Work Programme of the ETUI
1 April 2020 – 31 March 2021
Mission statement

The European Trade Union Institute (ETUI) was set up as a Belgian-based international non-profit-making association to conduct research, provide scientific, educational and technical support to the European Trade Union Confederation (ETUC) and its affiliates, and contribute to the development of social Europe and the social dialogue. Such is the broad and basic mission of the ETUI, reflected in Article 3 of the statutes adopted by its General Assembly on 1 December 2004. The mission is carried out by:

- collecting documentation, conducting research and producing studies on topics of strategic importance for the world of labour, while developing dialogue and cooperation with the academic and research community;
- providing technical support in the field of occupational health and safety to achieve a high level of health and safety protection for workers in Europe;
- promoting educational activities, programmes and exchanges designed to strengthen a European trade union identity and implement shared ETUC/ETUI priorities.
Main activities of the ETUI

The current strength of the ETUI lies in how its priorities, resources and capabilities are organised and brought together in a strategic way which fulfils and respects its general mission, whilst also facilitating the exercise of more specific, concrete activities.

The different kinds of support delivered by the ETUI are based on three components:

- firstly, multidisciplinary work, often carried out in teams of people with different professional backgrounds and experience;
- secondly, support received from individual and networks of national experts and trade union representatives who assist the ETUI and its staff; and
- thirdly, activities organised by the ETUI staff, such as conferences, workshops, training courses and educational seminars.

Establishing itself as an important European knowledge and competence centre means that the ETUI has to be a network-steering body that can organise and coordinate numerous academic and trade union activities, whilst simultaneously showing and drawing on its competence for critical analysis as well as for organising conferences, meetings, training activities and workshops in the EU27.

In 2020-2021, in accordance with its statutes, the main ETUI activities will include:

1. monitoring major European developments of importance to workers and the European trade union movement;
2. collecting, storing and providing data and information on policy areas of relevance to the European trade union movement in its capacity as an actor in the European integration process;
3. conducting multidisciplinary and intellectually independent research on topics of importance to the European trade union movement and other social actors, and publishing the results of this research in books, working papers, journals, reports, guides, policy briefs and background analyses;
4. disseminating the results of this work at conferences and seminars;
5. establishing European networks of researchers, research bodies and universities in fields relevant to the work of the ETUI;
6. coordinating European networks of health and safety experts in a range of fields including technical standards, ergonomics, gender, psycho-social risks, nanomaterials and chemicals;
7. representing and supporting the European trade union movement in the field of health and safety in regard to European Union (EU) strategy, legislative acts and their implementation, collective agreements and technical standards;

8. improving cooperation between the European trade union movement and academic institutions, research institutes, EU specialised agencies and preventive and enforcement agencies;

9. providing training programmes reflecting the needs of the ETUC and its affiliated organisations;

10. promoting new validated training systems for strategically targeted groups which will renew and modernise the trade union movement and meet the needs and demands of the members and organisations;

11. supporting the European trade union education community, which provides a forum for the strategic development of trade union education in Europe, and reinforcing the networks required for core and strategic activities and expertise;

12. adding a European dimension to national trade union education initiatives by providing basic and ongoing European training programmes for trainers and producing training resources;

13. providing expertise and advisory services for the design and delivery of European trade union education projects.

Research and education activities form the basis for the development of knowledge, expertise, technical support, policy advice and common identity projects. The research and expertise dimension of the ETUI is fundamental to the fulfilment of its mission, and this aspect of its work will be carried out in ways that also help to build bridges between the trade union and academic worlds. High-quality educational activities are a prerequisite for trade unionists to enable them to develop a common European understanding and a strong European trade union identity, as well as to implement joint European strategies.

Both regional and gendered aspects of the issues arising from European integration are taken into consideration when drawing up and implementing the ETUI work programme.

The ETUI offers a comprehensive and ongoing European training programme that enables trade union officers and representatives from all over Europe to participate in a unique learning experience and gain a broader European perspective on trade union issues.

In recent years, new pedagogical pathways have been developed and implemented, offering new skills, ensuring consistency and systematisation, and also consolidating the training of trade union representatives. The ETUI’s pedagogical
approach is constantly being improved and adapted to new technologies, forging a renewed pedagogical connectivity. The ETUI seeks to be innovative in its pedagogy, its primary objectives being an extended reach and a greater resilience in its provision of education. It aims to provide better support for the career-long progression of union members by offering them successive learning opportunities. E-learning, blended learning and online developments will be key to the future of learning at the ETUI.

The ETUI will contribute to the definition, implementation, monitoring and evaluation of EU policies and thus bring an added value to the decision-making process at EU level, as well as facilitating the contribution of social partners. The ETUI will do this by supporting and promoting EU initiatives through exchanges of information, analysis, reports, pamphlets, books, and other written material. The ETUI will also contribute by stimulating and developing networks of academics, trade union experts and representatives of the trade union organisations involved.

The successful implementation of this ETUI work programme relies on close cooperation with the ETUC, with its affiliated organisations, with academic bodies, research institutes and foundations in Europe, and with training centres which may benefit from financial support for the activities mentioned above.

Furthermore, the Foresight Unit is bringing a future-oriented dimension to the ETUI’s work, examining new and future societal challenges and trends likely to affect the future of trade unionism and the ETUI’s modus operandi. The unit helps to stimulate dialogue between different actors and to provide ground for further research and educational activities, focusing on the two priorities defined when it was created: the multi-faceted impact of digitalisation on future jobs and the nature of work; and the need for a social-ecological transition in the face of climate change.

The ETUI continuously monitors and evaluates its activities in a bid to improve their delivery and impact. This monitoring exercise is used to plan and implement the work programme as described here (see Annex). The institute’s staff also promote the dissemination of their research and educational facilities through a wide range of different networks and events held at national, European and international level.

In this work programme, the following conditions for subcontracting and financial support apply, as stipulated in the 2018–2021 framework partnership agreement (the eligibility criteria). A proposal will be considered eligible only if:

a) its content corresponds, wholly or in part, to the topic description in relation to which it is submitted, in the relevant part of the work programme (i.e. Part A or Part B);

b) it complies with the eligibility conditions set out in the framework partnership agreement. In view of the exit of the UK from the European Union, and taking
into consideration a transition period during which the UK will remain within the EU Customs Union and single market and during which the majority of EU law would continue to apply to the UK, the ETUI will ensure the contractual engagement with UK-based providers until the end of the Work Programme (31 March 2021).

**Data Protection**

The ETUI continues to work on implementing the General Data Protection Regulation (GDPR).

It has created a privacy framework covering all our departments and including internal awareness and up-to-date training for data protection officers. This also includes implementing the adequate and safe management of personal data with the ETUI’s database CiviCRM system. Three training sessions have been provided to staff and more of them will take place in the coming years.

A long-term project on data protection and privacy continues. It envisages identifying specific trade union concerns in employment contexts, as well as providing general guidance on how to implement GDPR principles and protect worker’s privacy and personal data. It consists of three parts:

1) Contacting trade unions and industrial federations and bringing them together in order to identify situations which need further guidance, either in managing personal data internally or in collecting cases of the impact on workers, such as surveillance, monitoring and automated decision-making (including profiling, amongst other things).

2) Producing infographics and videos that can provide clear and effective guidance for trade unions to understand critical issues on data protection and privacy at work, as well as to raise awareness and act at policy or workplace level.

**Communication strategy and visibility**

The two **major priorities** for the ETUI’s communication strategy this year will be the June conference ‘Towards a new socio-ecological contract’ and a complete renovation of all the ETUI’s websites.

The ETUI’s **overall communication strategy** is based on different types of printed and online outputs: research publications, training courses and materials, events and conferences, websites, social media and expert databases, newsletters, networks and journals. The main focus is to identify and update key performance indicators, measure and enhance the impact of the ETUI by promoting actions on a regular basis using in-house resources or via partnership with external media organisations such as the journal *Social Europe* and others.
Conference

The fourth ETUI-ETUC conference will take place in June 2020 and will be on the theme 'Towards a new socio-ecological contract'. The need to effectively tackle global warming puts great pressure on the existing industrial relations models in Europe. A new logic of sustainability needs to be incorporated into the social contracts in order to (re)build harmonious labour relations. A viable world of labour requires a new sustainability paradigm, which encompasses all three of its dimensions: economic, social and environmental.

Achieving economic sustainability (within the planetary boundaries) has become more challenging. Actual economic growth has come at a critically high cost in terms of inequality of opportunities and outcomes, planetary resources and environmental degradation, thus undermining both social and environmental sustainability. Social sustainability is also likely to come under increasing pressure from the impending fourth industrial revolution. In turn, widening inequality and climate change are forcing us to question the way we measure prosperity and wellbeing.

The conference will consist of five plenary sessions and 15 workshops. Around 400-500 participants from all over Europe will interact with more than 80 high-level keynote speakers and reflect on the themes together with our researchers, education officers and communications team. As with previous editions, the conference will be heavily promoted to our academic, education, policymaking and media contacts through our websites, social media and videos.

Websites

In 2020, the ETUI will develop, redesign and launch its main (etui.org) and five satellite websites (the Worker Participation and EWC Training sites, and the EWC, European Company, and European Social Dialogue databases) providing easier access to publications, education activities, databases, reports and newsletters. Our aim is to deliver the highest levels of security, a fully accessible user experience, and intuitive website navigation for online visitors and ETUI staff by proposing an improved version of the information architecture, as well as to create new functionalities which are crucial for a successful outcome without overloading the web system with unnecessary modules and functions. The ETUI websites will be optimised for viewing on mobile communications devices and will be a platform from which to promote our social media activities. The websites will be a focal point of information to stimulate debate, analysis and discussion for all those interested in inequality, social justice, the future of work and the socio-ecological change.

The main target for 2020–2021 will be to successfully migrate and launch the six new websites, integrate the new modules (such as CiviCRM and the newsletters, amongst other things), offer training sessions to the staff to get familiarised with the new technical environment and coordinate requests coming from internal and external users.
The most recent metrics for etui.org show that during the period January 2019–January 2020, the etui.org website had 277,719 sessions, was visited by 159,230 users and 156,295 new users, and attracted 552,472 pageviews. We expect to perform much better after the launch of the new websites.

The most recent metrics for worker-participation.eu show that during the period January 2019–January 2020, the website had 215,938 sessions, was visited by 168,468 users and 167,675 new users and attracted 410,278 pageviews. We expect to perform much better after the launch of the new websites.

Social media

The ETUI’s evolving online communication strategy currently involves the use of Twitter, Facebook, Instagram, LinkedIn, YouTube, Medium and Flickr, with a priority given to the first two social media platforms. Our researchers, communicators and trainers also regularly publish opinions or blogs on specialised independent media outlets such as Social Europe Journal, Equal Times and the various LSE blogs.

The ETUI is empowering its visibility using more innovative means of presenting information and educational material, with increased use of infographics on social media and short video interviews, as a way of visually explaining complex topics in an accessible and informative manner. The evolving online communication strategy is mainly driven by the necessity to connect the ETUI with its audiences, providing them in an ongoing manner with expertise and new information about publications, training courses, events, networks and databases. The philosophy underlying this expansion into new media is twofold: first, to reach the widest possible audience of trade unionists, who may not have the time to read in full our research publications, particularly those aimed mainly at academics; and, second, to reach out to younger generations of trade union activists who may be more comfortable with these forms of communication.

We will also better target the policymaker communities (the EU Parliament, Commission, Council, working groups and think tanks), which is important for working to change narratives.

Targets:

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<tr>
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<th>Current status</th>
<th>2020–2021 targets</th>
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<tbody>
<tr>
<td>Twitter</td>
<td>8,750 followers</td>
<td>&gt; 10,000 followers</td>
</tr>
<tr>
<td>Facebook</td>
<td>1,750 followers; 235 clicks; 6,500 reach</td>
<td>&gt; 2,000 followers; 250 clicks, 7,000 reach</td>
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Publications

The ETUI issues around 40 publications each year on key topical issues concerning workers in Europe. For this year, **fifteen working papers, ten policy briefs, five books, three reports, five foresight briefs, two guides** and **two background analyses** have been planned. On top of these ETUI publications, our researchers also contribute on a regular basis to external academic journals and conferences. In total, ETUI researchers were quoted more than 6,500 times on Google Scholar last year.

Our aim is to make these available to the widest **readership** possible – trade unions, researchers, journalists and media organisations, policymakers, and younger researchers and university students interested in trade unions – in order to foster debate and equip unions with the facts and data they need to win arguments over the need for better jobs and working conditions in Europe. In line with the document on the future of the ETUC adopted by the 2019 Congress we are working closely with the ETUC’s communications team on how to best support each other for any upcoming actions. Each publication output enters the evolving dissemination cycle developed by the ComPub Unit which follows the trending topics in the European media landscape and connects our research to these topics promoted by major media organisations. A publication can be disseminated physically at major events in Europe or elsewhere, during a specific event organised by the ETUI (monthly forum, brown bag lunches, conferences, etc.) but also virtually with bitesize versions of our research disseminated widely through our extensive activities in social media, newsletters, blogging and press releases to specialised journalists. More free-of-charge, user-friendly formats will be developed in order to contribute to the greening of the institute.

**Flagship publications**

**Benchmarking Working Europe 2020**
Published annually since 2001, *Benchmarking Working Europe* puts workers’ concerns firmly at the centre of our analysis and policy proposals. In 2020, the special edition will be launched in cooperation with the ETUC before the EU’s Annual Sustainable Growth Survey. The layout and the content structure will be reviewed for this edition to better align our research with the new Commission’s main priorities. An improved online version will be available for the target audience. It will be launched in November and presented in different settings and countries.

Published in March 2020, this 20th anniversary edition will be a special issue taking stock of 20 years of social policymaking in Europe at national and EU level. This publication will become the reference for anyone interested in the history of European social policy. It will be promoted throughout the year via all our communication channels and tools.
ETUI Newsletters

The ETUI produces **three monthly newsletters** informing targeted audiences about all its activities: ETUI News, HesaMail and the Collective Bargaining Newsletter.

**ETUI News** is the general newsletter of the institute sent out at the end of each month to 6,612 subscribers from all over Europe. The newsletter was launched more than five years ago and aims to inform its readers about the latest publications, videos, events and training activities which have taken place, but also about job vacancies, press coverage and future events. Most of these items have been published on the ETUI website before, and the newsletter serves to compile the recent items and attract the attention of the audience to them. The General Director’s editorial is also posted in other social media such as LinkedIn and Facebook, or in external media such as *Social Europe*, in order to stimulate debate.

**HesaMail** is a specialised newsletter keeping readers regularly updated on the activities of the Health and Safety Unit and on the news and latest developments in the area of European and international occupational health and safety. It is published every month and sent by email only. In 2020, the subscription method will be actively promoted online and the layout of the newsletter will be modernised in order to better integrate it with the other ETUI monthly newsletters.

The **Collective Bargaining Newsletter** (CBN) is the ETUI’s tool to provide up-to-date information on collective bargaining developments across Europe. More information on this newsletter can be found on pages 68-69.

In 2020 there will be a discussion on the feasibility of a **fourth newsletter** focusing on the EU’s Green New Deal. It would be developed with the help of external partners.

Newsletters from the ETUI are a key element in developing stronger relations with our core audiences and are therefore heavily promoted via the internet.

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<thead>
<tr>
<th></th>
<th>Current status</th>
<th>2020-2021 targets</th>
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<tbody>
<tr>
<td>ETUI News</td>
<td>6,600 subscribers</td>
<td>&gt; 8,000 subscribers</td>
</tr>
<tr>
<td>HesaMail</td>
<td>2,000 subscribers</td>
<td>&gt; 3,000 subscribers</td>
</tr>
<tr>
<td>Collective Bargaining Newsletter</td>
<td>3,600 subscribers</td>
<td>&gt; 4,000 subscribers</td>
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**Databases**

The ETUI has developed several **unique expert databases** which are increasingly accessible for external users via the general website or dedicated sites (sometimes in cooperation with external partners).

This year, the ETUI will improve and modernise the access to and content of our numerous exclusive **databases**: the European Company database, European Works Councils database, Facts and Figures database, RiscTox database, Strikes Map of Europe, Labourline, and the upcoming European Social Dialogue database. These
databases will be better exploited (for example, by incorporating easily accessible data graphics and interactive tools). A new online glossary of trade union terms developed by the ETUI Education Department and the ComPub Unit will be launched in 2020. It will tackle the industry’s jargon and help trade unionists to better communicate in multinational environments.

The **contacts database** (CiviCRM) used by the ETUI has been improved. It is now a much more flexible, user-friendly and efficient system, offering a smooth and easy interface, and it will greatly help us in targeting and reaching new audiences and in better serving existing ones while fully respecting the new GDPR rules.

**TURI Network**

In 2020 the **TURI (Trade Union-related Research Institutes) annual conference** will take place in **Vilnius on 13–15 May 2020**. It will be hosted by the Labour Market Research Institute of the Lithuanian Social Research Centre which has been a TURI member since 2014. The TURI network, which had its first meeting in 2007, is a structural, non-thematic and long-term platform for formal contacts between the institutes supporting the trade union movement across Europe. It facilitates a better collaboration and knowledge-sharing between them and helps researchers integrate the European dimension into their work in a more natural way. Currently, the TURI network has 42 members: 38 members from 21 countries of the EU, 1 institute from Norway and 2 European-level research centres. 32 of these are full members of the network and 10 are associated members.

**EduDays**

The 2020 **EduDays** conference will be held from **16-18 September in Malta** with the aim of strengthening our objective of being a high-quality reference point and example for the trade union education community and exploring fields for accreditation of courses.

**The journals HesaMag, Transfer and SEER**

**HesaMag**

Working conditions are a major determinant of social inequalities. **HesaMag is the flagship publication of the ETUI on working conditions**, health and safety (OSH), with a large audience among academic researchers, trade unionists, policymakers and OSH practitioners. It regularly covers developments in EU OSH policy, trade union actions and initiatives in this field and international developments. It approaches health-and-safety-specific questions in their broader social context.

