

# **Work Programme of the ETUI**

**1 April 2017 – 31 March 2018**

**etui.**

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## GENERAL INTRODUCTION

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

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

### Main activities of the ETUI

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

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

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

Establishing itself as an important European knowledge and competence centre means that the ETUI has to be a network-steering body that can organise and coordinate numerous academic and trade union activities, whilst simultaneously showing and drawing on its competence for critical analysis as well as for organising conferences, meetings, training activities and workshops in the EU28.

In 2017-2018, in accordance with the ETUI statutes, its **main activities** will include:

1. monitoring major European developments of importance to workers and the European trade union movement;
2. collecting, storing and providing data and information on policy areas of relevance to the European trade union movement in its capacity as an actor in the European integration process;
3. conducting multidisciplinary and intellectually independent research on topics of importance to the European trade union movement and other social actors, and publishing the results of this research in books, working papers, journals, reports, guides, policy briefs and background analyses;

4. disseminating the results of this work at conferences and seminars;
5. establishing European networks of researchers, research bodies and universities in the field of industrial relations;
6. coordinating European networks of health and safety experts in a range of fields including technical standards, ergonomics, gender, psycho-social risks, nanomaterials and chemicals;
7. representing and supporting the European trade union movement in the field of health and safety in regard to European Union (EU) strategy, legislative acts and their implementation, collective agreements and technical standards;
8. improving cooperation between the European trade union movement and academic institutions, research institutes, EU specialised agencies and preventive and enforcement agencies;
9. providing training programmes reflecting the needs of the ETUC and its affiliated organisations;
10. promoting new validated training systems for strategically targeted groups which will renew and update the trade union movement and challenge the needs and demands of the members and organisations;
11. improving the European trade union education community, which provides a forum for the strategic development of trade union education in Europe, and reinforcing the networks required for core and strategic activities and expertise;
12. adding a European dimension to national trade union education initiatives by providing basic and ongoing European training programmes for trainers and producing training resources;
13. providing expertise and advisory services for the design and delivery of European trade union education projects.

Research and education activities form the basis for the development of knowledge, expertise, technical support, policy advice and common identity projects. The research and expertise dimension of the ETUI is fundamental to the fulfilment of its mission, and this aspect of its work will be carried out in ways that also help to build bridges between the trade union and academic worlds. For without high-quality educational activities, trade unionists will be unable to develop a common European understanding, a strong European trade union identity and joint European strategies.

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

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

The introduction of a form of multi-annual programming has enabled the provision of training courses particularly suited to trade union officers with European-level responsibilities.

In recent years, new pedagogical pathways have been developed and implemented, thus adding skills, ensuring consistency and systematisation, and also consolidating the training of trade union representatives.

The ETUI will help to promote EU initiatives through exchanges of information, sensitisation campaigns, reports, pamphlets and books, and then to implement such initiatives by stimulating and developing networks of trade union experts and representatives of the trade union organisations involved. The provision of expert advice will remain part of the European trade union movement's efforts aimed at enlightening, educating and protecting workers and improving working conditions.

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

A new **Foresight Unit** ('*cellule prospective*') was set up in 2016 to examine new and future societal challenges and trends likely to affect the future of trade unionism and the ETUI's *modus operandi*.

The first of these challenges was already addressed in 2016. It deals with the multi-faceted impact of digitalisation on future jobs and the nature of work. The second is the need for the social-ecological transition linked to climate change and the energy revolution.

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

In this work programme, the following conditions for subcontracting and financial support apply as stipulated in the framework partnership agreement VS/2014/0106, Annex II, Part B (the eligibility criteria). A proposal will be considered eligible only if:

- a) its content corresponds, wholly or in part, to the topic description in relation to which it is submitted, in the relevant part of the work programme (i.e. Part A or Part B);
- b) it complies with the eligibility conditions set out in the framework partnership agreement VS/2014/0106, Annex II, Part B.

## **Main priorities 2017-2018**

The ETUI defined its research and training activities based on the five priorities agreed at the Executive Committee meeting on 14-15 December 2016 and in consultation with the ETUC Secretariat, taking account of the European Commission's 2017 work programme.

The **political context** of the ETUI's work is becoming **increasingly challenging**. Although some **economic recovery** has occurred in much of the EU, the upturn remains hesitant and conjectural, particularly in view of the further uncertainty caused by the UK decision to leave the EU and the 'America first' ideology of the new incoming US administration. Despite a verbal consensus on the need for a new policy direction, there are strong indications that the EU is losing the trust of its citizens and that both the European integration project and democracy within the Union are in serious danger.

The Commission led by Jean-Claude Juncker has sent out interesting signals about **greater focus on social justice and on tackling the jobs crisis**. The period 2016-2017 saw the public consultation on the European Pillar of Social Rights, the 'new start for Social Dialogue', closer involvement of the social partners in the European Semester, and the flexibilisation of budget constraints. The jury is still out on exactly how these developments will help to build consensus on the new direction to take.

The Commission also started reflecting on a vision for the **future of the European Union**. This thought process will lead to a White Paper, scheduled to be presented in March 2017, in time for the 60th anniversary of the Treaties of Rome. Furthermore, the Commission will address the issue of how to strengthen and reform the Economic and Monetary Union. In October 2016 the ETUC's Executive Committee adopted a paper underlining the need for a new Pact for the Future of Europe, based on prosperity, social justice and democracy and created a trade union Platform for the Future of Europe. This debate on Europe's future will also be prioritised in the ETUI's work, as it will be the main theme taken up by both the ETUC and the European institutions.

The five priorities laid down in the 2016-2017 work programme have been amended, to reflect the fresh urgency of finding ways of strengthening economic recovery and envisaging a new Future for Europe. These priorities are set out in detail below.

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

Particular attention will be paid to the **digitalisation of the economy and its potential and real impact on the labour market and forms of employment**. Building on the evaluation of the previous work programme, several projects will pave the way for providing evidence on which trade unions can base their analysis. The areas covered by these projects include, among others, how European Works Councils (EWCs) engage with digitalisation; how multinational companies (MNCs) work thoughts on digitalisation into the strategies they devise; the employment rights of crowdworkers; how widespread crowdworking is across Central and Eastern Europe (CEE); and whether the current machine regulation on health and safety is fit for robotisation. Hence, digitalisation is one of the emerging key issues with which the ETUI is engaging Europe-wide and in a multidimensional manner, thereby adding genuine European added-value.

The following paragraphs set out some of the main ideas which will be developed in the context of the ETUI's priorities.

## **Policies and tools for the future of Europe**

*Rationale:* Although there are growing indications of economic recovery, the EU is facing political challenges, whilst still having to deal with the consequences of previous years of crisis management. With Brexit, the new US administration and the rise of populists and 'illiberal democrats' in Europe, the European project itself seems under threat. The ETUI will continue to monitor these developments on both the European and national levels and analyse the results and effectiveness of policies. This first priority remains focused on new economic governance and policies, but will also include more research and training on a new vision for the future of the European Union, linked to the Commission's upcoming White Paper, the initiative on the European Social Pillar, the outcome of various REFIT exercises (in particular with respect to occupational health and safety) and the possibility of a new Convention.

*Main issues to be dealt with:*

- providing analysis and support in the debate on the future of Europe, in particular focusing on the European Pillar of Social Rights, initiatives on the Future of Europe and the outcomes of REFIT exercises;
- monitoring the European Semester: tracking and analysing its processes and outcomes, focusing in particular on the three pillars of investment, consolidation and structural reforms and paying special attention to continuous monitoring of the mix of monetary, fiscal and supply-side policies in the EU Member States and to policy developments in the 'new' Member States in Central and Eastern Europe;
- monitoring (the effects of the crisis on) social legislation, i.e. the impact of fiscal austerity on welfare states, labour markets and employment policies;
- a Reforms Watch service to track the main developments in industrial relations, labour reforms and pensions, among other things;
- monitoring collective bargaining (to map changes in industrial relations), research on pay inequality, different ways of coordinating collective bargaining, and European trade union organisations' capacity for action;
- investigating and identifying structural reforms for a sustainable recovery.

## **Workers' participation and industrial relations**

*Rationale:* Worker participation and industrial relations (IR) are integral to European integration at the national, sectoral and company levels. Ongoing integration of the European market is being accompanied by a parallel decentralisation and erosion of sectoral and national IR institutions. It has become clear that the key to successfully meeting the challenges of simultaneous processes of Europeanising and decentralising IR at company level lies in strategically combining the various instruments for information, consultation and Board-level participation and linking them to more general collective bargaining structures. This linkage involves varying constellations of actors and instruments across borders, from the local to the national and European levels. Consequently, new sources of influence and coordination emerge, while others disappear or become weakened. In its work, the European Worker Participation Competence Centre (EWPCC) will continue to explore and promote strategic and anticipatory interlinking of these processes, actors and levels.

### *Main issues to be dealt with :*

- monitoring and supporting the European Social Dialogue: fostering social dialogue and monitoring texts and agreements;
- monitoring collective bargaining in Europe: issuing a collective bargaining newsletter and keeping an archive, keeping tabs on the situation of collective bargaining institutions and processes in the EU28;
- the SEEurope network: the Europeanisation of information, consultation and Board-level participation;
- the GOODCORP network: monitoring company law and corporate governance particularly with a view to understanding the link with workers' rights and developing alternatives to the stakeholder value approach;
- understanding the changing contexts of multinational corporations: standardisation in MNCs and its impact on worker participation; restructuring and MNCs: digitalisation and the fragmentation of value chains;
- understanding and supporting workers' representatives in European Companies (SEs) and European Works Councils (EWCs): analysing agreements and practice, providing evidence and analysis for the ongoing review of the 2009 Recast EWC Directive; the EWC Data Service and SE Database: collecting and translating agreements and analysing their content; preparing for a large-scale survey of EWC and SE-WC members;
- understanding Board-level employee representation (BLER): adopting a country-specific approach to the influence, networking and articulation of BLERs; Europeanising industrial relations through BLER: taking an actor-centred approach;
- EWPC Conference 2017-2018: responding to multinational company strategies;
- improved monitoring of the phenomenon of company mobility in the EU and its impact on worker participation institutions;
- continuing and expanding the knowledge website 'worker-participation.eu' to include EWC court cases, the election and protection of Board-level employee representatives, and health and safety representation;
- developing practitioner-oriented material.

### **Sustainable development and industrial policy**

*Rationale:* Sustainable development was high on the European and national agendas before the crisis set in, but now seems to have slipped down, with increasing priority now being given to unregulated business development. Initiatives are being taken that will affect how the European Union shapes its future in a resource-scarce society and based on a re-regulatory agenda that decreases safety and increases social inequality. The re-industrialisation of Europe is advocated as a precondition for getting Europe back on track to sustainable growth, and the European agenda of the Digital Union is key in this respect. Close adherence to the agenda, combining issues of sustainability with industrial development, digitalisation and policy, is important for understanding and assessing the implications for trade unions and workers in the European Union. The implementation of decisions taken at the Paris COP21 meeting (21st Session of the

Conference of the Parties) in December 2015 is decisive in this respect. In addition, the revision of the Carcinogens and Mutagens Directive and the ongoing development of REACH are the focus of great attention, as they will shape the handling of major occupational health and safety hazards.

*Main issues to be dealt with:*

- monitoring EU policies on sustainable development, and the implications of Member States' policies under the impact of austerity, pointing out gaps between targets and reality;
- ongoing mapping of employment effects, focusing on social and employment risks (in sectors); quality of employment and working conditions in low-carbon sectors; sectoral analyses highlighting controversial issues (e.g. coal and nuclear energy, biofuels, extreme energy); further development of the sustainable company approach and a stakeholder-oriented form of corporate governance (i.e. one that includes trade unions and the workforce);
- conceptualising and identifying best practices with regard to a 'Just Transition', in particular monitoring and following up the request by the ETUC and the European Parliament for the establishment of a Just Transition Fund;
- analysing and gaining a closer understanding of the future of work with respect to digitalisation and climate change;
- increasing the capacity of trade unions to influence scientific and technological developments as well as emerging risks at work based on a social and safety assessment and an open debate on their impact on employment and society;
- proffering analysis and expertise to highlight occupational health and safety concerns when reviewing European directives, in particular on carcinogens and mutagens, and REACH;
- providing expertise and tools to include workers' health and safety concerns in standardisation;
- continuing to explore the contribution of worker participation to the sustainability debate.

## **Working conditions and job quality**

*Rationale:* The economic crisis and the reinforced economic governance system have been associated with changes in employment levels, working conditions and labour law, leading to a weakening of workers' rights and challenging the role of trade unions as agents for raising social standards. It is therefore essential to monitor employment levels and the types of jobs created with respect to the associated pay, stability of work organisation, health and safety issues and other relevant factors.

