



Eurofound

Annual Work programme 2010

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Executive summary

This is the second annual programme of the four-year period and continues Eurofound's work in the following three research focus areas:

- Employment growth and supply of labour in changing labour markets;
- More and better jobs and higher productivity through partnership;
- Promotion of social inclusion and sustainable social protection.

The 2010 programme gives more emphasis to the impacts of the current economic and financial crisis on the employment, working conditions and quality of life of Europeans. Many of the research projects started last year will continue and be completed in 2010. A full list of project outputs is given in Appendix 1.

The 2010 programme will include crisis-related research on restructuring, labour markets and wages as analysed by the new European Jobs Monitor and studies on flexicurity. Longer-term impacts of the recession will be examined in the context of the combined effects of recession and demographic change, as well as studies of new forms of corporate ownership and governance; the impacts of the recession on social dialogue structures will also be considered.

The social dimension of environmental sustainability and involvement of the social partners in European strategies will be the focus of a new project. The research on organisation of work, productivity and social innovations continues with emphasis on the links between quality of work and performance. The connections between working conditions and social dialogue will be examined in different ways, as will as the evolution of work and employment in terms of non-standard and flexible ways of working – trends that have been amplified by the crisis. In the area of social inclusion and sustainable social protection, the themes of reconciliation of employment with care and intergenerational solidarity will be developed. In this European Year for Combating Poverty and Social Exclusion, particular attention is being given to risks for exclusion associated with ill-health, age and care responsibilities. Key policy messages and trends in quality of life in Europe will be presented in a report and conference that will bring together a wide range of related research. Mobility patterns in the new European situation will be explored.

Results from the second *European Company Survey* will be reported and more in-depth analyses carried out. The fieldwork for the fifth *European Working Conditions Survey* will be executed with first results launched. For both the Eurofound surveys and its observatories (EIRO, EWCO and EMCC), the quality of the activities will be further strengthened.

In all of its work Eurofound will focus greater attention to users' needs, aiming to provide a targeted service for stakeholders and information users. This will be reflected in activities ranging from the monitoring of communication priorities to the development of focused and customised products, to web user interface enhancements. These initiatives should contribute to a Eurofound's work having a greater impact. A shift in the communication activities will result in more executive summaries and a doubling in the volume of translations. The European Year for Combating Poverty and Social Exclusion will also be marked, not least by the distribution of a targeted information pack drawing together Eurofound's substantial work in this area as part of its series of information resource packs, a series that began in 2008. Eurofound's participation and contribution in the most relevant activities of the various Presidency programmes will continue as will its own programme of workshops and seminars. The recent addition of research staff, as well as the further streamlining of internal work processes, will contribute directly to the high quality and timely delivery of this work programme.

1

Introduction: global, European and institutional context

The global drivers of change framing Eurofound's current four year programme for 2009–2012 are globalisation, technological innovation, demographic developments and climate change. The advent of the financial and economic crisis sparked a re-evaluation of the context for Eurofound's annual work programme, with a view to addressing the impacts of these turbulent times. However, in many respects, it only highlights in even sharper focus the importance of these drivers and accentuates the urgency of dealing with the issues they raise.

The most problematic demographic issue, the projected increase in the dependency ratio within the coming decades, clearly illustrates this point. As recession typically results in the permanent exclusion of some members of the labour force, the current economic downturn is expected to significantly worsen the imbalance between the active and non-active population and only reinforces the urgency of this issue. Furthermore, the recession also makes the primary financial problem of recent demographic developments, namely the adequacy of future pension incomes, acute. The trend towards marketisation (privatisation and funded pensions) in recent decades – and the subsequent collapse in their market value – leads to problems not just for future cohorts but for many of those currently becoming pensioners. Europe's capability for dealing with the challenges of an ageing population is thus weakened.

This is not to underestimate the problems that the recession will have on living and working conditions in Europe. Already by mid-2009 unemployment has risen very rapidly in most Member States and will bring economic and social hardship to many. The stimulus programmes are the actions taken at macro level; at the micro level, the approach to these problems is, in principle, to be found in the activation stance advocated in the European Employment Strategy as exemplified by the concrete proposal in the European Economic Recovery Plan to widen the scope of the European Globalisation Adjustment Fund and a better use of the European Social Fund to cover the impact of the recession. The challenge for active labour market policy is how to cope when resources dwindle and needs increase. While the activist approach must be maintained, rising unemployment in the face of fewer job vacancies may require some reorientation of active measures. It may also raise questions on the limitations of a supply-side policy in general and active labour market policy in particular.

Thus, demand-side policy to create more jobs is becoming more prominent in the public debate. Particularly, environmentally motivated infrastructural investments are coming to the fore, generating new 'green jobs'. This is clearly illustrated by the environmental loans that constituted a significant element of the European Economic Recovery Plan.

Globalisation will also remain a central issue in 2010. However, after years of increasing globalisation, the rapid decline in trade volumes and the rise in protectionist tendencies could shift the tone of the debate. The issue of how to reap the benefits of free trade while protecting those who lose out remains, however, essentially the same. This applies not only to external trade but equally importantly to the Single Market.

Member States and the EU social partners are called to engage in a shared commitment (European Commission Communication *A shared commitment for employment*¹) to tackle the impact of the crisis on jobs, focusing on maintaining and creating employment, promoting mobility, upgrading skills and matching labour market needs. The

¹ COM(2009) 257 final, Brussels, 3.6.2009

European Union wants to turn the recession into an opportunity ‘to create a more productive, more innovative, better skilled and low carbon economy’. In the long-term, the European Union works toward a stronger integration of the economic, social and environmental dimensions into a new single response mechanism to address negative impacts, which might be reflected in the future post-Lisbon 2010 strategy.

From an institutional point of view, the renewal of the European Parliament and the European Commission will partly drive Eurofound’s communication and cooperation strategy in 2010.

2 Objectives for the 2010 Work programme

Eurofound's overall mission is to conduct research in order to provide independent, relevant and timely information for social partner organisations on both EU and Member State level, as well as governmental and European institutions, aimed at improving living and working conditions in Europe, in the best spirit of its tripartite and independent nature.

Five strategic goals outline the medium- to long-term targets for Eurofound's work:

- improve research and output quality;
- identify, develop and understand customer target groups;
- expand impact and influence on real decision makers;
- increase the visibility and improve the image of Eurofound;
- identify and expand Eurofound's competitive advantage.

For 2010, Eurofound will aim to increase its impact through the implementation of a timely and relevant research and communication programme and proactive measures to contribute in a focused and planned way. Eurofound has prioritised projects that support the commitment shared by the European Commission, the European Parliament, the Member State governments, the employer organisations and trade unions to emerge from the recession with a globally competitive and sustainable European economy and a cohesive society for its citizens.

Eurofound's expertise lies in analysing the effect of policy measures as well as their impact on the quality of work and life in Europe. Through its observatories and surveys Eurofound has rich data sources at its disposal in the area of living and working conditions, industrial relations and the management of change. As identified in its 2009–2012 four-year programme, Eurofound will focus its research in this period on three broad areas:

- employment growth and supply of labour in changing labour markets;
- more and better jobs and higher productivity through partnership;
- promotion of social inclusion and sustainable social protection.

To enhance the visibility of its work in 2010, Eurofound's stakeholder outreach and overall communication programme will be slightly redirected. A new European Parliament and changes in the European Commission demand some rebuilding of relationships at European level. At the same time there will be more investment in communication to stakeholder groups at Member State level. Given the EU-wide scope of Eurofound's communication activities, partnership with national relay centres and the support of the Governing Board continue to be essential.

The aim of operational excellence guides all Eurofound's activities, reflected in the training and development of its human resources. Staff in the research units will further increase during 2010 to permit more in-house analysis, greater flexibility to respond more quickly to the needs of policymakers around Europe and more extensive communication with the target groups. The commitment to consistently high quality in research and outputs remains important.

These priorities and the selected projects and activities for 2010 should all contribute towards the achievement of the two specific objectives of the 2009–2012 four-year programme:

1. Be a reliable source of high quality information and identify emerging issues for research and debate
2. Strengthen the tripartite character and stakeholder relationships of Eurofound's activities

The following operational objectives will guide implementation of the 2010 Work programme.

- Fully utilise quality standards and quality assurance methods for research and outputs to ensure a relevant programme of reliable quality.
- Increase communication and cooperation with Governing Board members to better understand the needs and demands of user groups in Member States.
- Share and use knowledge about the impacts of our work on target groups at EU and Member State level, working towards greater synergy between research and communication units in achieving objectives.
- Align the planned projects, activities and objectives for 2010 with the staff resources and budget in an optimal way.

Eurofound's Performance Monitoring System (EPMS) includes a set of dynamic indicators that monitor inputs, outputs and outcomes for all of Eurofound's operations. The data periodically gathered and analysed assist in ensuring the relevance, efficiency and effectiveness of Eurofound's programme execution against annual targets.

Co-operation programmes will continue with the European Centre for the Development of Vocational Training (CEDEFOP) and the European Agency for Health and Safety at Work (EU-OSHA), as well as with the European Training Foundation (ETF). Cooperation with the new European Gender Institute (EGI) will be initiated. The aim is to develop a concrete cooperation programme with the Fundamental Rights Agency (FRA). All these will be based on concrete annual cooperation programs in line with the annual work programs of the agencies.

In the European Council, more active cooperation and exchange of information will be sought with the members of the Employment Committee and the Social Protection Committee.

Cooperation with the European Parliament, the European Economic and Social Committee (EESC) and the Committee of Regions (CoR) will be further strengthened, in particular with regard to the joint organisation of high-level events.

The cooperation with DG Employment's sector studies will continue through participation in the Steering Committee of the proposed European Sector Skills Councils. In addition and as previously agreed the EMCC is prepared to host the Anticipedia website as proposed.

Cooperation will be also further developed with Eurostat, and the joint project with the ILO in developing an international working conditions survey will be continued. The participation of the OECD in the project on industrial relations in EU, USA and Japan (3.2.1.6.) will continue, as will their involvement in projects on job skills and on social protection, in the general framework of the Commission's 'New Skills for New Jobs' initiative; further cooperation is envisaged in disseminating the results from the CLIP studies.

Through the Instrument for Pre-Accession Assistance (IPA) framework of the European Commission, Eurofound will continue to involve the Candidate and Potential Candidate countries in selected projects, such as in the fifth *European Working Conditions Survey*.

All projects and research activities will have their output delivered during 2010 unless otherwise mentioned in the project descriptions.

3.1 Employment growth and supply and demand of labour in changing labour markets

In 2009, two studies were published on the impact of the recession on the construction sector (which was the first to be hit) and on the automotive sector (which underwent much restructuring as early as late 2008). Two other reports examined company and social partner initiatives in response to the recession and the policy responses by Member States. The current recession will influence this research area in 2010. While of course, the economy may have recovered somewhat by 2010, it is highly unlikely that the labour market will have returned to anything like full employment. This reinforces the relevance of upgrading the usefulness and focus of the European Restructuring Monitor (ERM) and further highlights the need for the continual improvement of ERM data. Other important topics include the geographical mobility of labour in Europe and analysis of sectors of key importance in these turbulent times.

3.1.1. Labour market adjustment to structural change

In light of the current recession, this topic received much attention in 2009 and this priority will continue in 2010.

3.1.1.1. *European Employment Trends (EET)*

The EET comprises two elements – the European Restructuring Monitor and the European Jobs Monitor. The result of the evaluation of both monitoring tools involving external independent experts and social partners will be followed up in view of a continued monitoring and improvement of the used methodology, and reported in a repeated external evaluation at a later date.

The European Restructuring Monitor (ERM) (continuing)

Scope: The ERM is the only available pan-European restructuring monitoring tool providing data on announced job creation and loss. It is based on media reports of announced job loss and job creation. The recession has highlighted the need to improve and expand the ERM. While there have been significant recent improvements in the quality and quantity of the ERM data, further progress should be made in 2010. During 2008 and 2009, the ERM started to systematically gather restructuring measures and practices in Member States, part of which has relevance for flexicurity. This work will be intensified during 2010 and the existing information on the EMCC observatory will be developed and expanded. In 2009 the ERM published monthly, quarterly and annual reports.

Objectives: The further improvement of ERM statistical data continues to be a key objective. The other main objective is to improve the extent, the quality and the form of dissemination of the restructuring measures and practices information on the EMCC website.