Each issue contains a thematic dossier. For 2020–2021, the two **thematic issues** will cover strategic litigation on health and safety issues and working in the food chain.

The printed edition of **HesaMag** will be revamped with a new layout and there will be a new specific online version called **HesaMag Plus** containing exclusive audio-visual content (photos, videos or audio recordings) for online readers. Photo exhibitions
linked to the contents of each issue are planned to support the dissemination of the magazine and will be displayed at various places in Europe in partnership with ETUC member organisations.

Transfer

The academic journal *Transfer* (the *European Review of Labour and Research*) will continue to be published and distributed by publishing house SAGE. In 2020–2021, three thematic issues of *Transfer* will focus on ‘Institutional experimentation for better (or worse) work’, ‘Trade union internationalism’ and ‘Industrial relations and inequality’. In addition, as in other years, one issue will be a non-thematic ‘open’ issue publishing a selection of articles submitted to the journal and accepted for publication.

The Transfer Journal is performing very well. It is ranked amongst the 25% most quoted similar academic journals.

The ETUI remains in close communication with SAGE on the movement towards open access, particularly via institutional open access agreements, in line with the recommendations set out by Plan S. Plan S’s ultimate aim is for a transition to full and immediate open access to peer-reviewed scholarly publications.

SEER

The ETUI’s other academic journal *SEER* (the *Journal for Labour and Social Affairs in Eastern Europe*) will continue to stimulate an exchange of information between researchers, trade unionists and people who have a special interest in the political, social and economic development of the region of eastern Europe, with a focus on south-eastern Europe. Two issues will be published this year, in July and December 2020: one on the readiness of western Balkans accession countries for EU integration, and the other on economic and wage convergence in the region compared to EU Member States. Dissemination follows via the Nomos and ETUI websites, as well as through postal distribution of printed copies to a regularly updated distribution list, across the region and in EU Member States.

Monthly Forums

The ETUI will continue its monthly forums and other open-to-the-public meetings which are hugely successful and attract various audiences, depending on the topic. At least nine monthly forums will be held this year.

The ETUI will also develop and refine the new formula for ‘Open Foresight Debates’ which will involve a different and innovative style of presentation and discussion. Two to three debates will be held this year.

Documentation Centre

The Documentation Centre will continue to contribute to the collection of literature and information in 2020–2021. The main activities will concentrate on supporting the ongoing work and projects of the institute. This includes the continuous development of the reference database Labourline.
The improvement of the web interface will continue, providing new services to users and improving referencing to enhance our visibility on search engines.

The centre will continue to digitalise historical ETUC and ETUI documents as well as the processing of historical ETUC photographs (including physical archiving and digitalisation) and make them available on Labourline. In light of this, a partnership with the European University Institute (EUI) in Florence could be concluded in order to digitalise the Institute’s first publications, which are not available in PDF format. At the same time, to increase the visibility and use of the Documentation Centre at a national level, we plan to join the Belgian national network UniCat, a union catalogue of Belgian libraries.

The Documentation Centre’s role as a specialised information resource centre for external users will also be further developed. The centre will continue to be an active member of the European Documentation Centres network (EDC), a data provider for the European common catalogue of the European Institute for Gender Equality (EIGE, Vilnius), and for the Social History Portal (IALHI).

**Greening the ETUI**

As part of its top priorities, the ETUI is engaged in working on its internal environmental footprint.

In January 2020, ‘Bruxelles Environnement’ granted one star of the Ecodynamic Enterprise Label to the ETUI, for the quality of the practices in environmental management.

The ETUI Greening Team will continue its work and intensify the processes carried out for this ECO-DYN label. The overall project entails organising the internal Greening Team and top management in a way that together they work on:

1.1. **The environmental footprint of ETUI purchases**

This requires thinking about the products that the institute buys, the environmental criteria applied to the purchases, why they are made and the overall environmental footprint. It aims at ensuring that products with technical sheets have a A++ rating concerning respect to the environment and responsible catering, of which there are four required elements (local, seasonal, vegetarian and organic).

1.2. **Mobility**

On the issue of mobility, the ETUI will work on highlighting different modalities. For instance, the various procedures for visitors and the accessibility of its premises and events; providing a diagnostic and annual analysis of how
participants come to our venues; and using environmental criteria to assess how
the ETUI carries out its activities.

In general, the project aims at promoting a constant internal awareness of staff
towards purchases, water use, biodiversity and mobility. Outside of the label
framework, the ETUI Greening Team is engaging with other organisations in
the ITUH building to undertake similar initiatives and mostly to request the owners
of the building to improve it in a sustainable way.

**Collaboration**

The ETUI's collaboration with other institutions and organisations has a ‘multiplier
effect’, its efforts bearing fruit for all parties concerned.

The ETUI is increasingly perceived as being an important partner in organising
debates on European integration and building consensus on what the future of Europe
could look like. In the upcoming reference period the ETUI will seize the opportunities
at both European and national level to engage with trade unions and other actors in
order to organise events about the social dimension of European integration.

The institute also concluded a memorandum of understanding with the Institut der
Deutschen Wirtschaft (IDW) in Cologne (the think tank of German employers).

**Associated researchers**

The ETUI cooperates with its associated researchers on various projects and events:
Denis Bouget, Emeritus Prof., Maison de l’Homme, Nantes; Christelle Casse,
University of Lyon; Vera Glassner, AKWien; Maarten Keune, professor at Universiteit
van Amsterdam; Vassil Kirov, Bulgarian Academy of Sciences; Martin Myant; Jean-
Paul Tricart, former official in the European Commission, DG Employment and Social
Affairs; Gérard Valenduc, Universités de Namur (UNamur) and Louvain-la-Neuve
(UCL); Eric Van Den Abeele, IHECS Brussels; Pascale Vielle, Université de Louvain;
Sigurt Vitols, WZB; and Jeremy Waddington, Emeritus Prof., University of
Manchester.

**Trainees**

Meanwhile, trainees and guest researchers continue to play an important role in
determining the ETUI’s working methods. The institute’s aim in this respect is to
provide students and researchers across the EU with a unique experience at European
level by participating in the implementation of the ETUI work programme.
Words of thanks

The European Union continues to be the ETUI's most important provider of support. Without continuing support from and cooperation with the European Commission, the European Parliament and other European bodies, the research, expertise and training carried out by the ETUI would simply not be possible. We are extremely grateful for this support, which is vitally important for the effective functioning of the ETUC as a proactive European social partner and for underpinning the European Social Model.

What is more, regarding the successful implementation of this work programme, the ETUI is grateful for the excellent level of cooperation it enjoys with the ETUC and its affiliated organisations. It also welcomes the close level of cooperation with several academic bodies, research institutes and foundations across Europe. Particular support will be received from Germany's Hans Böckler Foundation (HBS), and additional funding will be provided by national affiliates, governments and agencies. Furthermore, the ETUI welcomes the cooperation agreements with various European industry federations and the projects financed by national affiliates. We very much appreciate such financial support and collaboration.

Political and institutional context

The context in which the ETUI is preparing its new work programme has changed substantially after the 2019 Congress of the ETUC in Vienna, the election of a new European Parliament and the launch of the new Commission’s ambitious work programme. Nevertheless, many questions about the challenges and future of European integration persist with the finalisation of Brexit and the continued presence of strong populist movements challenging EU integration. The planned Convention on the Future of Europe is also a new attempt to improve dialogue and consensus on the EU’s objectives. The questions of democracy and democracy at work cannot be separated and, in reality, are closely related.

In this context, the ETUC has adopted a key document underlining 15 priorities for the trade union movement, among them: the future of Europe and democracy, economic governance, taxation policy, wages and collective bargaining, social dialogue, democracy at work, the European Pillar of Social Rights and the UN’s 2030 Agenda, industrial policy and digitalisation, non-standard work, health and safety, sustainable development, climate change, energy policy, fair mobility, free movement and the posting of workers, and migration.

The Commission led by President Ursula von der Leyen has adopted a very ambitious work programme for 2020. A huge number of proposals will be presented during the first 100 days. While we already knew the names of these initiatives at the time of writing our work programme (the end of January), little was known about the actual content and level of ambition. The new Commission has identified the questions of climate change and digitalisation as key challenges.
Concerning the climate crisis, in December 2019 the Commission adopted a communication outlining plans for a ‘European Green Deal’ and will propose a European Climate Pact in March. Linked to the communication are no less than 48 measures (very often potentially important and ambitious) which should be adopted in the next two years. Of the utmost importance is the ‘just transition’ approach and the way it will be financed.

Concerning the other big domain, there is the EU’s digital strategy ‘A Europe fit for the digital age’. There will also be a white paper on artificial intelligence and data, as well as many other documents. Platform capitalism has already had and will continue to have a deep impact on the world of work and risks increasing precarious work, which already exists in many other sectors.

Among the important documents that the Commission has already adopted or should adopt this year, the following are of particular importance and will be followed and analysed closely by the ETUI.

- **On the social side:**
  - The fair minimum wage initiative
  - The European gender strategy
  - A new pact on migration and asylum

- **On the economic side:**
  - The review of the stability pact
  - A communication on the industrial strategy

The follow-up measures at national and European level (the European Pillar of Social Rights) will indicate the level of ambition for a new phase of European social policy.

**Main innovations in the 2020–2021 programme**

The ETUI has based its research and training activities on the five priorities agreed at the ETUC Executive Committee meeting on 17–18 December 2019. These priorities reflect the outcome of the 2019 ETUC Congress and take into consideration the work programme of the new European Commission led by President Ursula von der Leyen. They also take on board the main work-related research questions posed in the academic world.

The following five new priorities will guide all ETUI activities in 2020–2021:

1. The **social-ecological transition and the digital revolution**, identified as the two key challenges for the world of work.
2. The search for a **new economic model** which can reduce inequality and foster upward convergence while at the same time respecting the sustainability of the planet.
3. The need for a **renewed social contract** which includes reduced working time, job quality, good wages, affordable and effective social protection, and adequate health and safety measures.
4. **Reinforced democracy at all levels**, with a particular focus on workers’ participation, collective bargaining, industrial democracy and the various instruments for information and consultation.

5. **Stronger actors and trade union renewal**, including new ways of organising and innovative strategic approaches.

The (European) Social Dialogue, as the ETUI’s fundamental raison d’être, is relevant and instrumental to all five priorities and has therefore been mainstreamed and incorporated into each of the priority areas.

The conference on the future of Europe is also an over-arching priority which could affect, in general terms, our work programme and priorities. To help trade unions prepare for this conference, the ETUI will provide special training for trade union leaders.

Finally, the ETUI will take into account the gender dimension in all its activities and research.

More detailed descriptions of all activities undertaken under these priorities will follow in the next chapters, but here is a short overview of the main innovative education and research projects as well as the major publications and events for the coming year.

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The new ETUI strategy for the next four years has been developed following an inclusive methodology in which each internal and external stakeholder took an active role in the development process. After various rounds of consultation and feedback, the strategy received internal approval from the ETUI and endorsement from the ETUC in November 2019. The strategy was presented to the trade union education community at the EduDays held in Vienna from 28 to 29 November 2019.

In the first phase of strategy development, the Education Department redefined its value proposition as follows: ‘ETUI Education offers motivational and distinct European trade union training in a multicultural setting that is affordable, accessible and delivered a flexible manner. We provide high-quality training on key competencies, skills and knowledge to European trade union members and officers in a transnational and multicultural setting. The training is easy to access and focused on strengthening and expanding the sense of belonging to the same community.’

The strategy is built on three objectives, three building blocks and nine strategic actions.

**Increasing participation** is the first objective. The target groups of our training activities are diverse and comprehensive; hence we do not reach out to all the member
organisations. Countries and trade unions have to be stimulated to participate in our trainings in order to increase our multiplier effect and impact.

**Making more use of technology** is the second objective of this strategy. The aim is to reach out to a bigger target group offering easily accessible and user-friendly MOOCs/SPOCs and to combine them with face-to-face courses in order to present a blended learning offer and further develop online pre-course activities.

In the European context, the ETUI’s training offer is unique. Its strength comes from the specific nature of its trade union training and its proximity to the ETUC. It also lies in the expertise of its trainers and the ETUI’s own research capacities. As a third objective, the ETUI should **maintain and further develop its potential and capacity to offer high-quality training by making more use of internal research** and thus establish the ETUI as a key provider of trade union-oriented training. The synergy between the Education and the Research department is a key factor of success.

Our activities were redesigned and rethought through **3 building blocks: upskilling, online training, and strategic development**. Those 3 blocks are transversal: they cut across all of our core activities and are meant to frame the strategy. They mean to embrace our different strategic objectives.

The courses are developed under the philosophy that participants can think more strategically, explore innovative ideas and act to change. The ETUI priorities and the ETUC action plan are translated into courses. New areas, such as trade union renewal, have been conceived to develop mid to long-term visions. Topics such as climate change, sustainability and just transitions have different approaches, which will be explored in our courses.

Our flagship courses (e.g. Eurotrainers, young leaders and our EWC offer) have been reinforced and new areas of development have been launched (e.g. capacity-building on communication strategies, new trainings on emotional competence and group management, and developing the competence to build collective intelligence within groups).

The **9 strategic actions for 2020-2023** are:

- Enlarge the diversity of trainers to better include the countries and the organisations that participate less
- Better promote our EWC service through a multi-channel approach
- Constantly innovate in our use of technology, methodology, subjects, conceptual phase, personal approach
- Accredit more courses
- Increase the use of internal researchers during our courses
- Raise awareness to cope with change via training modules
- Use appropriate technology for better TU Development
• Produce quality content based on ETUI expertise that is up to date and tailor-made for unions
• Have our own online learning platform
• Put in place standard quality procedures for online courses (“ISO” label)

The combination of the different constitutive elements results in a multiannual course programme. The courses will, as always, be designed and delivered in partnership with the national and European trade union organisations.

Innovation is the key word of the strategy: every course, learning pathway or activity will search for innovative approaches, subjects and methodologies.

Finally, a new space in the ITUH building (ground floor) in Brussels will be arranged and fully equipped as a Training Centre. It will be ready for the beginning of this work programme for training (as well as other ETUI activities) and will reinforce interaction and direct contact with the ETUC leadership as, being in the same building, they will more easily be able to present their policies.
## New Research Department projects

### Priority 1

#### Just transition

The ETUI will provide an empirical mapping of the situation of the energy transition in selected Member States in terms of distributive and procedural justice criteria. We will do this by critically analysing the 2030 National Climate and Energy Plans (NCEPs) of Member States through the lens of ‘just transition’. This will include a consideration of procedural justice (i.e. participation of citizens, the quality of social dialogue, and energy democracy) and the underlying principles and material/institutional basis, in order to establish a ‘just transition score’.

**‘Scenarios for sustainability’** is the first step of a foresight exercise on the future of work in the context of climate transition. It includes an exploratory phase carried out with the help of an external expert in order to build draft scenarios. The second phase (2021–2022) will be devoted to presenting these scenarios to trade union organisations. The objective is to encourage the development of a strategic future-oriented way of thinking: what role can trade unions play in the climate transition, and what should their objectives and strategies be?

#### Platform work: comparing patterns across EU Member States

The objective is to provide new empirical evidence, further our understanding of the digital platform economy, and explore the regulatory responses and the role of institutions, with the aim of providing guidance for social partners and policymakers on how to ensure good-quality work and social inclusion in the platform economy.

**The ETUI Internet and Platform Work Survey** will map out the extent to which the internet is used as a tool to generate income by exploring a broad range of paid activities that can be found or carried out online and that fall outside of the standard employment relationship. Activities will include the dissemination of the results from the survey, which will be carried out in five CEE countries, and preparatory work on extending this survey to southern EU countries.

#### Health and safety in the new world of work

is a multi-annual project on a clearly under-researched topic. It will begin with a literature review on the topic, to identify key areas to investigate in further depth in the following years. It will include both the developments in AI and robotics in ‘traditional’ industries as well as those with respect to new forms of work (platform economy, virtual work, etc.) and the overlap between them.

#### Algorithms at work

is a research and training programme which aims at collecting information about what the trade union concerns are about algorithms at work (e.g. algorithmic management) and how to protect workers, including by legal means.
Priority 2

Mapping and explaining wage inequalities in Europe

This research will map out and seek to explain the causes of increasing income inequality in European countries and assess the impact of various public policies (including migration policies). The focus is on the analysis of data at sectoral and firm level, and continues previous work on the decoupling of productivity from real compensation growth. A working paper will be produced, knowledge and insights disseminated, and expertise provided to trade unions and policymakers on how to foster lower wage inequalities and wage convergence.

Mapping collective bargaining developments in Europe

The developments in collective bargaining and its wage outcomes will be tracked and analysed across Europe. The key focus will be on two themes:

(1) the development of minimum wages and the attempts in various Member States to turn minimum wages into living wages. We will collect in-depth information on national living wage initiatives. A workshop will be held in autumn 2020 that will bring together key actors involved in national living wage initiatives and a report will be published.

(2) the analysis of policies and initiatives aimed at the strengthening of sectoral collective bargaining as one of the key tools to combat inequality and to ensure broad-based wage increases. We will identify best practice cases in different countries and sectors as well as the factors that make sectoral bargaining work.

Priority 3

The costs of psychosocial risks

Occupational safety and health (OSH) legislation benefits workers and society by preventing work accidents and occupational illnesses. However, with the REFIT Programme, the EU Commission considers that OSH directives hinder economic growth by creating an ‘administrative burden’ for companies, in particular for SMEs. The objective of this study (led by an external expert) is to estimate the costs of inaction on this growing concern, and to feed the policy debate on psycho-social risk (PSR) prevention.

