.

**Kulcsszavak**

munkavédelmi képviselő, munkahelyi biztonság és egészségvédelem, képzés és oktatási célok, Bloom-féle taxonómia, kompetenciafejlesztés

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## INTRODUCTION

The report of the British Committee on Safety and Health at Work, chaired by Lord Alfred Robens in 1972, highlighted that an overly detailed regulatory environment can paradoxically lead to apathy. Such regulation may encourage both employers and employees to regard occupational safety and health solely as a state responsibility, thereby marginalizing their own roles. The Committee's central recommendation was that the general responsibility for regulating occupational safety and health should be reinterpreted and exercised as a shared responsibility between employers and employees. This reasoning was based on the need to establish a more effective, self-regulating system [1].

A fundamental element of the practical implementation of self-regulation is the fulfilment of employers' information and consultation obligations [2], as well as the enforcement of regulations concerning the election, legal compliance, and training of workers' representatives in the field of occupational safety and health [3]. In parallel, the responsibility of the employee side includes nominating and electing representatives and initiating their training. Numerous empirical studies have demonstrated that the active involvement of employees and their representatives in occupational safety and health measurably contributes to a reduction in the number of workplace accidents [4].

Following the identification of the core and distinguishing competencies required for workers' representatives in the field of occupational safety and health [5], it becomes necessary to precisely define the objectives and levels of their training. However, competence does not merely refer to the possession of knowledge or the achievement of learning objectives, but also to the application of that knowledge in a given context at a defined performance level [6]. This case study focuses on examining this level of knowledge and performance.

A recurring theme in the research series is the status of workers' representatives within occupational safety and health systems. During professional consultations with Hungarian occupational safety and health professionals – regardless of their level of qualification – it was repeatedly noted that the role of workers' representatives in the field of occupational safety and health is difficult to integrate into the organizational structure of occupational safety and health systems. This phenomenon justifies an examination of what educational objectives and training levels occupational safety and health professionals consider appropriate for this group of employees. The case study methodology provides an opportunity for a deeper understanding of the phenomenon within a clearly defined research context [7].

The fulfilment of information and consultation obligations – consistent with employer expectations articulated in the Lisbon Treaty [2] – poses a significant challenge, as a fundamental prerequisite for implementation is the development of a common professional language, that is, effective professional communication [8], [9]. In the case of workers' representatives in the field of occupational safety and health, this task is particularly complex, as it requires the simultaneous application of the terminology of occupational safety and that of the specific workplace profession(s). Both occupational safety-related knowledge and employer-related professional knowledge form part of the core competencies [10], and their development can be achieved relatively effectively through appropriate educational methodologies [11].

Various educational taxonomies provide a theoretical framework for defining educational objectives and training levels, as well as for developing effective teaching methods [12]. Among these, Bloom's taxonomy and its revised versions are of particular importance, along with Webb's Depth of Knowledge taxonomy, the SOLO (Structure of Observed Learning Outcomes) taxonomy, and the taxonomies proposed by Fink and Shulman [12]. The purpose of these frameworks is to support the definition, achievement, and evaluation of educational objectives and learning outcomes. A fundamental expectation in the learning process is that participants acquire the basic elements of knowledge on which they can build in their later studies and practical activities [13].

The case study involved ten occupational safety and health professionals employed in Hungary under an employee employment relationship.

### **Workers' representatives in the field of occupational safety and health**

The Treaty of Lisbon – which amends the Treaty on European Union and the Treaty establishing the European Community – addresses the issue of occupational safety and health in Article 153, placing particular emphasis on informing workers and consulting with them [2]. The European Union defines the role of workers' representatives in the field of occupational safety and health in several legal acts, including those related to collective redundancies [14], the transfer of undertakings or parts of undertakings [15], the establishment of Community-scale undertakings [16], and regulations concerning occupational safety and health [17].

These legal instruments consistently refer to these actors as “workers' representatives” in the field of occupational safety and health; however, different terms are used in the academic literature and in national legislation. For example, some publications of Eurofound refer to them as “employee representatives” [18], while in the Hungarian legal system the term “occupational safety and health representative” is commonly used [3].