*Main issues to be dealt with include:*

- conducting research on the future of work in the light of digitalisation of the economy;
- updating and developing job-quality indicators that can be applied across countries to monitor developments;

- understanding the link between the growth of precarious employment and the deterioration of working conditions; studying the implications of ageing, gender, work-related psychosocial risk factors and musculoskeletal disorders (MSDs);
- understanding the socio-economic impact of integrating EU-external migrants and refugees;
- monitoring and assessing the actions arising from the ex-post evaluation of the comprehensive EU Health and Safety acquis, and the impacts of the Better Regulation on the EU's 24 health and safety directives;
- understanding labour inspectorate challenges regarding occupational health and safety and finding better ways of collaborating with unions; evaluating and influencing the continuation of the European strategy on occupational health and safety in a bid to bolster the culture of occupational health prevention and reduce social inequality;
- monitoring and understanding implications of the management of the economic crisis for job quality and the labour market in general (including wages);
- supporting the process of European Social Dialogue and its implementation;
- monitoring labour law reforms and assessing the potential implications for workers and trade unions;
- assessing the European-level instruments designed to counter the drive towards lowering social standards at Member State level, including fundamental rights and helping to develop social benchmarks for upward convergence;
- continuing to assess developments in the sectoral social dialogue;
- stepping up cooperation with EU Member States and candidate countries on the role of social dialogue in health and safety, the links between other pieces of legislation and workers' rights (a free market and competition vs. fundamental collective rights, market regulation and working conditions);
- understanding the role of soft law and new ways of regulating complex issues like technical standards in various sectors (e.g. chemicals, nanotechnologies, nanomaterials and ergonomics) and the challenges they pose to trade unions.

## **Trade union renewal**

### **Trade union renewal**

*Rationale:* Falling membership continues to be one of the main challenges to trade unions across Europe. It is essential that trade unions across Europe gain a clearer understanding of the reasons underlying dwindling membership and share their experiences and best practices with each other. The potential of joining forces across borders in trade union renewal initiatives designed to keep pace with European integration should be explored. These questions should be viewed in the light of the ongoing crisis and deregulation of the labour market.

*Main issues to be dealt with include:*

- organising and recruiting as well as adopting retention strategies in Europe to attract and organise younger and atypical workers and connect with 'millennials';
- assessing the potential of a specifically European 'organising model';

- pinpointing and understanding current and long-term trends in strike activity and collective action;
- exploring trade union financing;
- sharing experiences and best practices across ETUC affiliates; conducting pilot projects on innovative cross-border recruitment and organising campaigns;
- devising and implementing innovative strategies for trade union development in Central and Eastern Europe.

## **Consolidating collaboration and cooperation**

Establishing, running, maintaining and contributing to networks are core areas of the ETUI's work. Evaluations by the ETUI have underscored the need to consolidate existing networks and learning across networks. Work on this will continue and, in some areas the associated efforts will be intensified.

Some of these networks relate to specific topics, e.g. the European Company (SEEUROPE), corporate governance (GOODCORP), Transnational Trade Union Rights (TTURs), but there are also four trade union expert networks devoted to health and safety (covering the safety of machinery, chemicals and nanomaterials, psycho-social risks and gender aspects of health and safety).

Other networks are more structural and of a more strategic nature, e.g. Trade-Union-related Research Institutes (TURI), and Trade-Union-related Economists (TUREC), form part of a dissemination strategy, like the Global Union Research Network (GURN), or are concerned with dissemination, e.g. re Horizon 2020 projects.

Since network-related business is core to the ETUI's activities, areas that will continue to receive close attention are reinforcing collaboration between and with TURIs and shoring up the capacity of the trade union trainers' network. The ETUI will support the TURI network by strengthening ongoing projects and, if need be, initiating new initiatives for collaboration between the TURI members. Wage developments and the social dimension of the European Union are another two areas of particular importance that will continue to be explored. During the reference period, the network's next annual conference will take place in London and a conference on digitalisation will be co-organised with IRES (France) in Brussels. Overall, the work done by the network will also be further disseminated and promoted through an improved TURI website and the use of social media (e.g. TURI twitter account).

The ETUI will also cooperate to consolidate the new TUREC network, which aims to build and maintain links between European trade-union-related economists in an effort to enhance cooperation between them and pool institutional resources in the production of research that supports, reinforces and stimulates the European labour movement. The main activity planned for this budget year is the organisation of the second annual meeting of the network in Brussels, most likely in September 2017.

Annual events organised with similar research bodies and networks from the US and Canada, e.g. Cornell University and the CRIMT net, also ensure exchanges of information on issues of strategic relevance to trade unions on both sides of the Atlantic. Only eligible costs will be incurred within the framework of the work programme.

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

The ETUI will likewise continue to organise events and projects with affiliates, related organisations and universities across the European Union, e.g. the 'European Panel' together with the Hans Böckler Foundation (HBS), and the General Workers Union (GWU) in Malta, which has the Presidency of the European Council during the first half of 2017. In essence, the ETUI's collaboration with other institutions and organisations means that it serves as a multiplier, its efforts bearing fruit for all parties.

The Institute also concluded a memorandum of understanding with the Institut der Deutschen Wirtschaft (IDW) in Cologne (the think tank of the German employers). One of the first activities will be a joint special roundtable and workshop in the second quarter of 2017 on '*Digitisation of Work – Challenges for Social Partners and legislators*'.

## Communication strategy

The ETUI continues to strengthen its communication policy by having **targeted approaches applicable to its different target audiences**. The main target audiences are European and national trade union (con)federations, but also academic institutes, networks and researchers, European and national policymakers, economic decision-makers, business leaders and NGOs, as well as specialised press and social media (bloggers) interested in developments in areas related to the social dimension of European integration.

In 2017-2018, the emphasis will continue to be placed on **better measurement of the impact of increased physical and online dissemination** of ETUI research publications. The new Publications Management (PUMA) system will improve the planning and tracking of the wider dissemination and impact of our publications and will be further refined in 2017-18 to improve the reporting process.

To improve the ETUI's outreach to non-academic audiences, the Institute will continue to produce short (1- or 2-page), easily digestible summaries (PubAlerts) of our research publications.

Our main channels of dissemination are one general and several topical electronic **newsletters**, use of the web and social media for high-level public events in Brussels and (occasionally) Member States, and carefully targeted postal dispatches of ETUI material.

A great deal of **knowledge is also disseminated** when ETUI researchers are given the opportunity to speak at network meetings or conferences, either in Brussels or abroad. Furthermore, the ETUI's training courses for trade unions make use of most of the publications produced by its research department. A renewal of the ETUI's education department web pages will raise the profile of the Institute's research output and training courses.

ETUI researchers also regularly produce or contribute to **external (non-ETUI) studies** which build on work carried out for the ETUI itself. These external publications will be given greater visibility on the ETUI website and on social media.

## Websites, social media and audiovisual services

The number of visits to the ETUI's general website remained stable in 2016-17. More than 450,000 pages were viewed over the whole year by more than 100,000 users. The worker participation website had 400,000,000 page views over the whole year from around 150,000 unique users. Altogether, all the different ETUI web services (including also the EWADB website and the EWC training site) receive more than 1 million page views per year. The addition of new services ('Reforms Watch', a dedicated 'Facts and Figures' section, redesigned training pages) and improved navigation should increase website visits by 10-15% over the next budget year.

Social media impact also grew considerably, with the number of Twitter followers doubling to more than 4,500 users. The objective for this budget year is to reach more than 6,000 followers by the end of March 2018.

Several new **web project developments** were started in 2016-2017 to improve the impact of our work. They will be finalised in the new budget year.

The **education department section** on the ETUI's general website is currently being redesigned, a Facts and Figures section containing more visual and graphical presentations of the results of ETUI research is planned. The analytical work planned to bring some ETUI web content to mobile platforms was postponed, but will be continued in 2017-18. A new web service was created (integrated into the general ETUI website) to monitor and aggregate, by country and by subject, the latest information (news, research, etc.) on recent developments in labour markets and labour law, pension reforms and industrial relations. This '**Reforms Watch**' started in December 2016 and will continue in 2017-18.

The ComPub team will continue its intensive use of **social media** (Twitter, LinkedIn, Slideshare, Storify dossiers) in an effort to alert the ETUI's target audiences to our activities and research results. The use of **data visualisation and infographics** will increase, and more events will be video-recorded for viewing on the ETUI YouTube channel. Some of our major events will be live-streamed.

More and more ETUI researchers are providing information on their work by contributing to major **blogging** sites, such as the Social Europe Journal and the blogs published by the London School of Economics. The successful internet service 'Medium' is another new online platform where articles based on their research are published.

Researchers will also remain available for **interviews with the European press** on topics falling within their range of expertise. They have received – and will continue to receive – special training on how to speak to the media and give video or radio interviews.

## **Events**

The successful '**Monthly Forum**' will be continued. These specialised debates held in Brussels focus on the ETUI's different priorities and other topical issues. External speakers and ETUI researchers use these two-hour events to present the results of their work to trade union representatives and other EU stakeholders.

Due to the growing success of these lunchtime events over the past year, we will continue to organise more of them, including in the form of ETUI symposiums, book presentations and brown-bag lunches.

A new type of discussion, dubbed '**Foresight debates**', will be organised to disseminate and discuss the results of work done by the new Foresight Unit. These debates will be less academic and more interactive.

In addition, a number of **large-scale public events** on the work programme's main priorities will take place during the year, highlighting some of the ETUI's findings on issues like worker participation, working conditions, occupational cancers, growth, etc. The ETUI aims to collaborate with other partners when organising these events, to increase their visibility and extend their reach.

## **Publications**

The ETUI has eight **categories of publications**. Each category has precise aims in terms of communication and target audience.

## 1. Newsletters

Specific newsletters that are designed for a more specialised and clearly identified audience will continue to be sent out electronically. These currently cover the following issues: collective bargaining; health and safety at work; worker participation; foresight thinking. A new general newsletter started in 2014 sends regular alerts of activities and publications to over 10,000 contacts.

## 2. Policy Briefs

Policy Briefs aim to introduce and showcase a line of argument or key issue in a policy-oriented manner, but always on the basis of in-depth analysis. Policy Briefs are read by a broad, non-specialised audience as well as by decision-makers and members of European think tanks. Policy Briefs are published in English, though specific issues may sometimes be published in other languages, too. Policy Briefs are usually distributed by electronic means.

In 2017, the new Foresight Unit will launch a specific briefing note entitled '**Foresight Brief**', focused on strategic thinking about the future challenges for the world of work (also available in French under the title *Notes de prospectives*). The publication of 4-5 issues of this "Foresight Brief" is planned during the period of the work programme 2017-2018.

## 3. Guides

This category covers documents that are designed for trainers to support their work or that aim to outline a question or issue in a clear and simple manner.

## 4. Working Papers

Working Papers present research that is either still ongoing or has recently been concluded. These papers are aimed primarily at academics, think tanks, European institutions, trade union organisations and non-governmental organisations.

## 5. Reports

Reports are more technical documents aimed at readers with a specialised knowledge of the area in question. In some cases, they serve to present the results of conferences.

## 6. Books

Depending on the topic and objective of publication, books are aimed either at specialists or at a broader readership. They also provide an opportunity to focus on activities conducted by ETUI research networks. Books demonstrate the ETUI's academic quality and dependability in relation to issues of key importance to the labour movement. Books may contain the findings of internal ETUI research projects, the results of external research network projects, or be regular annual publications on specific issues, e.g. *Social Developments in Europe* and *Benchmarking Working Europe*.

## 7. Background analysis

This more recently launched series is intended to explain and supply background information on recent EU policies (e.g. country-specific recommendations in the context of the new European governance). They are online products that can be downloaded from the ETUI website.

## 8. The journals *Transfer*, *SEER* and *HesaMag*

***Transfer*** – European Review of Labour and Research – has been published, since 2010, by SAGE, and the journal will continue to be published and distributed by this publishing house. Meanwhile, the ETUI remains responsible for the journal's general editorial line, contents and meetings of its editorial committee.

In 2017-2018, two thematic issues of *Transfer* will focus on '*Digitalisation and the labour market*' and '*Reforming the public-private pension mix*' respectively. In addition, as in other years, one issue will be a non-thematic 'open' issue publishing a selection of articles submitted to the journal and accepted for publication. A workshop will be organised to take forward the issue planned for 2-2018 on 'Trade unions and the polity'.

The *South East Europe Review on labour and social affairs (SEER)* is a journal published by the ETUI in cooperation with Nomos Publishing House. The ETUI has a contract with Nomos for the production and dissemination of two issues per year. The aim of the journal is to serve as a platform for exchanges between academics and trade unionists in the regions of South East Europe and the European Neighbourhood Policy region. Only eligible costs are incurred. The journal enjoys a stable presence in its traditional Western Balkans region, but some effort needs to be put into improving the quality of its articles.

The working conditions, health and safety information periodical ***HesaMag*** is a topical information magazine aimed simultaneously at specialists and a broader audience. Each issue covers a specific topic and reflects the cooperation between the ETUI and external researchers. The periodical will continue to monitor key European policy developments. The themes for 2017-2018 will be 'Occupations in the beauty sector' and 'digitalisation and working conditions'.