Priority 4

Health and safety and workers’ participation

This is a combination of two different projects that are intended to explore more fully how different forms of workers’ participation fit together. One is an expert workshop to identify common ground and strategies with TU experts in the field of OSH to see
how OSH interest representation works in tandem with other forms of workers’ participation. It will be developed further by an EWC seminar on ‘OHS as an EWC issue’, which will be led by the Education Department.

**Company Law Package: workers’ rights and anti-abuse provisions:**
Preparations for the transposition of the Company Law Package will start in 2020. The GoodCorp network and our own BLER experts, in close cooperation with the ETUC, will be developing a guide to the transposition for the unions to apply at the national level. This work will not only cover the workers’ rights laid down in the Company Law Package but will also look closely at the anti-abuse provisions which are intended to preclude letterbox companies and other abuses. Our flagship EWPCC Conference 2021 will also address the challenges and opportunities presented by the Company Law Package for policymakers, trade unions, and workers’ representatives.

**Priority 5**
**Strategic litigation on occupational health and safety**
The body of regulation on OSH that has been developed at both the EU and national levels, provides us with the basic principles to properly organise the prevention of safety and health hazards. However, these basic OSH preventive principles are not being sufficiently and/or correctly applied. Labour inspectorates are increasingly understaffed and not able to sufficiently enforce OSH legislation. Therefore, judicial enforcement is an alternative worth examining. Going to court can give trade unions the possibility to seek enforcement. If this is done in a strategic manner, a clearer understanding of the basic preventive principles of the existing OSH *acquis*, at both EU and national level, will be achieved, and thereby a basis for its further development (law creation). This forms the background for the launch of a multi-annual project on OSH litigation in the EU and its Member States.
Major publications in 2020-2021

- Benchmarking Working Europe 2020
- EWC survey
- Digital and climate transitions
- EWPCC Company Law Package
- Migration: integration of refugees in labour markets
- Minimum wages and best practices of living wages
- Strategic litigation on OSH
- Towards a new socio-ecological contract – report
- Handbook of Platform Work
- Bilan Social – Social Developments in the EU 2019

Major conferences in 2020-2021

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<td>January 2021 (Brussels)</td>
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<td>February 2021 (Brussels)</td>
<td>EWPCC Understanding debates about board-level employee representation across Europe</td>
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Main priorities 2020-2021

1. **Key overarching challenges: the ecological and digital transitions**

Two key transitions will shape the future world of work: the social-ecological transition and the digital revolution. The ETUI has a long tradition of publishing and educating about these topics. Since 2014, the institute and the ETUC have organised biennial conferences to address these transitions in an integrated way.

The ETUI set up the Foresight Unit to help trade unions anticipate and prepare for these challenges and to support them in developing their strategic approaches. The Foresight Unit has been tasked to look closer into the connection between the digital revolution and the social-ecological transition.

1. **Ecological transition**

Sustainability and climate change are not topics which were at the centre of the trade union training agenda. A clearly defined set of trainings are needed to allow a full appropriation of these different topics.

The Education Department adopted a ‘competences’ framework’ to guide trade union trainings for this specific priority. By working within this competence framework, trade unionists will be able to develop knowledge, skills and know-how related to multifactorial challenges such as climate change and sustainable development.

*Competences framework*

One of our biggest challenges when it comes to human complexity is without any doubt the climate emergency and sustainable development. A change of paradigm calls for the development of a new set of competences. Confronted with a new kind of complexity - in our case climate change created by human activities -, trade unionists must develop a new set of competences.

What makes this approach original is not the fact that these competences look new for trade unionists. They are not. Some of them constitute the core of trade union education. For example, ‘collective’ competence, when translated into the language of trade unionists means ‘organising campaign’ or ‘developing a network’. What is original in our approach is the fact that we are going to use a competence framework which encompasses five transversal competences called ‘green competences’. By working within this competence framework, trade unionists will be able to develop knowledge, skills and know-how related to multifactorial challenges such as climate change and sustainable development. The following competences will be used in the
trainings: collective’ competence; ‘prospective’ competence; ‘responsibility and ethics’ competence; ‘systemic’ competence and, competence ‘in terms of change’. For more on this, see pages 29-30.

The main activity in 2020 will be the joint ETUI-ETUC conference ‘Towards a new social-ecological contract’ to be held from 24-26 June at the Thon Hotel in Brussels. The conference will pursue different lines of inquiry and discussion, seeking to understand not only the challenges before us but also to identify what we can do today and tomorrow in order to establish a new social, economic and environmental contract.

The following issues will be addressed with international top speakers, European and national policymakers, NGOs, business representatives and trade union members: What targets or objectives should be set, and how might they be reached? How can we create a sustainable European growth model? How can we reverse the trend towards growing inequalities? What kind of Green New Deal is a realistic and feasible prospect for Europe? What elements of justice, solidarity and equity constitute a fair and sustainable social foundation? What are the roles of the market, the state, industry and civil society? And what role can trade unions play to build a sustainable future that addresses all these dimensions?

**A just transition**

A key condition for managing the ecological transition, given the magnitude of changes in the way we produce, consume and live that it entails, is that its costs are fairly distributed, or in other words, that there is a *just transition*, and thus to ensure that the necessary societal alliances are mobilised and sustained to achieve this goal.

Stepping up climate policy ambition in line with the Paris targets and reaching carbon neutrality by 2050 is one of the key policy priorities of the new Commission. The **European Green Deal** announced by the new Commission as its flagship initiative, is to transform this objective into concrete policies.

At the same time, a more ambitious climate and energy policy will also have greater social and employment effects; just transition policies therefore should be a key pillar of the Green Deal. Achieving high climate policy ambition in a socially balanced way is a key objective for trade unions.

A project on ‘just transition to climate neutrality’ has already been running for a few years.
In the previous budget year, a book entitled *Towards a just transition: coal, cars and the world of work* was published and in the coming year, its findings will be intensively disseminated.

Research in the context of the ‘Just transition’ project will provide an empirical mapping of the energy transition in selected Member States in terms of distributional and procedural justice criteria. We will do this by critically analysing the 2030 National Climate and Energy Plans (NCEPs) by Member States through the lens of `just transition`. So far, NCEPs are evaluated mostly from the point of view of how they contribute to the EU’s overall greenhouse gas emission reduction targets.

There are two innovations in the proposed project. First, our analysis will expand the concept of 'just transition' to include procedural justice (i.e. participation of citizens; quality of social dialogue; energy democracy), and examine its underlying principles and material/institutional basis. In that vein, it will establish a ‘just transition score’ to measure the impact of NCEPs on different dimensions of inequality. Secondly, we will also identify the role of actors and factors (partisanship of government, institutional structure, public opinion, interest group activities) contributing to the resulting country scores.

An edited volume is planned for the budget year after next, the first drafts of which will be discussed by its authors at a workshop organised in the coming budget year. The main expected outcome of the project is to exert some influence on EU policymakers to make the NECP policy cycle (with the national recommendations) more socially balanced. For trade unions, the main message is to strike a balance between ambitious climate policy objectives and social and environmental justice.

The link between the climate transition and the future of work will be tackled in a new project led by the Foresight Unit. This project will consist of two phases: an exploratory phase to be carried out with the help of an expert in order to build draft scenarios and a second phase (2021-2022) devoted to presenting these scenarios to trade union organisations. The objective of this project is to encourage the development of a strategic future-oriented thinking: what role will there be for trade unions in the climate transition, and what are their objectives and strategies? With this project, the Foresight Unit will help national trade union organisations to set up and use the foresight approach in their own structures, with its different methods, in order to help trade unions to develop strategies for anticipation and action.

**Workers’ voice in company sustainability**

The ETUI will also continue to address the actual and potential role of worker representatives in promoting sustainability (broadly defined: social, environmental and financial) at the company level, and thereby to disseminate best practices across Europe.
Exercising worker ‘voice’ is a key element in promoting sustainable companies, particularly in order to resist the strong pressures on companies from financial markets for short-term approaches which detract from sustainability. The ETUI has expertise in both the issue of worker participation and a broad concept of sustainability (which includes workers’ concerns), and thus is uniquely situated to organise these workshops.

Two workshops will be organised: one on worker participation and sustainability in civil aviation (planned for April 2020) and one on sustainability and worker participation in supply chains (planned for September 2020).

**Health and safety**
Besides looking at the possibilities to contribute to the prevention of climate change and to the just transition to climate neutrality, trade unions also have to deal with its consequences for workers as regards their safety and health.

The project ‘Heat stress as an increasingly important occupational health problem’ will deal with the consequences of the increase in heat waves and extreme heat episodes for workers’ safety and health.

It aims to explore the problem in terms of risks, possibilities for risk assessment and management, law and practices, and trade union action by way of a review of existing literature and practices, including the case of Spain as an example with respect to law and practices. The project started in the former budget year and will be finished during this one with a report targeted at the trade unions, both at EU and at national level. The report will, among other things, feed into the policies of the ETUC in the field of high temperatures as an occupational safety and health risk.

**Social-ecological transition: ETUI training support and responses**
The ETUI’s Education Department has planned 7 trainings dealing with the social-ecological transition.

**General**
A special training developed with the Foresight Unit will focus on ‘Strategic Foresight for leaders’.

Another training will be organised on global Green New Deal policies under the title ‘Trade unions and the socio-ecological contract’.

A course titled ‘What is Just Transition and how is it achievable?’ will explain the concept of just transition, describing challenges faced by the workers most affected
by a transition to a climate-neutral economy and mobilising trade unions to advocate for these workers.

Finally, a training will look at the roles for trade unionists in greening the economy. The training will introduce participants to the concept of the green economy, analyse the impact of the green economy on the labour market, and enable trade unionists to understand how they can influence the debate on greening the economy at local, national and European level.

**Sectoral**

A first training, ‘Sustainable development in the transport sector’, aims at defining European transport policies in the context of climate change and transition, sharing experiences in negotiating transition in the sector and influencing legislation so that ‘greener’ transport sectors can benefit from supportive measures.

A second training called ‘Trade unions and decarbonisation of the economy’ will introduce participants to the debate on decarbonisation of the economy at European level by raising awareness about the risks of decarbonisation in terms of income inequalities but also about the opportunities in terms of job creation. Energy production, transport and industry are the most critical sectors in this respect.

A third training ‘Reskilling workers at sectorial level for a green economy’ aims at analysing the impact of a green economy on skills development in the mining and automotive industry and drafting an action plan encouraging companies and public authorities to invest in skills development in these sectors.

*The green competences framework approach*

As indicated above, in the context of the ‘green’ themes, the Education Department adopted a ‘competences framework’ to guide trade union trainings. Five competences make up the basis of our training:

- (1) *collective* competence means the ability of trade unionists to organise themselves collectively in order to tackle a specific issue.
- (2) *prospective* competence means the ability to prepare for the future, to create new scenarios, new mechanisms, and new legal rights that would expand the role of trade unionists - and ultimately the role of workers - in a world characterised by uncertainty.
- (3) *responsibility and ethics* competence means the ability to act according to ‘fundamental’ values. When it comes to climate change and sustainable development, difficult decisions are going to be taken. For example, as trade unionists, are we willing to close some polluting factories which have generated thousands of jobs in the name of decarbonising our economy? This is where the responsibility and ethics competence comes into play.
• (4) ‘systemic’ competence means the ability to understand that any phenomenon is composed of various elements and is part of a broader system. For example, developing a systemic competence means providing opportunities and training for workers to participate in reorganising the ways that their work is done (phenomena composed of various elements) in order to reduce the climate footprint of the workplace (the broader system).

• (5) competence ‘in terms of change’ means the ability to identify and analyse factors of change. (i.e. strong and weak signals of change). These competences are entrenched in facts or scientific evidence: to provide trade unionists with facts on climate change and the reasons why they should be dealing with it at the workplace.

It is noteworthy that each of these five ‘green competences’ could be developed independently of each other.

1. Digitalisation

The development of the digital platform economy has sparked a considerable policy debate on how its impact can be harnessed and what regulatory responses are needed.

For a few years now, the ETUI has taken a leading role in this reflection on the future of work as a result of digitalisation. Special conferences were held on the topic, many publications were disseminated, and our researchers were invited to speak at several international conferences and debates on these issues.

However, the policy debate suffers from a lack of adequate empirical evidence, including on the scale of the platform economy, on the diversity of employment arrangements, the role of national institutions and on the characteristics of the workforce engaged in platform work. Moreover, there is a need for an improved theoretical understanding of platform work that integrates it into the wider labour market analysis.

During this budget year, a new innovative focus for this work will be on the impact of digitalisation for health and safety at the workplace.

Work on platforms

The project Work on platforms: comparing patterns across EU Member States will provide new empirical evidence, further the understanding of the digital platform economy, and explore the regulatory responses and the role of institutions, with the aim of providing guidance for social partners and policy makers on how to ensure quality of work and social inclusion in platform work.

The three main activities are:
1. **The ETUI Internet and Platform Work Survey**

The objective of the survey is to map the extent to which the internet is used as a tool to generate income by exploring a broad range of paid activities that can be found or carried out online and that fall outside of the standard employment relationship. The aim is to record the prevalence of such activities in surveyed countries, income from this type of work, and the socio-economic status of workers.

Activities will include the dissemination of results from the survey carried out in five CEE countries (Bulgaria, Poland, Slovakia, Hungary and Latvia) and preparatory work on extending this population survey to five countries (still to be specified) in the south of Europe. The methodology developed in the first round that overcomes many of the weaknesses of previous attempts to measure the platform (or collaborative) economy - such as using online paid surveys that are themselves online gig work, or using complex definitions of platform work that might underestimate the scale of generating income through internet - will be used.

2. **Publish a handbook on platform work**

The aim of the handbook (with contributions from academic researchers and to be published with an external publisher) is to survey and analyse key issues and significant trends related to labour within the platform economy, considering existing comparative evidence covering all world regions.

3. **Work on a case study of UberEats in Poland.**

This is an exploratory analysis of the role of a national regulatory framework that prompted the emergence of an additional layer of intermediaries. The case study also explores the role of the platform in employing migrant workers, as well as their situation and motivations to undertake platform work in Poland.

The expected outputs of this project are an edited volume, a working paper, the presentation of findings at academic conferences and seminars, and the provision of expertise to trade unions.

Platform work will also be tackled in three training courses organised by the ETUI’s Education Department and in specific English courses.

The Collective Bargaining Summer School will deal with Industry 4.0 and the digitalisation challenges that are radically changing the manufacturing industries, work organisation, employment conditions and skill needs. The target group for this training are the workers in the manufacturing industries who are affected by digitalisation.
A special training will look at the impact of digitalisation in the construction and wood industries. This training is targeted towards trade union officials from the wood and construction sector involved in the reflection on the future of work.

A training titled Digitalisation: exploring new ways of protecting and representing platform workers will focus on the situation and workers’ rights of the growing number of platform workers and digital freelancers. This training will describe the actual situation of the platform workers and freelancers in different European countries, identify the needs and ways to defend their rights through collective bargaining, exchange practices on organising platform workers and freelancers in the labour movement, and develop ideas for actions to protect platform workers and freelancers.

The Education Department will provide an online, instructor-led English for Digitalisation course. The course covers the intermediate level of English. It includes different types of activities.

Health and safety in the new world of work
Health and safety at work is of paramount importance in the European Union, comprising one of the key principles of the European Pillar of Social Rights. Digitalisation poses new challenges in the field of occupational health and safety, yet these are currently still poorly researched and analysed.

The project Health and safety in the new world of work is a multi-annual project that will start with a review of the current literature on the issue as a starting point for a selection of research topics in the coming years. A starting point for the analysis is the division of the issue of ‘Digitalisation and Health and Safety’ into two main parts, with an overlap in between.

On the one hand, the project will focus on artificial intelligence and robotics in ‘traditional’ industry, touching upon, for example, psychosocial harms as a result of new working environments and patterns, automation, etc. The question of whether automation and ‘shared’ workplaces lead to an exacerbation of the risks of musculoskeletal disorders, the safety and health risks of robot-human interaction, the effects of virtual reality on mental health.

On the other hand, the project will focus on the health and safety risks that come along with new forms of work, like platform work and virtual work. This part of the research deals with, for example, the poor legal status of the workers involved, which leads to non-applicability of legal health and safety obligations, isolation and the mental problems that this leads to, and the health and safety effects of certain characteristics of the gig economy, like poor payment, which leads to stress and work intensification. Overlapping issues between the two fields (AI and robotics on the one
hand and new forms of work on the other) include management by algorithms, digital control / total surveillance, working time, and work-life balance.

As a basis for the literature review, one or two expert meetings are foreseen to frame the topic. The output of the project will be a literature review, to be published at the very end of the budget year.

The outcome is an overview of the existing research that has a value in itself and can serve as a starting point for the choice and prioritisation of topics for further research. It can also give a first indication of where regulation and policy measures are lacking and hence need to be developed. The target audiences are trade unions, policy makers and regulators.

**Digital revolution: further training support and responses**

Next to the training on platform work mentioned above, the ETUI’s Education Department will organise two specific training seminars dealing with algorithms at work and how to protect workers’ rights in the new era of digitalisation and technological developments.

The first course, ‘AI systems and data privacy at work’, will focus on the fact that workers need to know how their personal data is collected, retained, processed, disseminated and possibly sold, and how data related to their behaviour at work can be used (potentially against them). The objectives are to explain GDPR basics (especially what to do when there are data protection breaches at work), to provide legal avenues to reach the data protection authorities, and to discover how GDPR can be used to benefit trade unions.

A second course, ‘AI systems at the workplace and explaining algorithms’, will look at how unions can gain knowledge and understanding of algorithms as regards how they impact workers. It will provide a practical approach to understanding the algorithms’ decision-making in the workplace and its implications. The objectives are: to explain what algorithmic fairness is; to provide a practical approach to understanding algorithms; to list the most important technologies for work and TUs; and to decide what particular information about workers can be compromised and how this will impact the negotiation process.