Method: The improvement of ERM factsheet quality control (aiming for more and better factsheets) that was accelerated in 2009 will continue. In this context, the control and incentive mechanisms in the forthcoming new NEO contracts regarding the submission of factsheets will boost their quantity. The compilation and analysis of complementary data, such as the notification data emanating from the reporting requirement in the Collective Redundancy Directive will be intensified. The notification data will complement the ERM data.

The online data base of restructuring measures and practices will be updated and expanded by in-house research, contributions from NEO and through ongoing cooperation with DG Employment.

Outputs: The data used in the European Restructuring Monitor will provide the main empirical basis for analysis presented in the annual ERM Report, four issues of the ERM quarterly and twelve monthly reports to the European

Commission. Most of this will continue to be done in-house. During the course of the recession this data will continue to be reported to the European Commission and other stakeholders on a monthly basis. Further development of a online database will present information on restructuring, measures and practices.

Through the Network of European Observatories, three comparative analytical reports (CARs) related to restructuring and management of change will be developed for the ERM.

■ **Availability and effectiveness of public restructuring instruments**

The framework of existing public instruments to support companies' restructuring process will be elaborated. This is to supplement and validate information gathered in-house from other sources.

■ **Joint public–private partnership initiatives at local level to cope with the effects of the recession**

During the last number of years, increasing attention has been paid to involving local stakeholders (regional/local governments, NGOs/NPOs, and companies) in local employment development. A DG EMPL study from 2008 revealed much variation in the approaches taken to integrate companies' corporate social responsibility (CSR) activities in local employment development as well as the drivers and success factors of such joint initiatives. On the basis of these findings the CAR will inform on whether and how respective instruments have been used to prevent or counteract the negative labour market effects of the current economic crisis, in order to identify and disseminate good practices.

■ **Emerging forms of entrepreneurship**

Demographic and sociodemographic change as well as economic trends (e.g. outsourcing) are resulting in new/emerging forms of entrepreneurship that have not been prevalent in the European economy in former times (or at least not to this extent). Examples of these emerging forms of self-employment are one-person-enterprises (OPEs), part-time entrepreneurship or serial entrepreneurship. So far, very little is known about the exact extent, drivers and characteristics (incl. performance) of these types of business activities. However, respective information would be of relevance not only to picture the overall restructuring process going on in Europe, but also due to the assumed labour market effects of these entrepreneurial forms (e.g. with regard to quantity, quality and sustainability of created jobs). A CAR identifying national sources of information and data on these emerging forms of entrepreneurship as well as giving first hints about their labour market effects (and potential needs for support instruments to realise them) could serve as a basis for a more detailed research study later on.

See Annex 1 for an overview of all proposed comparative analytical studies, together with other outputs from NEO. See also section 4.1 for further details about the Network of European Observatories (NEO).

European Jobs Monitor (EJM) (continuing)

Scope: The previous European Jobs Project used hourly wage to gain qualitative information on the patterns of employment growth in Europe. The European Jobs Monitor intends to perform this analysis on a regular basis. However, there are several as yet unresolved issues as regards the Eurostat classification of the variables which define jobs, namely sector (NACE) and occupation (ISCO). The extent of temporal consistency that will finally materialise as regards the still on-going implementation of the NACE revision and the, practically unpredictable, intended revision of ISCO, make precise estimates of time schedules of future EJM reports unfeasible at this moment. However, on the basis of our own judgement and that of external experts, this issue does not appreciably adventure the long run viability of the project. The change in employment structure should be mainly based on annual but with more frequent publications based on thematic analysis on for example the structure of employment growth by gender, age and nationality.

The EJM expert network will provide analysis of existing jobs project data contributing to the methodology and guaranteeing the robustness of EJM approach.

Objectives: To monitor changes in the structure of employment in Europe. Its expert network should contribute to an in-depth understanding of longer term trends of employment quantity and quality in Europe.

Method: The empirical basis of these projects is several EU-wide databases (external to Eurofound) – mainly the European Labour Force Survey. This project will be performed in-house.

Output: Regular (the periodicity of which has yet to be decided) publication of the European Jobs Monitor reports.

3.1.1.2. EMCC's sector studies: in-depth study on educational and training services

Scope: As part of its original mission the EMCC has conducted future-oriented sector studies since 2002. In light of a major initiative by DG Employment to conduct 16 similar studies in 2008 and 2009 in the framework of the 'New Skills for New Jobs' initiative', the EMCC ceased conducting its own studies but devoted its efforts to cooperate with DG Employment. Upon the completion of these studies the EMCC has continued to conduct sector studies with a view to complementing and updating DG Employment's initiatives. In 2009 it published an update on developments in the rapidly changing financial sector.

The results of this study will contribute directly to the Commission's New Skills for New Jobs initiative, in two ways. First, with a large percentage of all jobs in Europe located in this sector (not covered yet by previous DG Employment studies) it is an important source of employment. Second, the adaptation of the education and training sector is a necessary precondition for ensuring adequate skills upgrading and matching. In the short run, it is a vital player in accommodating recovery in the European labour market from the recession. The structural transformation of the sector is also key to the creation of long term competitiveness and social equity. The mapping of both short and long run challenges and opportunities faced by this sector will help to implement the New Skills for New Jobs initiative and formulate informed policy recommendations.

Objectives: Focus will be placed upon the impact of a series of drivers, including demographic change, on the number and profile of learners (as the age profile of its pupils moves from mainly children to older workers and the provision of education and training services is provided throughout the life course) and its consequences on the employment structure of the sector (recruitment/replacement needs) and on new (including pedagogic) skills needs for teaching professionals. Focus will also be placed on the provision of equal access to education and training services and on capability to provide learners with individualised support and the right skills and competences for the world of work and adult life

Method: The method will broadly follow the methodology of previous EMCC studies. This includes a mapping of the sector, identification of the main drivers of change, scenarios and between four and six clusters and company/institutional case studies.

Output: Research report, scenarios and 4 to 6 case and cluster studies

3.1.1.3. Restructuring in recession and labour force participation (new project)

Scope: It is highly likely that the recession will seriously worsen the current and future imbalances between the active and inactive workforce. It is almost inevitable that in a serious recession some workers never return to the labour force after losing their jobs, and that new entrants are not able to establish a firm foothold in the labour market. A lesson drawn from the last major recessions of the late 1970s and 1980s was that early pensioning of a significant number of employees was not in the long term interests of Member States. While previously, early pensioning was financially

feasible in the short run and relatively attractive to the workers, this is not the case today. The recession itself has seriously undermined public finances in many Member States and many workers relying on company-based pensions face appreciably lower levels of pension that has previously been the case. Indeed the relatively poor level of current pension income may lead to an increase in labour force participation for many laid-off older workers. It should be underlined that there is huge diversity between Member States as regards the labour market participation of older workers. This project relates to project 3.3.1.1. (Company initiatives to reconcile employment with care) and is related to previous Eurofound research on ageing workforces.

Objectives: To analyse the impact of the recession for various age groups and to examine the implications of this for the activity rate of the population of working age. To explain the development of divergent age profiles in labour force participation among Member States, in terms of the state of the labour market, labour market policy and pension regimes.

Method: An analysis of the current impact of the current recession on labour market participation rates, using the European Labour Force Survey and other existing datasets. In addition there will be a number of case examples of age management at restructuring.

Output: Research report with 5 case studies

3.1.2. Flexicurity

Flexicurity is a key element of the European Employment Strategy. It has been seen to be successful in many countries but with the current recession may be subject to some challenges and new emphasis. The proposed project is based on our understanding of what the shifting emphasis may well entail. This is based on our observation of the recent trend to more short-time working.

3.1.2.1. Developing flexicurity within the enterprise and offering transition security through the recession (new project)

Scope: According to the European Commission the second (of the four) pathways to flexicurity is termed ‘Developing flexicurity within the enterprise and offering transition security’² which ‘... would increase investments in employability to allow workers within enterprises to continuously update their capabilities and thus be better prepared for future changes in markets, production methods and organization of work. This pathway should also look beyond the actual job and the actual employer, by putting in place systems that provide safe and successful job-to-job transitions in the case of company restructurings and redundancy.’

In the current economic climate more emphasis may come to be placed on this pathway than on the others. Since the autumn of 2008, there has been a massive increase in short-time working and other such job preservation practices. In the short term these can clearly be viewed as flexicurity measures as labour costs are cut (providing flexibility for the employer) while maintaining some degree of income security for the employee. These schemes may be introduced unilaterally by the firm, stipulated in collective agreements or regulated in law or some combination of the three. Throughout, the role and contribution of the social partners will be explored in detail, since in many countries these short working time arrangements are extensively regulated by collective agreements.

² From Towards Common Principles of Flexicurity: More and better jobs through flexibility and Security. European Commission. Directorate-General for Employment, Social Affairs and Equal Opportunities Unit D.2, July 2007.

There is also the macro and industrial policy perspective – do these schemes give temporary support in difficult times to viable businesses or just prolong the life of ultimately unproductive enterprises?. For job creation and preservation it is crucial that companies remain competitive and productive in the marketplace. While this may not be researched in any detail, some regard to this issue would be useful. The crucial issue for a flexicurity pathway, however, is to determine whether or not even in a longer term perspective such schemes can be viewed as flexicurity instruments, in that they also update worker capabilities to enable successful transitions either within or outside the current workplace. The answer to this question is largely related to whether training is provided. Whether this training may enable external or internal mobility will probably mainly depend on the source of financing.

From a European policy point of view, the main contribution will be how job maintenance schemes within firms can contribute to the application of the ‘Developing flexicurity within the enterprise and offering transition security’ principle.

Objectives: To examine the extent to which short time working arrangements and other similar schemes can be viewed in this flexicurity perspective and how these schemes vary among Member States.

The project will explore best practices both in terms of short-term flexicurity (does it provide adequate income support and appropriate means of flexibility to the firm?) and in terms of a longer term pathway. It will also explore whether there are any conflicts between short and long run perspectives.

Method: Research in 2009 into the increase in short term working and other temporary job preservation schemes will provide a broad overview of current practices and some analysis of regulatory systems. In addition, in-depth case studies will provide a more detailed analysis of the more interesting cases.

Output: Research report on the national schemes with 6-7 case studies

3.1.2.2. Flexicurity in times of crisis (new project)

Scope: Flexicurity is a key element of the European Employment Strategy. Flexicurity aims to achieve both the goals of the renewed Lisbon strategy and to modernise the labour market. What is important is the integrated approach to flexicurity which requires policies that address both: flexibility of labour markets, work organisation and labour relations and employment and social security. All the four components of flexicurity need to be looked at, namely: contractual flexicurity, life long learning, active labour market policies modern social security policies. Flexicurity requires an active involvement of the social partners. Despite the emphasis on flexibility and security in the labour market this approach includes a number of other dimensions. These refer to flexibility and security within companies, such as work organisation, acquisition and upgrading of skills, careers, etc. When considering company flexicurity practices it is important to take into account also the national context of the flexicurity policies.

Objective: To assess how measures and policies defined at national level could be considered as flexicurity policies; to identify and study company cases of policies aiming at implementing balanced flexibility and security; to assess the impact of the crisis on flexicurity policies.

Method: A strategic research analysing flexicurity measures and national policies as the background for companies’ policies and social partners’ discussions, negotiations and agreements could be developed with the aim to identify and develop company case studies.

Output: Research report and case studies

3.1.3 Addressing labour shortages and mobility of labour

3.1.3.2 *The role of intermediaries in the mobility of labour in Europe (new project)*

Scope: While labour mobility is of central importance for the creation of a single market, when related to the freedom of services and free movement of workers it poses a number of social issues. Much mobility is facilitated by labour market intermediaries such as the public employment services, private temporary work agencies or recruitment firms, sub contracting firms, and occupation or sector based organisations. The proposed focus on private intermediaries is that much of the relatively unknown labour temporary mobility in Europe is conducted through these companies. A preliminary study for this project will be provided through project 3.3.2.1. The project will carefully follow and gain insights from the impending study by DG Employment on Posted Workers.

Objective: To understand the role of private intermediaries in labour mobility in Europe and thereby obtain some empirical understanding of the type of workers involved (including country of origin) and to which occupation, sector, and country this labour moves to. Another important objective of the project is to gain some understanding of why this mobility occurs, not least from the perspective of the user firm in the host country. Is it driven by skill shortages or some other factors? The potential for public employment service and private partnership in the context of the issues mentioned above will be explored.

Method: In-depth case studies of the major players in the field, including transnational temporary work agencies, recruitment and sub-contracting firms, and interviews with the key stakeholders, primarily the social partners and with public employment services. It also requires some study on the legal background.