According to the European Union directive aimed at introducing measures to improve the safety and health of workers, workers' representatives in the field of occupational safety and health are employees who are elected, designated, or appointed in accordance with national legislation or practice in order to represent workers' interests in matters of occupational safety and health [17].

Under Hungarian legislation, an occupational safety and health representative is an employee elected by the workforce who represents employees' rights and interests related to safe and healthy working conditions, in cooperation with the employer [3].

Any employee of the employer may be elected as a workers' representative in the field of occupational safety and health, ranging from workers performing activities that do not require formal qualifications to senior managers. Consequently, the completion of basic or secondary education (grades 1–12) is not a prerequisite for participation in their training.

### **Case study**

The case study is one of the most widely used and accepted qualitative research methods in the social sciences [19]. Case studies can be classified into three main categories [20]:

- Instrumental case study, in which the researcher focuses on a specific issue or concern and selects a bounded case to illustrate it [21]. This approach is particularly

suitable when the investigation targets a single individual, group, or a well-defined phenomenon [22].

- Collective case study, which is based on the joint examination of multiple cases in order to explore a given problem or phenomenon [21]. The aim of this type of research is to identify common patterns, relationships, or similarities across cases [22]. This method is often applied when studying rare or difficult-to-observe phenomena.
- Intrinsic case study, in which the focus is on the case itself, with the aim of achieving an in-depth understanding of it [21]. This approach is especially suitable for the analysis of unique or rare phenomena, while preserving the analytical procedures characteristic of case study research [20].

In the present research, the intrinsic case study method was applied to explore and understand why workers' representatives in the field of occupational safety and health do not become a defining and indispensable actor within the occupational safety and health organization.

### **Bloom's taxonomy**

In 1956, Benjamin Bloom and his colleagues – Max Englehart, Edward Furst, Walter Hill, and David Krathwohl – published their work *Taxonomy of Educational Objectives*, which presented a theoretical framework for the classification of educational objectives. The taxonomy developed by Bloom distinguishes six main categories: Knowledge, Comprehension, Application, Analysis, Synthesis, and Evaluation. The categories following the Knowledge level were defined as skills and abilities, emphasizing that knowledge is a prerequisite for the practical application of these skills and abilities [23].

According to Bloom's taxonomy, learning is a hierarchically structured process in which the individual levels build upon one another [13]. The interpretation of each category is as follows [24]:

- Knowledge: recall of facts and information;
- Comprehension: interpretation of the meaning of information and concepts;
- Application: use of acquired knowledge to solve problems or perform tasks;
- Analysis: breaking down information into its constituent parts in order to understand its structure;
- Synthesis: combining elements to create new structures or to solve complex problems;
- Evaluation: making judgments based on defined criteria and standards.

During the case study, Bloom's taxonomy was applied despite the fact that it has been subject to considerable criticism in the literature, primarily due to its emphasis on cognitive skills while giving less attention to the affective and psychomotor domains. Nevertheless, the taxonomy's wide acceptance and extensive use justify its application in educational research [13].

## METHOD

The study applies the intrinsic case study method in order to gain an in-depth understanding of how workers' representatives in the field of occupational safety and health are positioned within their roles as defined by the Hungarian regulatory environment. The research focused on the system of relationships between occupational safety and health professionals and the representatives.

Relying on the cognitive levels of Bloom's taxonomy, the study sought to identify the training objectives of workers' representatives in the field of occupational safety and health, involving Hungarian professionals holding higher education qualifications in occupational safety and health.

### Participant Selection

As the first step of the study, participants were selected. Sampling began with convenience sampling, as initially the professionals who were most easily accessible were chosen [25]. According to the original plan, additional participants were to be recruited using the snowball method, in which new participants would be identified from the acquaintances of the current study subjects [26]. However, this method proved unsuccessful, and the remainder of the sample was recruited by contacting easily accessible professionals.