**2. A new economic model**

Our second priority is to participate with many others in the redefinition of the current dominant economic model and to challenge the mainstream ideas which guide it.

The current economic model has led to serious failings with regards to creating just and sustainable prosperity for all and respecting planetary limits. There needs to be a debate on the feasibility and the merits of (an) alternative model(s) which can drastically reduce inequality and foster upward convergence while at the same time
respecting the sustainability of the planet. The ETUI has already overseen many projects on this topic in the past but it will now develop its priorities in a more integrated way in order to contribute to this debate. The three main topics for this priority will be: European governance, globalisation and migration.

**European economic governance**

Developments in the EU economic governance and policies are of key importance to how the ecological and green transition will be shaped and to the way we create and share prosperity both within and between EU Member States. They have also been at the root of recent dismal economic, social and labour market developments.

The project **European economic policies for a sustainable and inclusive growth, convergence and resilience** deals broadly, from a macro perspective, with the question of how the mix of European and national economic policies, and of EU economic governance processes, their outputs and their reforms, impact economic, labour market and social developments.

While the main means of dealing with this question is through continuous monitoring and assessment of economic and policy developments, some more in-depth research is also undertaken internally and by commissioning work to external partners.

Analysis and research will be partly shaped by the continuous policy developments in the field. Special attention will be paid to issues concerning the macroeconomic elements as well as the political economy of a European Green Deal (e.g. a sustainable investment plan), the deepening of EMU and EU economic governance, and upwards economic and wage convergence. We will be closely monitoring and assessing developments and proposals on the reform of the EMU and the adoption of the next Multi-annual Financial Framework (2021-2027).

The output of this project on **European economic governance** will consist of analysis, commentary and advice (as and whenever requested). Shorter and speedier responses to policy developments (in the form of blog posts and op-eds) will be combined with more in-depth pieces of research and active presence in public events. For the budget year, we envisage the production of two working papers.

The outcome of this project will be to provide **technical expertise** to the ETUC but also to put forward **ideas in the public sphere** on how to achieve a socio-economic model that creates sustainable and widely shared prosperity.

**Beyond GDP**

The ETUI will engage with the debate on developing indicators of prosperity that go ‘beyond GDP’, to include social and environmental aspects of societal and individual well-being and progress, examining also viable alternatives to an economic model solely focused on growth. This is an important debate as the quest to tackle the environmental damage and the exhaustion of planetary limits as well as rampant
social and economic inequalities has gained political prominence. A report will be produced in cooperation with EPSU.

The ETUI will also actively participate as partner in a very big conference that will be organised by several MEPs from different political groups in the EU Parliament led by Philippe Lamberts (Greens). This EP conference on ‘Beyond GDP’ will take place in September 2020.

**Globalisation**

One of the processes characterising and shaping the outcomes of the current economic model is that of globalisation, in particular the development of global value chains and the expansion of multinational companies but also of increasing migration flows. Globalisation is facilitated by and interacts with technological change, especially digitalisation, creating pressures over the way in which we create and distribute prosperity. Three projects will be looking into different aspects of these processes on our economic model.

Wage inequalities have increased in recent decades both within and between countries in Europe. Standard explanations point to globalisation, particularly the emergence of global value chains, and technological developments, but also policy choices and institutional developments, especially but not exclusively in labour markets.

Over the next few years, this new project will **map and seek to explain the causes of earnings inequalities in European countries** and assess the impact of various public policies (including on migration) on them. The focus will be particularly on the analysis of data at sectoral and firm level.

Work which started in the previous budget year on the decoupling of productivity from real compensation growth in Europe will continue under this project.

A working paper will be produced, knowledge and insights will be disseminated, and expertise will be provided to trade unions and policymakers on how to foster lower wage inequalities and wage convergence.

For many years now we have been investigating the nature of **multinational corporations (MNCs) and value-chain restructuring** and the implications they have for working conditions, employment, and industrial relations. We have also analysed the strategies that trade unions and employees can use to shape outcomes. There will be new research using quantitative evidence on outsourcing and on business outcomes on the company level. And we will continue the promotion of our publication on digitalisation of production networks that presents case study evidence collected over the past few years.
For the first strand of this project, an edited volume will be published and disseminated, examining the **impact of industry 4.0 on the organisation and geography of production networks in Europe**. Additional (case) studies on the impact of digital technologies on working conditions and how this can be shaped by workers and trade unions are also planned for the coming budget year. This work will be disseminated through working papers.

The second strand of this project looks into the topic of outsourcing that had been addressed primarily through qualitative research in previous years. In cooperation with researchers at the universities of Leicester and Pavia, the ETUI explored possibilities of addressing **outsourcing and reorganisation of production networks** by using quantitative data from the world input-output database. In particular, the project looked at different forms of outsourcing and offshoring (geographically and product-wise) and where value was added, captured and distributed in the value chains. It explored the possibilities to analyse, for instance, the changing shares of capital and high/medium/low-skilled labour. In 2020-2021, the focus on these questions will continue, also exploring newer data sources (the Eora Global MRIO).

In addition, in cooperation with a researcher at the National Bank of Slovakia, new research will start using the **European Company Survey 2019** (upon its early release). The data includes questions on outsourcing, allowing the researchers to conduct a mapping exercise (identifying the types of companies that rely on outsourcing and mapping the differences between countries). This research also plans to address more analytical questions, such as the effects of the adoption of various managerial strategies identified in the survey and that of workplace practices, including the different forms of worker involvement, on wages and other business outcomes. A research workshop will be organised to support this activity.

**Transnational company agreements**

In cooperation with the ETUC, the ETUI will explore the possibility of setting up a dedicated database of Transnational company agreements. The ETUFs will be closely involved in the selection of agreements to be put in a database.

In the context of globalisation and the need for a new economic model, one of the most important developments is the implementation of the UN’s 17 **Sustainable Development Goals (SDGs)**.

The Education Department will organise special training courses on **Trade Unions and the Sustainable Development Goals** to explain why SDG’s are central in the trade union agenda, to share experience on how trade unions contribute to the achievement of the SGD’s, to analyse the implications for workers in terms of social justice and fair distribution of wealth and to draft action plans in order to make workers aware of these implications.
Migration

Migration is one of the focus topics of European policies and a crucial issue for trade unions, in particular as regards asylum seekers and refugees. The refugee wave that reached an unprepared Europe in 2015 still needs supporting policies and above all a successful labour market integration. Economic migration of third-country nationals also needs to be accommodated and managed properly. Individual member states are affected by different waves and types of migration.

Project work already under way will continue to focus on the labour market integration of asylum seekers and refugees who have arrived since 2014 in the main receiving countries in the EU15. Population structure and main characteristics in terms of national, foreign-born citizens – with third-country nationals and EU citizens considered separately, and an additional differentiation between the EU13 (new member states) and EU15 (old member states) – will be examined. Historical patterns of the labour market status of third-country migrants will also be shown.

One research question is to what extent labour market and welfare policies in general, and labour market integration policies (and institutions) in particular, were affected and upgraded due to the historical wave of refugees in the last couple of years. In this regard, major policies (and policy changes) by the national governments, such as the role of trade unions in the most important EU15 member states will be summarised.

The second research question is about the labour market outcomes. To what extent did historical employment patterns (such as low employment rates, in particular for women) change, and has there been any improvement due to new policy initiatives? Were innovative policy initiatives and good practices found?

Migration policies and labour market integration policies will be monitored and analysed, with the inclusion of labour market performance indicators. The role of trade unions and their related policies will also be discussed.

Based on this framework, a network project started with a planning workshop (February 2019) with the involvement of national experts from a selected number of member states (Austria, Denmark, Finland, France, Germany, Greece, Italy, Spain, Sweden). Eurostat labour force survey data will be applied, but due to gaps and data access issues, national labour force survey data and specific data collection by institutional actors involved in assisting refugees at national level will also be applied. Given the lack of transparency and comparability of data, this integrated approach will be an added value of this project. The comparative research will offer lessons on applied policies and their impacts.
Based on a comparative analysis, policy recommendations will be outlined in an edited volume, which will appear in the coming budget year. Besides information exchange and lessons for actors, a main objective of this project is to have some influence on policy makers, as a European-level migration policy framework is largely missing. An ETUI working paper and an academic journal article are also planned for this budget year, while the results will be disseminated at a conference of trade unions and relevant policy makers.

The broader context of EU mobility policy is also addressed in the ETUI’s continuing work on posted workers.

The employment and posting of third-country nationals is an exceptional and fast-developing labour market phenomena in the EU which is characterised by a very complex set of rules on gaining access to the European labour market. Member States’ immigration rules overlap with posting rules, thus enabling the phenomena of intra-EU posting of third-country nationals within the EU27. The interaction between posting rules and immigration rules is complex, and creates both opportunities and gaps in Member States’ protection systems. In practical terms, third-country nationals represent a virtually unlimited workforce for EU-based companies. At the same time, these workers might often be more vulnerable than EU nationals due to their lack of resources, lack of knowledge of the local language, and lack of means to enforce their rights. Their residence permit is also often directly dependent on their employment contract; hence, there is a large disincentive for them to leave employment even if they are paid less than local workers and/or exploited. All this makes the posting of third-country nationals an especially fascinating topic to explore further.

The ETUI has a strong research record on migration and posting in the EU. Moreover, there seems to be great interest in this topic from the ETUI stakeholders, the ETUC and the European Federation of Building and Woodworkers (EFBWW) in particular, but also from the ETUC affiliates at the national level.

While the recent revision of the Posted Workers Directive addressed some gaps in the protection of posted workers, it did not address the posting of third-country nationals specifically. While there are some EU-level rules on the access of third-country nationals to the European labour market, the immigration rules largely remain national-level competences. However, it is not clear how they interact with EU-level posting rules.

To address this knowledge gap, the ETUI is planning to carry out case studies on the legal framework relevant for the posting of third-country nationals (immigration law) in the 27 Member States.

Since it will be the first comparative study on this topic in the EU, it is hoped that it will have a significant impact on research and policy development in this area. Moreover, it will hopefully help the trade unions in addressing the problems faced by third-country nationals and allow them to successfully represent them in disputes.
over their rights. In this sense, the project fits in with two of the other ETUI key priorities: strengthening trade unions (renewal) and a renewed social contract.

The migration issue will also be the subject of several training courses organised by the Education Department.

In the context of an ETUC campaign for a fair and sustainable European agenda for migration, a special training course will be organised on ‘Another narrative for migration’. The aim of this training is three-fold: identifying the causes and consequences of international migration, developing arguments against a biased narrative about migrants and international migration, and changing perceptions on migrants and international migration.

Another course will deal with ‘Promoting the rights of migrants as workers’. This training will assess the situation of migrant workers’ rights, outline the main challenges facing migrant workers in Europe, and share trade unions’ achievements in dealing with discrimination and abuses.

Finally, the ‘Migrant workers and access to education’ course will focus on the increased feminisation of migration. The objectives of the training will be to get an overview of migrant workers and their access to education/training in Europe, to highlight the role played by trade unions regarding access to education for migrant workers (with particular attention paid to women migrant workers), and to develop strategies to improve access to education for migrant workers.

**Other collaborations**

Collaboration with international and European organisations and universities is well integrated in the ETUI activities, as evidenced by presentations at different events and expert meetings, and by projects in which the ETUI participates as an associated partner or associated organisation.

Over the years the ETUI has established a solid knowledge in the area of economic policy coordination and the macroeconomic dialogue.

In 2020-2021, the ETUI will be involved in the ‘Economic Policies for the Global Transition’ (EPOG+) Master’s programme (ErasmusPlus project). ETUI research links several themes that are treated within the EPOG+ programme: economic crisis and socioeconomic transition, sustainable development, industrial policy and digital transition, labour markets, and the future
of the EU. Within this project, the ETUI will receive and supervise visiting students and involve them in different types of academic collaboration.

The ETUI also contributes to a range of other external projects with its expertise. For example, the ETUI will host an external researcher from SNSPA (Şcoala Naţională de Studii Politice si Administrative) for a three-month visit to further his/her research about **the implications of the economic transformation on industrial relations**. This is part of a larger project approved by the European Commission under the DG EMPL budget, in which the ETUI is participating as an associated organisation (receiving no financial contribution).¹

The ETUI will be participating in a multi-annual cross-national comparative research project led by the **Institute for Social Research in Oslo** (Norway). The research will cover different levels of the European political economy: the company level, the national sectoral level and the EU level. A study will be made on how the change in regional economic integration (eastern enlargement) impacts production and staffing strategies in the **shipbuilding industry**, how these changes are negotiated by the actors involved, and how the technological changes affect employers’ strategies. The study will be based on interviews with representatives of the European Commission and the actors involved in the European Social Dialogue, both on the trade union and the employers’ side. To this end, the ETUI will develop an interview guide and conduct interviews.

ETUI General Director Philippe Pochet is also member of the Stakeholder Advisory Platform of the Horizon 2020 Research Project on ‘**The Future of European Social Citizenship**’ (EUSOCIALCIT) (2020-2024). There will be one meeting per year. The overarching objective of EUSOCIALCIT is to provide scientific analysis and examine alternative policy scenarios that support the European Union’s aim of strengthening EU social citizenship.

Last but not least, several ETUI researchers are regularly requested to provide expertise for advisory reports developed in the **European Social and Economic Committee**.

**TUREC**

The **Trade Union-Related Economists (TUREC) network** will continue its knowledge-sharing activities on questions of European economic policy for a new

¹ Title of the project: Improving expertise in the field of industrial relations (SODITREC)
Reference: VP/2018/004
Budget heading: 04.03 01 08
economic model in the coming budget year, most notably in the context of its annual meeting, which will take place in late spring/early summer 2020.

**New economic model: further ETUI training support and responses**

With the scientific help of Paris Sciences-Po, an *economic high-level training seminar* on the state of and prospects for Europe’s economy will be given for a special top-level selected group, composed of members of the ETUC Secretariat and its advisors.
1. A renewed social contract

European labour markets are faced with mounting challenges related to, among other things, technological and demographic change but also to the consequences of low and uncertain growth and the need for ecological and digital transition. These processes impact not only the structure of the labour market, in terms of the sectoral composition and skills requirements of future jobs, but also the number of jobs and especially the employment relationship, with a growth in atypical and non-standard forms of work. At the same time, pressures on social policies have also increased in the last few decades for these reasons and are likely to intensify.

These attacks on the social contract in the last decade, as well as the changing workforce (in terms of gender, age, ethnic diversity, etc.) have become major challenges for the trade union movement and its workers. Therefore, the ETUI has made the request for a renewed social contract a priority for its activities. This priority includes issues such as working time, job quality, wages, social protection, and health and safety.

**European Pillar of Social Rights**

The European Pillar of Social Rights (EPSR), proclaimed by the EU institutions in 2017, contains a promising number of progressive principles expressed in a language of rights, and the implementation of those rights via the multiple policy and legal framework mechanisms and instruments available at the EU level is of utmost importance for improving the immediate situation of workers (e.g. wages, job quality, social protection, etc.).

The EPSR came about with a promise to serve as a milestone for significantly strengthening the EU’s social dimension. It was the hallmark social initiative of the Juncker Commission. While in the narrow sense the Pillar consists of a policy document setting out 20 principles related to labour law and social policy in a broader sense, it has also been characterised as an agenda or a process, which includes legislative and soft law initiatives in addition to the 20 principles and rights.

The ETUI’s work on the EPSR has been recognised and endorsed by a number of stakeholders. The **monitoring and critical analysis of developments surrounding the European Pillar of Social Rights** both at the EU and national level will continue. In this context, the following activities are planned:

1) Dissemination of the already published ETUI research on the subject.
2) Publication of two journal articles: ‘EMU and the European Pillar of Social Rights: do (shall) the twain ever meet?’ and ‘Implementing the European Pillar of Social Rights: Quo vadis?’, along with the accompanying dissemination activities.
3) An update of the social scoreboard published in 2017, in order to take account of the changes and developments that have taken place in the intervening period, including the changes in the approach to the EPSR by the European Commission but also the agenda on the Just Green Transition.

The key audience remains policymakers at the EU and national level, and the trade unions.

On the same subject, the Education Department will organise a training course titled ‘The **EPSR and trade union involvement in its implementation**’. This course looks at the **European Pillar of Social Rights** and aims to highlight the importance of the measure, analyse its strengths and weaknesses, find solutions to problems, and establish strategies for those countries who will be left out (how can they advocate for the implementation of the pillar?)

**Job quality**

In view of the aforementioned challenges in the labour markets, it is crucial to ensure that we do not lose sight of the quality of jobs of European workers, because better jobs translate into better health and well-being of workers, as well as a more competitive and resilient economy.

Therefore, the objective of the project ‘Developments in job quality in Europe’ is twofold: on the one hand to provide empirical evidence on and new insights into the development of non-standard forms of employment, and on the other, to evaluate current EU employment strategy in search of effective tools for policy monitoring and evaluation in the area of job quality. To respond to these challenges, the project is dedicated to the analysis of developments in job quality, employment and related labour market policies from a comparative cross-national perspective. In part, it builds on activities from previous years.

Research activities on the ‘**Development of job quality in Europe**’ will focus on the following:

- A collaborative research project, with leading academic researchers from across the EU, to investigate whether the quality of non-standard and fragmented employment relations differs across European countries, and whether this can be attributed to labour market institutions, policies and regulatory frameworks.

- The monitoring and evaluation of indicators of job quality used in EU employment policy. The focus will be on the integration of the UN **Sustainable Development Goals (SDGs)** and their indicators in the area of employment in the European Semester.
Expected outcomes include new insights into the drivers of job quality in non-standard employment to inform policies aiming at ensuring decent work for European citizens, as well as a better understanding of how new SDG indicators can effectively guide EU employment policy towards better jobs for all.