Output: Research report

3.2. More and better jobs and greater productivity through partnership

This thematic area will place emphasis on the crisis and its impact. It will tap into 2009 work which already dealt with the subject matter, i.e. recession and social dialogue, industrial relations in the automotive sector: how can social dialogue assist in getting the sector out of the crisis. In 2010 the two observatories, EIRO and EWCO orientate their work so that they cover widely the impact of the crisis at national and European level and more focused research work is dedicated to the subject matter; examples include the research on social dialogue in times of economic crisis, the economic crisis and evolution of work and employment.

3.2.1. Industrial relations and organisation of work

The European Industrial Relations Observatory (EIRO): EIRO offers information and analysis on industrial relations developments in each Member State and at EU level. Through the Network of European Observatories EIRO will continue production of: information updates, comparative analytical reports (CARs), Annual Report on Industrial relations developments, Annual Updates (on pay, working time, etc), updating of the European Industrial Relations Dictionary and the Representativeness studies. In-house analysis of existing EIRO material will be undertaken particularly following up on developments related to the role of social dialogue in times of economic crisis and complementing other research work. The observatory will continue to respond to the EC's request for more information regarding recession and the role of social dialogue.

3.2.1.1. *Comparative analytical reports*

Scope: Topics for the 2010 comparative analytical reports have been discussed with the Advisory Committee on Industrial Relations in September 2009.

Objective: To provide European comparative analysis on relevant topics about industrial relations and organisation of work

Method: National reports and a comparative overview, using NEO correspondents and specialised contractors

Output: Information updates; four comparative analytical reports; three Annual Updates, one Annual Report

Specific in house reports are written based on information reported by the network of correspondents. An in-house report on social dialogue and recession will be delivered in early 2010.

1. Industrial relations in the health care sector, in particular the situation of nurses and carers

The health care sector has an increasing economic and social importance in the context of an ageing population in Europe. Demand for public and private services in hospitals and residential care is on the increase. Previous Eurofound research indicates that employment of carers and nurses often involves less favourable working conditions and comparatively low pay. Employment is characterised by a strong gender imbalance, while problems to attract workers to the care sector and to recruit qualified staff remain a challenge across Europe. The high transnational mobility of the workforce has implications for health care services in sending as well as receiving countries.

After initially mapping the employment situation across the EU27, the CAR will look into industrial relations in the sector with regard to social partner organisations, collective bargaining levels and social dialogue. The contribution by social partners to address the challenges in the sector, such as the supply of qualified staff to meet future demand and the provision of good working conditions will be analysed. A further aspect of the CAR will be the impact of EU-level regulation with regard to health care services, such as the Green paper on the EU Workforce for Health.

2. Effect of the information and consultation directive on industrial relations in the EU Member States five years after its transposition.

In 2008 EUROFOUND prepared a study (published beginning of 2009) on the impact of the information and consultation directive on industrial relations. In 2008, the Commission also reviewed the Directive, examining in particular its legal transposition and its impact in the EU27. Both documents noted that it was too early to evaluate the Directive's impact.

In 2010, 5 years after the deadline for the Directive's transposition is a good time to research the way the provisions of the Directive have been integrated into the industrial relations systems of the Member States, especially the ones whose legislation was substantially modified in line with the Directive's requirements.

This is even more true in the present context of crisis, where it is crucial that employee' representatives have information on the financial situation of the undertaking and timely information and consultation on employers' decisions, e.g. in case of restructuring.

The project aims at mapping the current situation regarding the reality of information and consultation at national/company level, in particular the establishment of employees representatives' bodies and their functioning within the industrial relations systems of the concerned countries. It will explore the role of social dialogue at company level in cushioning the effects of the crisis, and examine the impact of the Directive in this regard including the points of view and perspectives of the concerned stakeholders.

3. SMEs: Employment, Industrial relations and local partnerships

The current economic downturn has heavily hit SMEs in nearly all EU member states. Taking into consideration the number of enterprises and the level of employment in the SMEs, many governments have stepped in to support them. Showing high degree of adaptability during times of crisis, some enterprises have been engaged themselves into local partnerships (involving public authorities, chambers of commerce, other enterprises, social partner organisations, research centres, etc) with a view to maintain production, services and employment. This study will look into the current situation in SMEs, the outcomes of national, regional and local measures and partnerships developed to support employment and economic growth; measures introduced as a result of social dialogue; activities of social partners; the positions of public authorities and social partners.

4. Helping young workers during the crisis: Contributions by social dialogue and public services

As previous Eurofound research shows, young workers are often subject to more flexible and less secure employment conditions, including a comparatively high share of fixed-term contracts and temporary agency work. Such employment conditions as well as redundancy schemes make young workers more vulnerable during crisis situations. This is already highlighted by a steep increase in youth unemployment rates during 2009, with rates often three times higher than average unemployment. These developments imply serious consequences for both personal development as well as social cohesion.

The CAR will focus on the views and strategies of social partner organisations to tackle youth unemployment, including recent discussions on labour law issues.

It has two main objectives: First, the current situation of young workers during the crisis will be analysed across the EU27, taking into account gender aspects, educational levels and economic sectors. Secondly, the CAR will provide an overview of recent actions of social partners and governments to address the situation of young workers, such as the provision of additional apprenticeships and training opportunities both in the private and public sector, the coverage of young workers' issues in collective agreements and workplace social dialogue.

See Annex 1 for an overview of all proposed comparative analytical studies, together with other outputs from NEO. See also section 4.1 for further details about the Network of European Observatories (NEO).

3.2.1.2. Representativeness studies (new sectors and possibly updates)

Scope: The representativeness studies are strongly connected to the dynamism of sectoral social dialogue in the European Union. Eurofound has been conducting these studies since 2006, following a request by the European Commission (DG EMPL). They provide the basic information needed to set up sectoral social dialogue committees and to ensure the continuing representativeness of existing committees. After more than 10 years of EU Sectoral Social Dialogue, and 37 Committees, the Commission has requested that a process of updating be undertaken. The studies will continue to be carried out in close collaboration and consultation with the social partners of the sectors involved in the Sectoral Social Dialogue Committees concerned. After three years of experience in conducting these studies, a review of the methodology including data collection will form the basis for improvements to better respond to the needs of its stakeholders. The review will be carried out in close cooperation with the Advisory Committee on Industrial Relations.

Beside four updates of existing representativeness studies, the European Commission has requested three new representativeness studies to be carried out in 2010.

Objective: To support the European Sectoral Social Dialogue

Method: Comparative analysis comprising of an overview report and national (sectoral) reports using EIRO and in close cooperation with DG EMPL.

Output: Four overview studies and their national reports on the following sectors: Banking, Private security, Commerce, Paper. Two shorter reports on TAW and Telecommunications.

3.2.1.3. European industrial relations dictionary

Scope: The European industrial relations dictionary consists of over three hundred terms and concepts widely used in Europe in the context of Industrial Relations. The dictionary is being continuously updated, revised and extended.

Objective: To provide up-to-date descriptions of key issues in European industrial relations systems and developments

Method: Updates and extensions using the EU level NEO correspondents

Output: Continuous updates in the dictionary. Until October 2009 a total of 35 revised, updated or new entries were delivered by the EU level centre. In the course of 2010 a minimum of 24 entries will be delivered.

3.2.1.4. European Company Statute (continuation 2009)

Scope: A European company (Societas Europaea: SE) operates on a Europe-wide basis and is governed by an EC regulation directly applicable in the Member States, rather than by national law. An SE may only be registered, if an agreement for employee involvement, pursuant to Article 4 of Directive 2001/86/EC has been concluded. At the beginning of 2008, there were 113 established SEs. Out of these, only around 30 are SEs with economic activities and employees and these will be studied in this project. In 2009 the contract was awarded and a kick-off meeting held with the contractors. On 30 November 2009 an expert workshop will be organised to discuss the research design, first preliminary findings as well as the case study selection.

Objectives: To build up a first inventory, analysis and case studies of the nature and functioning of employee involvement in SEs and capture experience in companies from both a management and employees' point of view.

Method: Strategic research and eight to 10 case studies

Output: With the delivery and evaluation of the report in 2010 this project will be finalised.

3.2.1.5. Project: The national IR systems in EU: country-specific and sector-specific properties (continuation 2009)

Scope: Analytical work on industrial relations systems in a number of sectors to compare the characteristics of the national industrial relations systems and of the same sector in other EU countries. The work programme 2009 cycle includes sector reports and overview report all to be delivered in 2010 and in-house preparatory material to be delivered in 2009.

Objectives: To assess trends and developments in industrial relations at sectoral level and to explore the impact of globalisation on industrial relations of EU industries.

Method: Selected sectors (three or four) are analysed at three levels

Output: Research report

3.2.1.6. Project: Industrial relations developments in the EU, USA, Japan and in emerging economies (ongoing project, new topic)

Scope: To carry out comparative studies on industrial relations developments in the EU, Japan, and the USA. In the last few years, the studies have also been extended to Brazil, China and India. The project will look into the nature of the problems associated with the topic and principally the responses of social partners and governments as well as the industry itself. Good practices and failures will provide insights into the workings of the employers, trade unions, governments as well as of the European institutions. Every year a specific theme is chosen; in previous years, topics were wage developments, working time, temporary agency work, SMEs, migration and the automotive sector. Within the context of the 2009 work programme a tender to cover the European countries was launched to map the situation in the automotive sector, particularly how the two sides of the industry responded and the national government measures. At the same time, researchers from the countries outside Europe do a similar exercise. The results of both reports, EU and international, were presented on the 26-27 November 2009 seminar in Dublin with contributions from USA, Japan, India, China, Brazil.

The 2010 suggested topic is: *Social dialogue and conditions in the finance sector* (which links with the EIRO CAR)

Objective: To examine measures and policies undertaken by various countries in Europe and in selected countries outside Europe and the main actors (i.e. social partners, governments, institutions, etc) and their impact on work and industrial relations; to show how different systems of industrial relations go about tackling the same challenges identifying the implications. The lessons drawn can be used by social partners and governments discussing the future developments of industrial relations.

Method: Individual country studies are to be carried out first which will then be discussed at a seminar. Based on the individual reports and the debate a comparative report will be produced.

Output: National reports for EU and other global economies and an annual workshop, as well as a comparative overview report

3.2.1.7. Social dialogue in times of global economic crisis

Scope: This project will cover the European, national, territorial, local and company levels of social dialogue to identify and analyse joint measures (e.g. social pacts, concession bargaining, etc.) taken by the social partners, governments and relevant public bodies (skills councils, public employment services, training organisations) aiming to address the effects of the global economic crisis. A special focus shall be put on the company level in order to identify examples of good practice taken by management and labour to address the challenges of the economic crisis. Finally, the project will also look into the role of social partners in the definition of exit strategies, i.e. in the context when the economy will eventually start to recover.

Objectives:

- To map and analyse measures of social partnership taken to address the problems arising from the global economic crisis;
- To assess those measures in view of their effectiveness;
- To identify and analyse schemes developed by companies in cooperation with social partners and governments aimed at rescuing the companies, preventing job losses, cushioning the effects of the crisis, whilst allowing for worker up-skilling.

Method: Research will draw, inter alia, on input from EIRO information updates and their in-house analysis, the ERM CAR on 'Addressing Recession', the 2009 European Company Survey and between six to eight case studies at company level.

The project will be carried out over the next two years:

1. in the year 2010, social partners' measures undertaken to fight the impact of the crisis will be mapped and analysed. A first set of three company case studies will be carried out and an interim report will be presented;
2. in the year 2011 the project will focus on the completion of the company case studies. The final report will comprise an inventory of measures taken to tackle the crisis, an analytical report examining the impact of these measures, all the company case studies, policy pointers and examples of good practice.

Output: An interim report (2010) and a final report including an inventory of measures and the company case studies (2011).

Organisation of work, productivity and social innovations

3.2.1.8 Links between quality of work and performance (on-going project)

Scope: Through a literature review this project has explored the links between high levels of quality of work and performance and between low levels of job quality and individual employee and company performances. The conceptual framework applied refers to the innovations at the work place level, impacting the quality of work and thus individual employee's performance and company productivity. In 2010 a series of case studies exploring relationships between job quality with an extended module on social dialogue and performance will be produced in a transversal project (see 3.2.2.3). Besides, further analysis using the data of the European Company Survey (ECS) will complete the project (see 3.4.3 on the secondary analysis of the ECS data).