### **Documentation Centre**

The activities of the documentation centre for 2017-2018 will continue to contribute to the collection of literature and information as well as knowledge management. The main activities of the documentation centre will concentrate on fully supporting the ongoing work and projects of the Institute. This will include the ongoing development of the reference database Labourline ([www.labourline.org](http://www.labourline.org)) and updating the software to offer users new features. This year, the emphasis will be on giving the web interface a makeover.

The documentation centre's role as a specialised information resource centre for external users will also be developed further. The centre will continue to actively provide data for the European common catalogue of the European Institute for Gender Equality (EIGE) and for the EUROPEANA-DSI project. During 2017-2018, the Labourline will be integrated into the Social History Portal (IALHI). The documentation centre will continue digitalising historical ETUC documents and making them available on Labourline.

The new leaflet will be sent to universities and research centres working on the same topics as the ETUI, thereby raising the documentation centre's profile and opening up its resources to a new, broader audience.

The documentalists intend to increase face-to-face contacts with peers covering the same subjects, the aim invariably being to promote its rich, specialised collections.

### **Internal development**

A new **Foresight Unit ('Cellule prospective')** was created under the direct responsibility of the ETUI's General Director (see above).

During the reference period, the ETUI will carry out an online survey to assess the extent to which its outputs and expertise are deemed relevant for its main stakeholders.

### **The ETUI: an 'eco-dynamic workplace'**

Having received the status of an 'eco-dynamic workplace' in 2013, the ETUI has continued to implement its action plan to decrease the Institute's environmental footprint. After a positive evaluation in 2016, more actions on greening the Institute have been planned for the next budget year. The special working group 'Greening the ETUI' has been strengthened and will take additional steps during the coming year.

### **Words of thanks**

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

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

### **Overview main new developments in 2017-2018**

- Further development of **Reforms Watch**, the new online service consisting of dossiers on EU Member States with fact-based information on the industrial relations system in each country (key facts, players and institutions), information on the latest developments in labour market reforms and pension reforms, as well as data and legislative information on the right to strike and strike activities.
- The new **Foresight Unit ('cellule prospective')** will provide food for thought about the future of labour markets against the backdrop of the social-ecological transition and the digital revolution.
- Education department **e-learning project**: two pilot online training courses will be started. They are: 'European Works Councils – the rules of the game' (pilot version in English) and 'Being a citizen in Europe today' (pilot version in French).
- **Accreditation** for trainings: several courses have been accredited and new ones are in the pipeline for accreditation.
- The annual **'Young trade union leaders' course** will be updated, reinforced and improved.
- Increasingly research results will be presented and disseminated with the help of visual communication tools such as **infographics and videos**.
- The renewed **database on European works councils** will be heavily promoted, as it is a unique tool for EWC practitioners to get one-stop shop information on good practices.
- **TUREC – Trade Union Related Economist network**: this new network of economists with links to trade unions will discuss and formulate analyses as well as support policy proposals regarding macro-economic developments.
- The ETUI will organise on a regular basis **ad-hoc seminars** on specific requested topics exclusively for the ETUC secretariat and invited trade union experts to discuss issues related to their priorities or challenges.

## **A. MAIN PRIORITIES**

### **1. Policies and tools for the future of Europe**

Although there are growing indications of economic recovery, the EU is facing political challenges, whilst still having to deal with the consequences of previous years of crisis management. With Brexit, the new US administration and the rise of populists and 'illiberal democrats' in Europe, the European project itself seems under threat. The ETUI will continue to monitor these developments on both the European and national levels and analyse the results and effectiveness of policies. This first priority remains focused on new economic governance and policies, but will also include more research and training on a new vision for the future of the European Union, linked to the Commission's upcoming White Paper, the initiative on the European Social Pillar, the outcome of various REFIT exercises (in particular with respect to occupational health and safety) and the possibility of a new Convention.

The fact that the European Union displays considerable divergence on a number of economic and social indicators raises the question of whether Europe is heading towards a new model of integration in which lower-income countries will be unable to attain convergence with richer Member States, confining them to the role of providers of cheap labour, either through outsourced production or through migration. There is a verbal consensus on the need for a growth orientation, but even the limited measures undertaken (the investment plan) have bypassed the need to address the issue of divergences. This links up with the need for a green transition, investment in education and the reindustrialisation of Europe, which raise different questions across the Member States. Furthermore, the announced European Pillar of Social Rights is emerging as the catch-all construction for all future social policy initiatives. It remains to be seen how binding or voluntarist this approach will be. Finally, the (de)regulatory approaches of the Better Regulation and the REFIT agenda continue to be implemented. These questions are being compounded by digitalisation of the economy, which seems to amplify many of the issues raised above.

In response, the ETUI's research will pay close attention to monitoring the processes underlying these developments and focusing on specific themes that are central to the European labour movement.

Main issues to be dealt with include:

- closely monitoring, assessing and contributing analysis to the results of the consultation on the European Pillar of Social Rights;
- closely monitoring, assessing and contributing analysis to the ETUC's and European institutions' debate on the future of Europe;
- monitoring the effects of current policies as expressed through the European Semester and austerity measures (CSR and memorandum of understanding) and their implications for the social dimension;
- analysing alternative monetary and macroeconomic policies and proposing alternatives for shoring up the European Social Model;
- critically assessing and proposing alternatives for the measures undertaken, including the course of the current investment plan and of possible revisions to the Stability and Growth Pact;
- analysing the implications of current wage levels and differences between countries and hence the possibilities for wage-led growth and for supporting trade union actions to raise wage levels across the EU;

- continuing to consider further questions raised by the impending Brexit and likely demise of TTIP regarding the future of trade policy and the place of the EU in the world;
- continuing to focus on 'structural reforms', both criticising past policies and researching and supporting positive alternatives;
- assessing the potential consequences of a protracted period of low growth;
- carefully monitoring the success of the relaunch of the Social Dialogue, the changing landscape of collective bargaining and industrial relations at all levels, and the impact of new regulatory approaches (such as REFIT or the Social Pillar) on workers' rights in the workplace;
- closely monitoring shifts in social legislation in all Member States, particularly as they are catalysed by responses to the crisis.

The issues listed above will be addressed by the projects described below.

One of the key new initiatives in 2016 in the social policy area was the consultation on the **European Pillar of Social Rights**. In 2017-2018, the ETUI will continue to provide expertise and input to the discussion. The Commission has pledged to issue a formal Pillar proposal in spring 2017. This proposal is expected to clarify both the content and form of the European Pillar of Social Rights. Therefore, further research will be based on the Commission's proposal. The European Pillar of Social Rights may lead to a new framework for evaluating all social policy initiatives and create a framework for re-evaluating former ones, e.g. benchmarks. As such it could conflict or clash with the rationale underlying the Better Regulation agenda. Further research will explore the compatibility of the two frameworks.

The new dynamics in the social dimension of the European Union clearly require the continuation of the annual publication '**Social developments**'. The 2017 edition will be published during the second half of 2017, and a call for tenders will be launched for the publication of the 2018 edition. '**Social developments**' is published in French and English and is launched at an event held in Brussels.

Much research will focus on regular monitoring and tracking of **economic, employment and social policy developments and systems and processes of economic governance** at EU level. This will include commentary, analysis, external advice and reactions to EU-level policy developments. Particular attention will be paid to the recently initiated European investment plan, the course it takes and the effects it has, to the implications of the UK decision to leave the EU, and to future EU trade policy in the light of the negotiation of the trade and investment partnership between the EU and the USA. Research will also be conducted as issues arise, with attention continuing to be paid to proposals for improving competitiveness, reforms of banking and financial systems and proposals for alternative economic policies. External experts will be brought in where appropriate. Research findings will be disseminated via publications, through participation in events and in the form of direct advice, primarily to individual and ETUC-affiliated trade unions and federations.

Continuing a past project provides a clearer and more detailed focus on the countries of **Central and Eastern Europe**, aiming to support **social dialogue** there by developing links and the assistance offered to local trade union organisations in their efforts to provide input to the policy process in individual countries as well as at European level. These activities include offering advice to trade unions and policymakers, contributing to conferences and expert meetings in Eastern European

countries, and jointly publishing research findings with trade unions and researchers from those countries.

Another project will look into the **alternative policy mix** required to deliver sustainable growth, create jobs and ensure greater equality in the era of digitalisation in Europe. It will provide regular and continual monitoring of the mix of monetary, fiscal and supply-side policies in the EU Member States, with a particular, but not exclusive, interest in eurozone countries. Although this is a domain extensively researched by academics and policy research organisations, the active involvement and presence of the ETUI in the academic and public debate plays an essential role by investigating and disseminating findings that debunk myths about policy options to boost recovery and supporting policy options that are labour-friendly and compatible with both growth and equality. Accordingly, this project will include research, analysis, commentary, reactions to developments and external advice (if solicited) on these policy areas, also drawing on the insights gained from projects in previous years. The planned output is 1-2 working papers, to be presented at international conferences and workshops and which, after feedback and revision, will be submitted to journals for publication in due course. There are also plans to organise 2-3 public events (e.g. a Monthly Forum or lunchtime debate) on the broad theme of 'The Future of the Euro'. These events will look into some of the policy questions most crucial for the sustainability of the single currency project, drawing on the Five Presidents' Report, the ETUC's response to it and the steps taken by the European Commission. The panels at these events will consist of academics, trade unionists and EU policymakers, depending on the topic.

The emerging economic governance, as well as the longer-term vision of the EU as a 'viable Economic and Monetary Union', is currently promoting integrated frameworks on fiscal and economic policy matters. However, pursuit of this vision appears to cause tensions insofar as it conflicts with the promotion of social cohesion and solidarity among Member States. A current project is examining how **national welfare states in Europe** have been changing under the pressures created by austerity and policies aimed at reducing divergence in competitiveness among Member States in Europe. In February 2018, Policy Press will publish an edited report on this project, and the activities associated with it will include the dissemination of the book's conclusions and a book launch, plus the publication of a working paper summarising the findings of the project and implications for the EU. Building on the accumulated knowledge about changes in labour market policies, the project will extend its scope to consider further challenges currently facing the EU, from the increasing digitalisation of production and employment to the influx of refugees and mass migration.

Pensions have undergone in-depth reforms over the past five years. Hence a project has been underway to analyse **pension systems** in Europe with specific reference to supplementary schemes. The main issues analysed relate to the governance of supplementary schemes and, in particular, their interaction with public programmes and the way they deal with common challenges. The project addresses two sets of challenges affecting pension systems, their governance, and their sustainability and adequacy, analysing the role of the state and social partners (mainly trade unions) in the management of pension policy (in interaction with market forces) and in promoting solidarity in the renewed pension mix (especially in second- and third-pillar schemes). The results will be published in book form and widely disseminated during the first half of 2017.

Another project will investigate changes in **taxation**, as one of the key components of a welfare state and hence a main pillar in shaping the European Social Model. Taxation is

high on the European agenda, and issues of particular interest for the trade unions in Europe are tax evasion, in all its forms, and attempts to harmonise the corporate tax base. The ETUI will assemble a small group of experts on various tax issues to investigate how the issues are dealt with at European level and what this means for trade unions in Europe. External expertise will be sought on a couple of key issues with a view to writing up evidence-based research documents on issues identified as being of particular relevance to European trade unions.

In the wake of the current crisis, many European countries have enacted **labour law reforms**, most of which make existing provisions of labour law more flexible and ease minimum standards, shifting the emphasis to soft law (deregulation). The ETUI's ongoing project on monitoring European legislation critically addresses the widespread ongoing deregulation of labour law, in particular its negative impact on fundamental social rights and workers' protection. The project's findings will also be incorporated into the Reform Watch web service. The same project is also critically assessing the Commission's 'Smart Regulation' agenda (so-called 'fitness check') and the REFIT process.

The **REFIT** process will continue to receive close attention in the course of this work programme, since it affects both the social *acquis communautaire* and forthcoming or pending social legislation. In 2017-18, the ETUI will focus its work on REFIT on developing an evaluation methodology and analysing the process's impact on labour rights. The objective for activities implemented during this budgetary cycle will be: firstly, to exchange acquired knowledge (via a lunchtime seminar for various experts) and, secondly, to critically evaluate available results of the REFIT process and the impact of this mechanism on EU labour law and social policy (via working papers).

Special attention will be paid to actions following the publication of the ex-post evaluation of **EU health and safety legislation**. The ETUI will monitor the outcome of this process and provide expertise to the workers' group in the Advisory Committee on Safety and Health at Work (ACSH) to the European Commission, with one project focusing on strengthening the capacity of the members of the workers' group. The ETUI will also analyse the actions arising from the Commission Communication on the revision of the EU-OSH *acquis*, and will provide relevant expertise and identify how to avoid the erosion of workers' protection in the EU.