Expected outputs include providing ongoing expertise and support in response to requests from social partners and other policy actors, in particular on-going support to the ETUC and ETUC Employment Committee; the presentation of findings at academic conferences and seminars; the submission of an article to an academic journal; and the publication of a special issue in an academic journal.

**Collective bargaining and wage outcomes**

An important element of any prospective social contract is related to developments in collective bargaining and its wage outcomes, which will be tracked and analysed across Europe.

In light of the European Commission’s initiative to introduce a legal instrument to ensure that every worker in the EU has an adequate minimum wage and the ETUC’s political priority of strengthening sectoral collective bargaining, the key focus of the project will be on the following two themes:

1. The development of minimum wages and the attempts in various Member States to turn minimum wages into living wages that enable each worker and his/her families to a decent life from the money he/she is earning. The aim is to collect in-depth information on national living wage initiatives, combining desktop research and interviews with talking to the key actors involved. The following questions will be addressed: What were the key drivers of the initiative? What was the key narrative? Are there already some tangible outcomes? The output of this part of the project will be a report that will lead to the facilitation of cross-country learning and the support of trade unions and policymakers in implementing the European Social Pillar’s commitment to ‘fair wages’ and ‘adequate minimum wages’. In order to support mutual learning processes a workshop will be held in autumn 2020 that will bring together key actors involved in national living wage initiatives.

2. The second key theme of the project will be the analysis of policies and initiatives aimed at strengthening of sectoral collective bargaining as one of the key tools to combat inequality and to ensure broad-based wage increases. The intended outcome is to identify best practice cases in different countries and sectors and to identify the factors that make sectoral bargaining work. In order to compile the required information, the ETUI will utilise its
extensive network of national collective bargaining experts. A report may be produced that would identify a toolbox of measures that should help trade unions and policymakers in their attempts to strengthen and/or (re-)build sectoral bargaining structures and to identify the need for action at European level.

On the same topic, the Education Department will organise a training course titled ‘Collective bargaining coordination and wage setting’, which will identify key issues in the development of cross-sector and sectoral collective bargaining in each target country, analyse and compare problems of the national collective bargaining frameworks concerned, and develop concrete solutions and proposals to overcome these problems.

**Gender equality**

Gender equality remains a challenge in the EU labour market. Discrimination based on gender manifests itself not only in easily observable wage differences, but also in multiple layers of gender segregation in the world of work that affect career chances, future pensions and individual life courses. In this respect, the transition to motherhood is a critical point that has a strong impact on gender inequality in work.

For the ETUI, this issue is of very high importance and therefore the challenge of gender equality is mainstreamed in other research projects and domains. In view of the new European Commission and its political priorities, we will be monitoring and assessing the developments around its announced new European Gender Strategy, in particular the proposals for introducing binding pay-transparency measures and the process of impact assessment of European laws on the decisions that women make throughout their lives and careers. As the unequal division of care responsibilities, whether of children or/and increasingly of elderly parents, is critical for the capacity and conditions under which women and men participate in the labour market, part of our work will focus on this issue.

The objective of the project on gender equality, undertaken in collaboration with a network of academic researchers, is to investigate changes in women’s well-being at work around the time of childbirth, and the role of various job and employment factors. The analysis uses official statistics and survey data on women’s employment trajectories.

We will be able to provide ongoing expertise and support in response to requests from social partners and other policy actors, in particular ongoing support to the ETUC, its Employment Committee and its Women’s Committee. The findings will also be
presented at academic conferences and seminars, supported by a publication based on empirical research findings.

Since policies on occupational health and prevention practices are also built on a model of gender neutrality that implicitly refers to male workers, the Health and Safety and Working Conditions Unit of the ETUI has a longstanding history of research and dissemination on the gender aspect of occupational health and safety.

The project ‘The gender dimension in occupational health and safety’ builds on that tradition. A dedicated book on ‘gender and working conditions’ will be published, and findings from prior research will also be disseminated at academic, policy and trade union conferences and seminars.

The Education Department will organise an important training course spread over two weeks focusing on ‘Leadership and capacity-building for women trade unionists’.

Another training course, Eliminating violence and harassment at work, in partnership with ILO ACTRAV, will provide the tools and strategies needed to end gender-based violence at work. It aims to define the violence in today’s world of work, to identify the root causes of gender-based violence and risk factors for victims and perpetrators, and to design strategies, good practices, and tools that help address the problem.

**Posting of workers**

The posting of workers across borders within the EU raises new challenges for the European labour movement.

An ETUI book, Posting of workers before national courts, which includes analysis of the national-level case law on posting in eleven EU Member States (Bulgaria, Denmark, Germany, Finland, France, Ireland, Latvia, the Netherlands, Poland, Portugal and Slovenia), was published in January 2020. This book offers a unique analysis based on an original data set and is the first and only volume covering this topic in a comparative manner in Europe. This year, the editors will organise a publication of the project outcomes in external journals and continue dissemination activities.

**European labour and social policymaking**
More generally, the ETUI monitors the approach of the EU towards the labour and social dimension of the EU.

This implies, first, the analysis of EU (labour and social) policy making and legislative activity, with the objective to identify the balance between economic integration and social priorities. In particular, this project will address those policy areas that most reflect the challenges that are currently affecting our society: the intersection between business restructurings/company law and workers' rights, non-standard forms of work, digitalisation, and privacy at the workplace.

Furthermore, the project addresses two specific instruments or mechanisms of EU governance. First, the implementation of the European Pillar of Social Rights requires both legislative and non-legislative initiatives, some of which have already been adopted, while others have merely been promised. The work on how the European Pillar of Social Rights should, could and will be implemented will be continued by the ETUI. Second, the European Semester remains a crucial tool of EU governance but for a long time has been weak on its social policy aspects. Due to this persisting deficiency the ETUI research on mapping the ‘social CSRs’ will be continued. Moreover, the European Pillar of Social Rights and the European Semester are becoming more intertwined since the latter partly serves as a framework for mainstreaming the former: the idea is that the Pillar’s accompanying Social Scoreboard informs the reporting and assessing exercise that leads to the Country-Specific Recommendations (CSRs).

This study is relevant for a better understanding of the EU approach to labour and social rights as well as to (EU) social dialogue. The analysis that will be carried out allows for an assessment of EU governance and policy making, and a reflection on possible future developments.

The analysis will be carried out in coordination with the ETUC and its policy agenda. Its implementation will imply mainly desk work (the study of policy documents and reports); the analysis of the CSRs will be done by an external expert. The expected outcomes consist of an ETUI working paper and/or policy brief on the EU social dimension, and the mapping of the social CSRs.

The targeted audience of this project are trade unions, academic scholars and policy makers.

**Occupational health and safety: psycho-social risks**

Other research projects targeting EU regulation will deal specifically with the regulation of psycho-social risks (PSR), one of the major occupational risks in Europe.

While Europe has an extensive body of regulation on all kinds of occupational risks, psycho-social risks are not regulated at European level. Like all other occupational risks, they are supposed to be covered by the Framework Directive on Safety and Health in the Workplace (Dir 89/391/EEC), but unlike the others, they lack further
specification in any ‘daughter directive(s)’. Since the coverage by the Framework Directive seems to be far from sufficient to lead to any practical measures in the workplace and also makes it difficult for labour inspectorates to enforce on issues related to psycho-social risks, the ETUC has called for a EU Directive specifically targeted at these risks.

However, some EU Member States have regulated the PSR issue at national level. The multi-annual project ‘Good regulation and good (regulation, implementation and enforcement) practices on psycho-social risks’ aims to take stock of these national regulatory measures, as well as, to some extent, their implementation and enforcement, in the relevant Member States. It also aims to serve as a basis for reflection and possible proposals for the content of an EU Directive.

A small expert meeting will be held to define the questions for a research project that will lead to a first overview of regulation and its related practices. The research and the resulting report will be executed by an external expert. The report will contain a first overview of good regulation on psycho-social risks in Member States. It will be published at the end of this budget year or in the first half of the next.

The target audience of this project is the ETUC, the Workers’ Interest group (WIG) of the Advisory Committee on Safety and Health (ACSH), and the EU Commission.

**FOCUS psychosocial risks**

A very important and new innovative project on the issue of psychosocial risks at EU level will take stock of the ‘Costs of psycho-social risks’.

It has long been proven that Occupational Safety and Health (OSH) legislation benefits workers and society by preventing work accidents and occupational illnesses. However, with the REFIT (Regulatory Fitness and Performance) Programme, the EU Commission considers that OSH directives hinder economic growth in Europe through provisions that represent an ‘administrative burden’ for companies, in particular for SMEs.

Under these conditions, psychosocial risks at the workplace remain the ‘poor relatives’ of OSH at the EU level. Indeed, for the coming years, no regulatory work is foreseen to improve a situation that now may be likened to a pandemic.

The objective of this study would be to estimate the costs of inaction on this OSH issue which is of growing concern. It is expected that the cost estimates will in turn feed the policy debate on PSR prevention.
The project is a continuation of the previous year’s work programme. The expert is expected to deliver the final manuscript at the end of the year, and the study will thereafter be prepared for publication and dissemination.

The project ‘Development of knowledge on psycho-social risks’ will continue the long-term work of discourse analysis and dissemination of the knowledge gained from it.

The ETUI wants to keep the collective aspect of the problem on the agenda, by stressing the role of work organisation and working conditions in causing mental health problems for workers, as well as the ways in which these health problems can be prevented by organising work in a way that prevents it from being harmful to the workers. The output of this project will mainly be advice to the ETUC and some dissemination activities (mainly on demand).

The challenges of ‘Digital work and its impacts on emerging/new psychosocial risks’ will be highlighted in a special training course organised by the Education Department. It will aim at identifying emerging psychosocial risks in the digital age, debating cases of psychosocial risks related to digital work and drafting an action plan for the prevention of psychosocial risks related to digital work.

**Chemicals**

**The European Network on Chemicals** is a long-term project of the ETUI that started in 2006 and has gained even more relevance in recent years. This is an opportunity for trade union experts across Europe to meet, exchange information and experiences but also coordinate their actions for prevention. With these annual seminars, participants are updated on the latest legislative developments; they can learn from the successes and failures of various plans aimed at reducing chemical risks at work and build capacities to improve preventative actions.

The reason for the project is the fact that the use of chemicals takes a heavy toll on European workers in all sectors: up to 30% of recognised occupational diseases and half of the work-related deaths each year are caused by exposure to hazardous substances. In particular, occupational cancers account for more than 100,000 deaths a year in the EU, yet these could be avoided by eliminating carcinogens in the production processes. Trade unions have an important role to play at EU and national level to frame and help implement prevention strategies.
The objectives are to consolidate the ETUI network of national trade union experts on chemicals, exchange information on EU legislation (in preparation or in force) related to chemical safety at the workplace (Chemical Agents Directive, Carcinogens & Mutagens Directive, REACH, CLP, Pesticides, etc.) and coordinate trade union activities on key issues for the protection of workers from chemical risks.

**Development of information on chemical risks and the implementation of EU legislation on chemicals** is another project on the risks of chemicals and their prevention.

The objective is to ensure trade union participation in EU bodies related to chemical risk management, develop information on existing and future legislations on chemicals and disseminate them to the trade union community and other interested parties.

The ETUI coordinates the Workers' Interest Group within the Working Party on Chemicals of the EU Advisory Committee on Health and Safety, a consultative tripartite body whose remit is to assist the European Commission in the preparation and implementation of decisions taken in the field of safety and health at work (i.e. ongoing revisions of the Chemical Agents Directive and the Carcinogens & Mutagens Directive). The ETUI is also a permanent Stakeholder Observer in the various Scientific Committees of the European Chemicals Agency (ECHA), the EU Authority managing the REACH, Classification, Labelling & Packaging and Biocide Products regulations.

The ETUI also runs and maintains RISCTOX, a database of hazardous substances developed to provide clear, organised and concise information about health and environmental risks caused by chemicals contained in products used or handled by workers.

**Standardisation**

‘Safe design and use of machines: directives, harmonised standards, emerging technologies, workers’ feedback’ is part of the ETUI’s work programme because of the still great need of attention for machine safety.

The core of the project, which incorporates many different activities (see below), is the integration of workers' knowledge into machinery design.

The ETUI seeks out, identifies and assembles the knowledge of workers using machines by applying the Feedback Method, and shares this information with EU
The ETUI also regularly initiates cooperative projects to raise awareness about selected topics like the introduction of new machine technologies, human-machine interaction, undesirable consequences of machine use like long-term illness and diseases, the quality of machinery, harmonised standards, and the respect of legislative ergonomic requirements.

The ETUI participates in the Machinery Working Group and contributes to the revision of the Machinery Directive. In this context, the ETUI will revise the EU Guide for the application of the ergonomic requirements of the machinery directive by gathering together once again the ErgoMach Group.

In the context of the project on ‘**Improving the quality, transparency and inclusiveness of European Standardisation: networking and surveillance**’, the ETUI focuses on harmonised occupational health and safety standards initiated by a Standardisation Request issued by the European Commission; and standards that are in direct support of the EU OSH Acquis. It coordinates European trade union federations and national trade unions and cooperates with the ETUC on horizontal standardisation issues. Workers’ feedback is sought and collected in order to contribute to the periodic revision of selected standards. In parallel, the ETUI monitors the implementation of Regulation (EU) No 1025/2012 on Standardisation and its vade mecum; it also participates in the activities of the CEN and CENELEC Governing Bodies: this task is carried out in cooperation with ANEC, ECOS and ETUC.

The **CEN TC 122 Ergonomics** project is also related to standardisation.

For the past two years, the ETUI has been following the annual plenary meeting and the strategic advisory group (SAG) (one day once a year). Notably, the ETUI follows projects on the standardisation of machinery and safety components placed on the European market in the framework of the so-called ‘New Approach’.

The ETUI is member of two specific CEN/TC122 working groups: TC 122/WG 2 ‘Ergonomic design principles’ and TC 122/WG 4 ‘Biomechanics’. In TC 122/WG2 we support studies on selected machines to improve the comfort, health and safety of workers through a participatory methodology of risk assessment (the Feedback Methodology). We also monitor the revisions of standards in ergonomic design principles. In TC 122/WG4, the ETUI follows the revisions of standards that aim to improve the health and safety of workers, particularly regarding the manual handling of loads.

**Occupational health and safety: other activities**

The project ‘**Cooperation between trade unions for OSH strategy**’ is a long-term ETUI project, set up because the Workers’ Interest Group (WIG) of the tripartite
Advisory Committee on Safety and Health (ACSH) needs professional coordination and expert support to carry out its activities in an orderly, effective and efficient way. The objective of the project is to provide the coordination and support needed.

The **Annual Strategic Meeting for the ACSH Workers’ Interest Group** is related to this cooperation project. This meeting will take place in Valencia, Spain, during the second week of September. The agenda covers the actual debate on (new) OHS policies and strategies and challenges, put forward by the ACSH agenda and signalled by the national affiliates.

In this context the revision of the EU directives on OHS and/or proposals on new legislation or action plans on the EU level should be discussed and a joint opinion adopted. The same must be done with regard to two European agencies: the EU OSHA and Eurofound.

Another project focuses on a **regional dimension**. The Baltic and Balkan regions stand out as areas where the OSH of workers differs from other parts of the EU, as shown by several surveys (ESENER, ELS, ESWC). The aim of the project is therefore to promote fruitful models of cooperation and exchange between neighbouring countries in the region to support improvements in health and safety and working conditions. Regional cooperation also contributes to the relevant implementation of national and trade union strategies in OSH. A specific issue for this project is setting common best rules for trade union interventions at national, branch or company level regarding occupational diseases.

The project will focus on the unions' role in the drafting, setting and implementation of their own strategies. Neighbouring countries can assist each other by sharing knowledge and skills. The expected output of the project is the strengthening of cooperation and the inclusion of EU priorities into unions' strategies without removing their 'own' national priorities from the agenda.

Last but not least, an online, instructor-led language course, **English for Health and Safety**, will be organised by the Education Department. It aims at helping participants to communicate more effectively in English on the following topics relating to Occupational Health and Safety: psycho-social risks, standardisation, chemicals and gender issues.

**Labour law, Court of Justice and European Court of Human Rights**

This project will focus on the decision-making of the **Court of Justice and of the European Court of Human Rights** in cases that concern labour matters and workers' rights.
The central objective is to identify the factors that play a role in the definition of the rulings. Therefore, the decisions will be analysed by taking into particular consideration specific elements such as the degree of coincidence between the Courts’ reasoning and the positions submitted during the proceeding by the different intervening parties, which include the EU Commission (before the CJEU), trade unions and national governments.

As for the European Court of Human Rights, the analysis will focus on cases that will be selected in an ad hoc manner, due to the limited amount of proceedings on labour matters before that jurisdiction. Regarding the Court of Justice, the study will instead address a specific body of case law concerning labour rights in the context of business restructurings. Those decisions stem from the interpretation of the EU Directives on collective redundancies, information and consultation, EWCs, and cross-border mergers, as well as on co-determination rights. Not all the legal questions that the CJEU considered in those cases will be part of the analysis, but only those that confer relevance and coherence to the case study: the interpretation of the workers’ rights and the scope of the directives.

The objective of this project is to deepen the understanding of the European Courts as policy-makers by investigating their reasoning.

This study is relevant in several ways. First, there is not yet any research that coherently approaches labour law through a study of the decision-making of the Courts. Therefore, this project intends to enrich the academic debate on the role of the European Courts vis-a-vis EU and national labour law. Second, the study has the potential to unveil patterns and dynamics that are useful from a strategic litigation perspective. Third, this research unpacks the CJEU case law on business restructurings, which is characterised by a high degree of complexity and incoherence. Overall, this project will provide practitioners as well as the legal services of trade unions with a detailed overview of the decision-making approach of the European Courts that can help them to define their legal strategies.