The following channels were used to collect applications for participation:

- "Occupational Safety And Health Professionals" Facebook group (approx. 2,500 members; 2 applicants, 1 successfully recruited)
- Author's former classmates (approx. 25 individuals; 3 applicants, 2 successfully recruited)

### Interviews and data collection

Semi-structured interviews [25] were conducted with ten occupational safety and health professionals, each holding a higher education degree and possessing over 10 years of professional experience. The gender distribution was balanced (5 women, 5 men). By economic sector: 6 participants were from manufacturing, 1 from trade and vehicle repair, 1 from public administration, defense, and compulsory social security, 1 from electricity, gas, steam supply and air conditioning, and 1 from professional, scientific, and technical activities.

All ten professionals were Hungarian citizens working in Hungary: 3 as specialists, 2 as middle managers, and 5 as executives. Their age groups were evenly distributed: 5 participants aged 26–45, and 5 aged 46–65. The represented employers had workforce sizes ranging from 20 to 13,000 employees.

The purpose of the interviews was to explore the professionals' subjective experiences [27]. A questionnaire with six questions was prepared in advance [28], based on the literature and preliminary data collection, with one question aligned with a parallel study [29]. Based on expert feedback, the questionnaire was revised, and a total of seven questions were finalized. The interviews were conducted in person or via online platforms (e.g., BBB, Microsoft Teams) by individual invitation [30], allowing for interactive participation and immediate responses to unanticipated topics [27].

## Educational objectives and application of Bloom's taxonomy

The determination of the cognitive levels of Bloom's Taxonomy was conducted in two parts:

- Examination of occupational safety-related knowledge
- Establishing the required level of workplace- and employer-related knowledge

During the interviews, participants completed two interrelated tasks:

- In the first task, verbs corresponding to different cognitive levels were alphabetically arranged in a table, and each expert selected 20 verbs they considered most important for workers' representatives in the field of occupational safety and health
- In the second task, the cognitive levels and their explanations were placed on cards, and the experts had to select the knowledge level most characteristic for workers' representatives in the field of occupational safety and health

## EQF-HuQF training levels

To determine the training levels, participants were asked to select the appropriate level using cards, taking into account skills, responsibility, and autonomy [23], [31].

The cards used for defining the training levels included the EQF-HuQF levels as defined by European Union and Hungarian regulations, along with the associated knowledge, skills, responsibility, and autonomy. Based on this information, the experts had to choose the level that, in their opinion, best reflected the knowledge and skills expected of an worker's representative in the field of occupational safety and health, as well as the responsibility and independence required for the role.

## Data Processing

The notes taken during the interviews were subjected to qualitative content analysis, also known as thematic analysis [32], with the aim of identifying the training objectives and levels expected by the experts. The results were subsequently compiled in Excel spreadsheets for further analysis.

## RESULTS

During the semi-structured interviews conducted with occupational safety and health professionals holding higher-education qualifications, participants were first asked to select 20 verbs that, in their opinion, characterize the required level of occupational safety-related knowledge of workers' representatives in the field of occupational safety and health. They were also asked to select another 20 verbs that they believed characterize the required level of professional and workplace-related knowledge of workers' representatives in the field of occupational safety and health. During the selection process, participants were allowed to choose freely from the complete list of verbs for both categories.