In addition, the ETUI will continue to monitor the **revision of the Carcinogens and Mutagens Directive** (2004/37/EC) and any new additions to the list of carcinogenic substances. The Institute's contribution will entail finalising and disseminating a research project that examines the annual cost of occupational cancers in the EU28. This study will aim to generate new and up-to-date statistics on the numbers of occupational cancers and associated costs in each Member State. The fresh findings that result will be key to helping trade unions refine their strategy and measures designed to tackle occupational cancers and provide scientific evidence in the context of the revision of the present Carcinogens Directive. Specific expertise will be sought when needed.

In addition, a 2-day conference will be organised during the second half of 2017 to debate how to reduce **work-related cancers**, which are the prime cause of work-related fatalities in the European Union, accounting for more than 100,000 deaths per year. The revision of the legislative framework for workers' protection is a central point in the OSH agenda for the period 2016-2020. The conference will contribute to the debate on the furtherance of scientific knowledge about work-related cancers and its consideration in policymaking. It will be part of the ETUI's contribution to the Roadmap

on Carcinogens jointly initiated in 2016 by a number of stakeholders. In addition, the ETUI will co-host a conference on health, safety and carcinogens in Malta in April 2017.

The ETUI's **Transnational Trade Union Rights** (TTUR) network will continue to assess the potential of European legal sources of rights. Building on its prior work on the Lisbon Treaty, the European Convention on Human Rights, and the European Social Charter, the TTUR will devote its next research and publication to the Charter of Fundamental Rights and the employment relationship.

Like previous publications in this series, this new publication will aim to: provide arguments for the justiciability of social rights; make employment rights in the CFREU more widely known in legal circles and in the wider debate; and strengthen the impact of social rights on Europe's fundamental rights architecture, particularly with respect to the Council of Europe's instruments (ECHR and ESC), taking particular account of the international dimension (UN and ILO).

Furthermore, the TTUR will explore further topics in internal working groups, such as better regulation and the REFIT, the European pillar of social rights, the definition of the worker and – depending on the actual developments – the legal consequences of Brexit at both the EU and national levels.

Moreover, the TTUR will provide research support to the ETUC upon request.

A new umbrella project will analyse the **potential of a litigation strategy to enforce workers' rights, including health and safety**. European courts are becoming increasingly important conduits for all the stakeholders interested in European policymaking, including trade unions. Case law can generate political leverage, and in the light of delayed or failing legislative processes, courts are often the only actors capable of actually delivering outcomes. However, unlike environmental and civil rights organisations, for example, the trade unions rarely resort to court rulings.

Fresh research activities will be launched in 2017-2018 in two areas: firstly, litigation before the national courts and CJEU on EU law affecting workers' interests and workers' representatives. This research is expected to result in a working paper on EWC case law and to yield a second working paper on the ETUC's access to the CJEU. The second focal area of research will be building a trade union litigation strategy. A workshop will bring together those experts who have explored strategic litigation from an academic perspective with others who have practical experience of selecting and bringing cases before national and European courts on behalf of the trade unions as well as with trade union legal experts who are interested in developing such strategies for their own organisations. In addition, work will begin on examining health and safety litigation, building on the strategy outlined above.

The response to the economic crisis and its impact in the social (legislation) domain continues to dominate the political agenda and thus remains a primordial consideration in the work done by the ETUI. Whereas the main social (legislation) domains affected by the reforms proposed and/or pursued at EU level and implemented at national level remain largely the same, the same does not necessarily apply to 'guiding background documents', and we note a shift in and proliferation of policy documents prescribing reforms in the social (legislation) domain (ranging from MoUs to the European semester (CSRs) to the REFIT process).

Thus, the main foci of research remains the impact of the crisis on labour legislation as and the impact of country-specific recommendations in different subsets of the social

domain. Since trade union rights are among the main sets of rights currently under attack, in line with a demand by EPSU, particular efforts will be made to develop country factsheets on the legislative framework relating to the right to strike and/or take collective action in the public sector.

Furthermore, the ETUC's renewed and enhanced interest in protecting fundamental social rights, and trade union rights in particular, is also bound to give rise to a need for more expert input in different formats.

Since the reforms are continuing unabated, the **mapping exercise**, which provides a comprehensive overview of recent changes in labour law enacted against the backdrop of the crisis, will be updated. This publication will be complemented by regularly updated individual country reports in which the latest developments and their impact are analysed country by country. Several new and updated publications on the impact of the crisis on labour law and the analysis of the impact of CSRs are envisaged. The series of 'social policy fiches', or brief summaries of EU social legislation, will be updated as necessary.

Yet it is not just changes in national legislation that need to be mapped. It is also crucial to recognise and assess the logic underlying the various policy approaches and tools, such as the Memorandums of Understanding (MoUs) or **country-specific recommendations (CSRs)** issued in the context of the European Semester.

In addition, the researchers concerned will continue their 'traditional' tasks, in particular providing expert input to the ETUC legal experts' network NETLEX (including proffering advice to the annual conference organised by the ETUC) and, with regard to the Council of Europe Social Charter, monitoring enforcement mechanisms and bodies.

While most industrial relations actors and academics are at least broadly familiar with the changes in their own country, the range of parallels across Europe casts a different light on developments and reveals much about the overall regulatory context of an increasingly integrated Europe. The ETUI's unique contribution to the debate is its systematically European approach. The results of this mapping will feed into the monitoring tool, the Reform Watch, to provide timely, readily accessible information to ETUI stakeholders on changes and reforms affecting industrial relations, labour markets and pensions. The aim is to provide European trade unions with two types of information and analysis: firstly, timely information on occurring changes, and secondly, in-depth analysis of what these changes mean for labour markets, social partners and European integration.

The ETUI's research on monitoring the **Social Dialogue** seeks to critically assess the EU social partners' involvement in European economic governance processes. The project is intended to provide scientific findings on issues related to the development of particular aspects of the European Social Dialogue (ESD) that are of major interest to the European trade union movement, such as the evaluation of ESD instruments.

Despite the revival initiatives launched by the European Commission, the European Social Dialogue is still at a crossroads. However, in 2016 the EU social partners did manage to publish some new joint texts (on refugees, digitalisation, finalisation of the negotiations of a framework agreement on active ageing and intergenerational approach) as well as an unprecedented quadripartite statement together with the European Commission and European Council on a New Start for Social Dialogue. In

2017, negotiations on a 6th joint autonomous work programme between the cross-industry social partners will also get under way. All these developments will necessitate close scrutiny (especially with regard to actual implementation) and require input in the form of ETUI expertise. Furthermore, at Member State level the ETUI will continue to monitor the implementation of existing instruments of the cross-sectoral ESD, such as framework agreements incorporated into directives, autonomous framework agreements, autonomous work programmes, and so on.

As part of the project, the ETUI database on joint ESD texts will be updated and put online.

Apart from own research, the ETUI will also continue to provide its expertise in external projects run by (European) trade unions, external institutions and/or academic experts.

**Collective bargaining** practices and outcomes have undergone considerable changes as a result of both the economic crisis and recent policy developments. The Collective Bargaining Newsletter (CBN) is the ETUI's tool for providing up-to-date information on collective bargaining developments across Europe. The project delivers on two fronts: firstly, by producing 11 electronic issues of the CBN each year; and secondly, by maintaining and improving the CBN archive, which contains all CBN issues published since February 2008. The CBN is compiled by an external research team from the Amsterdam Institute for Advanced Labour Studies (AIAS) at the University of Amsterdam.

A project to map developments in collective bargaining will continue. One strand of it will map further changes in collective bargaining outcomes and practices that were prompted by the crisis and the crisis management objectives pursued by European and national policymakers. This analysis will be based on desk research as well as first-hand information gathered from representatives of the ETUC and European Trade Union Federations (ETUFs) and their national affiliates and by the planned monitoring tool. The results of this mapping exercise will be fed into numerous presentations at academic and trade union conferences. A second strand of the project will explore the constraints of and opportunities for developing and implementing an alternative expansive and solidarity-based wage policy across Europe as part of an alternative demand-side oriented wage policy that views pay as a key factor in generating domestic demand. Key issues to be investigated are measures to remedy the various wage gaps (based on geographical, sectoral or gender-related factors as well as categories of workers) and steps designed to push up pay across the board (strengthening multi-employer collective bargaining systems and establishing appropriate minimum and/or living wages, including a European minimum wage policy). This research will be based on desktop research and transnationally comparative statistical data provided by international institutions such as Eurostat or the European Commission's Ameco database as well as information provided by actors involved in wage setting at the European and national levels. As part of this project, a workshop held in autumn 2017 will aim to bring together academics, trade unionists and policymakers from different international institutions for an exchange of views and to discuss more concretely the constraints and opportunities of implementing such an alternative expansive and solidarity-based wage policy.

The enduring economic crisis in Europe, and in particular the various political measures pursued in the context of its management, have led to far-reaching implications for national collective bargaining systems. However, what we lack is a **comprehensive overview of the situation regarding collective bargaining in the EU28**. In

2015-2016, a project was launched to compile a publication on this, edited by experts from across the EU28. In January 2017, the first meeting of all the authors took place for discussions on the first round of draft chapters. In May 2017, another meeting of the project team will take place to discuss and review the second round of draft chapters. Bearing in mind the large number of country chapters, another meeting of the project team will be held in October 2017. The aim of all these project team meetings is to provide the authors of chapters with feedback and guidance on how to revise them. By the end of 2017, revised final versions of all the country chapters will be ready, so work on editing their language can begin in January 2018.

The ETUI's education department organises several training courses based on priority 1 projects, e.g. on the future of Europe, the European Pillar of Social Rights, the rise of populism, trade (CETA and TTIP), social dialogue, and so on.

## **2. Worker participation and industrial relations**

Ongoing integration of the European market is being accompanied by a parallel decentralisation and erosion of sectoral and national IR institutions. It has become clear that the key to successfully meeting the challenges of simultaneous processes of Europeanising and decentralising IR at company level lies in strategically combining the various instruments for information, consultation and Board-level participation and linking them more generally to collective bargaining structures. This linkage involves varying constellations of actors and instruments across borders, from the local to the national and European levels. Consequently, new sources of influence and coordination emerge, while others disappear or become weakened.

In its work, the **European Worker Participation Competence Centre (EWPPC)** will continue to explore and promote strategic and anticipatory interlinking of these processes, actors and levels.

This area of increasing importance for the trade unions across the European Union is driven principally by the **implementation of directives on employee representation and workers' information and consultation rights**, which at the same time play a pivotal role in safeguarding and further enhancing the interests and safety of workers. These innovative institutional arrangements are also one of the main drivers of the Europeanisation of industrial relations.

The monitoring, investigation and understanding of – as well as active support for – the development of various forms and levels of worker representation and interest mediation, as well as the dynamic relationships between them, have constituted an important and constantly growing area of the ETUI's activity over the years. One of the ETUI's key contributions to this field is the **development of a genuinely European comparative and cumulative knowledge base**. The ETUI will continue to carry out research, pool knowledge via networks, evaluate legislative proposals, train trade unionists and workplace employee representatives, and provide technical support for efforts designed to strengthen the protection of workers' interests and the advancement of those interests throughout Europe and at different levels of society.

Main issues to be dealt with include:

- understanding and supporting unions and employee representatives in the *Società Europea* (SE) and European Works Councils (EWC);

- analysing agreements and practice;
- the EWC Data Service and SE Database;
- collecting and translating agreements and analysing their content: drafting a report on the impact of the EWC Recast Directive;
- understanding and supporting Board-level employee representation (BLER): taking a country-specific approach regarding the influence, networking and articulation of BLERs;
- fostering the Europeanisation of industrial relations through the BLER: an actor-centred approach;
- understanding the changing contexts of multinational corporations: standardisation in MNCs and impact on worker participation;
- restructuring and MNCs: the fragmentation of value chains and impact of digitalisation;
- assessing business strategies and their consequences for labour and employment in Europe;
- holding an annual EWPCC conference spotlighting the impact of management strategy on worker participation in MNCs;
- running the EWPCC's expert networks: the SEEurope network, which specialises in the Europeanisation of information, consultation, and Board-level participation, and the GOODCORP network, which monitors company law and corporate governance;
- continuing and expanding the knowledge website 'worker-participation.eu' to include EWC court cases, and health and safety representation;
- developing practitioner-oriented material.

By monitoring, disseminating information, conducting research and offering **training courses**, the ETUI has provided trade unions, workplace employee representatives, and other relevant audiences across the European Union with detailed and up-to-date material on developments in this domain and their implications for systems of industrial relations.

A special effort is being made to develop a **network of trainers** who can act as multipliers and reinforce this dimension of the ETUI's work. Another priority involves making the wide-ranging expertise of the ETUI more accessible to practitioners. This approach not only applies to issues strictly associated with worker participation, but will also seek to cover a broader range of domains, including employment law, health and safety and sustainability.

The ETUI will also continue to support the members of EWCs and SE-WCs (European Company Works Councils) via training and information services, working closely together with European Industry Federations.