Objectives: To provide insight in the complex relationships between quality of work and performance at the company level examining whether any patterns in Europe exist

Method: Analysis of the 2009 European Company Survey data based on the analytical framework developed in 2009

Output: Research report

New forms of corporate ownership and governance

3.2.1.9 Project: The impact of emerging forms of inter-firm relationships on working conditions (continuation 2009)

Scope: Recent decades have seen significant changes in inter-firm relationships and organisation of economic activity. Little is known about the impact of these changes on the employment relationship and especially on working conditions. The focus is on the nature of the integration of companies in recent enlargement countries into international (ideally European-dominated) production networks.

Objectives: To identify the impact of these organisational forms on the employment relationship and working conditions

Methods: Case studies that follow changes in these inter firm relationships and draw conclusions on the impact on employment relationships and working conditions. The cases may be identified by social partners or contractors, in consultation with Eurofound.

Outputs: Case study reports on some of the types of partnerships/networks as exemplified above

3.2.1.10 Project: *The impact of private equity and hedge funds on restructuring practice, employment levels and shareholder value (continuation 2009)*

Scope: Emerging new forms of corporate ownership may have a significant impact on employment levels, restructuring practices, work organisation, productivity and innovation. Other ownership issues may arise from the implications of the internationalisation of outsourcing as international production networks become more established. The objective of the owners of this type is to create shareholder value and this aspect will also be included. New corporate ownership forms and new forms of governance have profound implications on human resources policies, working conditions, and especially on social dialogue and industrial relations. These effects will be at the centre of the research.

Objectives: To assess the impact on employment levels, restructuring practices and productivity

Method: In-depth study of the impact of these funds in 6 clusters of EU Member States

Output: Research report

Industrial relations and sustainability

3.2.1.11 *Industrial relations and sustainability*

Scope: Climate change will impact regional, sectoral and occupational employment to a different extent, and will require adaptation within and across sectors, regions and occupations. Impacts on employment are diverse. New ‘green’ jobs will appear and evolve, existing jobs will have to become ‘greener’ and some jobs will disappear. In order to mediate between and among the different interest groups, good governance within coherent strategies and a well functioning social dialogue are prerequisites for facilitating the transition towards a low-carbon economy if the EU wants to meet its energy consumption and CO₂ emission goals until 2020. Social partners are themselves part of social capital – a building block of socio-economic wealth – and have together with governments a vital role to play in accompanying the transition towards a sustainable path of development. Eurofound seeks to contribute by looking into good practice regional and company examples where social partners and governments have promoted and supported the transitional phase towards a new production/consumption model³ in a sustainable way.

Preparatory works for the project have begun in 2009 with the production of an in-house background paper, giving an overview of European policies, initiatives and studies in that field and an expert meeting to be held at the end of 2009, in which the thematic focus of the project will be narrowed further within the scope of the ‘new consumption/production model’.

Objective: To look at the role of social partners in the process at the national/sectoral/regional and company level and to learn from good practice where tripartite efforts have proven to be successful. Which factors of good governance have proven to be successful? How have policy responses been formulated in an integrated way, meeting social, economic and environmental objectives? To what extent did social partners have to mediate within different groups of members? To what extent have joint agreements between the social partners been implemented?

³ The Green-Jobs framework discusses the new consumption/production model along the following lines: durability and reparability of products (with related job implications and shifts in transportation), the transition towards a new service economy (quality of services, revenues based on quality of services and durability), rethinking of consumption (avoid excessive consumption, consumer credits, supporting labelling and taxation measures of environmentally friendly products) and a new approach to working hours (more flexibility, time instead of wage increases).

Method: Five selected case studies on the regional or company level in several countries. Cases selected should have a larger scale (some multiplier effects on other regional companies, sectors, occupations or the regional labour force) and/or be replicable to a certain extent, in order to serve as good practice for other regions/sectors.

Output: Overview report and five case studies

3.2.2. Working conditions

Exploring measures in addressing inequalities in working conditions

3.2.2.1. The European Working Conditions Observatory (EWCO): Comparative analytical reports

Scope: EWCO offers information and analysis on the issues of quality of work and employment in each Member States and on developments at EU level. Through the Network of European Correspondents three comparative analytical reports (CARs) related to working conditions will be produced.

Objective: To provide European comparative analysis on relevant topics about working conditions and quality of employment

Method: National reports and a comparative overview, using NEO

Output: Information updates; three reports with comparative analysis and their underlying national reports: Regular Survey data reports summarising the methodology and findings of a relevant survey in one of the fields of observation; one Annual Review with developments on Working Conditions at European level.

List of EWCO CARs selected after discussion in the Advisory Committee on Working Conditions in September 2009:

■ **The impact of the crisis on working conditions: Getting prepared for the upswing – qualification and training during the crisis.**

During the crisis, some employers might cut down expenses on training measures, gearing resources towards consolidation activities and some employees might be more reluctant using sabbaticals or making use of part-time arrangements for training purposes for fear of job loss.

In a more positive view the crisis however could also be seen as a window of opportunity for both sides: While maintaining employment, companies could make use of open ‘time resources’ for productivity-enhancing organisational changes by retraining their employees for new tasks, processes etc. Employees on the other hand might themselves be prone to make use of short-term-work related reductions in working hours through upskilling activities.

This CAR aims to look at government, PES and social partners activities in incentivising and supporting companies and workers to undertake **qualification and training measures within existing employment contracts**, during the recession i.e: to what extent have short-term agreements been coupled with qualification and trainings measures? Are there any major good practice company examples?

■ **Work organisation**

Recent EWCO reporting shows that new work organisation issues are emerging at company place and in a number of countries, for instance dissatisfaction expressed on ways of teamwork and the way it works, as well as new debates on work organisation. To capture these developments at an early stage it is suggested to conduct a CAR which will report

on research findings based on practice/evidence from the workplace and the recent academic and policy debate; the role/impact of the crisis on work organisation policies will be examined as well.

■ **Working Conditions of nationals with a foreign background**

The 2009 CARs ‘Migrant Workers Working Conditions’ and ‘Occupational Promotion of Migrant Workers’ have provided information on migrant workers conditions of work and possibilities of promotion in our societies. For 2010 it is suggested to expand and provide information on nationals with a foreign background (first and second generation) and their working conditions. This CAR envisages drawing a picture on the different national debates and solutions advanced; how to capture this reality of nationals with a foreign background through surveys investigations.

See Annex 1 for an overview of all proposed comparative analytical studies, together with other outputs from NEO. See also section 4.1 for further details about the Network of European Observatories (NEO).

Social dialogue and working conditions

3.2.2.2. *Project: Working conditions and social dialogue (continuation 2009)*

Scope: An analysis of the impact of employee involvement at the workplace level through worker representation bodies as a source of motivation for the workforce.

In 2010, two parts should be achieved regarding this project: the completion of the 2009 research and the 2010 follow up focusing on case studies.

2009 has first seen the achievement of the CAR on ‘WC and SD’. Then the launch of the research aimed at deepening the assessment on surveys carried out in some EU MS tackling in various ways the link between SD and WC and to examine few case studies in two sectors. With the support of an expert group, the research has delivered 6 national reports, one overview report and 18 case studies. After evaluation (May 2009), the findings of the report have been presented at the Eurofound – Czech Presidency conference in Prague. Finally, the next step aims at studying case studies in a more systematic way in three sectors. The investigation of the possible link between improvement of working conditions and social dialogue through the example of selected sectors will be continued. The various forms of workers’ representation will be analysed, as their impact on working conditions. This phase should be completed and finalised after evaluation in autumn 2010. See also 3.2.2.3.

Objectives: To analyse the impact of employee involvement as a source of motivation for the workforce

Method: Analysis and case studies: 13 case studies in 3 sectors

Output: Research report with case studies

3.2.2.3. *Working conditions, social dialogue and performance*

Scope: Building upon the findings from two projects: Working conditions and Social Dialogue (3.2.2.2) and Links between quality of work and performance (3.2.1.8), this project will explore the relationships between job quality, social dialogue and performance at company level. The promotion of social dialogue and the improvement of good working conditions are well served by demonstrating the circumstances under which they may or may not enhance performance at the workplace. The choice of sectors from which companies will be selected will be made with input from the Advisory Committee.

Objectives: There are two interrelated objectives; to examine the interrelations between social dialogue and working conditions and to analyse their impact on performance at the workplace level.

Method: Case studies

Output: Case studies and an overview report

3.2.2.4. *The economic crisis and evolution of work and employment*

Scope: Forms of work and employment are continuously evolving. Departing from the standard permanent, full time employment contractual arrangements, an increasing number of different flexible contractual and practical arrangements exist. These various forms meet in different ways some of the governments', employers' and employees' interests. This project will focus on the implications of the evolution of forms of work and employment for working conditions, quality of work and industrial relations developments in selected sectors with case studies at company level.

Objective: To analyse the most recent evolution of work and employment and different flexible working arrangements as an input for policies in the post-Lisbon strategy. To study the recent impacts of the crisis on this evolution and the related working conditions.

Method: The project will be carried out in three phases over two years.

First, existing research findings of Eurofound will be analysed, e.g. on forms of work (*selected non standard forms of work, temporary agents work, self employment*), contractual and working time arrangements; the results of the 4th European Working Conditions Survey on workers profiles (*low skilled and low qualified*) and other research (*Working conditions and social dialogue*).

The second phase of the research should look at data from the 5th EWCS, analysing working conditions in the non-standard employment contractual arrangements.

The third phase will develop case study research (*sectoral and company level*).

Output: Research with first analysis of data from the 5th EWCS and case studies report (2011).

3.3. Promotion of social inclusion and sustainable social protection

In 2007, around 79 million people (16% of the EU27 population) were at risk of poverty. Children and people aged 65 and over were more likely to live below the poverty threshold. Risks of social exclusion have evidently increased with the economic crisis, reflected in the numbers of families in debt, the growing insecurity of pensions, and the rise in unemployment rates since the beginning of 2008. In June 2009 more than 21 million people in the EU27 were unemployed – an increase of 5 million in 12 months. And youth unemployment (those aged 15–24) was twice the rate for the working age population (which was 9%). The urgency of action needed to address exclusion and economic inactivity, especially among young people, is reflected in the priorities of the EU's 'shared commitment for employment'.

The social impact of the recession is underlined in new research on measures to improve employment prospects of young people and examination of company initiatives to promote equal opportunities, through enabling reconciliation of employment with care responsibilities. EU Member States have been spending around 27% of GDP on social protection but facing enormous pressures to maintain or improve social security, health care and social services - this emphasises

the important contribution of volunteering and unpaid work. However, while the first priority is to respond to the economic crisis, the work programme maintains awareness of the longer-term challenges – with an ageing population and climate change – for the promotion of mobility, new services and social cohesion.

3.3.1. Families and working life

Public policies and company measures increasingly emphasise work-life balance as a key issue – for people at all ages. Demographic changes are generating greater pressures on public financing of social protection, and highlighting the role of families in providing care. While family life is regarded as key to quality of life, there are new challenges to be addressed in both the workplace and community.

3.3.1.1. Company initiatives to reconcile employment with care (continuation 2009 and new phase)

Scope: This project documents and analyses company initiatives to support workers who have care responsibilities for disabled children or dependent adults. A recent review of policy initiatives and company measures has demonstrated increasing debate and developments on this issue, particularly as it is an important obstacle to women's employment. In 2009 a template for case studies was applied through research in four Member States. In 2010 this will be extended to a second round of countries and made available in one database on the Eurofound web site. This project relates to project 3.1.1.4. Restructuring in a context of demographic change, as both the workforce and the general population are ageing.

Objectives: To examine the characteristics and effectiveness of agreements, flexible working arrangements and support measures in companies that enable workers with care responsibilities to reconcile employment with family life.

Method: Five company case studies in each of six countries

Output: A database with case studies of company good practices. A consolidated report with guidelines for good practice.

3.3.1.2. Quality of life in Europe: changes and challenges

Scope: During 2009 and 2010 a series of detailed analytical reports will have been prepared based upon the EQLS surveys from 2003 and 2007, also drawing upon results from other surveys such as the EWCS and the European Social Survey; a special survey including trend questions from the EQLS will be incorporated into the autumn 2009 Eurobarometer. There is now an opportunity to evaluate change over the last seven to eight years, to identify key messages for policy-makers in government and the social partners, and to debate key challenges for the post-Lisbon agenda.

Objectives: To highlight the main and emerging challenges for social and employment policies by bringing together the main elements of social change over the decade, drawing upon results from the EQLS analytical reports and other EU-wide research. This will identify key issues for policy audiences and for future research.