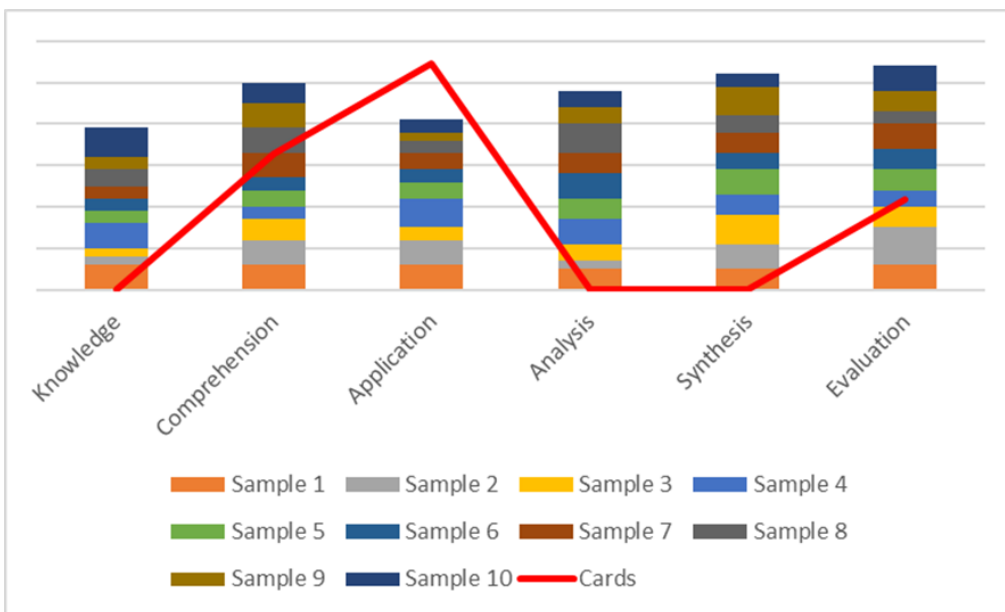


Figure 1. The required level of occupational safety and health knowledge of workers' representatives in the field of occupational safety and health according to Bloom's taxonomy, by respondent, based on the selected verbs and cards

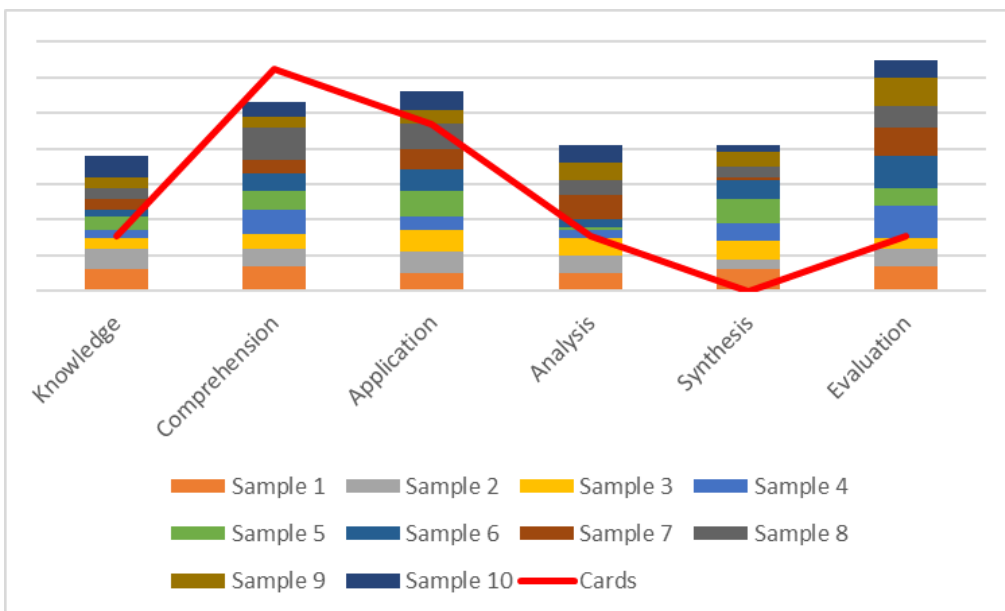


Figure 2. The required level of job-related professional and workplace knowledge of workers' representatives in the field of occupational safety and health according to Bloom's taxonomy, by respondent, based on the selected verbs and cards

When determining the level of both occupational safety-related knowledge and professional and workplace-related knowledge, a significant discrepancy was observed depending on whether the experts were asked to select verbs associated with knowledge levels unfamiliar to them, or to choose cards that included interpretive descriptions of the individual levels. In both cases, it can be established that when selecting verbs, the highest knowledge level was identified as the required level; however, when the interpretations of the levels were taken into account, the experts selected the “application” level for occupational safety-related knowledge and the “understanding” level for professional and workplace-related knowledge. The results of the card-based selection for occupational safety-related knowledge are consistent with statutory requirements, while in the case of professional and workplace-related knowledge they correspond to the minimum level necessary for the use of a common professional language.