The **EWPCC Conferences** regularly bring together Board-level employee representatives and other practitioners, academic experts, trade unions and policymakers to discuss relevant research and debate topics to do with worker participation. Casting the multinational company as a multi-level system of institutional arrangements marked by highly variable practice, the EWPCC Conferences held during the last four work programmes cumulatively explored the possibilities and constraints to the articulation of employee interest representation across all company levels. The EWPCC Conference for 2017-18 will focus on the impact of management strategy on worker participation in MNCs and build on recent years' research on this conducted by the ETUI.

Over the past few years, the **SEEurope network** has developed into a key resource for research and advice on the European Company (SE) and worker participation issues in general. The heart of the SEEurope project is an active network of legal, economic and industrial relations experts covering all 30 concerned EU and EEA Member States. The network covers very specific areas as well as more general aspects of both worker participation and industrial relations in the broadest sense of the term. Only eligible costs will be incurred under the work programme. The network meets twice a year.

### ***2.1. Board-level employee representation and corporate governance***

Several projects will continue to monitor the development of **Board-level worker participation at European level** by founding SEs or through the European Cooperative Societies (SCEs) Directive, as well as via the application at national level of the Cross-border Mergers Directive and other European initiatives in the field of company law and corporate governance directives. The application of these laws, as well as developments at national level, have prompted a form of Europeanisation the impulses, effects and implications of which have yet to be fully understood.

Building on research conducted in these projects about the emergence of internationalised Board-level employee representation, the ETUI will continue to refine and implement its efforts to identify these new European bodies and include them in its analysis. Apart from updating the database containing all SEs, SCEs and cross-border mergers, and transfers of case studies of instances of this particular form of merger and their implementation (including in a cross-enterprise comparison), will serve as a starting point for analysis and assessment designed to ascertain how workers' Board-level participation contributes to the Europeanisation of industrial relations.

A new project on legal regimes of BLERs in Europe aims to complete the knowledge gathered by ETUI throughout the years on the *de jure* Europe-wide situation regarding them. It will attempt to clarify the diversity of BLER regulatory regimes in terms of rights and options for influencing company decisions based on the applicable regulatory framework at the EU and national levels. This project will also strive to collect and monitor specific EU developments. A key objective will be to complete the library of legislation transposing EU law on Board-level employee representation, since several translations of the legislation implementing the SE, the CBM and the SCE Directives are missing from the Commission's website.

Research will also map existing systems and monitor legislative and political developments that shape Board-level employee representation rights at the national level, which may in turn affect the rights governing Board-level employee participation at the European level. This work will also entail monitoring relevant national and ECJ case law dealing with the implementation of BLER rights across Europe in the context of company mobility, and possible collisions of rights across borders. The information will be posted on the worker participation website for dissemination and better accessibility. The second strand of this project will entail building a reliable network of corporate law experts linked with the ETUI, to deliver occasional support and assessment in corporate legal issues across Europe.

An the ETUI's ongoing project seeks to complete the picture of the regulatory framework affecting the origins and practice of BLER rights, its objective is to add to the knowledge acquired by the Institute on the regulation of worker participation rights as set out in European agreements (so far the main focus has been on provisions related to EWCs and SE-WCs) by looking specifically at BLER provisions contained in SE agreements as

well as at formal arrangements concerning SCEs and CBMs. Thus, BLER provisions and the rights they stipulate will be monitored and analysed. To this end, the collective agreements containing Board-level employee representation provisions in the context of SE (and SCE) constitution and cross-border mergers will be monitored and progressively analysed and integrated into the EWADB. The data on sources of BLER provisions will be posted on the general worker participation portal. The findings will also be discussed in a journal article, thus reaching academics and policymakers.

Finally, the material from fieldwork, checked and reused by ETUI researchers, will be made accessible, with the specific authorisation of the interviewees, drawn from an (historical) archive for qualitative research where it will be stored. This material will be useful for future research projects on the 'Europeanisation of IR' and/or for communication purposes (e.g. podcasts, short videos/documentaries featuring selected excerpts) aimed at imparting the findings on BLER work, experience and role-related constraints to other BLERs (during training courses), trade unions, rank-and-file shop-stewards and the general public.

Dissemination of the results of the Voice of Labour project, which was the large-scale survey on the activities, roles, decision-making criteria and networking of Board-level employee representatives across Europe completed in 2015, will continue. Since comparative research on BLER remains a fairly new and under investigated field, a follow-up project was launched under the previous work programme. This involved contacting researchers who had conducted country-based empirical studies on Board-level employee representation to shed new light on the 'Corporate Governance and Voice of Labour' survey data related to their country. The expected outcome is an edited volume comprising country-focused chapters.

The **qualitative research on SEs** will continue. Research will continue on a project launched in the previous work programme which analyses specific provisions of SE agreements by drawing on the ETUI's unique database on European Companies (ECDB). In approximately 60 SEs, Board-level representation (participation) rights have been negotiated in addition to information and consultation rights. A large proportion of these agreements is available to the ETUI and can be analysed according to specific criteria. Key questions to be examined in the report include structural analysis (such as the models chosen, the numbers of Board members, the spread of nationalities, etc.); the 'before-and-after principle' in practice; eligibility rules and the methods used to select and/or nominate Board members, and in particular the role of SE-WCs and/or national representation structures in this process; also the notion of a 'European mandate'; the articulation between the Board and SE-WC; and rights to training and expertise.

Within this work programme, the ETUI will also conduct a number of exploratory case studies on BLER. Complementary to the research on quantitative developments, a second research project will investigate how Board-level representation actually functions in practice in a number of selected SEs. On the basis of a dozen case studies selected from those featuring the most internationalised BLERs, this research project will question the practice, orientation of action and prospects and perceptions of the employee representatives who sit on European corporate Boards. The objective is to assess the process of integration of 'foreign' members into the Board, the effects on Board practices and the added value or constraints that may arise for the different actors involved. The data collection (interviews) will be partly sub-contracted to a team of external experts. An ETUI researcher will coordinate the research, select the SE cases, design the methodology and draw up a preliminary analytical grid.

The **European Company Database** (<http://ecdb.worker-participation.eu>) is a service focusing on the collection, processing and publication of data on SE companies, and primarily on transnational forms of worker participation in such companies. It is the reference database on European Companies, widely used by researchers and also by the European Commission.

During 2017-2018, the service will gradually switch to a new method of data collection, since the old method was yielding increasingly incomplete results. Firstly, the personnel-intensive method adopted until now to search and process (largely obscure) data on the growing number of SEs in Europe and find those with workers' representation has been carefully examined. Secondly, in recent years the ETUI has identified cross-border mergers as an important source of transnational Board-level employee representation. This data will be obtained via cooperation with external experts for inclusion into the existing SE database and data on transfers of corporate seats will be fed into the GoodCorp project on company mobility. As a consequence of these developments, the database on the Board-level employee representation (BLER) will extend its scope beyond SEs to include also SCEs and companies set up via transnational company mergers, and transfers of corporate seats.

The ETUI will continue to address future directions for employee Board representatives and European corporate governance, building on an alternative to the 'shareholder value' model of corporate governance which has dominated the debate on the reform of corporate governance in Europe for roughly a decade. This work is primarily channelled through the **GOODCORP network**, which brings together academics and other experts concerned with company law and corporate governance issues. The ETUI is assisted by an external expert in all activities related to corporate governance, sustainability and new forms of European Company.

As **intra-EU company mobility** increases, important questions of applicable regulation arise when a company moves its official seat. In the work programme 2016-2017, the GOODCORP network started to address this complex emerging issue. During the period covered by the work programme 2017-2018, two workshops are planned. The first one, to be held in Vienna in June 2017 will cover the development of a work programme for research into the impact of company mobility on worker representation and possible links with other issue areas, specifically taxation and workers' rights. The second workshop, scheduled to take place in Brussels in October 2017, will discuss ongoing work on this research topic and other current developments in European corporate governance and company law.

Regarding ongoing responsibilities, the network will continue to monitor overall developments in EU corporate governance and company law, plus developments at the national level that are significant for European corporate governance and the European trade union movement. Furthermore, the network will continue to support the ETUC on these issues, including by providing assistance in drafting responses to consultations and advice on analysing and responding to new policy developments.

## ***2.2. European Works Councils and SE Works Councils***

The ETUI's increasingly integrated treatment of EWCs and SE-WCs reflects the underlying understanding that both provide the definitive locus for transnational information and consultation. Although the Commission has yet to pronounce its intentions with respect to the review of the Recast EWC Directive, the ETUI is prepared to contribute to the impending debate about the impact of the Recast EWC Directive,

and will continue to explore the implications of the new provisions for the functioning of EWCs and build this knowledge into its ongoing monitoring and training activities.

The ETUI will continue to develop, maintain and update the EWC database and its website portal [www.ewcdb.eu](http://www.ewcdb.eu). The renewed EWC database website portal will be maintained and further developed. Through the launch of the rebuilt website in early 2016, the ETUI enabled access to the analysis of the contents of EWC and SE-WC agreements for the first time. Efforts will be made to ensure their ample integration into the [www.worker-participation.eu](http://www.worker-participation.eu) site and the general [www.etui.org](http://www.etui.org) website.

In 2017-2018, efforts will also be made to improve the systematic collection of EWC agreements. Responding to stakeholders' requests, the collection of EWC-related court cases will be more systematically developed into a database. The national case law available in the EWC database will be assessed in a bid to understand the key legal issues faced by EWCs at national level and to explore the reasons behind the lack of EU-level litigation in this area. With the support of the SEEurope Network, and possibly an external expert, an approach for a systematic monitoring of EWC and SE-WC jurisprudence will be developed.

Furthermore, now that the database on EWCs and SE-WCs has been updated, attention can be turned to analysing the collection of agreements more closely. A Policy Brief is planned on renegotiation provisions in EWC and SE-WC agreements. An analysis of the potential contribution of EWCs to the digitalisation debate will be undertaken. Efforts to develop an EWC typology will be continued. The developed typology will be linked to agreement performance indicators to evaluate whether EWC agreements can predict company performance. The results will be published in a working paper.

A publication on the contestation and litigation of legal issues in EWCs will build on a previous ETUI project from 2011. This will be linked to the research related to enforcement and litigation strategies. A policy brief on confidentiality in EWCs and SE-WCs will be prepared, developing policy and practice pointers regarding both limitations on the information provided to EWCs as well as information that employee representatives can share with other representatives.

Other outcomes from this component will be presented online in the form of material for practitioners. This may necessitate the adjustment and/or development of the currently available interface and functionalities within this section of the website [www.ewcdb.eu](http://www.ewcdb.eu).

The ongoing policy discussion on the EWC Recast Directive will be followed up by a publication planning to collate the insights from various evaluation studies and sketching a way forward. A project from 2016-2017 evaluated the impact of and compliance with the Recast EWC Directive from several angles. Building on this, a set of best and worst practices will be developed during 2017-2018 and subsequently monitored. These insights will be combined with a new informal network of EWC research: here, the ETUI will seek to provide a European hub for exchanges across the increasingly differentiated EWC research landscape.

In 2017-2018, preparations for the large-scale survey of EWC and SE-WC members will be continued. An initial survey of EWC representatives was conducted between 2005 and 2008. The objective here is to reproduce that survey and ascertain whether the views of EWC representatives on EWCs have shifted in the intervening years. While this means that several of the questions in the second survey will be identical to those asked in the

first survey, we also acknowledge that EWCs have developed since 2008, so the survey will have to include a range of new questions as well. Further dissemination will continue to take place via contributions to training courses for EWCs, SE-WCs, and SNBs (special negotiating bodies) organised by the ETUI education department under separate headings and/or projects. EWCs' key role in securing employee input will be promoted through training and information activities carried out in cooperation with the European Trade Union Federations. We will develop tools designed to expand the competencies of European Works Councils in this domain. Support will also be given to an ongoing project run by the education department, designed to develop educational material to train members of EWCs, SE-WCs and their coordinators on how to deal with financial and economic information in their respective representational bodies.

An overarching element in dealing with worker participation is the various body of EU-level provisions on information and consultation. The number of provisions governing workers' information and consultation is estimated to total around 30. This begs the question of whether differing definitions and content of information and consultation rights result in variations in practice and possibly competition between various employee representation bodies. The REFIT process launched by the European Commission brings these questions into sharp focus. ETUI research in this field draws on the results of an analysis of all the myriad provisions on information and consultation rights in EU legislation, which was completed in the last budget period.

The maintenance of the information and consultation *acquis* – and indeed, overdue improvements to it in the areas of consistency and compliance – continues to necessitate sustained in-depth research and the mobilisation of both legal and practical arguments. In addition, practitioners' material on information and consultation in the EU *acquis* will be further developed and disseminated.

### ***2.3. Multinationals' strategies and worker participation***

Networks have been developed to advance research on **multinational corporations** (MNCs) and international business strategies, approaching the key questions in the field from the perspective of employee representatives. In exploratory research begun during the budget period 2015-2016, experts identified and assessed between 5 and 7 key trends and illustrated them with practical examples, and then outlined the potential implications of their findings for the work of the ETUI with regard to possible future research and potential training activities. A follow-up meeting with selected practitioners will be held and the results of the report or a summary thereof will be published. These and other research findings from the ETUI will be the subject of the annual EWPC conference in 2017-2018.