In this project, the main activities will be case-law analysis, research visits at the CJEU in Luxembourg and at the ECHR in Strasbourg, and study of the relevant literature. This project will be closely coordinated with the ETUC and its litigation strategy.

The expected outcome is a policy brief and/or a working paper. The project targets trade unions, legal practitioners, trade unions, scholars and judges.

**GoodCorp**

It is an essential tenet of the social contract that workers are stakeholders too: the interests of the workforce must therefore be brought to bear on corporate governance and corporate decision-making.
The ETUI’s GoodCorp network brings together academic experts and worker representatives concerned with company law and corporate governance issues. Meeting twice per year, key goals are to monitor and analyse developments at the EU level in company law and corporate governance, to identify and develop alternatives to shareholder value, and to encourage discussion of these issues among worker representatives in Europe.

The GoodCorp project involves two yearly workshops and research work. The first workshop (April 2020) is planned for Brussels. The second workshop (October 2020) is planned for Berlin, as Germany will host the EU Council Presidency in the second half of 2020.

The research activity for this year will include:

1) an update of the European Participation Index (EPI) with data from Eurofound’s European Company Survey and EU OSHA’s ESENER survey;

2) an exploratory project looking at anti-abuse measures already in place in selected Member States, with a view to propose ‘best practice’ in the national transposition of the EU Company Law Package. Countries planned to be involved in the pilot project include Germany (specifically the ‘gatekeeping’ role of notaries), Latvia (new efforts to fight money laundering and tax evasion through letterbox companies) and Finland (bilateral cooperation with Estonia to combat undermining of labour standards through letterbox companies). The project will also involve statistical work generating descriptive statistics and regression analysis on the relationship between worker participation, sustainability and company performance.

Furthermore, ETUI policy briefs are planned addressing workers’ rights and interests in European company law, as well as a report for practitioners on the EU Company Law Package (CLP), the most significant development in European company law since the 2003 EU Company Law Action Plan.

The report will be designed to explain to worker representatives the main features of the two Directives in the CLP and to indicate which provisions could be strengthened in the national transpositions of the two Directives. Supplementing these publications will be two videos of about 10 minutes each explaining: 1) the information, consultation and participation aspects of the CLP and 2) the anti-abuse provisions of the CLP.

The network will continue to monitor overall developments in EU corporate governance and company law, as well as developments on the national level that have significance for European corporate governance and the European trade union movement. Furthermore, the network will continue to provide support to the ETUC on these issues, including assistance in preparing responses to consultations and advice on analysing and responding to new policy developments.
**EWPC Conference**

The 2021 Flagship EWPC Conference will focus on understanding the debates around board-level employee representation in Europe.

It brings together around 200 practitioners, policy-makers, trade unionists and academics. It will examine the different debates taking place in different countries in Europe around board-level employee representation and seek to generate a genuinely European understanding of the issue. Drawing on the input of the various trade union networks active at the national level, as well as the ETUI’s expert networks, the conference will bring together experts, policy and trade union actors, and company-level employee representatives such as EWC members and board-level employee representatives. The conference will also address the impact of the 2020 EU Company Law Package.

**Renewed social contract: further training support and responses**

Next to the training courses already mentioned, the Education Department will organise another course for trade union members under this priority on a renewed social contract.

‘Strengthening and promoting European Social Dialogue’ is a course that will focus on analysing the recent results of the European Social Dialogue 2019-2021 work programme and the implementation of the autonomous framework agreement on digitalisation.
2. Reinforced democracy at all levels

Democracy is under attack in many areas of society. The ETUI is focusing on the question of democracy at the workplace, which covers workers’ participation, collective bargaining, industrial democracy, board-level participation and the various instruments for information and consultation.

There is a political momentum for democratising the economy and company governance in Europe. The ETUI is in an exceptional position to frame the debate around this topic, and feed it with knowledge from its research and expertise. The European perspective allows us to broaden the scope of our focus on the topic of workers' voice in company governance, so that more areas of analysis can be covered and we can be better prepared to fruitfully engage with local-level debates and help unions and stakeholders to relate to the ETUC ‘democracy at work’ campaign.

**FOCUS: The far right, populism and trade unions**

Democracy at work also strengthens civil democracy and therefore acts as a bulwark against populism and extreme-right tendencies. The important topic of the rise of these tendencies will be of particular attention for the ETUI's Education Department. It is important that trade unions exchange opinions, strategies and good practices in frank debates. Special training will be organised on these questions.

**Workers’ participation**

A wide range of topical research contributes to ongoing or emerging debates in the field of workers’ participation.

The umbrella project **EWC and SE analysis** covers all kind of internal and external research related to the European Works Councils and SE Works Councils.

This work is based on the **large-scale survey of EWC and SE-WC representatives completed in the last work programme in 2018-2019**. This survey reproduced parts of the last large-scale survey of EWCs conducted by the ETUI between 2004 and 2008, and thus promises important insights into possible shifts in the views of EWC representatives in the intervening years. The survey also includes a range of new questions, which will thus enable the ETUI to get an up-to-date view of the practices in a large sample of EWCs and contribute to evaluating the impact of the 2009 EWC Recast Directive.
The research questions are: What can we learn from the EWC survey? In which settings do we see forms of transnational solidarity in EWCs? Is there a clear difference in the experience of EWC members between 2008 and 2018? The research questions treated with external research are: How do national works council members (BE) think about Europe? How is confidentiality more/less of an issue amongst national works council members (BE) and how can these lessons be useful for the European level?

This umbrella project covers the research efforts based on data acquired by the ETUI (e.g. the EWC database, EWC survey, and court cases database). It is therefore part of a long-standing ETUI tradition in doing research on transnational information and consultation. It also tries to stimulate some external research on the topic.

The ETUI is the only institute that collects data on all EWCs and does research on transnational information and consultation continuously. Having this information is important because: (a) it enables others to do research on the topic, (b) we can provide oversight research that covers the whole of Europe/all EWCs, (c) it addresses a real need for practical examples and benchmarks, and (d) we can always and immediately feed into a policy agenda that may come up at any time.

One example for this is the influence of EWC research on the European Commission’s work on EWCs (evaluation report of the Recast) and in the follow-up process (such as the expert group on sanctions). The continuous research and data collection enabled the ETUI to jump to the occasion and provide Europe with necessary data and insights.

A book on the EWC survey will be published as well as two articles: one on transnational solidarity in EWCs, and the other on 10 years of EWCs. Finally, a working paper on a study of works council trends will be co-authored and published.

The project ‘Board-level Employee Representation (BLER): national level’ continues to develop the knowledge that the ETUI has gathered over the years on BLER legal regimes and practices across Europe.

It aims to monitor the content and evolution of mandatory and soft national rules regulating the presence, composition and functioning of BLER across Europe. Research will map existing systems and monitor legislative and political developments that shape board-level employee representation rights at the national level, which may in turn affect the rights governing board-level employee participation at the European level.

This long-standing umbrella project will: 1) keep monitoring national regimes of board-level employee representation (legislation, evolution in political debates, and trade unions’ and other stakeholders' positions) and developments in the women on
company boards quota; 2) move the focus from a legislative/formal approach to developing knowledge on the implementation of these rights, and their meaning and practice in different societal contexts; 3) stimulate dialogue and a better understanding between different approaches to workers' representation in companies’ governing bodies, by stimulating local debates on workers' representation in company boards and economic democracy, highlighting a European perspective on the topic.

Regular update and reading of economic and industrial relations journals and daily press, and data collection via our WPEurope Network of national experts will allow us to answer the first of the objectives (constant monitoring of developments).

The other objectives will be reached by ad-hoc research on specific national cases (by the ETUI or outsourced), the organisation of a BLER workshop locally, and the participation in other meetings or training organised by trade unions or other stakeholders, in order to provide our expert knowledge on the matter.

**One event**, organised in collaboration with local unions and stakeholders, will promote the debate and exchange experiences on workers' participation in corporate governance. The goal is to expand our European networks on the issue, disseminate ETUI work by feeding local debates with a European perspective, and stimulate the debate around this issue at the national level in those countries with little-established or weakened BLER systems. The workshop will take place in Portugal or Greece and target circa 25 to 30 participants.

**One article**, to be published in academic journal, on the meaning of board-level employee representation in Spain and its decline will be written.

An **ETUI report** will be produced on the experience and implementation of **board-level employee representation in France** in the wake of recent legislative changes expanding codetermination from the public to the private sector. This report will fill a clear gap in the research about the implementation and impact of BLER legislation in France, and how it is contributing (or not) to internationalising worker representation in company boards. This research project will provide French and non-French unions with tools to better understand and address the reality of BLER in France, and will also raise awareness and reveal the achievements and/or gaps between legislation and implementation for policy makers.

A third project, ‘**BLER: European integration**’ seeks to monitor and assess the impact of European integration on board-level employee representation rights. From a regulatory and legal perspective, this entails following-up legislative developments at the EU level concerning BLER, such as the Company Law Package, as well as other European and national case law related to BLER rights, particularly in the context of multinational companies, SEs, cross-border mergers, or transfers of undertaking or corporate seat.
In order to monitor emerging practices, a long-standing project will continue to monitor the impact of company law and company mobility on board-level worker participation at European level. The application of these laws, as well as developments at national level, has prompted forms of Europeanisation whose motivations and consequences have yet to be fully understood.

The aim of the long-standing project is to monitor and assess the impacts of European integration on board-level employee representation rights.

From a regulatory and legal perspective, this entails following up the legislative developments at the EU level concerning BLER, particularly the recently adopted Company Law Package. With a view to advising policy-making and unions, documents will be prepared to accompany the transposition of the Directive. Under this project, we will also monitor and analyse CJEU (and national) case law related to BLER rights, particularly in the context of multinational companies, SEs, cross-border mergers, or transfers of undertaking or corporate seat.

Under this project, we will also monitor and analyse CJEU (and national) case law related to BLER rights, particularly in the context of multinational companies, SEs, cross-border mergers, or transfers of undertaking or corporate seat.

We will keep collecting SE agreements where board-level employee representation is negotiated, in order to feed the database on BLER in SEs and keep it as far as possible up to date. These empirical data serve an advisory purpose to practitioners and trade unions currently negotiating such agreements, as it can provide them with examples of good and also bad practice.

The ETUI is well placed to highlight the importance of EU legislation and how it directly affects BLER rights at national level and monitor these changes to make them comprehensible for national unions and stakeholders. But the ETUI is also well placed to raise awareness amongst EU policy-makers of the fact that EU integration and cross-border mobility has also indirect, unexpected consequences for the way BLER rights can be implemented in practice, and raises new legal and political questions for stakeholders (such as the conflict of mandates at the level of SE BLER) which need to be addressed.

The following outputs are planned:

1) Study on the role of EWCs in French companies to appoint BLER, and how this is provided for by EWC agreements or not. This study should help fill the gap in research and empirical knowledge on how the French law is being implemented, but with this Europeanisation focus as a starting point. An ETUI Policy Brief will be published.

2) Study on the conflict of mandates in internationalised boards of SEs (and potentially other EU corporate forms). The expected outcome is an ETUI Policy Brief.

3) Study and analysis of the Company Law Package from the perspective of board-level employee representation rights, in terms of impact in their imple-
mentation, and possible solutions or fall-backs to be foreseen for the transposition level.

We will produce a checklist of advice addressed to national unions, to make them aware of relevant points that they should find in their transposition laws.

**Interactions within the palette of workers’ rights**

Having identified the EU-level legislation that provides various rights to information and consultation to workers and their representatives (ETUI infographic on the palette of workers’ rights, 2019) the goal is to understand how comprehensive the EU framework in this area is, how and if the individual pieces of legislation interact, and how workers and their representatives can use the available legislation to promote their interests and defend their rights.

The ETUI pioneered research on this topic and was the first to map out workers’ rights in various pieces of EU legislation. Developing insight into the EU system of workers’ information and consultation contributes to developing an understanding of the European system of industrial relations and how it can offer solutions to transnational challenges workers face nowadays.

This project is targeted at practitioners and trade unions and aims at stimulating out-of-the-box thinking on workers’ participation rights beyond what is considered the standard package (national works councils, EWCs and BLER). In this vein it aims at turning attention to the underexploited resource of workers’ representation in the health and safety area and strives to explore its potential for workers’ representatives in terms of access to company data.

This explorative research will provide a forum for a systematic exchange of experience about different forms and practices of health and safety representation across the EU. The project will seek to integrate and draw upon the ETUI’s practical and policy expertise in the area of occupational health and safety (OSH) strategies, as well as on the processes underlying workers’ participation. It also builds upon the systematic mapping of H&S representation systems and exploratory work about H&S as a topic for EWCs that was conducted in previous work programmes in both research and training activities.

The goal is to reinvigorate the debate by means of producing a working paper and holding an expert workshop.
Confidentiality of information and consultation

EWC and SE works councils’ members are constantly confronted with confidentiality limitations imposed by management on information provided to them. This project continues activities from the previous years and extends the analysis to further remaining EU Member States. The goal is to explore the nature of the confidentiality challenge and its consequences for how workers’ representatives operate under confidentiality and what implications this has for workers’ participation at large.

Confidentiality is the sole and the key instrument to limit information flows to EWCs/SE works councils, curtail workers’ representatives’ ability to process information provided and keep EWCs/SE Works councils linked to the national/local level, i.e. the constituents (workers).

With this project we explore the evidence and sources to empower workers’ representatives to identify abusive and extensive application of confidentiality as well as to equip them with the knowledge and tools to challenge management in such situations. This project also aims at informing the political debate about the consequences of imprecise legislation on confidentiality and possible remedies.

The research project on the legal provisions governing confidentiality will finalise and disseminate the results of the project launched under the last programme about confidentiality rules as a determinant for workers’ capacities to process information provided by companies. Responding to the extensive positive feedback and interest in the topic by stakeholders (practitioners and experts), the project maps the legal frameworks and limitations that application of rules on the confidentiality and secrecy of information imposes on workers' representatives.

It also aims to provide very practical support to trade union advisors and employee representatives about managing confidential information at various levels. Overall, the research outcomes are intended for multiple audiences, ranging from academic and scholarly audiences, European and national trade union organisations, and policymakers, to practitioners, such as workers’ representatives, experts and advisors to EWCs.

The findings and evidence gathered so far will be disseminated to the research community, as well as to practitioners and experts. Where relevant, excerpts will also be made available via the ETUI’s existing websites: www.worker-participation.eu and www.ewcdb.eu.

We will publish a working paper/report (follow-up volume).
**FOCUS: Democracy at Work**

This project deals with questions such as: what should we understand by democracy at work, what are some of the advantages of democracy at work and how can it be improved/developed further?

How does transnational solidarity grow in certain companies, what can we learn from that, and what is the role of (missing) institutions such as European Works Councils?

What can trade unions do to enable more transnational solidarity?

For various reasons, we have observed that the topic of ‘**democracy at work**’ has gained some attention in the last years: (a) the ETUC has started a ‘campaign’ on the issue which was copied by various national-level (con)federations, (b) in the UK and the US, politicians and think tanks are proposing many creative new policies on the issue, and (c) in *Benchmarking Working Europe 2019*, the ETUI published a chapter focused on ‘democracy at work’, which received quite some attention.

**Transnational solidarity** is an implicit objective for establishing European-level information and consultation institutions. Consequently, we observe that EWCs can indeed be catalysts for such transnational solidarity as seen in Renault, GM and more recently Caterpillar and Eurostar. We also observe, however, that some of the strongest recent examples of transnational solidarity has been manifest in a company without an EWC and with strong anti-union policies (Ryanair) or with a decentralised workforce (Deliveroo). We have also observed that the way unions and EWCs are organised is not necessarily conducive to creating more transnational solidarity. For this reason, we find it necessary to take a closer look at these forms of transnational solidarity and see what we can learn in terms of EWC and trade union policies.

A working paper about the European Participation Index will be updated, and possibly presented at the IZA Conference in July 2020. The article summarising the Belgian debates on democracy at work will be revised and translated. A piece on transnational solidarity at Ryanair will be developed as a case study.

**Networks**

One of the distinctive features of research at the ETUI is the work of its diverse research networks. Through regular meetings and closely coordinated topical contributions from each country or sub-discipline, these networks pool national expertise in order to fuse it into a genuinely European approach and knowledge base. The work of the ETUI is supported by several such networks, active in the areas of workers’ participation, corporate governance, and training. Networks of specialists are
also the foundation of other research projects, such as the international teams conducting comparative research on the impact of European company law on workers’ rights.

The work of the ETUI on workers’ participation is supported by a network of national experts: The Workers’ Participation in Europe (WPEurope) Network. This is an active network of legal, economic and industrial relations experts covering all 30 concerned EU and EEA Member States (EU Member States plus Norway, Iceland and Lichtenstein). Since its inception, this network has become a key resource for research and advice on the European Company (SE) and worker participation issues in general. The network covers very specific areas as well as more general aspects of both worker participation and industrial relations in the broadest sense of the term. It meets twice per year.

**Key issues to be addressed in the period 2019-2020** are a stocktaking of workers’ participation in policy and practice, with a view to informing the deliberations about policy priorities in the European institutions thereafter.

With the new political context, 2020-21 may present new opportunities to relaunch the stalled approaches to both classical sources of workers’ participation rights laid down in employment law as well as those elements of workers' participation whose basis is laid down in company law. This process has been delayed but may receive new impetus through the European Pillar of Social Rights. Furthermore, EWCs and SEWCs are more often beginning to utilise their cross-border rights to move beyond restructuring and to address the transnational impacts of multinationals' strategies on workers’ rights and working conditions. This involves a recalibration of ways in which the local rights of employee representatives can be more effectively combined across borders via the EWC. The network will also assess the potential impact of the Company Law Package (expected to be adopted in early 2020) and explore ways to inform its implementation in the Member States.