During the determination of the EQF–HuQF level, among the experts involved in the study, two selected Level 2 (lower secondary partial qualifications, partial occupations, workshop school programme qualifications), four selected Level 3 (lower secondary partial qualifications, vocational qualifications, vocational qualification add-ons, partial occupations), two selected Level 4 (upper secondary vocational qualifications, vocational qualification add-ons, full vocational occupations), one selected Level 5 (higher-level vocational education, short-cycle higher education), and one selected Level 6 (Bachelor’s degree (BA), higher-level vocational education).

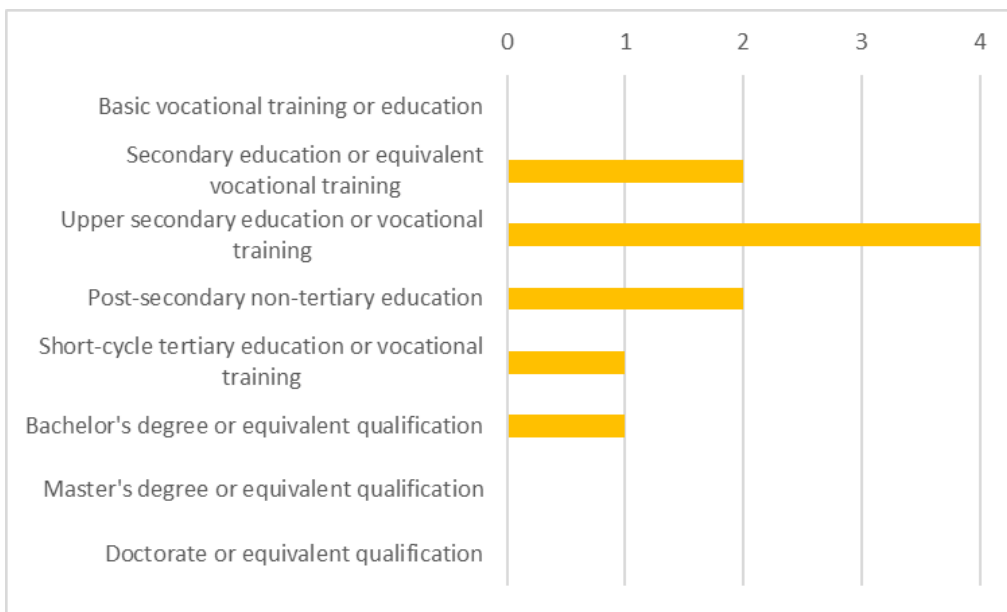


Figure 3. The required qualification level of worker’s representatives in the field of occupational safety and health according to the EQF–HuQF levels, based on the selected cards

During the interviews, the implementation of information provision and consultation, as well as the involvement of workers’ representatives in occupational safety and health-related communication at the employers represented by the experts, was assessed through a separate, dedicated question.

- Monthly occupational safety and health training sessions
- On a daily basis through middle managers (production managers, supervisors, shift leaders)
- Management walkthroughs twice a week
- Communication via a chat application with key-position employees who have company mobile phones (approximately 60–70% of the workforce)
- Training every Monday, with a review of current issues
- Notice board
- Monthly meetings with worker's representatives in the field of occupational safety and health
- Training sessions held twice a year
- Monthly “all-hands meeting”
- Online channel – Slack Safety
- Anonymous channel – poster with QR code
- Work accident reporting platform
- Shared mailbox / group email addresses
- Representative-based system – professional liaison
- Face-to-face communication
- Daily morning briefing
- Personal communication
- e-mail
- Notice
- In writing
- Not really
- Works Council
- Through worker's representatives in the field of occupational safety and health
- HSE notice board
- Monthly HSE update

Based on the identified communication channels, only two employers were found where occupational safety and health professionals implement information provision and consultation through workers’ representatives in the field of occupational safety and health, even if only partially.