Another project in this MNC cluster for 2017-2018 will build on earlier research into the nature and implication of subcontracting on working conditions, employment, and industrial relations by focusing on the impact of digitalisation on the restructuring of MNC networks. In 2016-2017, an exploratory workshop was held on the 'digitalisation of manufacturing and restructuring of value chains'. In 2017-2018, we will focus on some of the key aspects of industry 4.0 that will be explored through research conducted at the company level (with evidence to be collected in Southern, Eastern, and Northern Europe), starting with three expert reports that will be published initially as working papers. A workshop will also be held for the researchers involved. Outputs will include the submission of a journal article and two working papers.

## **2.4. Overarching issues**

An essential part of the EWPCC's mission is to make acquired knowledge accessible to a broader public. Several websites operating at the ETUI under the umbrella of the EWPCC provide a wealth of information on worker participation, the European Company (SE), and our unrivalled collection of EWC and SE-WC agreements.

The website [www.worker-participation.eu](http://www.worker-participation.eu) project is a continuation of a multiannual project and ongoing online information service on worker participation and industrial relations issues in Europe. The website provides comprehensive, up-to-date information on workers' information, consultation and participation rights across the EU.

The WP.eu website and the ECDB are updated and new content is added on a continuous basis. The European Company Database (<http://ecdb.worker-participation.eu>) is an ongoing expert service of the ETUI (provided in cooperation with the ETUI's SE-Europe Network) focusing on following, collecting, processing and publishing data on SE companies. The main focus is on SEs that feature transnational forms of worker participation. Outcomes (statistics and facts) are disseminated in electronic form via the website [www.worker-participation.eu](http://www.worker-participation.eu).

In 2017-18, the service will continue as before, but with a number of changes. Firstly, in order to improve the quality of information and address shortages of human resources devoted to searching and processing (largely obscure) data on the growing number of SEs in Europe, part of the work will be outsourced to an external research and/or academic partner following a tender procedure (see above). The external partner will deliver data on all forms of company mobility according to ETUI's specifications and enter it directly into the database. Secondly, the content of the SE database will be integrated into and/or merged with the existing portal [www.ewcdb.eu](http://www.ewcdb.eu), albeit as a distinct part thereof. This will improve the dissemination of knowledge on SEs, SCEs, cross-border mergers and transfers of corporate seats, benefit from the content management system of [www.ewcdb.eu](http://www.ewcdb.eu), limit administrative costs and result in a better allocation of the resources devoted to publishing the SE database. Thirdly, the SE Fact Sheet Team will be renamed the Company Mobility Fact Sheet Team. In light of the extension of data collection to include all forms of company mobility, the support of an external expert will be required to help the ETUI interpret fresh data on company mobility.

In 2017-18, the ETUI will continue to provide relevant content, including on the right to strike in the public sector, BLER elections, etc; continue its technical efforts to improve its integration into other ETUI websites (primarily [www.etui.org](http://www.etui.org)) and include the mutual interlinking and accessibility of information on both websites as well as improve the website's graphical interface, usability, functionalities and structure, including necessary updates of its content management system. Thirdly, the information on national industrial relations will be updated and extended to new areas via cooperation with an external researcher.

Building on the positive experiences of previous years, the ETUI intends to continue offering (at least) one dedicated **training course** for Board-level employee representatives on the Institute's work programme. Since the vast majority of SEs with Board-level employee representation were established on the basis of German SE legislation, and non-German employee representatives as a rule form a very small minority on those Boards, there is a need for training that adequately addresses this issue, which has major implications for the nature and degree of 'Europeanisation' possible among employee representatives.

The need for both basic and advanced training for European workers' representatives continues unabated and the added value of the training offered by the ETUI lies in the multinational, multicultural composition of the group of participants and team of trainers. The ETUI is often invited to assist European Trade Union Federations, local trade union organisations or other parties as an expert and/or trainer for different projects, whether or not financed via an EU budget line. This can involve attending conferences, workshops, training or information meetings.

In 2016, the ETUI began developing an online course on the basics of EWC activities, which was designed to provide a highly interactive introduction on their legal framework, on how to negotiate EWC agreements and on how to get to grips with European-level information and consultation. The Institute aims to launch the online course for the first time in 2017.

In 2016, a new package of training materials on working with financial data in EWCs was put together in cooperation with an external agency. To make the network's trainers familiar with the material and available to a broader audience, the ETUI will organise an 'open' seminar on this topic for experienced EWC members from different companies and sectors.

Since the last work programme, the ETUI has been a partner in an external EU-financed project about EWCs, ensuring that they are fit to face various aspects of change, including restructuring, relocation, mergers, and so forth. Besides leading to a range of seminars and expert workshops, this project is expected to yield a training manual for EWCs as well as a more academic analysis. The experience gained through this project can also effectively serve as the basis for a third booklet in the series of manuals for European worker representatives, providing a very practical set of tips and tricks on how EWCs can be shaped to cope with change.

Several industrial EWCs can draw on a strong trade union presence in a number of (mainly Western European) countries, while no (or only weak) trade union presence in others (mainly in Eastern Europe). A workshop/seminar will address this issue and see how EWCs can be used as an instrument for organising and building trade union power.

At its latest congress, IndustriAll Europe defined a fourth new priority: 'building trade union power and European identity'. Obviously, EWCs can contribute to this, as they are important instruments for identifying weak trade union presence in (sometimes) large company subsidiaries in (Eastern) Europe. The training course will explore how a strong trade union presence in certain companies in certain countries (as achieved via representation on company Boards, for example) can be combined with a powerful trade union presence on national and/or local works councils. Based on a well-defined vision, an action plan could be developed on how to organise some TNCs' 'unorganised' plants in Eastern Europe.

The directive on non-financial reporting requires social reporting at company level. Once it has been implemented, some 6,000 companies in the EU are expected to fall within its scope. A seminar will explore how this directive could generate an interesting new level for potential social dialogue at company level, increase the need for workers' and EWCs representatives' awareness of several issues, and increase the prospects of influencing social reporting.

Furthermore, trade union experts who are appointed to support and coordinate European Works Councils and SE Works Councils have repeatedly requested the provision of a

similar basic introduction to the topic. Therefore, under this work programme, the ETUI will offer a course for this particular target group, empowering them to support the development of better transnational information and consultation in those EWCs where they serve as experts and coordinators. Both seminars will retain the focus on effectively implementing the rights laid down in agreements and legislation, and especially on shoring up in practice the information and consultation rights based on the 2009/39 recast EWC Directive.

Given the growing demand for training for members of European Works Councils, Special Negotiating Bodies and SE Works Councils – not least because the 2009 Recast EWC Directive established the right to training for EWC and SNB members, regardless of national provisions or provisions in the agreement –, a network of specialised **EWC trainers** with close links to the trade union movement has been established under the aegis of the ETUI's education department.

The coordination of the **network of European Works Council trainers** (the N.E.T.) requires continuous exchange and communication, as well as regular workshops to share experiences and develop new materials. Annual workshops for EWC trainers have been organised since 2009. This approach will continue in 2017-2018, focusing in particular on evaluating initial experiences with the ETUI's new online course on the basics of EWC activities.

Since 2009, the ETUI has hosted the **European Workers Participation Fund** (EWPF), which collects a share of the fees received by trade union Board-level representatives in companies set up under the European Company Statute. The fund is allocated to support Board-level representatives and work on employee participation issues across Europe, e.g. training courses, annual conferences, manuals, and meetings that facilitate knowledge transfers between workers' representatives and their trade union support.

### ***2.5. Worker participation in technical standardisation***

The ETUI will continue its work on the **safety of machinery and ergonomics** in the standardisation process. The project will continue to review standards, collect users' knowledge and experiences for the reconstruction and comprehension of the actual work, and engage in real activity aimed at improving technical standards, design, manufacturing and the use of the machinery. The project covers the Feedback Method, including the ergonomic analysis to be applied in European standards to improve machinery safety. Alongside this approach, attention will be paid to the interface between human beings and working systems and to the efficiency of man-machine interaction (ergonomics) through the ErgoMach platform.

With a view to engaging in a debate on how the Feedback Method could be useful for European ergonomists, in conjunction with the Federation of European Ergonomics Societies and the Belgian Ergonomist Society, the ETUI will organise a conference on participatory ergonomics in Brussels on 26-27 June 2017. The aim of this Conference will be to share details of ergonomic interventions and practices between ergonomists, workers and safety representatives. The Feedback Method will be presented and disseminated to a specific target group: European ergonomists and trade unionists. We expect there to be about 150 participants.

Furthermore, the annual event of the ETUI Network on Standardisation will take the form of a full-immersion training course on the Feedback Method.

The ETUI will explore the competencies of trade unions and industry federations on the standardisation of machinery. This will help to shape the priorities on future activities on an ongoing basis and continue to support worker participation in standardisation processes by: bringing their knowledge to the European Commission Machinery Committee and other technical committees in National Standardisation Bodies; discussing the associated difficulties at a seminar held for the network; and exploring best practices for cooperation in regulating the safety of machinery (design, procurement, monitoring and research).

The project will generate useful input for various working groups at the European Committee for Standardization (CEN) and the European Committee for Electrotechnical Standardization (CENELEC) and benefit a range of networks of experts, practitioners and stakeholders. In particular CEN/TC 122 is drafting European Standards in the field of ergonomics to tailor the requirements of the free and fair European market to ergonomic design principles. By working on the revision of standards, we will support the integration of ergonomics into designs. This will enable us to work on preventing musculoskeletal disorders (MSDs), one of the major occupational risks in Europe. Another working group will focus on biomechanics. The ETUI will provide expertise during revisions of standards aimed to improve the health and safety of workers, particularly in connection with the manual handling of loads. The aim of this work is to ensure that the Working Group delivers a consistent set of basic ergonomics requirements for European workers. Furthermore the ETUI is seeking to engage with the issue of personal protective equipment and will devise a strategy and working method on this. Building trade union capacity and engagement will be a part of this strategy. To test working methods, the ETUI will take up the issue of the standardisation of personal protective equipment (PPE) for firefighters, which is another outcome of the ex-post evaluation of the health and safety *acquis*.

The ETUI will monitor the annual plenary meeting and the Strategic Advisory Group (SAG) at CEN with a view to giving the Institute a comprehensive overview of the ongoing activities of all CEN TC 122 working groups and allow it to notify the ETUC and other industry federations whenever standardisation projects impact the health and safety of workers. The ETUI is monitoring projects aimed at standardising machinery and safety components placed on the European Market within the framework of the so-called 'New Approach'. In this connection, the Institute will focus on the health and safety aspects of machine standards. The ongoing evaluation of the Machinery Directive will be monitored and expert input will be provided when necessary. In addition, a workshop will be organised to explore the application of the Feedback Method to new technologies (robots) and bring together labour inspectors and market surveillance authorities.

The operating grant agreement established with the ETUC and DG GROW (SA/ETUC/ENTR/2015-01) has enabled the ETUC to engage in the work on standardisation and represent social interests. The division of work between the ETUC and the ETUI was carefully and rigorously determined. The ETUI will continue its work on machine standards and ergonomics, thereby improving health and safety standards, and is currently engaging with PPE-related issues. In general it will continue covering its current range of health and safety issues, whilst the ETUC deals with service standardisation and broader industry issues. From time to time, health and safety issues could arise within the ETUC's field of action. If this happens, the ETUI will continue to be consulted, to ensure that there is no duplication of effort on these aspects. The ETUI will report transparently both on its activities on standardisation and on any interaction with the ETUC on health and safety issues. The activities will be organised in a manner

that guarantees transparency and complementarity and avoids any risk of double-financing activities.

The ETUI's education department offers several training courses based on projects falling under priority 2, e.g. on basic aspects of EWCs, financial data for the members of EWCs, European workers' representatives, and so on.

### **3. Sustainable development and industrial policy**

Sustainable development was high on the European and national agendas before the crisis set in, but now seems to have slipped down, with increasing priority now being given to unregulated business development. Initiatives are being taken that will affect how the European Union shapes its future in a resource-scarce society and based on a re-regulatory agenda that decreases safety and increases social inequality. Sustainable development means both socially and environmentally sustainable development. This entails understanding how to shape a context that respects environmental as well as social and labour standards and gives rise to quality jobs. The re-industrialisation of Europe is advocated as a precondition for getting Europe back on track to sustainable growth, and the European agenda of the Digital Union is key in this respect. Close adherence to the agenda, combining issues of sustainability with industrial development, digitalisation and policy, is important for understanding and assessing the implications for trade unions and workers in the European Union. Digitalisation and the 'future of work' will be part of this agenda, as will the revision of the Carcinogens and Mutagens Directives, REACH and articulation between these two strands of legislation.