**EWPF Board of Trustees**

The 7-member Board of Trustees of the European Workers’ Participation Fund meets twice a year to oversee the use of the Fund. The meeting is usually attended by 5 ETUI representatives as well. The Board normally meets in April to discuss the year’s report and the new work programme and in October to discuss the half-yearly report and ideas for the next work programme.
Worker Participation Databases

This umbrella project regroups activities related to the collection, processing and dissemination of workers’ representation relevant data regrouped in three databases. It represents a foundation for the ETUI’s own research as well as a service to stakeholders (trade unions, practitioners, works councils’ members, experts, academia). The three databases that have been developed are: the European Works Councils’ and SE works councils' agreement database (ewcdb.eu); the European social dialogue database (ESDDB.eu); and the Company Mobility database.

The ETUI initiated collection of these unique data on transnational forms of workers' participation and social dialogue many years ago and since then has been the sole provider in these areas for policy-making, academia and practitioners. These databases provide foundations for the ETUI’s own research and represent unique services provided by the ETUI to the relevant stakeholders, allowing the ETUI to take a central position in the topical debates.

Activities comprise data collection, processing, storage and dissemination. Data is collected in the form of databases (EWC database, ESD database) and one dataset (CBM). The databases are disseminated in the form of internet portals, while the CBM dataset is used internally to generate expertise and prepare future publications (allowing free access and open dissemination under internal scrutiny within the ETUI).

1. European Works Councils' and SE works councils' agreement database (ewcdb.eu)

Activities in this area will be a continuation of the services provided in the past years, i.e.: collection of EWC and SE works councils’ agreements; uploading to the database; content analysis; online presentation.

EWC court cases: We will continue to collect **EWC-related jurisprudence** and provide access to this specific part of the EWC database project. Activities in this area will be a continuation of service from previous years.

This database is the most exhaustive collection of EWC agreements and information on EWCs available. This research project is thus aimed principally at continuing the existing database and the online portal, refining the back-end of the database and improving the outside accessibility of the information.

The EWC database will be integrated into a newly developed structure of ETUI databases and possibly require adjustments.

2. ESDDB.eu – European social dialogue database: this new online service of the ETUI was developed and launched in 2018/19. Due to redevelopment of the main ETUI portal [www.etui.org](http://www.etui.org) and development of a new structure of the ETUI ‘satellite’
websites this database portal will have to be adjusted and positioned anew either as an
alone standing web-service of the ETUI or as part of the new www.etui.org.

3. Company Mobility: in response to vast and very positive feedback from
stakeholders (researchers, national trade unions, EWC members, policymakers),
gathering and processing of company data will be continued in cooperation with
external partners. There is currently a comprehensive data set, but no searchable
database. This will need to be developed. Depending on the decision at the ETUI,
actions may comprise turning this dataset into a database and, consequently, finding
the right backend solution (software), elaborating the database structure, etc. Data and
findings of this database project will continue to be disseminated in the form of
presentations, statistics, contributions to seminars, reports and similar publications.
The data set needs to be turned into a database which is focussed on the impact of
cross-border company mobility.

Data analysis will be done with the help of external experts. The goal is to complete the
dataset with individual follow-up research about unclear cases in which the outcome
remains unclear based on the data sources used until now, and to make sense of the
impact of company mobility on workers' rights.

Web site www.worker-participation.eu

The web site focuses on providing online access to vast information on workers'
participation and industrial relations via an online portal www.worker-
participation.eu.

The objective is to provide practitioners, experts and the general public with
comprehensive information on workers' information, consultation and participation
structures and developments across the EU. The format is meant to be an easily
accessible collection of descriptive data containing reliable information on the
components of European system of industrial relations: employees' rights to
information, consultation, co-determination, social dialogue, company law and
corporate governance, health and safety and board-level representation.

In 2020-2021 we will continue to provide the online service with emphasis on
technical re-development of the website and its integration with the newly
developed www.etui.org. It implies ongoing maintenance and necessary
adjustments to the existing website (transition phase) and the redevelopment of the
website structure, development of a new user interface, development of a new
content management system and transfer of contents/data to the new website. This
task will also include a review of the existing contents and their reordering, updating
and cleaning up, as well as another round of the regular update of contents in the
section about national industrial relations in the EU Member States.
FOCUS: Collective Bargaining Newsletter

For more than ten years, the Collective Bargaining Newsletter (CBN) has been the ETUI’s tool to provide up-to-date information on collective bargaining developments across Europe. The CBN presents an important source of up-to-date information on collective bargaining developments assisting trade unionists and policymakers in the development of political strategies in the field of collective bargaining. It is sent to more than 3,600 subscribers.

The key objectives of the newsletter are: (1) facilitating the exchange of information among trade unions; (2) supporting the work of the ETUC and its affiliates; (3) providing transparent and easily accessible information to practitioners, policymakers and researchers.

There are eleven electronic issues each year. Each includes a short summary of bargaining developments with links to records that provide more detailed information. The CBN is compiled by an external research team from the Stichting de Burcht in the Netherlands.

The themes covered in the CBN include both outcomes and processes of collective bargaining. As regards outcomes, the newsletter not only deals with traditional ‘bread-and butter’ bargaining issues such as wages and working time but also developments in politically important areas such as minimum and living wages, new forms of (often precarious) work and gender issues. Additionally, the CBN also contains a special section called ‘European sources’ which reports on European-level and cross-national comparative collective bargaining issues.

As regards bargaining processes, the CBN focuses on the following themes: the development of bargaining structures, regulatory changes of bargaining arrangements and the question of compliance and disputes related to the non-respect of agreements or failed negotiations.

We are also maintaining and improving the CBN archive which holds all the CBN issues published since February 2008.

Reinforced democracy at all levels: ETUI training support and responses

The ETUI’s Education Department will organise a great number of training courses for trade union members on this priority for reinforced democracy at all levels.
The most important novelty is the development of an extensive online training offer.

One online course will focus on ‘EWCs: the rules of the game’. This training will be instructor-led and will be given in English, German, French and Spanish. A self-paced online course on the same subject matter will be available in English.

Online self-paced training on ‘European Social Dialogue for Trade Unionists’ (in English) will be organised for trade union officers from ETUC-affiliated organisations who already have a basic knowledge/experience concerning EU institutions and are responsible for EU-related issues in their unions. This also includes national representatives in ETUC Permanent Committees.

An instructor-led online course titled ‘English for Worker Participation’ (intermediate level) will also be organised.

Training seminars will be held for company members of European Works Councils, SE Representative Bodies and Special Negotiating Bodies. This company training for European Works Councils, SE Representative Bodies and Special Negotiating Bodies is delivered by the ETUI’s own in-house trainers and through the Network of European Works Council Trainers (the N.E.T., a network of trainers that is coordinated by ETUI Education) and also draw on a wide range of ETUI in-house researchers and external experts.

Training will continue for board-level employee representatives in European Companies (SE). The objective is to improve the cooperation between board members from different countries; to exchange experiences with representatives from other companies, while at the same time offering the space and opportunity to work closely with colleagues from the same company; to increase the knowledge level on specific topics regarding multinational company policies.

The annual workshop for the members of the network of European Works Council trainers (the N.E.T.) will continue.

The special training seminar ‘Assistance and expertise for EWC/SE WC-related initiatives from ETUC affiliates’ will assist the European, national and regional trade union organisations with their own training initiatives, workshops and conferences for EWC members and promote the expertise and services offered by the ETUI.
A training course titled ‘**EWC basics for candidate Member States**’ will be organised for worker representatives of candidate countries, with a first session in 2020 and a second one in 2022. Depending on political evolutions, the 2020 course will focus on Serbia and North Macedonia.

**UNI Europa** seeks to strengthen trade union presence in EWCs by running three **sector-specific seminars for EWC members and EWC coordinators**. The sectors to be covered are ICTS, commerce and property services.

Special EWC training for **IndustriAll Europe and UNI Europa** will be continued.

The **Italian trade unions** plan to set up a joint national database of EWC members with a view to better supporting their representatives serving in EWCs. This would be the first time that the three unions seek to systematically identify and coordinate their members of largely non-Italian EWCs. To this end, a ‘census’ will be conducted for the first time and a conference for Italian EWC delegates will be held. Research will be required to identify and contact the Italian delegates.

Training will also be given on **Occupational Health & Safety (OSH): strengthening the action of EWCs and SE WCs**.

A new training offer, ‘**CSR and non-financial reporting: enlarging the scope of EWC and SE WC activities**’ aims to: raise awareness regarding ‘soft law’ initiatives and legal obligations concerning CSR and non-financial information; develop social dialogue at the company level; help acquire tools and methods to understand if companies are transparent, inclusive, accessible and sustainable for the workers; and improve the mechanisms of information, consultation and participation to better be able to check the company's activities and decisions.

The course ‘**Strengthening the European Works Councils in Property Services – Setting sectoral standards and building union power**’ will address issues such as company restructuring, digitalisation, health and safety, and the recruitment and retention of staff in the property services sector.
The course ‘Working and living in the capital regions’ will be organised for trade union leaders in capital regions. The aim of this training is to empower trade union leaders by providing them with knowledge about the realities at local/regional (capital) level; to share collective experiences of the local trade unions in face of the main problems; and to strengthen the network of the trade union organisations active at capital level.

3. Stronger actors: trade union renewal

None of the above-mentioned ETUI and ETUC priorities can be properly addressed without strong collective actors, in particular trade unions. Trade union organisations need to explore new areas of the labour market, develop new ways of organising workers and innovate for their own strategic development.

A recent OECD report has shown the importance of collective bargaining as a tool with five dimensions that can ensure job quality. These dimensions are occupational health and safety, training, working time, management practices and the prevention of discrimination and intimidation. Along these five dimensions, collective bargaining and democracy at work can help to develop job quality in many ways: firstly at the workplace level with the presence of workers’ representatives who can help to identify the problems and find solutions; secondly, at a higher level where collective bargaining can help through negotiating about the problems; and thirdly at the national level where collective bargaining offers a lobbying tool to improve general conditions and prevent discrimination between workers.

Uncertainties about the future as a result of rapidly changing conditions, together with the observed decline of union membership, require trade unions to urgently think about their renewal. Being able to think strategically has become an increasingly essential skill for trade unionists, in particular for those leaders willing to drive their organisations towards new ways of representing, mobilising and organising workers. A way of thinking that is project-oriented, critical, open and strategic is a method that we put forward in our training on helping to define future strategies for a trade unionism that is effective, modern and up to date.

The ETUI’s Education Department will organise a series of training activities tackling different aspects: including strategic foresight in trade union practices, exploring new areas of trade union action linked to the observed megatrends (globalisation, climate change, digitalisation and demographic transition) and defining organising strategies in specific sectors.

For that purpose, a new Network for Strategic TU Development has been set up to: to set, review and update the tools, methodologies and best practices to be used in ETUI
training supporting strategic TU development; and to ensure the quality and consistency of the courses designed.

**Strategic training for leaders**

For members of the ETUC secretariat, a special course, ‘**Training for the future - next leaders’ generation**’ will be held. It aims to stimulate participation, critical thinking, innovation and a common understanding about the main challenges of the European trade union movement and the European Union / social Europe.

The training course ‘**Verbal and political communication for TU leaders in an EU context**’ will enhance the skills of trade union leaders when communicating with decision makers, for example company leaders and politicians, as well as with the general public.

For trade unionists from ETUC-affiliated organisations, training will be provided on ‘**Strategic foresight for facilitators**’. This training will be given in cooperation with the ETUI’s Foresight Unit.

**Trade Unions in Europe**

The time is ripe for a stocktaking of the state of **trade unions in Europe**. Following the success of the Collective Bargaining book project, the ETUI has launched a similar project on ‘Trade Unions in Europe’. The intention is to produce a three-volume publication comprising chapters on each Member State and on European-level unionism, together with an introduction and a conclusion. In addition, the final publication will include a data appendix, a glossary and a comprehensive index. The final publication is foreseen for mid-2021.

Building upon many years of work in researching about organising models, the ETUI will launch a new project on **organising and trade union renewal**. Trade union membership in Europe, above all in the private sector, has been unable to catch up with employment growth in the last decades. This has resulted in a further decrease of union density in almost every European country, although density rates still differ significantly between countries. Therefore, the ETUI’s research will be particularly focused on the membership dimension in the following years, although it is admitted that it is only one of the dimensions of trade union ‘revitalisation’ or ‘renewal’. Other dimensions include, for example, new forms of representation, the environment, and alliances with NGOs. This project will not ignore these and other aspects of renewal, but will place membership at the centre of the research.
The organising approach has been one of the most prominent trade union responses to combat the declining and ageing membership, and to make the membership composition again more representative of the workforce. The approach has its roots in the US and has been adopted primarily in other Anglo-Saxon countries such as Australia and the UK. Given persistent union decline in most countries in continental Europe, trade unions in some of these countries have started to experiment and to engage with this approach as well to revitalise or renew. While scholars have examined the failure or success of single organising campaigns in specific countries or the adoption of the organising approach in one country, there are little systematic studies towards understanding the conditions for the diffusion of this approach within trade union confederations and unions and across countries, and the conditions for its success across industries or countries, especially from a European (continental) perspective. Therefore, in consideration of the ETUI priorities and the needs of its stakeholders and based on the experience and knowledge gained so far, the main objectives of this long-term project are the following:

(1) to identify and analyse the role or function of the ETUC, ETUFs, union confederations in Europe and other relevant organisations or bodies for accepting, adopting and promoting the organising approach within national trade unions;

(2) to analyse the depth of organising policies in selected union confederations and national trade unions with regards to, for instance, the range of organising targets; the adoption of organising methods and tactics; and resource allocation as measured by centrality, formalisation and specialisation;

(3) to qualitatively (phase I) and quantitatively (phase II) identify and analyse the (contextual) conditions and characteristics of successful organising campaigns in Europe in selected industries and countries;

(4) to setup an online depository of organising campaigns across Europe and their (contextual) conditions and characteristics;

(5) to stimulate and reinforce the interchange between academic scholars and practitioners and to strengthen capacity-building among them in (and outside) Europe;

(6) to establish and to promote the ETUI as a leading institute in the debate and discussion about the organising approach and trade union ‘revitalisation’ or ‘renewal’ in general.

The following activities will be undertaken:

A network event will be organised at least once a year involving academics, practitioners and interested parties across Europe. The initial meeting of this network is scheduled for October 2020. The main objectives of the network event are as follows:
• Stimulating capacity-building by presenting and discussing good practices of organising campaigns;
• Providing input into the ETUI field research programme on the organising approach and trade union revitalisation and renewal in general;
• Building an epistemic community on the organising approach and trade union revitalisation or renewal in general;
• Identifying and analysing the necessary and sufficient conditions for accepting, adopting and promoting the organising approach within trade union confederations and trade unions;
• Developing a method for comparing selected cases of (successful) organising campaigns in terms of similarities and differences;
• Identifying and analysing (contextual) conditions and characteristics of successful organising campaigns. This is based on a step-by-step industry focus via interviews with selected key actors. Survey research will be used to enlarge case collection later on;
• Establishing an (online) depository of organising campaigns as a virtual observatory, which could feed into courses on the organising approach by the ETUI’s Education Department (and practitioner material).

The project will stretch across the next few years. In 2020-21, a network meeting focussing on capacity-building will be held. In 2021-22, we will take stock of the organising approach in Europe: what do we know (including the role of ETUFs and other relevant bodies)? This work will include a literature review, capacity-building and a network meeting. This work will seek to identify and analyse conditions and characteristics of successful organising campaigns in selected industries/countries, based on semi-structured interviews of stakeholders in selected cases. Several publications are foreseen. In 2022-23, next to further capacity-building and the network meeting, a method will be developed for comparing selected cases of organising campaigns. This work will feed into the development of a survey, which will be conducted in 2023-24 and the results analysed. An online depository and database of organising campaigns across Europe will be built. In 2024-25, the survey results will be reported on in an ETUI Working Paper. Further academic publications will be prepared about the project’s overall findings.

Social dialogue in east European countries

This project aims to support social dialogue in east European countries by developing links and assistance to local trade union organisations in their efforts to provide input into the policy process in individual countries and also on the European level.

The activities include providing advice to trade unions and policy makers, inputs to conferences and expert meetings in east European countries and publication of results of research conducted jointly with trade unions and researchers from those
countries. This will lead to publication of a working paper on developments in east-central Europe.

On the same theme, the Education Department will organise a special training course, ‘Trade union renewal for eastern European trade unions’ and for EPSU affiliates, a special training course will look at ‘Trade union renewal for public service unions in CEE’.

Western European multinational corporations and trade unions

This project investigates the nature and implications of the approaches of western European multinational corporations (MNCs) towards trade unions and collective bargaining in Member States of eastern and east-central Europe.

This project complements studies undertaken in the USA by AFL-CIO on the practices of European MNCs in the southern US states. The project is intended to help in the formulation of trade union strategies across Europe and in proposals for possible changes in the legal frameworks that could be beneficial to trade unions.

First results of a preliminary investigation, including a further research framework, will be published as a working paper in early 2020. For a deeper investigation of MNC strategies and trade union responses, the research will compare six countries, looking in particular at the retail and automotive sectors, two with a very large presence of incoming MNCs. Research will focus on some key companies, although these need not be the same for all countries. Research will also be conducted to check the practices of the key MNCs in their home base and across western Europe. Research will look into trade union recognition, collective bargaining and its outcomes and trade union responses and strategies, both within individual countries and at the international level. Experiences of individual countries will be investigated by experts recruited from those countries.

The framework for research and preliminary results will be discussed at a workshop in April-May 2020. Final draft chapters will be discussed at a workshop in January-March 2021, after which a book will be published.