Method: An in-house review of social trends and developments in the EU over the period 2000–2010 followed by a conference during the Belgian Presidency.

Output: Trends paper. Conference report highlighting issues for the emerging post – Lisbon agenda. Possible web broadcast and media outreach during the conference.

3.3.2. Social, economic and cultural integration of migrants

The public and political debate around mobility and migration continues at all levels from European to the city level. There is a need for information – especially quantitative – on patterns and effects of migration, as well as more knowledge for successful integration measures.

3.3.2.1. *New mobility trends (New)*

Scope: Eurofound has a high reputation and policy profile in the area of workers' mobility. The most recent original research dates back to 2006–2007 when mobility reports for the European Commission were produced. In order to explore the scope for further original research it is proposed to organise an expert workshop during the first half of 2010. One issue to explore could be related to new trends in return and circular migration in Europe. The analysis could focus on the extent, the sectors as well as the economic and social effects. A key aspect of the seminar should also be the question how to overcome the existing knowledge gaps due to insufficient data on flows in labour markets in Europe or the measures that should be taken to keep improving access to comprehensive and up-to-date information on issues such as taxation and social security, residence requirements, social advantages and visas to facilitate trans-national mobility. Another element would be concerned with the role of intermediaries in international labour mobility, which would provide a preliminary analysis to the project on “The role of intermediaries in the mobility of labour in Europe (project 3.1.3.2)

Objectives: To assess achievements of Eurofound in the field and (identify the relevant future thematic agenda, on mobility in Europe. Through examining existing knowledge gaps a ‘market niche’ for future Eurofound activities will be defined, including consideration of emerging issues like return and circular migration.

Method: Background paper and expert seminar

Output: Two background papers to the workshop:

- on mobility trends (labour market related mobility, circular migration, etc., including US experiences)
- on trends of return migration (a preliminary analysis)

Seminar report, summarising the two background papers and findings of the seminar

3.3.2.2. *European Network of Cities for Local Integration Policy for Migrants (CLIP) (Communication of 2009 research) (Continuation of project)*

Scope: The earlier decision of the Governing Board to end further financial contributions of Eurofound in the 2010 budget is confirmed. However, communication and dissemination of the CLIP project results will still continue in 2010. The CLIP project partners are encouraged to explore other ways for future funding of the project.

With the budget for 2009, CLIP will complete the fourth and final module on ethnic entrepreneurship, with case studies in around 30 cities. The research takes into account the recent economic downturn and its impact on integration policies. It is proposed to hold an EU event on ethnic entrepreneurship – similar to the December 2009 event on intercultural dialogue – to be organised with a number of international and EU organisations, including OECD. In addition, regional seminars in Spain and Italy are being planned. The first will try to tie in with the Spanish Presidency of the EU in the first half of 2010. Further cooperation will be established with the European Integration Forum (launched on 20 April 2009) to maximise the uptake of the CLIP research results. Cost sharing with cities and other organisations will be continued.

Objectives: To communicate the findings and lessons from the CLIP research, enabling local authorities to learn from each other as regards local policies on ethnic entrepreneurship

Method: Communicating the results of the CLIP project, in collaboration with other parties

Output: case studies, overview report, policy recommendations for EU, national and local level (all for 4th module from 2009 budget). Events: two regional seminars, two CLIP meetings (one with a wider EU audience).

3.3.2.4. Analysis of the socio-economic situation of migrants (New)

Scope: Eurofound will finalise an analysis on 'quality of life in ethnic neighbourhoods in Europe' early in 2010. This is primarily based on EQLS data and includes some analysis considering migrant status or migration background. However, analysis of the socio-economic situation of migrants enters new territory, as up to now little relevant quantitative research has been done in this field. Therefore it is proposed to bring together a small group of experts to discuss quality of data, methods, and results from research in this area.

Objectives: To reflect on results of the relevant research and prepare a future study on the issue of socio-economic conditions of migrants

Method: Expert meeting and development of an in-house paper

Output: Proposal for future research and communication activities

3.3.3 Quality services in health and social welfare

The economic crisis is presenting major difficulties to sustain the scope and quality of key public services. At the same time, social welfare services play a central role in both responding to the impacts of the crisis and in developing active measures for integration into employment.

3.3.3.1 Managing debts: extent and character, access to and quality of advisory services (New)

Scope: Large numbers of people have found their incomes reduced by unemployment or short-time working. Others, particularly in Eastern Europe, have been exposed to currency fluctuations creating problems for repayments of mortgages and other loans, while some retirees have seen a marked fall in the value of their pensions. This project will examine the extent of the personal debt problem (property, utilities, credit card, loans) and identify what strategies are in place to advise and support people in debt - as part of the social services response to exclusion.

Objectives: To review the extent and character of debt problems in Member States with an expert group to identify key developments in debt management services. To illustrate financial advisory service developments and their place in an integrated response from social services at local level.

Method: Review (possible through network of national correspondents in social services), expert workshop

Output: Report prepared in-house, with proposals for relevant further research

3.3.4. Health as a factor for social inclusion

Poor health is associated with poverty and exclusion from both employment and society. Effective measures to promote a healthy and active working-age population are increasingly needed.

3.3.4.1. *Project: Active inclusion for young people with disabilities or health problems (Continuation 2009- new phase)*

Scope: An overview has been completed of existing incapacity benefits system aimed at young people of working age in the EU Member States, including data on the take-up of benefits. Results were discussed in a 2009 workshop and elaborated in a first report which identified a range of initiatives by Member State governments, social partners and public services to promote the integration to employment of these young people. The new phase of research in 2010 will gather and present information on activation measures specifically in health, social and employment services, but considering also the role of the incapacity benefits agencies, education systems and employers. This will include some evaluation of effectiveness.

Objectives:

- To investigate the main reasons for the increase in the take up of the incapacity benefits among young people
- To identify the most effective measures to promote employment for these young people
- To contribute to the European Year against Poverty and Social Exclusion
- To feed into the EU's new Disability Action Plan (the current version expires in 2010 and the European Commission is looking for evidence based future areas for action)

Method: Policy analysis, new research into selected activation measures in 7 Member States (followed by 6 further countries in 2011)

Output: Consolidated research report in 2011, with national reports in 2010

3.3.5. Intergenerational solidarity

The current Social Agenda emphasises solidarity as a distinctive social dimension of Europe. Intergenerational solidarity is essential to ensure sustainable social protection and quality of life. The older population contributes significantly in care and community development; however more opportunities are needed to promote the social inclusion of all in the elderly population.

3.3.5.1. *Measures for social inclusion of elderly (Continuation 2009-new phase)*

Scope: The participation of older people in society is largely through unpaid work in the family and community, as well as involvement in local clubs and community organisations. However exclusion, isolation and loneliness are relatively common among those beyond retirement, particularly in the upper age group. Poverty and financial insecurity are problems in themselves but also potential barriers to participation in social and community life. The focus in this project is on measures to strengthen social participation, particularly in inter-generational activities in the community. An overview of illustrative approaches was presented in the first phase of the project and research was done in 3 Member States: this phase will involve more collection of data from 5 Member States on social participation measures, particularly for volunteering by older people. It will investigate the role of the public and private sector as well as that of the NGOs and local community organisations.

Objectives: To identify effective measures for social inclusion of elderly; documenting the most serious obstacles hindering this process; investigating cross-country differences within the context of their welfare systems and revealing

cases of effective practice. To prepare contributions to the European Years for Combating Poverty and Social Exclusion in 2010 and of Volunteering in 2011.

Method: Case study research in 5 countries, workshop

Output: Consolidated report drawing on analysis of initiatives from 8 Member States (3 in 2009, 5 in 2010)

3.4. Research methods

3.4.1. Network of European Observatories (NEO)

The observatories will operate in 2010 under new contracts, with the launch of the new network of correspondents, the development of new products to link and integrate the contents of the observatories, more proactive use of the expertise offered by the network of correspondents (including in-house synthesis of their work) and greater efforts to disseminate the work of the observatories.

Eurofound will continue to monitor developments and research findings in the fields of quality of work and employment, industrial relations and company restructuring through its observatories, based on the work of a Europe-wide network of expert correspondents. The observatories, the European Industrial Relations Observatory (EIRO), the European Working Conditions Observatory (EWCO) and the European Restructuring Monitor (ERM) of the European Monitoring Centre on Change (EMCC), gather and synthesise data and compare and analyse it on a cross-national basis. They provide regular news articles, comparative analytical reports, reports on surveys and related research, periodical reviews and quantitative data, and other forms of information. The observatories are designed to identify and report on key developments in a timely way. They will continue to be central to the Foundation's efforts to monitor both the impact of the economic crisis and the response to it of economic and social actors. In addition to the scheduled work outlined below, additional reporting through the observatories will be programmed in the light of stakeholder needs and the resources available.

A new network of correspondents and experts providing analytical services will be in place from March 2010, and will produce at a minimum the following:

- four comparative analytical reports (CARs) in the field of industrial relations;
- four new studies on the representativeness of social partner organisations and possibly some updates or alternative studies;
- three CARs in the field of quality of work and employment;
- three CARs in the field of restructuring;
- an annual review of developments in the quality of work and employment, restructuring and industrial relations in Europe;
- three annual updates of quantitative data (e.g. on pay, working time, labour productivity or industrial disputes);
- inputs to the ERM Quarterly and Annual Reports.

While this work will be contracted in 2010, some of it will be completed in 2011. The correspondents will also provide articles reporting on key developments and research findings in the relevant fields, including survey reports, and will update the European Industrial Relations Dictionary. Beyond this, it is planned to improve the quality of the observatories by ensuring that timely and supplementary information and analysis is produced in the light of

developments in the fields of observation and the needs of stakeholders. Eurofound will take a more pro-active approach in programming the work of the correspondents, and undertake more in-house analysis and synthesis work on the basis of the material supplied by correspondents.

In 2010 it is intended to focus increased efforts on disseminating the work of the observatories, in particular by co-organising with the NEO correspondent, occasional meetings in Member States with the objective to make better known the work of the observatories, and the contribution of the national correspondent, to an audience of social partners, public authorities, researchers and the media. The work of the observatories (particularly EIRO) will also be promoted, as in previous years, at the European Congress of the IIRA. It is also intended to mark the fifth anniversary of the European Industrial Relations Dictionary with an appropriate event. A new product summarising key developments and findings in all three observatories will be developed.

3.4.2. The European Working Conditions Survey (EWCS)

The objectives of the working conditions surveys are to provide an overview of working conditions in order to:

1. Assess and quantify working conditions of both employees and self-employed across Europe on a harmonised basis;
2. Analyse relationships between changes/ working conditions;
3. Identify groups at risk and issues of concern/progress;
4. Monitor trends by providing homogeneous indicators on these issues.

In 2010, work on the Fourth edition of the European Working Conditions Survey will be completed, and the Fifth survey will be implemented. The questionnaire of the 5th edition of the EWCS has been reviewed and expanded in order to integrate concerns raised by the recession and to be able to expand the capacity of the survey to understand the impact of the crisis on working conditions in Europe.

3.4.2.1. Fourth EWCS

The major focus of activity will be continuing dissemination of the results from the fourth wave of the survey. The final analysis based on the fourth EWCS, the policy lessons report, will be published.

3.4.2.2. Fifth EWCS

2010 will be an important year for the EWCS as fieldwork of its fifth edition will take place during the first semester in all member States as well as the three Candidate Countries. It is expected at this stage of preparation of the project that up to 34 countries would participate in this edition of the EWCS. For the first time, some Member States will top up their national sample size. This will increase the analytical possibility of the surveys notably at national level and will also allow more benchmarking with the rest of Europe.

In line with Eurofound's commitment to improve the quality of its research, efforts have been made in the preparation of the 5th EWCS to identify the most cost effective combination of measures that would increase the quality of the data; this has resulted in adaptation of the methodology and revision of existing procedures. The sample size will match the one that was reached in the last European Quality of Life Survey.

During the first part of the year, close monitoring of the survey fieldwork will be undertaken. This is important in order to gather and provide information to stakeholders on the quality of the survey. This information will be completed and further analysed in a 'data quality assessment of the 5th EWCS' report developed in accordance with current Eurostat guidelines on quality.

The first results of the 5th survey will be analysed and disseminated in 2010. In particular it is envisaged to produce a summary of the main results as well as a report on 20 years change in working conditions that would be launched during the Belgian Presidency. It will be based on the results of the five waves of the EWCS as well as results from national working conditions surveys. It is envisaged to complete this analysis by integrating results coming from long standing national working conditions surveys as well as identifying main challenges for the future in relation to working conditions and quality of work and employment similarly based on national working conditions surveys. The descriptive report of the 5th EWCS will be prepared for publication in 2011.