Main issues to be dealt with include:

- monitoring EU policies on sustainable development, and the implications of Member States' policies under the impact of austerity, pointing out gaps between targets and reality;
- ongoing mapping of employment effects, focusing on social and employment risks (in sectors);
- quality of employment and working conditions in low-carbon sectors;
- sectoral analyses highlighting controversial issues (e.g. coal and nuclear energy, biofuels, extreme energy);
- conceptualising and identifying best practices with regard to a 'Just Transition';
- continuing the sector-specific exploration of the potential contribution of trade unions and employee representatives to the sustainability challenge at company level;
- monitoring and generating knowledge on exposure to substances in the workplace and work-related cancers, and rising the profile of the ongoing revision of the Carcinogens and Mutagens Directive;
- developing a trade union-oriented approach to sustainability debates;
- continuing the debate on 'Beyond GDP' and alternative indicators;
- increasing the capacity of trade unions to influence scientific and technological developments as well as emerging risks at work based on a social and safety assessment and an open debate on their impact on employment and society.

Continuing research on the broad topic of greening, a project will build on past work on the **transformation of industrial regions and climate policies**, using expert contributions to set them in a new framework and enable assessments of the changes in the employment structure of key European regions, matched with emissions and energy

efficiency performance. One expert study will take a realistic look at the net job creation effect of renewable energy generation, examining whether we can indeed expect the transition from fossil fuels to renewables to result in the net creation of jobs. Other expert studies will focus on future challenges in key sectors and the green job creation potential of digitalisation. A workshop will take place in early summer 2017 and expert contracts will be concluded in 2017.

An additional project, building on the results of past research, will focus on **industrial policy options** for getting peripheral European middle-income economies on track towards a more balanced growth model and mapping industrial policy options. Past ETUI research has focused on the policy implications of the end of a growth model based on foreign direct investment (FDI) and possible alternatives for CEE and Southern European economies. An ETUI-edited volume with contributions from external experts is planned for 2017. The finalisation of the experts' contributions and the payment of the second tranche of their fees will take place during the new project year. A dissemination meeting will be held in autumn 2017.

A high percentage of all occupational diseases reported each year in the EU is related to exposure to chemicals, and the number of work-related fatalities remains high. The ETUI will continue its efforts to **protect workers against chemical hazards**. Two conferences highlighting the need to tackle this work-related exposure will be organised (see above).

One focus of the ETUI's work will be the **REACH regulation**, which has the potential to improve health and safety in the workplace and help reduce the number of occupational diseases and fatalities caused by hazardous chemicals. The ETUI will monitor and assess the ongoing consultation on the REACH REFIT process. At the same time, it will continue monitoring the European Chemicals Agency (ECHA) and update the trade union priority list for the REACH authorisation process and also provide trade union expertise in the interface between the REACH Regulation and legislation on workers' protection and provide tools to monitor workers' health and safety with regard to chemicals. In addition, the ETUI will continue consolidating its network of national trade union experts on chemicals and exchange information on EU legislation governing the safety of chemicals used in the workplace. The ETUI network of national trade union experts on chemicals will have an annual two-day seminar to exchange information on (existing or impending) EU legislation on the safety of chemicals in the workplace and coordinate trade-union-related activities on key issues to protect workers against chemical risks. External expertise will be sought when necessary.

Work will continue on known or presumed carcinogens, mutagens, reprotoxic substances, following up on the revision of the Carcinogens Directive and occupational exposure limit values, endocrine disrupting substances and the safety of nanomaterials. As an outcome of this project, information will be disseminated at seminars and network meetings and input into different expert groups at ECHA and the World Health Organisation (WHO). At the same time, the ETUI will continue maintaining RISCTOX, a comprehensive database providing information on hazardous and toxic chemical substances in the workplace. Furthermore, the project started in 2015-16 on the costs of non-prevention will be finalised and published.

A project conducted under the European Worker Participation Fund (EWPF) is exploring the potential **role of workers' representatives in promoting sustainability** (in the broad sense of the term, meaning social, environmental and financial sustainability) at company level, and thereby disseminating best practices

across Europe. Making workers' voices heard is key to promoting sustainable companies, especially when it comes to resisting the strong pressures exerted on companies by financial markets to adopt short-term approaches that diminish sustainability. A sectoral approach is being taken because there is tremendous variation across sectors regarding the specific sustainability issues of most concern to workers' representatives. The associated seminars are organised in a mixed format that includes presentations on topical issues as well as leading examples of sustainability initiatives, and gives workers' representatives opportunities to discuss and develop action plans. The target audience for these workshops includes EWC/SE works council representatives, Board-level employee representatives (BLER), shop-floor workers' representatives and trade union officials who coordinate the activities of workers' representatives. As has been the case since the 2013-2014 work programme, sectoral workshops will be organised in two specific sectors.

The ETUI's education department will organise several training courses based on priority 3 projects, i.e. those dealing with the circular economy, crowdwork, the digital transformation of work, collective bargaining in the digital age and other issues.

#### **4. Working conditions and job quality**

The economic crisis and the reinforced economic governance system have been associated with changes in employment levels, working conditions and labour law, leading to a weakening of workers' rights and challenging the role of trade unions as agents for raising social standards. It is therefore essential to monitor employment levels and the types of jobs created with respect to the associated pay, stability of work organisation, health and safety issues and other relevant factors.

Main issues to be dealt with include:

- Understanding the link between the growth of precarious employment and the deterioration of working conditions, studying the implications of ageing, gender, musculoskeletal disorders, psychosocial risk factors and general precariousness at work;
- evaluating and influencing the continuation of the European strategy on health and safety at work with a view to reinforcing the culture of occupational health prevention and reducing social inequalities;
- following and understanding the implications of the management of the economic crisis on job quality and the labour market in general (including wages);
- analysing the gender equality situation in Europe, especially within trade unions;
- developing and updating indicators of job quality that can be applied across countries to monitor developments;
- analysing the effects of digitalisation and following their implications for trade union organisation in new work contexts;
- supporting the process and implementation of the European Social Dialogue: monitoring the effects of the free movement of labour in relation to posted workers and the concept of social dumping;
- monitoring and assessing steps taken to integrate refugees and extra-EU migrants into the labour market;
- monitoring labour law reforms and assessing the potential implications for workers and trade unions;

- continuing to assess developments in the sectoral social dialogue; stepping up cooperation with other countries (including candidate EU Member States) on the role of social dialogue in health and safety, links between other legislative instruments and workers' rights (free market and competition vs. fundamental collective rights, market regulation and working conditions);
- understanding the role of soft law and finding new ways to regulate complex issues like technical standards in different sectors, chemicals, nanotechnologies and nanomaterials, endocrine disrupters, ergonomics and the challenges they pose for trade unions.

The importance of **preventive occupational safety and health strategies** for future generations is a factor that continues to influence the nature of the ETUI's work. The Institute carries out dissemination activities to use the scenarios set out in the publication 'What OHS for future generations?' as a basis for involving trade unions across the EU in debating a common strategy. Furthermore, a special effort will be made to empower European trade unionists to engage with the European health and safety *acquis* and also exchange information and good practices. A series of regional workshops will be organised to this end, to assist unions with the strategic planning of OHS preventive actions and explore how neighbouring countries can help each other.

**Occupational diseases** constitute the major OHS challenge, and the scientifically devised and institutional instruments developed within the European Union do not enable the accurate measurement of the considerable impact of work on people's health. Official occupational disease statistics represent merely the tip of the iceberg, such are the myriad links between work and ill health. To address this situation, the ETUI will prepare a publication on how to recognise work-related diseases, focusing on specific examples from different countries and analysing methods for improving the links between trade unions and public health institutions. In addition, the ETUI will start work on a book that will present the most important ECJ case law, crucial for determining the precise content of legal standards in OSH legislation. The goal is to improve trade unions' awareness of the importance of strategic litigation. This work will slot in with other projects on European case law.

The ETUI will also continue its efforts to gain expertise on **nanotechnology and nanomaterials**, especially when it comes to monitoring the regulation of nanomaterials in the EU, including transparency measures, following the work done by the Organisation for Economic Cooperation and Development (OECD) working party on manufactured nanomaterials, providing input to the WHO Guidelines on Nanomaterials and Workers' Health, and promoting and disseminating the training and exposure awareness package for workers produced under the European FP7 project NanoDiode. The ETUI will continue participating in the relevant working groups at ECHA and acquiring the expertise needed to inform workers in Europe about the issues at stake.

The Institute will also continue its research on work-induced **musculoskeletal disorders**. The relative heterogeneity of medical and legislative contexts in EU Member States makes it difficult to compare health data. The aim of this project will be to provide expertise during the revision of standards by the CEN Technical Committees on ergonomics design principles and biomechanics. The work will involve identifying standards that can hamper health and safety at work and attending various conferences geared towards improving the quality of working life. Furthermore, the ETUI will produce materials that aim to distil its research on musculoskeletal disorders and the complexity of tackling this issue within an ever-changing world of work. In particular,

the Institute will produce an infographic highlighting actions that can be taken to prevent musculoskeletal disorders and prepare the publication of a guide on MSDs and preventive actions during the reference period. These activities will be linked to actions after the publication of the ex-post evaluation.

**Psychosocial risks** – which are often described as emerging risks – will continue to be analysed in relation to work organisation. The ETUI will focus its research on prevention and on strengthening the relevant networks of trade unionists and academics. Special efforts will be made to collect the latest evidence on the development and causes of psychosocial risks and how trade unions deal with them. The output of this project will be a fourth edition of the network seminar, dealing with the various forms of collective action that can be developed to tackle psychosocial risks at different levels (company, sector, etc.) A seminar is also planned, to strengthen the network's collection and sharing of information. Also during the reference period, a guide will be drafted that analyses why psychosocial risks are on the increase, how they are linked to work organisation and what can be done to prevent them.

Unemployment levels vary widely across EU Member States, depending on long-standing situations, the extent of job cuts following the 2008 economic crisis and the extent of new employment creation. The ETUI's research in this area includes a project examining the **employment effects** of recent changes in regulations governing job security and collective bargaining coverage. The project will conclude with the dissemination of the ETUI's findings and a book launch.

Another labour-market topic is **social dumping**. Previous research will be continued with the analysis of empirical data gathered during 2016 fieldwork and with additional interviews conducted with trade unionists, members of employers' organisations and labour inspectors in Belgium. This will lead to a research paper that analyses patterns of competition in the international road transport sector and the most widespread abuses of the existing regulatory framework. A further topic of the ETUI's research will be the issue of intra-EU employee posting. National legal experts who are the members of a network set up specifically for the project, will provide an overview and evaluate the key legal issues brought before national courts. This project will endeavour to identify problems emerging when posting regulations are applied to workers or arising for companies in different politico-economic and/or industrial relations settings that post workers. The first stage of this research will entail identifying the researchers to include in the network, commissioning country reports and organising two workshops, one preliminary and the other when the national reports are nearing completion. The production of an edited volume, drafting of a comparative working paper and dissemination of the project's findings are envisaged during the 2018-2019 budget year.

Alongside concerns about the quantity of available jobs, research has been carried out over a number of years to measure **job quality**. One project, continuing a project from last year, is dedicated to analysing developments in job quality and employment from a comparative cross-national perspective. It will focus on three areas: the development and updating of cross-nationally comparable and relevant indicators of job quality in the form of the European (ETUI) Job Quality Index; the monitoring of developments in job quality across the EU; and progress towards articulating job quality in public policy. Expected outputs are the presentation of findings at academic conferences and seminars and of findings and expertise at the request of various organisations and bodies; in particular ongoing support for the ETUC and Employment Committee; and the publication of an updated ETUI Job Quality Index in a working paper.

The findings will be fed into the ETUI's work on monitoring and contributing to the European agenda on **social benchmarks for upward convergence and the establishment of fundamental social rights**.

Particular attention will be paid to the **impact of the digitalisation of the economy and its potential and real consequences for the labour market and forms of employment**. The ETUI hosted a three-day conference on this topic in Brussels in June 2016 and has already commissioned expert reports on the subject. Building on the aforementioned conference, a new European network of experts will be set up in 2017 under the umbrella of the Foresight Unit. In June 2017, a first meeting will be held in Brussels on 'The Digitalisation of the Economy and its Social Impacts: from Research to Action Plans'. The aims will be to organise a structured dialogue between researchers involved in forward-looking studies on the future of labour and trade union leaders facing the challenges of digitalisation, and to strengthen the links between scientific analysis and strategic action.

To gain a better understanding of the **gender dimension in occupational health**, taking account of the different approaches in various European countries, another project will tackle the health impact of working conditions for women and the social inequalities between women and men in the labour market, employment, working conditions and occupational health and safety. The ETUI will continue its efforts to consolidate a network of trade unionists and academics working on gender and occupational health and equality on the labour market. It will also seek to raise European trade unionists' awareness of the gender-sensitive analysis of labour markets, employment patterns and working conditions, and will show that such gender-differentiated analysis yields useful information about occupational health. Another aim of the project is to participate in external gender-related networks and in expert groups on gender and equality, such as the GAS network (*Genre-Activité-Santé*). A book will also be published during the reference period, containing contributions from the network and covering several aspects of the working conditions faced by women and their impact on health. It will also present specific cases of actions taken by trade unions to improve working conditions and summarise some recent scientific research in selected areas (like occupational exposure and breast cancer). The book will be published in English and French, and activities will be organised to disseminate it.