## DISCUSSION

The definition of educational objectives means clearly specifying what outcomes the education aims to achieve, that is, which knowledge, skills, and attitudes should be conveyed to the participants of the training. These expected outcomes guide the teaching–learning process and can only be considered fulfilled if the participants have actually acquired them [33].

In the training of workers’ representatives in the field of occupational safety and health, a key objective is the development of a common language with employees and with the occupational safety and health professional(s). This shared professional language represents a so-called “semi-foreign language” for participants in education [8]. In the case of

participants attending the 16-hour basic training for workers' representatives in the field of occupational safety and health [34], this includes the acquisition of occupational safety-related knowledge, but it may also apply to familiarization with workplace-related professional and workplace-specific knowledge for individuals who are not familiar with all professions, activities, or technologies present at a given employer. It can therefore be stated that professional language is field-specific and specialized; it is distinguished from other professional languages and from general language by its connection to the specific knowledge, methods, tasks, and approaches of each discipline [9].

In line with previous research, the present study also confirmed that professionals would prefer to see occupational safety and health representatives with at least upper secondary education within the occupational safety and health organizations they lead or in which they participate. During the examination of Bloom's taxonomy, all professionals selected verbs from the highest cognitive level, and overall, the largest number of verbs was selected from this level in both knowledge domains examined in the study. At the same time, when the professionals became familiar with the interpretations associated with each level, expectations remained higher than the skill levels defined by European Union and Hungarian legislators, even in this case.

In the determination of the EQF–HuQR level, the aspirations of the research participants became even more apparent, as four respondents expected at least upper secondary education and two expected tertiary education in the training of workers' representatives in the field of occupational safety and health.

The case study demonstrated that, in the opinion of occupational safety and health professionals, workers' representatives do not currently constitute partners for them within occupational safety and health organizations under the existing training system, and they are not relied upon in the development of safe and healthy workplaces.

An interesting result emerged from the examination of occupational safety and health communication channels identified at the employers represented by the participating professionals, as communication through workers' representatives in the field of occupational safety and health was mentioned in only two cases.

An effectively functioning workers' representative in the field of occupational safety and health, who speaks a common language with occupational safety and health professionals, employers, and employees, represents the first step in developing the level of an employer's safety culture [35], in the implementation of the European Union's "zero" vision [35], and in increasing sustainable safety [36].

## CONCLUSIONS

According to the components of knowledge as a fundamental competence, occupational safety and health representatives must be trained at an appropriate level in order to acquire the confident use of professional language. The aim of education is for them to master a common language, thereby becoming useful members of the employer's occupational safety and health organization.

The definition of knowledge-related educational objectives falls to two actors within the tripartite system. State responsibilities and training objectives have already been defined at the legislative level; however, employers themselves must develop training objectives and tasks related to workplace-specific, professional, and workplace-related

knowledge. The third participant in the tripartite system—employees and their representatives—can encourage such workplace training and make proposals regarding the definition of educational objectives. Through the National Occupational Safety and Health Committee, employers and employees and their representatives may also communicate their needs and proposals related to occupational safety and health knowledge to the state.

The research highlighted that greater emphasis should also be placed, during the training of occupational safety and health professionals, on issues related to the activities of worker's representatives in the field occupational safety and health.

At the employers represented by the occupational safety and health professionals involved in the study, the relatively low number of elected occupational safety and health representatives compared to the number of employees suggests that both employers and employees need to be more clearly informed about their rights related to the election of occupational safety and health representatives, and especially about the benefits arising from this process.

A defining characteristic of an effective workers' representative in the field of occupational safety and health is the ability to actively participate in occupational safety and health communication, to accurately convey employer-provided information, to take part in employee consultations, and to speak a common professional language even with individuals holding occupational safety and health professional qualifications.

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