3.4.3. The 2nd European Company Survey

By the end of 2009 the first results of the second European Company Survey will have been presented. The survey gathers data on two main topics:

- flexibility practices in companies
- and social dialogue practices in European workplaces through interviews with HR managers and employee representatives, when one could be identified and took part in the survey.

In 2010, dissemination of the results will continue, including the launch of the overview report, probably under the auspices of the European Parliament. Eurofound intends to organise a seminar to discuss the findings about social dialogue practices in European workplaces with a wide participation of stakeholders from a tripartite audience in Brussels.

It is also planned to organise a methodological workshop in order to prepare and contribute with peer review on analyses of the data. In the second quarter of 2010, the first secondary analyses of the surveys results will focus on the following two topics (titles are provisional):

- Modern workplaces: flexibility, work organisation and performance
- Quality of social dialogue; performance and social dialogue

Some ad-hoc papers will be written in-house to analyse some key findings of the survey, these may be based on request of stakeholders. Topics could be: working time flexibility (some trend analysis considering the two editions of the ECS), training in workplaces, variable pay and financial participation, social dialogue at workplace level.

Furthermore, Eurofound will publish a data quality assessment report to evaluate the quality of the data from the survey. It is also intended to publish the results of a validation exercise on the performance questions in the survey in five countries.

Last but not least, Eurofound will start a reflection on the development of this survey in view of the expectations and objectives, including drawing some lessons from the experience with this survey, in the framework of the overall reflection of improvement of quality of our surveys. This process will include an expert discussion with Eurofound stakeholders.

3.4.4. The European Quality of Life Survey

3.4.4.1. The second EQLS

Work on the 2nd EQLS will be completed with a conference (see 3.3.1.2).

An analysis of the autumn 2009 Eurobarometer survey which includes a sub set of EQLS question will complement the current trend analysis on quality of life before and during the recession in Europe.

3.4.4.2. The third EQLS

Activities will be undertaken to prepare the 3rd wave of the EQLS.

- Assessment of user needs through desk research and focus group meetings.
- Updating the questionnaire with a questionnaire development group.
- Methodological reviews. A methodological review shall be carried with a view to assess cost-effective measures for quality improvements. It is also envisaged to collect data and translate – where relevant – questionnaires on quality of life with a view to identifying new possible questions for the survey.

3.4.5. Information from the information centre

The information centre maintains an internal daily alert service of news items, policy papers and cutting edge research on topics relating to the work of Eurofound. For 2010 a weblog will be developed with a focus on survey-based European comparative research and on research quoting Eurofound publications. See also 4.2.

3.4.6. Harmonisation and development of surveys

This activity started in 2009, involving mostly internal work. It consists of codifying processes for developing and analysing the surveys, and of reviewing practices to ensure the transfer of best practice across the three Eurofound surveys as well as the implementation of cost effective practice whenever this is possible.

For 2010 the activities will focus on:

1. The overall cycle of the survey: a review of practices for each of Eurofound surveys will be carried with a view to ensure some harmonisation whenever this is possible and transfer of good practice.
2. Quality assurance: quality control of the data individual frameworks for quality assurance of Eurofound's surveys will be reviewed and harmonised.

3.4.7. Development of Eurofound surveys

A feasibility study of development paths for Eurofound surveys was conducted in 2008 when plans for the current four-year programme were developed. Part of this work examines possible scenarios for the development of Eurofound surveys. The results of this study originally carried within the framework of the EWCS advisory Committee meeting have been discussed with all survey-related Advisory Committees in 2009. The results of these consultations will be an input to the further discussion in the Bureau in the first half of 2010. A seminar on Eurofound surveys involving stakeholders and experts will be organised in the second half of 2010 with a view to improve their relevance to users, quality and efficiency.

The programme of work for 2010 is based clearly on the orientations defined by the four-year work programme, which requires greater focus of Eurofound's communication activities and a particular emphasis on serving specific target groups which may have been, for many reasons, less actively targeted than other groups. Against a background of reduced available resources, this requires an adaptation of current communication activities and the corresponding budgetary allocations to ensure optimum cost efficiency. Specifically, the 2010 programme of communication will see a doubling of the translation capacity, with particular emphasis on translation of short summary documents as well as access pages on the Eurofound website into all official EU languages. It will also see increased investment in the expansion of the existing contact database to significantly expand the current number of entries to ensure both a better geographical spread and the comprehensive coverage of targeted contacts within social partner organisations, governments and other selected target groups across all Member States.

In addition it will be necessary to further intensify the cooperation links built up over recent years with key partners within the EU institutions and amongst the social partners at EU and national level to exploit the benefits and efficiencies of greater cooperation and collaboration in all areas of Eurofound's communication activities. In particular, Eurofound will actively work to rapidly establish solid links with the incoming European Commission college as well as building up and consolidating its contacts with the new members of the European Parliament.

Moreover, in 2010 Eurofound will promote the in-depth findings of the second European Company Survey as well as launch the first findings of the fifth European Working Conditions Survey. The European Year of Combating Poverty and Social Exclusion will also be marked, not least by the distribution of a targeted information pack drawing together Eurofound's substantial work in this area as part of its series of information resource packs, which began in 2008.

4.1. Publishing

- The publications programme will be further streamlined in an effort to respond to the demand for increased translation of summary documents and the general trend towards greater web publishing and print-on-demand facilities. This will involve some reduction in the print publications output but greater focus on targeted outputs such as secondary analysis from the European Company Survey and the second European Quality of Life Survey, the first findings from the fifth European Working Conditions Survey and the flagship annual reviews from EIRO, EWCO and ERM.
- Aiming to expand the reach of Eurofound's findings, analysis and information across the 27 Member States and to better reach the 'unserved audience', the translation programme will double in 2010. This will include the translation into all languages of, and increased number of, short summary documents such as executive summaries as well as a significant proportion of entry level web pages, again in all official languages. The ongoing policy of providing language versions of particular publications on the basis of demand and potential impact will also continue.
- The strategy of focusing Eurofound's output better towards the users' needs will continue using the Foundation Findings series, the information resource packs and the Foundation Focus magazine as key tools to present Eurofound's findings and analysis on key topics from different perspectives in a more concise and user-friendly form.

4.2. Web based publishing and distribution

- The web publishing programme will continue as a key tool for Eurofound's communication activities, providing the foundation for information dissemination to an increasingly wide audience. Corresponding with the decline in the print programme, it is planned to increase the web publishing capacity to the degree necessary to cover the increase in translated publications. The increase in translated publications will in itself expand the web publishing programme.
- Work will take place to develop a summary electronic output highlighting the work of the observatories.

- A Eurofound information blog will be developed in an effort to maximise Eurofound's profile as a premier information resource in the key areas of European social policymaking; see also 3.4.5.
- The capture and analysis of user profiles, which will help target and channel relevant information to the right people at the right time, will continue, as will the use of RSS news feeds and e-alerts. The latter will be a key tool to inform stakeholders about the availability of translated summary documents and language versions of publications. Synchronisation of user data between the web and the Customer Relations Management system will be an important component of this targeted approach and will feed into developing future activities in this area that best respond to the users' needs.
- Translation of the entry level web pages will aim to improve access for some target groups while topic-specific navigation tools will be put in place to assist users in accessing relevant and timely information online.
- Development of web applications will include the maintenance of critical applications such as online registration and recruitment facilities, the content management and publishing system used for NEO, the updating of the existing survey mapping tool and a very limited number of flagship development projects, such as the updating of the EMCC website.
- Web content development will be maintained at the same level with limited scope for usability testing and satisfaction assessments.

4.3. Debate and events

- The streamlined events programme, which was commenced in 2009, will continue into 2010 with greater potential for savings and efficiency. With reference to 3.3.1.2 at least one high-level Eurofound conference on Quality of Life in Europe will take place during the year in addition to a series of small-scale planned seminars. Contribution and participation at high-level international events such as the European Congress of the IIRA conference in Copenhagen will continue to maintain Eurofound's profile in the key areas of its expertise. Eurofound's participation and contribution in the most relevant activities of the various EU Presidency programmes will also continue. Preparatory work in 2009 for both the Spanish and Belgian Presidencies will ensure the same level of visibility of Eurofound's work and contribution to the debates as has come to be expected.
- A series of seminars and presentations will accompany the launch of the second European Company survey both at EU and national level.
- The launch of the first findings of the fifth EWCS survey will take place under the Belgian Presidency in the second half of the year. See also 3.4.2.2.
- It is planned to harness the potential under the new NEO contracts, which will be in place in 2010, to develop improved possibilities for debate and exchange of expertise on specific themes across the network of contributors in Member States. This will further support the agreed orientation towards better serving the social partners at national level, as further described in 3.4.1.
- Preparations will begin for Forum 2011, specifically an evaluation and thorough examination of the experience to date.
- Investment in exhibition development will be reduced in 2010 albeit maintaining a constant presence at Presidency events, Employment Week, trade union and employer conferences etc as per the annual events programme.

- The Foundation Seminar Series (FSS) will continue. Using research findings from all Eurofound's research areas the seminars provide knowledge on:
 - European trends, from various fields (social, economics, demographic)
 - Views and positions of the social actors
 - Typologies of the Member States policies.

In addition they facilitate the sharing of national experiences through case examples. For the actors at national level involved in EU social policy the seminars offer opportunities to debate the national situations vis-à-vis European developments.

4.4. Stakeholder outreach

- To respond to the need to better serve the social partners and decision makers at national level, increased resources, both human and financial, will be made available to expand the current number of entries within the customer relations management system (CRM) to reflect specifically an improved coverage of stakeholders at national level. Working in close collaboration with the Governing Board representatives and other networks, Eurofound will attempt to expand its reach to include an increased number of contacts within the different target groups. Resources will also be placed into the management, maintenance and updating of these additional contacts.
- The programme of dissemination via both the Office of Publications and Eurofound's own distribution channels and ad hoc forms of targeted dissemination will be expanded in consequence of the above. Interest profiling, an integral part of the communication strategy and the CRM system, will be further exploited to ensure the best possible match between Eurofound's output and the users' needs.
- Eurofound will attempt to find a more appropriate, efficient and cost effective means of improving Eurofound's presence and effectiveness at national level following the closure of the National Outreach Centres. It is planned to begin work on a pilot project to enhance Eurofound's capacity to disseminate information at national level in 2010.
- A more formalised approach to cooperation with the network of European Commission and European Parliament Representations in the Member States will be sought based on previous experience, which has shown that members of this network are willing and able to assist Eurofound to some extent in its dissemination of information at national level with appropriate communication channels already in place.
- Targeted meetings focused on increasing the dissemination specifically of Eurofound's observatories will equally seek to better respond to the needs of the stakeholders at Member State level through direct information exchange.
- Consolidating relationships with the new European Parliament and European Commission will be a key priority during 2010 with the work of the Brussels Liaison Office key to Eurofound's activities in this sphere. Specifically, a targeted programme for new MEPs, including a programme of tailored information sessions and information packs will be continued into 2010.
- Eurofound will also continue to serve the EU-level social partners and other actors via the ongoing programme of information exchange and debate facilitated by the strengthened Brussels office.
- The Member State outreach programme, which was to act as a vehicle for responding to invitations from stakeholders to visit various countries and provide expertise and exchange experience, will continue on an invitation only basis as requested.

- The visits programme, which sees an average of one visit per week to Eurofound from social partner groups and other actors across the EU and beyond, will be intensified during 2010 and adapted to ensure a more even geographical and target group spread. Specific provisions will be made to facilitate the visits of the defined priority target groups at national level which will entail a modest increase in this budget.
- The customised report service, which provides a tailored and timely response to stakeholder requests for information on specific topics, will be continued and increased in-house resources will be made available to ensure Eurofound's capacity to meet the growing demand for this service. All reports are available online for all interest groups.
- The stakeholders' enquiry service: as part of Eurofound's drive to produce more in-depth, on-demand studies and services to the main stakeholder groups, this project allocates monies for tailor-made research studies. These can be either used to build on previous Eurofound research and/or to fill information needs of the stakeholders, so as to help them advance their own work. The objective is to contribute to social partners' and governments' work by providing timely research results in accordance with their special interest. All reports will be available for all interest groups.
- User satisfaction and stakeholder feedback of Eurofound's activities, outputs and processes will continue to be monitored via a range of tools including focus groups, user satisfaction surveys via email and print as well as interviews and analysis.