Trade union finances

A long-running project has been seeking to better understand the different ways in which trade unions finance their work.
To date, a significant amount of data has been collected from public sources on trade union finances. Because trade unions report their financial position differently in different countries, the assembly of comparable data has been extremely difficult. In Germany, for example, trade unions report data in the Annual Report, whereas in the UK and USA there are formal (legal) reporting procedures with which each trade union must comply. The consequence of this variation is that the data sets for each country need to be compiled individually and then assessments made concerning comparability. This has proved extremely time-consuming. The project team are now in a position to assemble comparable data series for six trade unions. This process will be complete in early 2020. The intention is then to write up the material that has been compiled. Once this process has been completed the project team will then do interviews from the relevant trade unions. A publication is foreseen for the budget year 2021-22.

**IndustriAll: Airbus TU network**

The aim of the project is to use a targeted seminar and networking program to give a selected group of employee and trade union representatives a better tool for more participation in transnational cooperation and networking among themselves. The target group are local trade union representatives who act as contacts at the sites and are to be continuously involved in the transnational information and communication processes. This will create a broader base of operational multipliers that will expand and support the existing narrow circle of European mandate holders (SE Works Council members at group and division level).

A second important component for promoting information and communication across national borders is the establishment of a digital trade union communication platform. The technical and organisational preparations have reached a stage where the system is operational and can be officially launched in the near future.

**Transatlantic social dialogue**

The ETUI will be represented – to incorporate the European dimension and contribute to the exchange of information and in-depth discussion – at the annual 'transatlantic social dialogue' which is co-organised by the Hans Böckler Stiftung and the Worker Institute from Cornell University. This annual event with debates between labour researchers and trade unionists from both sides of the Atlantic, focuses on issues of concern to trade unions in Europe and North America. This year the event will be hosted by the Worker Institute in Nashville/Spring Hill, US.
Organising new migrant workers from former CEE countries

Accession of the CEE countries to the EU in 2004 and 2007 resulted in a high level of labour migration to the western European Member States. One of the responses by western European trade unions to the phenomenon of CEE migration was the development of various initiatives aimed at supporting migrants including a policy focusing on recruitment. For this purpose, many trade unions used innovative practices that match existing methods of recruitment with organising techniques developed by US and Australian unions, which include developing activists and coalition-building with community organisations, and which aim to revitalise the trade union movement.

Fifteen years after the enlargement of the EU, the ETUI will organise an important conference (in October 2020) to assess how effective and sustainable those initiatives were and why certain policies were successful, or more importantly what factors contributed to negative outcomes. After 15 years, are CEE workers better integrated in the western European trade unions? Is organising migrant workers different from organising precarious workers? Have trade unions’ efforts to successfully organise migrants been hindered by other factors such as those related to external funding, lack of political will or internal structures to support migrants’ integration?

Networks

FOCUS: Transnational Trade Union Rights (TTUR)

The ETUI’s permanent expert network Transnational Trade Union Rights (TTUR) was established with the objective to aid trade union renewal by providing legal and research expertise on topics relevant for the trade union movement at the European level. The ETUI organises meetings of the TTUR network members four times per year. The meetings are closed to the public but often organised alongside labour law conferences or other events, thus providing excellent dissemination opportunities for TTUR research.

Its existence is of crucial importance for the ETUI and also for the TTUR members. From one side, the TTUR provides the ETUI with high-level academic reinforcement in the area of comparative and European labour law; from the other side, the TTUR members gain an insight into the ETUI and indirectly also into ETUC activities, and their academic work gains a broader non-academic audience and thus has greater practical impact. The TTUR members also regularly provide ad hoc legal expertise on certain research-related questions to the ETUC. In the long-term, the TTUR aims at empowering trade unions via the knowledge and expertise of its members and the
TTUR research outcomes. TTUR research also certainly aids the discussion of the renewed social contract, especially in terms of contributions on specific labour law topics (such as the notion of the worker or working conditions). The main activities of the TTUR network are the following:

1) Work on the enforcement of EU labour law: Since rights are worth nothing if they are not enforced, this topic is of utmost significance for workers and trade unions in the EU. A book is planned (joint volume) by the network members and external authors to be ready for early 2022.

2) Work on the notion of worker: A joint ETUI publication (two working papers or a longer report) covering the recent developments in understanding who the worker is at the EU level, especially in the context of the recently adopted Directive on Transparent and Predictable Working Conditions (Directive 2019/1152) is foreseen.

3) Continue active dissemination of the recent book *The Charter of Fundamental Rights of the EU and the Employment Relation*.

4) In line with the ETUC priorities and in relation to the promotion of trade union/social rights in Europe in particular, the TTUR will continue to provide expert/research support to the ETUC upon request.

**Strategic litigation**

A long-term project on strategic litigation is concerned with, first, exploring the opportunity structures already existing in the European (not only EU) legal framework for strategic judicial enforcement of trade union and workers' rights.

Second, the project provides concrete knowledge and case studies which should empower the trade unions to see litigation as an essential part of their overall political strategy and encourage them to pursue litigation where it is needed and strategically appropriate.

The ETUI is uniquely placed to provide expertise and carry out research on this topic because its position as a pan-European research institute closely linked to the trade union movement allows it not only to effectively organise research and gather the necessary data, but also permits it to disseminate the findings broadly within the trade union movement afterwards.

In 2020/2021, the project manager will continue the work started in the previous budget year on collective redress when litigating for labour and social rights. In this context and following from previous research (expert reports on collective access to courts in four EU Member States and research on collective access to EU courts), an ETUI working paper or a report is planned that summarises the research results and disseminates them in a practice-oriented way.
In addition, it is envisioned that the project participants will submit a joint panel proposal for an academic conference.

The target audience for the written output of this project (working paper/report) are the trade unions both at national and at the EU level, and especially trade union lawyers. At the same time, this project and its findings should be of great interest to the research community and policymakers at EU level. Hopefully, this will strengthen the position of judicial enforcement as an inherent part of the trade union strategy, as well as advance a discussion on how legal opportunity structures should be designed at the EU level in order to be conducive for strategic litigation, as well as identify the key obstacles for litigation by trade unions.

This project aims at empowering trade unions to take up the role of advancing social justice not only on behalf of their immediate members but also on behalf of all workers and the self-employed. This hopefully encourages a more modern outlook when it comes to the role of the trade union movement.

**Strategic litigation on occupational safety and health**

A separate multi-annual project on ‘Strategic litigation on Occupational Safety and Health’ started in the last budget year, aiming at empowering and strengthening the trade union movement in reaching its goals through judicial action, specifically in the field of occupational health and safety.

Although the EU trade union movement still has essential demands for improvement of the EU and national OSH Acquis, the body of regulation on OSH that has been developed at both levels since the EU Framework Directive on Health and Safety at Work of 1989 provides us with the basic principles to properly organise prevention of safety and health hazards. However, these basic OSH preventive principles are not sufficiently and/or correctly applied, and while strong enforcement bodies could help in this respect, labour inspectorates are increasingly understaffed, while at the same time assigned more extensive duties (not being OSH-related) and as a result are not able to sufficiently enforce OSH legislation. Therefore, judicial enforcement is an alternative worth examining. Going to court can give trade unions the possibility to seek enforcement after all. It can be a strong means of trade union action. If this is done in a strategic manner, beside enforcement, a clearer and more concrete understanding of the basic preventive principles of the existing OSH Acquis, both at EU and national level, will be achieved, and thereby a basis for its further development (law creation).

The starting point of this multi-annual project was a seminar held in the former budget year. It had the character of a stocktaking and a first exploration of opportunities for
further development. Beside content (fields of law, topics of litigation, lines of reasoning), it explored the needs of trade unionists, legal practitioners and other professionals in the field for exchanging knowledge and experiences. It will explore existing OSH litigation and future opportunities and needs both at EU level and national level. A bottom-up approach was strongly advocated, meaning that contributors were kindly invited to put forward their experiences.

The project will continue as the basis of the outcomes of this seminar. A seminar report will be published in the budget year. It will contain the seminar conclusions and directions for further steps within the project. An expert meeting will be organised in the budget year to decide on the issues to be researched and elaborated on in further detail, the target audiences to specifically address and the means with which to do this.

This project is related to the ‘Conference on strategic litigation on OSH’ (see below). HesaMag will publish a special issue on the topic in the second half of the budget year.

### The Conference on strategic litigation on OSH

The **Conference on strategic litigation on OSH** is the Health and Safety and Working Conditions Unit’s annual conference and is an important flagship of the ETUI. It attracts every year between 150 and 220 OSH professionals, both from within trade unions as from other OSH communities, like the academic, the policy and the regulatory community.

This year’s conference will be on strategic litigation in line with the project on that topic. This topic was chosen because of the strong trade union action element that it holds. Moreover, the first steps in the ‘Strategic Litigation on OSH’ project showed that the topic has potential, both at EU level as well as a means of exchange between Member States. The target audience is all professionals involved in litigation on OSH: trade unionists, in specific sectors as well as OSH specialists, (trade union) lawyers specialised in OSH, (occupational) doctors and psychologists, ergonomists, occupational hygienists, and other experts engaged in litigation on OSH, and academics specialised in OSH.

The conference will be held in Brussels at the beginning of December 2020. An external expert will be hired to organise the conference under the supervision of the Head of Unit. A conference report will be published afterwards.
**CRIMT**

The Interuniversity Research Centre on Globalization and Work (CRIMT, from its French equivalent *Le Centre de recherche interuniversitaire sur la mondialisation et le travail*) is an interdisciplinary and interuniversity research centre which focuses on the theoretical and practical challenges of institutional and organisational renewal in the areas of work and employment in the global era.

**FOCUS: CRIMT Partnership Project on Institutional Experimentation**

The ETUI is one of the key partners in a major international research initiative, extending over seven years, on the future of work, awarded by the highly competitive Partnership Program of the Social Sciences and Humanities Research Council of Canada (SSHRC) and led by the CRIMT. There has been a long-standing collaboration (more than 10 years) between the CRIMT and the ETUI.

The CRIMT Partnership Project on Institutional Experimentation for Better Work brings together an international network of 150 researchers and 20 leading partner centres in 12 countries specialised in issues of work and employment, among which are the ETUI, Bristol University (UK), Cardiff University (UK), Catholic University of Louvain (Belgium), Cornell University (US), El Colegio de la Frontera Norte (Mexico), Griffith University (Australia), HEC Montréal (Canada), Manchester University (UK), McGill University (Canada), Loughborough University London (UK), McMaster/Guelph Universities (Canada), Queen's University (Canada), Renmin University (China), RMIT (Australia), Rutgers University (US), Université de Bordeaux (France), Université de Montréal (Canada), Université Laval (Canada), and Université Paris Dauphine (France).

Digital technologies, the recasting of company strategies, the growth of global production networks, climate change, shifts in identities and values, and changes in public policy are transforming the world of work. Existing institutions for the regulation of work seem out of sync. While there is an aspiration for productive, innovative, healthy and inclusive work, in which individuals live free from excessive insecurity, exercise control over their working lives, and contribute to their workplace and society – everything that can be labelled as ‘better work’ – quite a different picture often emerges, in which fragmented work results in disjointed communities. Yet these disruptions also open up space for experimentation. At many levels, in different national, institutional and organisational contexts, trade unions, employers, NGOs and governments are engaged in experimentation.

A key challenge is to share knowledge and understanding of these processes and to engage social actors in shared learning. The CRIMT Partnership Project on Institutional Experimentation for Better Work focuses on the conditions under which that experimentation leads to work being better or worse. The stakes are high since better work makes for better societies; worse work weakens the social fabric.
Beyond the networking aspect of this collaboration, which entails an ongoing series of workshops, conferences and publications, the project will create an international data base and virtual observatory of such experimentation. ETUI researchers are contributing core expertise to this project in relation to the digital economy, climate change, union renewal and social dialogue.

A special issue of *Transfer* on this topic will be published in spring 2020.

**Trade union renewal: ETUI training support and responses**

The ETUI’s Education Department will organise four courses specifically for young members of trade unions.

The Education Department will continue its **European training for young trade union leaders**. These training activities (over 3 weeks in a 9-month period) are meant to reinforce trade union knowledge and action in Europe. The target audience are young trade union officers (the age limit is 35).

A special ‘**Youth training week**’ will be organised for the members of the ETUC Youth Committee to reinforce the networking between these members, discuss the ETUC’s priorities and action plan, develop project-oriented strategies and action plans for future activity, and enhance further cooperation at EU level.

At sectoral level, a training course on ‘**Youth empowerment**’ will be held for the EFFAT Youth Committee.

An action-oriented course, ‘**Building trade union power: empowering young organisers**’ for the Youth Working Group of IndustriAll Europe will be organised to support young unionists in their activities of building trade union power and contribute to trade union renewal.

In line with the development of the network presented at the beginning of this priority, two important training courses will take place:

**Trade union organising and recruiting across Europe** for organisers from ETUC affiliates will help identify different organising models and practices; share experiences of organising workers and contribute towards strategies and action plans for workplace organising.
Another training course will deal with the ‘Revitalisation of trade unions through cooperation and alliances with social organisation and social forces’.

Other training courses:

For the European Federation of Journalists (EFJ), a course on ‘Identifying trade union strategies on training and education’ will train journalists’ unions’ key representatives on leadership skills, trade union mobilising skills and leading changes in the unions.

Another training on ‘Trade union renewal for eastern European trade unions’ will be organised for EPSU affiliates and a special training course will look at ‘Trade union renewal for public service unions in CEE’.
Other activities

1. Education Department

Additional priority for the development of trade union education

The five priorities of the ETUI are at the core of our training programme. The Education Department has designed training activities and workshops on skills and competences that are needed for our learners to act and participate in the debate at European level. For example, the new green competences (see above under Priority 1) were specifically designed to deal with the complexity of the topics related to environmental transitions. Another very important set of training activities regarding youth responds to the priority of trade union renewal, but also to the commitment of the ETUI to supporting the capacity development of young leaders. The European training for young trade union leaders is a programme designed as a 9-month course combining three residential seminars (face-to-face activities) with group activities on specific issues to be completed between the seminars.

As a training institute, we have also designed and developed a range of pedagogical approaches and activities on capacity-building and learning development. Our training activities and accredited learning pathways make an indispensable contribution to supporting, reinforcing and stimulating the European trade union movement and its identity.

Our 2020-2023 Strategy has also included ‘Train the Trainers’ as a priority to reinforce the training capacity of various trade unions across Europe.

Topics like time management, interpersonal communication, diverse communication skills, conflict resolution, developing trust and interest in others, and keeping focus and engagement, just to name a few, are part of the training programme of the ETUI.

The pedagogy we practice is centred on learners. It builds on the experience of adult participants through joint reflection, the sharing of practices and critical thinking.

A unique opportunity: Eurotrainers

The Eurotrainers programme is a long-term learning itinerary, which stands out as an important training programme and is a unique programme at the European level. The 2020-2023 Strategy identifies for 2023 the potential of developing a Level 3 for this training programme.

Our e-learning offer will be enlarged and diversified during this work programme. Pre-course activities will be launched through an online educational resource, developed according to the standards of ETUI online courses, and which presents in a user-friendly and interactive way the work done by the ETUI. Participants attending ETUI training will be invited to go through this online content before joining the face-to-face or online activities. This will facilitate a common and appropriate understanding of what the ETUI does and can offer to participants and trade unionists.
in general. This blended approach will also allow a better use of the training time, in particular for face-to-face courses. This activity is self-paced and delivered in English.

For this work programme, our e-learning programme consists of the following courses:

- EWC: the rules of the game – instructor-led and delivered in various sessions in English, German, French and Spanish; plus one ‘introductory’ session, self-paced, in English
- Project Management (EN) – instructor-led
- EU for Trade Unionists – introductory (EN) – self-paced
- EU for Trade Unionists – advanced (EN) - instructor-led
- English for Trade Unionists – instructor-led
- English for Worker Participation – instructor-led
- English for Digitalisation – instructor-led
- English for Health and Safety – instructor-led
- European Social Dialogue for Trade Unionists (EN) – self-paced

Our pedagogical workshops and skills development activities consist of:

- E-tutors training
- Eurotrainers level 1 and level 2
- Eurotrainers accreditation process
- Pedagogical workshop: Active learning methodologies
- Workshop: Coaching: analysis of reflective e-portfolios
- Workshop: Developing emotional competence in the context of training
- Pedagogical workshop: Cross-cultural communication
- E-Portfolio building: from description to reflection
- English language and communication course - Intermediate level (face to face)
- Pedagogical workshop: Training design
- Pedagogical workshop: Group management in multicultural contexts and conflict resolution

2. Research Department

Cooperation with the Pan-European Regional Council network (PERC)

PERC is a body set up by the ETUC and the International Trade Union Confederation (ITUC) to deal with European issues.

The ETUI provides expertise for the PERC network and its economic expert group. The Institute's participation is focused mainly on the impact of economic integration on eastern Europe. This entails attending key PERC events, and in some cases involving an additional expert.
Networks, experts and dissemination

The ETUI is a partner of several international trade union research networks and contributes to the networks by providing them with expert knowledge on priorities dealt with at the Institute. Encouraged by the positive experiences and frequent requests to share research findings, the ETUI will continue to participate in these international trade-union-institute-related networks, such as the European-Asian network on minimum wages. This cooperation involves a maximum of four days of work in any year and a travel budget to attend the meetings.

Another forum at which the ETUI will be represented, to incorporate the European dimension and contribute to the exchange of information and in-depth discussion between labour researchers and trade union leaders, is the annual 'transatlantic social dialogue', where issues of concern to trade unions in North America and Europe are debated by researchers and trade unionists from both sides of the Atlantic. A similar initiative is planned with the CRIMT in Canada, according to whether relevant opportunities emerge. Only eligible costs will be incurred during the period covered by this work programme.

The ETUI also cooperates with universities, through meetings, conferences and publications, in a bid to enhance the dialogue between trade unions and academics on issues of trade union relevance relating to the European integration process. Such cooperation affords the ETUI relatively easy access to high-quality research.
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