4.5. Media

- Work will continue in 2010 to both channel Eurofound's key information and findings via a wide range of media conduits across all Member States as well as monitoring and assessing the reach and potential impact of these activities. Particular efforts will be made during 2010 to exploit the potential of all media channels to communicate as well as possible with relevant priority target groups at national level.
- The production of online audiovisual material will be reduced in 2010 with money allocated only to the production of a short video new release for the fifth European Working Conditions Surveys to be used in conjunction with the overall package of information promotion and distribution as per the second EQLS launch in 2008.

5.1. Budget 2010

For 2010 an increase in the budget and in the general subsidy of about 2% is expected to be approved by the Budgetary Authority.

The revenue and expenditure totals are equal to the Draft Budget 2010 submitted by the Governing Board to the Commission in March 2009. However, Title 1 (staff and staff related cost) and Title 2 (buildings and infrastructure) were slightly reduced to accommodate the proposed project budgets of this Work Programme in Annex 1.

The budget funds of any given year are available to finance projects and tasks planned to be committed in that particular year. The financial regulation of the European bodies distinguishes between a financial commitment and the actual payment of money to a contractor. Budget funds are recorded as committed whenever Eurofound enters into a legal commitment, e.g. at the moment of signing a study contract. At this very moment, the budget funds are 'deemed to be spent'. The actual payment is mostly several months later and depends on the length of the study contract and the agreed payment schedule. This distinction between financial commitment (actually 'absorbing' the budget) and the physical payment of money leads to the situation that funds have to be carried forward to the following year if the payment does not happen during the calendar year of commitment. These 'carry-overs' are not only possible under the Financial Regulation, they are mandatory. In summary, the budget 2010 as laid out in Table 1 is the amount available for financial commitments in 2010.

The projects 2010 as listed in Annex 1 ('Budget 2010') do exactly reflect the full consumption of the 2010 budget by indicating the planned financial commitment per project; it does not reflect the actual payment. Projects listed in Annex 1 under "Budget 2009" will be finalised in 2010; however, all budgeted funds for these projects (shown in brackets) were already committed in 2009, i.e. consumed the budget 2009, and do not require any money from the 2010 budget. They are shown, therefore, purely for your information as the actual decision on them was part of the Work Programme 2009.

The money available for human resources (Title 1) still allows financing of all recruitments planned for 2009 and 2010 ensuring that all vacant posts will be filled in 2010.

Compared to 2008 and in line with the development in 2009, Eurofound strives to gear own staff resources into work areas that were contracted out in the past.

Table 1: *Revenue and expenditure budgets for 2010 (EUR)*

| EXPENDITURE | 2008 actuals | 2009 budget | 2010 estimate |
|--|-------------------|-------------------|-------------------|
| Title | | | |
| 1. Staff | 9 972 339 | 11 030 000 | 11 050 000 |
| 2. Buildings, equipment and miscellaneous, operating expenditure | 1 706 157 | 1 500 000 | 1 500 000 |
| 3. Operating expenditure | 8 036 624 | 7 530 000 | 7 890 000 |
| Total | 19 715 120 | 20 060 000 | 20 440 000 |

| REVENUE | 2008 actuals | 2009 budget | 2010 estimate |
|--------------------------|-------------------|-------------------|-------------------|
| Title | | | |
| 1. General Subsidy | 20 000 000 | 19 450 000 | 19 830 000 |
| IPA / Phare programme | 307 677 | 300 000 | 300 000 |
| 5. Miscellaneous revenue | 17 808 | pm | pm |
| 6. Revenue from services | 124 694 | 310 000 | 310 000 |
| Total | 20 450 179 | 20 060 000 | 20 440 000 |

The activity-based view in Table 2 allows a better understanding of the budget allocation into Eurofound's different work activities. It reflects not only the external operational expenditure (Title 3) but also the cost for human resources (Title 1) and infrastructure (Title 2) as assigned to the different activities.

Due to cost for the fifth European Working Conditions Survey in 2010, the total amount allocated to 'Observatories and Surveys' as well as its share of the overall budget is increasing.

As the share for 'Administration & Support' is reduced in 2010, more money can be dedicated to the core mission of Eurofound – the development and dissemination of knowledge.

Table 2: *Activity-based budget (ABB) for 2010*

| ACTIVITIES | 2009 (in thousand €) | % of total | 2010 (in thousand €) | % of total |
|--|-------------------------|-------------|-------------------------|-------------|
| Observatories and Surveys | 4,830 | 24% | 6,030 | 29% |
| Employment and Competitiveness | 1,530 | 8% | 1,470 | 7% |
| Industrial Relations and Workplace Development | 2,395 | 12% | 2,460 | 12% |
| Living Conditions and Quality of Life | 2,245 | 11% | 2,040 | 10% |
| Information and Communication | 4,700 | 23% | 4,620 | 23% |
| Administration and Support | 4,360 | 22% | 3,820 | 19% |
| Total Budget | 20,060 | 100% | 20,440 | 100% |

The above budget split leads to the following allocation of resources to the three research areas:

Table 3: *Activity-based budget for three research areas in 2010*

| RESEARCH AREAS | 2010 estimate (in thousand €) | % of total |
|--|----------------------------------|-------------|
| Employment growth and demand and supply of labour in changing labour markets | 4,275 | 21% |
| More and better jobs and higher productivity through partnership | 7,530 | 37% |
| Promotion of social inclusion and sustainable social protection | 4,585 | 22% |
| Non-allocated activities, e.g. Governing Board, Administration and Support | 4,050 | 20% |
| Total | 20,440 | 100% |

Again, financial and human resources are considered and calculated for each research area and the non-allocated activities. Furthermore, the costs of observatories and surveys as well as the information and communication activities have been allocated to the research areas.

5.2. Human resources and work processes

In 2010, Eurofound will complete the recruitments to fill all of its still vacant positions. The strategy of using own staff resources to those areas of work that directly contribute to the achievement of the strategic goals will continue. This will include:

- in-house execution of more tasks to compensate for the reduction of the funds for external contracting and development of own human resources accordingly;
- re-allocation of posts to higher value-adding tasks as positions become available;
- review of the outsourcing policy – use of fixed-term resources for some value-added analytical tasks, if that is more beneficial than external service contracts;
- training of staff to ensure skills are continuously developed;
- flexible work organisation based on multi-disciplinarily and transversal project teams;
- partnerships with other organisations to team up with expertise better found elsewhere.

The performance review and promotion processes are geared to ensure that high levels of performance can be planned and achieved, and that good performance can be rewarded. It is also recognised that staff can avail of several flexible working options that allow them to achieve an acceptable balance while at the same time making a full contribution to Eurofound's work.

Eurofound's work processes will be further streamlined and simplified where possible in order to improve efficiency and productivity of work.

Information and communication technology supports all Eurofound's activities and work organisation. A four year strategic ICT plan was developed based on the business needs and priorities defined in the 2009–2012 work programme. A number of key ICT projects defined in this plan were implemented during 2009. The plan will be reviewed and updated to reflect the requirements of the 2010 annual work programme and ICT projects will be implemented in a priority order within the limits of available resources.

The dedicated knowledge management strategy will be extended while an electronic document management system will enhance the quality and efficiency of internal document flow, as well as the potential to exploit existing and new research findings.

6

Monitoring and evaluation

Eurofound recognises evaluation as a valuable systematic tool which provides evidence for better decision making, and a tool for organisational learning and continuous improvement.

As part of the 2009–2012 four-year work programme Eurofound works with a multi-annual evaluation programme. In 2010 it will implement an action plan based on the findings of the *ex-post* evaluation of Eurofound's 2005–2008 work programme period, carried out during 2009. These findings also inform the selection of one or two projects or processes for evaluation in 2010. The *ex-post* evaluation included some cases that may merit some more in-depth evaluation questions. An example is the surveys that are being reviewed with a view to more harmonisation (see 3.4.6). Eurofound will also take note of the findings from the inter-agency evaluation, with results published end of 2009.

The quality of the data for Eurofound's Performance Monitoring System continues to be of high importance. Not only do they inform management decisions, they are also an important source of information for any evaluation exercise.

Annexes

Annex 1: List of 2010 projects, budgets and deliverables

As planned in October 2009, Bureau to be notified of changes

| Reference | Project | EURO (title 3) | Output | Planned date | Procurement procedure and launch date (quarter) |
|---|--|--------------------------------|---|--|---|
| Area 1: Employment growth and demand and supply of labour in changing labour markets | | | | | |
| 2010 budget | | | | | |
| 3.1.1.1 | The European Employment Trends monitor – European Restructuring Monitor (ERM) | NEO + In-house In-house | 12 Monthly reports to the European Commission, 4 quarterly reports and an annual ERM report. On-line data base of restructuring cases. | Monthly and quarterly. Annual report – Q3 2010 | -- |
| 3.1.1.3 | EMCC's sector studies: In-depth study on educational and training services | 80 000 | Research report 4–6 case studies + scenarios | Q4 | Open Q2 |
| 3.1.1.4 | Restructuring in recession and labour force participation | 80 000 | Research report + 5 case studies | Q4 | Open Q1 |
| 3.1.2.1 | Developing flexicurity within the enterprise and offering transition security through the recession | 30 000 + In-house | Research report + 6–7 case studies | Q4 | Negotiated Q2 |
| 3.1.2.2 | Flexicurity in times of crisis | In-house | Research report + case studies | Q4 | -- |
| 3.1.3.1 | The role of intermediaries in the mobility of labour in Europe | 80 000 | Research report | Q4 | Open Q1 |
| | Advisory Committee on Employment & Competitiveness | 7 000 | Meeting | Q1 and Q3 | -- |
| Area 2: More and better jobs and higher productivity through partnership | | | | | |
| 2009 budget | | | | | |
| 3.2.1.4 | European Company Statute | (100 000) | Report | Q4 | (2009) |
| 3.2.1.5 | The national IR systems in EU: country-specific and sector-specific properties | (175 000) | Report | Q4 | (2009) |
| 3.2.1.6 | Industrial relations developments in EU, USA, Japan and in emerging economies: IR in the automotive sector; how can SD assist a sector in crisis? | (65 000) | Report | Q2 | (2009) |
| 3.2.1.8 | Links between quality of work and performance (with 3.2.2.2.) | (100 000) | Methodological report + overview report with case studies | Q4 | (2009) |

| Reference | Project | EURO (title 3) | Output | Planned date | Procurement procedure and launch date (quarter) |
|--|--|----------------|---|-------------------------------------|---|
| Area 2: More and better jobs and higher productivity through partnership (cont'd) | | | | | |
| 2009 budget | | | | | |
| 3.2.1.9 | The impact of emerging forms of inter-firm relationships on working conditions | (80 000) | Report with case studies | Q4 | (2009) |
| 3.2.1.11 | The impact of private equity and hedge funds on restructuring practice, employment levels and shareholder value | (80 000) | Research report | Q4 | (2009) |
| 3.2.2.2 | Working conditions and social dialogue (with 3.2.1.8) | | Methodological report + overview report with case studies | Q3 | (2009) |
| 2010 budget | | | | | |
| 3.2.1.1 | Comparative analytical reports: EIRO | NEO | Overview and national reports | See schedule provided below for NEO | Specific contracts |
| 3.2.1.2 | Representativeness studies (new sectors) | NEO | Overview and national reports | See schedule provided below for NEO | Specific contracts |
| 3.2.1.3 | European IR Dictionary | NEO | Continuous update | 2010 | |
| 3.2.1.6 | Industrial relations developments in EU, USA, Japan and in emerging economies. Suggested topic: Social dialogue and conditions in the finance sector | 90 000 | National reports | Q3 | Negotiated Q3 |
| | | | Overview | Q4 | |
| | | | Seminar | Q4 | |
| 3.2.1.7 | Social dialogue in times of global economic crisis | 100 000 | Reports | Q3 2011 | Open Q1 |
| 3.2.1.8 | Links between quality of work and performance | See 3.4.3. ECS | | | |
| 3.2.1.12 | Industrial relations and sustainability | 60 000 | Report + case studies | Q4 | Open Q2 |
| 3.2.2.1 | Comparative analytical reports: EWCO | NEO | Overview and national reports | | Specific contracts |
| 3.2.2.3 | Working conditions, social dialogue and performance (based on 3.2.1.8. and 3.2.2.2) | 70 000 | Case studies | Q4 | (2009) |
| 3.2.2.4 | The economic crisis and evolution of work and employment | In house | Interim report | Q4 | -- |
| | Advisory Committee on Working Conditions | 7 000 | Meetings | Q1 and Q3 | -- |
| | Advisory Committee on Industrial Relations | 7 000 | Meetings | Q1 and Q3 | -- |

| Reference | Project | EURO (title 3) | Output | Planned date | Procurement procedure and launch date (quarter) |
|--|--|----------------|---|--------------|---|
| Area 3: Promotion of social inclusion and sustainable social protection | | | | | |
| 2009 budget | | | | | |
| 3.3.1.1 | Company initiatives to reconcile employment with care | (100 000) | Case studies | Q2 | (2009) |
| 3.3.2.2 | European Network of Cities for Local Integration Policy for Migrants (CLIP) | (300 000) | 3rd module Intercultural dialogue Overview report | Q1 | (2009) |
| | | | Good practice guide | Q1 | |
| | | | 4th module reporting Ethnic entrepreneurship 2010 – Case studies, overview report, policy recommendations | Q4 | |
| 3.3.5.1 | Measures for social inclusion of elderly | (65 000) | Overview report | Q2 | (2009) |
| 3.4.4.1 | European Quality of Life Survey (EQLS) | (100 000) | 2 reports on Ethnic neighbourhoods Volunteering | Q3 | (2009) |
| 2010 budget | | | | | |
| 3.3.1.1 | Company initiatives to reconcile employment with care | 145 000 | Case studies for web database | Q3 | Open Q1 |
| | | | In-house consolidated report and guidelines for good practice | Q4 | -- |
| 3.3.1.2 | Quality of life in Europe: changes and challenges | 30 000 | In-house background paper | Q4 | -- |
| | | | Conference report highlighting issues for the emerging post-Lisbon agenda | | Negotiated Q2 |
| 3.3.2.1 | New mobility trends | In-house | Two in-house background papers to the conference | Q3 | -- |
| | | 30 000 | Seminar report (web) | Q3 | Negotiated Q2 |
| 3.3.2.2 | European Network of Cities for Local Integration Policy for Migrants (CLIP) | 10 000 | 2 regional seminars & 2 CLIP meetings | Q1–Q4 | -- |
| 3.3.2.4 | Analysis of socio-economic situation of migrants | 10 000 | In-house background paper and proposal for future research and communication activities following expert seminar | Q2 | -- |
| 3.3.3.1 | Managing debts: extent and character, access to and quality of advisory services | 5 000 | Review paper with proposal for research (internal document) | Q3 | -- |

| Reference | Project | EURO (title 3) | Output | Planned date | Procurement procedure and launch date (quarter) | |
|---|--|------------------------|---|--|---|----|
| Area 3: Promotion of social inclusion and sustainable social protection (cont'd) | | | | | | |
| 2010 budget | | | | | | |
| 3.3.4.1 | Active inclusion for young people with disabilities or health problems | 120 000 (100k in 2011) | Consolidated overview report with national reports | National reports Q4 Consolidated report in 2011 | Open Q1 | |
| 3.3.5.1 | Measures for social inclusion of elderly | 95 000 | Consolidated report drawing on initiatives from 8 Member States | Q4 | Open Q1 | |
| | Advisory Committee on Living Conditions | 7 000 | Meetings | Q1 and 3 | -- | |
| Surveys and Observatories | | | | | | |
| 2009 budget | | | | | | |
| 3.4.1 | NEO | (1 850 000) | See schedule provided below | | (2009) | |
| 3.4.2.1 | Fourth European Working Conditions Survey (EWCS) | (28 750) | Policy lessons report 4th EWCS | Q1 | (2009) | |
| 3.4.3 | Second European Company Survey (ECS) | (180 000) | - Descriptive report - Data quality assessment report - Flexibility strategies of companies - Social dialogue at workplace level | Q1 Q4 Q3 Q4 | (2009) | |
| 3.4.4.1 | 2nd EQLS | (30 000) | Data quality assessment report See also Area 3 'Promotion of social inclusion and sustainable social protection' | Q2 | (2009) | |
| 3.4.4.2 | 5th European Working Conditions Survey (EWCS) | (30 000) | Data quality assesment report | Q3 | (2009) | |
| 2010 budget | | | | | | |
| 3.4.1 | Network of European Observatories (NEO) | 1 770 000 | See schedule provided below | | (2009) + specific contracts | |
| 3.4.2.2 | 5th European Working Conditions Survey (EWCS) | 2 130 000 | Fieldwork | Q1–2 2010 | Specific contract | |
| | | | In house | Updated website with all relevant methodological information | Q4 | -- |
| | | | | Resumé | Q4 | |
| | | | | Survey mapping tool | Q4 | -- |
| | In house + NEO network | | Trend report (60 pages) | Q4 | -- | |

| Reference | Project | EURO (title 3) | Output | Planned date | Procurement procedure and launch date (quarter) |
|---|---|---------------------------------|--------------------------------|-----------------|---|
| Information & Communication (cont'd) | | | | | |
| | Web-based publishing and distribution | | n/a | n/a | Specific contracts for Web content and Web Publishing |
| | • web content development | 50 000 | | | |
| | • web hosting | 79 000 | | | New tenders for Web hosting and Web application development |
| | • web application development | 150 000 | | | |
| | • web publishing | 70 000 | | | |
| | Stakeholder outreach | | n/a | n/a | Courier service: Open Q1 |
| | • Visitors programme | 15 000 | | | |
| | • MS outreach | 10 000 | | | |
| | • Transport and distribution | 165 000 | | | |
| | • National communication relays | 40 000 | | | National relays: Negotiated Q2 |
| | • Customised reports | In-house | | | |
| | • Strategic information and communication (user satisfaction) | 30 000 | | | Specific contract |
| | Debate and events | | n/a | n/a | Specific contracts |
| | • Exhibitions | 10 000 | | | |
| | • Flagship promotions and events | 15 000 | | | |
| | Media | | n/a | n/a | Specific contracts |
| | • Press | 51 000 | | | |
| | • Audiovisual | 20 000 | | | |
| | Advisory Committee on Information & Communication | 7 000 | n/a | n/a | |
| Other activities | | | | | |
| | Foundation Seminar Series | 140 000 | Two sessions + Two AC meetings | Sept 10/ Jan 11 | Negotiated Q2 and Q3 |
| | Advisory Committee on Foundation Seminar Series | Included in project budget cost | n/a | n/a | |
| | Enquiry service | 60 000 | Ad hoc reports | 2010 | Negotiated |
| | Evaluation Programme | 32 750 | n/a | n/a | Specific contract |
| | BLO | 10 000 | n/a | n/a | |
| | Governing Board | 190 000 | n/a | n/a | |
| | Support activities | 98 000 | n/a | n/a | |

1. NEO - Current contractual year March 2009 – February 2010

| Title | Type of product | Observatory | Expected overview delivery | Expected date publication | Other i.e. evaluation |
|--|-----------------|-------------|----------------------------|---------------------------|-----------------------|
| Deliverables published in 2009 not covered | | | | | |
| Development in social partner organisations | CAR | EIRO | 06 Oct 09 | 05 Jan 10 | |
| Legal, policy and institutional framework | CAR | ERM | 06 Oct 09 | 05 Jan 10 | |
| Individual disputes | CAR | EIRO | 13 Oct 09 | 15 Jan 10 | |
| Information and consultation of workers on health and safety | CAR | EWCO | 03 Nov 09 | 16 Jan 10 | |
| Central Administration | REP | EIRO | 01 Dec 09 | | Feb 2010 |
| Absence from work | CAR | EWCO | 24 Nov 09 | 06 Feb 10 | |
| Gender gap | CAR | EIRO | 08 Dec 09 | 11 March 10 | |
| Survey terminology (ad hoc) | CAR | EWCO | 26 Jan 10 | not for publication | |
| Education | REP | EIRO | 15 Dec 09 | | Feb 2010 |
| Stress | CAR | EWCO | 20 Apr 10 | 17 Jul 10 | |
| Annual Review 2009 | | EIRO | 13 Apr 10 | 08 July 10 | |
| Annual Update on Pay | | EIRO | tbc | tbc | |
| Annual Update on Working Time | | EIRO | tbc | tbc | |
| Annual Update 3 | | EIRO | tbc | tbc | |
| Annual Review of Working Conditions in Europe | | EWCO | March 2010 | April 2010 | |
| IR in the automotive sector in the EU and other global economies | | EIRO | March 2010 | April 2010 | |

2. NEO – Expected publication and/or evaluation (contractual year March 2010 – February 2011)

| Title | Type of product | Observatory | Expected publication/evaluation |
|--|-----------------|-------------|---------------------------------|
| Joint public-private partnership initiatives at local level to cope with the effects of the recession* | CAR | ERM | Q3 2010 |
| Availability and effectiveness of public restructuring instruments | CAR | ERM | Q 4 2010 |
| Emerging forms of entrepreneurship | CAR | ERM | Q 4 2010 |
| Industrial relations in the care sector | CAR | EIRO | Q3 2010 |
| Information and consultation directive | CAR | EIRO | Q 4 2010 |
| Helping young workers during the crisis | CAR | EIRO | Q 1 2011 |
| SMEs and employment* | CAR | EIRO | Q 1 2011 |
| Commerce | Rep study | EIRO | Q 4 2010 |
| Banking | Rep study | EIRO | Q 2 2011 |
| Private security | Rep study | EIRO | Q 2 2011 |
| Paper and pulp | Rep study | EIRO | Q 2 2011 |
| REP study Sector E | Rep study | EIRO | Q 3 2011 |
| REP study Sector F | Rep study | EIRO | Q 3 2011 |
| REP study Sector G | Rep study | EIRO | Q 4 2011 |

2. NEO – Expected publication and/or evaluation (contractual year March 2010 – February 2011) (cont'd)

| Title | Type of product | Observatory | Expected publication/evaluation |
|---|-----------------|-------------|---------------------------------|
| 20 Years of Working Conditions | CAR | EWCO | Q3 2010 |
| Impact of crisis/preparing for upswing - training | CAR | EWCO | Q 1 2011 |
| Working conditions of nationals with foreign background | CAR | EWCO | Q 1 2011 |
| Work Organisation | CAR | EWCO | Q 2 2011 |
| Electronic newsletter | | NEO | to be determined |
| IUs | | EIRO/EWCO | continuous |
| Fact sheets | | ERM | continuous |
| Annual review* | | All | Q1 2011 |
| Survey data report | | All | 7 according to schedule |

Annex 2: Eurofound risk register

| Description of key risks | Actions | Deadline |
|--|--|---|
| The 2010 work programme aims to deliver recession relevant research findings in a timely manner based on more than 20 projects and the work of the Network of European correspondents. Project-based reporting leads to scattered communication which risks lack of visibility and impact. | Transversal communication plan based on focused and customised products, and targeted information packs | December 2009 |
| Lack of resources (budget and time) for ad hoc requests during the implementation period of the work programme risks: <ul style="list-style-type: none"> • missing the opportunity of researching emerging issues • adversely affecting stakeholder relationships | Earmark budget and time for ad hoc work Ensure streamlining of responses to such requests using the identified procedure of the customised report and enquiry service | Throughout the programme period |
| No sufficient budgetary means to cover all EU Member States in research projects risks reducing the EU-wide relevance of Eurofound's research and ultimately its comparative character as well as visibility at national level. | Specify coverage of the EU27 based on meaningful geographical clusters or other common characteristics as a requirement in tender specifications | Applicable to every relevant tender procedure |
| Continued questioning of the quality of its methodology risks reduced impact of the European Restructuring Monitor and as a consequence Eurofound's image of delivering high quality research. | Continued improvement of quality and clarity about what the ERM can and cannot do (see project description in 3.1.1.1.) | Oct 2009 |
| No clarity about the handover of CLIP network during 2010 while the research is being completed and results are to be communicated risks the loss of Eurofound's investment in this project. | Actions as discussed in the Advisory Committee September meeting of Living Conditions and Quality of Life | Spring 2010 |
| If efforts to strengthen the stakeholder relationships (specifically at national level) are considered to not be sufficient it may hinder further strengthening of the stakeholder relationships. | Agree targets and methodology for collecting data and report regularly during 2010 as part of the Eurofound's Performance Monitoring System (EPMS) | Oct 2009 |
| Integration issues due to high proportion of new staff risks operational excellence of internal work processes which may impact the timely delivery of the work programme. | Short- and medium-term Eurofound-wide induction and training programme | Already started |