In addition, the usual annual seminar will bring together the network of stakeholders (researchers, safety representatives and actors in OSH prevention) from several Member States to discuss the social inequalities, especially those between women and men with regard to working conditions and occupational health and safety. The seminar will also raise the awareness of European trade unionists to the gender-sensitive analysis of working conditions and occupational health and strive to improve understanding and boost recognition of the gender approach by sharing research, experience and current thinking from various European countries with the European trade unions.

One project dedicated to analysing trends in **gender equality** across the EU will include monitoring developments in policy discourse with respect to gender equality, including the influence of EU-level strategies and mechanisms, and ascertaining how the gender pay gap has been addressed in collective bargaining across Europe. Labour market developments and recent trends in new forms of work will be tracked from a gender-sensitive perspective. There has been a heated debate both in academic circles and among policymakers on changes in the employment relationship, mostly linked to digitalisation and emergence of the platform economy. While the main emphasis has been on the disruption of old models of work organisation and potential effects on job

creation and/or destruction, little attention has been paid to how these developments related to vulnerable labour supply groups and their interaction with traditional inequalities. This project will set out to examine the links between gender equality and new forms of work. The empirical part will entail analysing extensive surveys on work and working conditions, i.e. the EU-LFS and the EWCS. Expected outputs include an article for an academic journal, a working paper and the presentation of the project's findings at international academic conferences and seminars.

Research will also continue on **cross-border labour mobility**. Migration is one of the focus topics of European policies and a crucial issue for trade unions. The wave of refugees who reached Europe unprepared in 2015 still need support, in the form of policies and, above all, their successful integration into the labour market. Economic migration by third-country nationals also needs to be properly accommodated and managed. Intra-EU labour mobility, which is a fundamental right in the EU, has come under pressure, and further policies are needed to make it a success. A working paper will map recent turbulent events and show how individual Member States are affected by the different waves and types of migration. Based on the framework set up by the working paper, a network project will be launched, involving national experts and trade unions from a selected number of Member States. During the 2017-2018 budget year, a preparatory workshop will be held. Some expert fees for the next project phase will also be due during this period. The publication of a book will follow in the 2018-2019 project year.

The ETUI's education department organises several training courses based on priority 4 projects, e.g. on better rights and quality jobs, gender segregation at work, atypical work, and so on.

## 5. Trade union renewal

Falling membership continues to be one of the main challenges to trade unions across Europe. It is essential that trade unions across Europe gain a clearer understanding of the reasons underlying dwindling membership and share their experiences and best practices with each other. The potential of joining forces across borders in trade union renewal initiatives designed to keep pace with European integration should be explored. These questions should be viewed in the light of the ongoing crisis and deregulation of the labour market

Main issues to be dealt with include:

- organising and recruiting, adopting retention strategies in Europe to recruit and organise younger and atypical workers;
- assessing the potential of a specifically European 'organising model';
- pinpointing and understanding current and long-term trends in strike activity and collective action;
- sharing experiences and best practices across ETUC affiliates; conducting pilot projects on innovative cross-border recruitment and organising campaigns;
- exploring trade union financing;
- devising and implementing innovative strategies for trade union development in Central and Eastern Europe.

In line with a voluntaristic view of trade unions, the ETUI's research on trade union revitalisation focuses is particular on the **membership dimension**, though this is only one of many aspects of trade union revitalisation (or renewal). Accordingly, the

main focus of this project is on the **transferability of the 'organising model' to continental Europe**, though it will also serve as an 'umbrella project' for issues related to union membership, such as strategies for retaining members and allowing them to participate in their union or encourage them to become more involved in general.

Today, most – but not all – trade unions in continental Europe face the same problems relating to their members, who are very passive. Albeit with striking variation between countries, trade union members are ageing and their composition is fairly unrepresentative of the overall workforce. Membership levels, above all in the private sector, have also failed to keep pace with growth in employment, even in countries where membership has been on the rise, resulting in a further drop in levels of union density in most countries (though the actual levels differ significantly from one country to the next). In English-speaking countries, the decline in membership became widespread earlier than in most countries in continental Europe, which goes some way towards explaining why a voluntary 'transfer' of recruiting policies between unions, especially in Australia, Canada, Ireland, New Zealand, the United Kingdom and the United States, began in around the late 1990s. Predominantly, this transfer of intensive recruitment policies refers to a process whereby knowledge about the 'organising model' in one country is used by a union elsewhere to develop union revitalisation in another region or country.

Over the past decade or so, some unions in continental Europe have shown a growing interest in such a policy transfer as well. Based on a review of the literature and additional interviews, we will develop the argument that for various reasons unions in Germanic and Nordic Europe are better equipped to develop their own understanding of the organising model than their counterparts in Central and Eastern Europe and especially in Southern Europe. This emerging pattern can be explained by invoking unions' identity and referring to the institutional structure of national industrial relations systems, and the strategies of unions, employers and the State. In addition, attention will also be paid to this policy transfer in itself, in an effort to explain emerging national and sub-national patterns. Closer examination of the process will probably fuel a better understanding of the particular substance of the organising model in different national contextual settings and of how this is having a spill-over effect on the Europeanisation of industrial relations. An analytical distinction will also be drawn between the process and substance of the policy transfer of the organising model.

The lack of systematic country studies on the organising model in continental Europe makes it difficult to gain a precise understanding of its origins, extent and significance on a European scale. Most current research on union recruitment policies and the organising model consists of case studies evaluating union campaigns in specific economic sectors. In addition, little is known about the process of policy transfer, and the knowledge about and understanding of the substance of the transfer is still in its infancy, too. Thus, in essence, this project will examine the emerging patterns of policy transfer of the organising model from the English-speaking to continental European countries, the limitations and the prospects of this process. Consequently, it will yield an agenda for further academic research and at the same time attempt to stimulate debate about the organising model within unions themselves. Research results will be disseminated through participation in conferences and the publication of ETUI working papers and articles in one or more academic journals.

Building on evidence based on a survey conducted among primarily young unionists across Europe, another project will further explore and report on the unionist insiders'

perspective with regard to the **integration and participation of young members in union life** and the internal structures developed by national unions to cover young workers' interests, i.e. the unions 'deliberative vitality' vis-à-vis young workers. In addition, the ETUI is involved in an international project comparing young workers and the representation of workers' interests in five countries by assessing case-study successes. Research findings will also be disseminated by participating in conferences, issuing ETUI publications and publishing one or more articles in academic journals. Finally, a new pilot-based survey will be designed and conducted for the purpose of analysing the possible young members' expectations of their unions and their membership. The project will also examine the extent to which school to labour market transitions might influence these expectations and help to gain insights into the long-term development of trade unions in the European Union.

The ETUI is running a long-term project that serves as an 'umbrella' both for monitoring **strike behaviour and social protests by workers** (particularly during socio-economic crises) in Europe and for external meetings and publications covering those issues. In particular, findings from the 2016 issue of *Transfer* focusing on recent developments in strike action will be disseminated, and the database on strikes will be updated and visually revamped to make it more dynamic, up-to-date and interactive.

Another project aims to help assess the techniques, organisation and outcomes of **trade union recruitment drives**. This project supports a transnational organising initiative involving some 15 trade unions representing members within a single company. To this end, it will entail a single meeting of trade union representatives from two companies, who will discuss the possibility of establishing an organising network within the company in question. There are plans to hold further meetings in subsequent years if the network is established and the representatives wish to pursue the initiative. The second strand of this project will consist of a single meeting of trade union representatives from company 'B' who will discuss the development of an internal organising network that has already held six meetings. The network members currently cover their own accommodation and travel costs, while the ETUI pays for interpreting and meeting rooms. This project, carried out with an external expert, was awarded a contract following an ETUI call for tenders and enjoys the support of UNI-Global and UNI-Europa. There are plans to hold further meetings in subsequent years.

An exploratory project on **trade union financing** was launched in September 2015 and initially comprised a pilot investigation into the availability of information on trade union finances in three countries (Belgium, Germany and the UK). Efforts will be made to design a database and to collect information on aggregate (country-level) union finances. If comparable data can be unearthed, comparisons between the three countries will be made.

The key objective of the project is to compare how trade unions finance themselves. Our working hypothesis is that trade unions are funded very differently across Europe (both in terms of the scale and methods involved). One of the basic assumptions is that trade union funding is essentially a political issue and therefore depends on the unions' specific role within the broader political and societal context and their embeddedness in specific national constellations and institutions. Against this backdrop, the key question is how trade unions are adapting to a situation in which increasing political efforts are being made to restrict their capacity to act and in which they are being asked to do more in terms of contracting income with a view to identifying common European trends.

Another project will focus specifically on **CEE trade union movements**. Work began in 2015-2016, with the launch of a network project examining innovative strategies developed by CEE trade union movements since 2008. It followed the development of a theoretical framework for the study and selection of country experts from 11 new EU Member States who were contracted to provide detailed accounts of innovative trade union practices in their respective countries. Activities planned for the 2017-2018 budget year will focus on disseminating the project's findings, among other things by holding a book launch and presenting the results at both internal and external events, producing a brochure that summarises the book's findings and making efforts to ensure that some contributions are published in an academic journal. Research will also be conducted on the relations between trade unions and populist political movements in Poland and Hungary.

A new partnership project will be launched with the Canadian Interuniversity Research Centre on Globalization and Work/*Centre de recherche interuniversitaire sur la mondialisation et le travail* (CRIMT). This will focus on improving work by encouraging social actors to experiment with institutions that regulate work. Only eligible costs will be incurred in the work programme.

The ETUI's education department organises several training courses based on priority 5 projects, i.e. on trade union organising and recruiting, leadership and capacity building, communication and campaigning, organising youth, and similar issues.

## **B. OTHER PROJECTS**

### **1. Education department**

This year, in line with our recent practice, the education department will continue to develop activities based on priorities set out in the work programmes of the ETUC and the ETUI but will focus more intensively on the future of Europe, macro-economic policies, investments, the social pillar, trade union renewal and young workers.

The ETUI will continue responding to demands and needs to boost and strengthen European trade union action, social dialogue and social Europe.

The context remains (politically, socially, economically and culturally) challenging in view of the crisis, austerity policies, the difficulties faced by workers and trade unions in improving workers' lives and influencing trade union activities. It is also important to look ahead to post-austerity and post-crisis times and policies (namely sustainable development and industrial policies). So these issues are also covered by the ETUI's training programme.

Growing inequalities are apparent across the entire EU. Worse, populism is spreading and threatening the European project (Brexit being one expression of this) in which trade unions have been so deeply engaged. The present situation is a far cry from the original European project and its values, and it is failing to motivate – indeed is generating opposition among – growing numbers of workers, so this trend is necessarily covered by the Institute's training programme.

The unions' bargaining power has been curbed, reducing the ability to attract members, influence ideas and policies and bring about change and development. In the context of industrial relations systems, social dialogue and collective bargaining – as part of the European Social Model – are also covered by the education programme. It is also important for trade unions to gain expertise in a number of specialised areas, e.g. communication and how to influence the EU decision process. With this in mind, trade union renewal is one of the priorities of a number of training courses.

Other courses focus on the key roles played by European trade unionism, covering the creation of quality jobs and working conditions, workers' rights, (including the rights to collective bargaining and to strike), the social transition to a green economy and worker participation.

#### **Applying the EDU strategy**

All this represents a challenge for European trade union education activities, and new ways must be found of rising to it. More than ever, it is crucial to identify specific needs and expectations and offer technical and operational training to support and reinforce trade union activities.

The four-year ETUI education strategy adopted by 'EDUDAYS' (the annual meeting of the ETUI education community) is being developed and applied with a view to meeting future requirements.

We are looking to maximise investments in training, widen target audiences, move beyond face-to-face training and enhance the multiplier effect of implemented activities and of the teaching materials produced by the ETUI.

To achieve this strategic objective, the programme identifies and sets the following priorities:

- to integrate the ETUC's priorities, adopt multiannual planning and establish cooperation agreements with trade unions;
- to increase the number of participants (through e-learning and other means) and strike a better gender balance;
- to develop processes that identify needs, but also quality standards and common evaluation practices;
- to develop our potential and capacity to offer high-quality training and further enhance the ETUI's standing as a key provider of trade union-oriented training for EWCs, SNBs and SE-WCs;
- to increase visibility and improve the dissemination of activities and content among trade union organisations;
- to consolidate the work done by our networks, increase their membership and create an ETUI Eurotrainer identity.

### **ETUI Education – E-learning project**

The ETUI's distance learning activities will continue, testing courses and content and integrating activities with other face-to-face activities (blended learning). The Institute's primary objectives for this initiative are to extend the reach and increase the resilience of its provision of education and to provide better support for career-long progression for union members by offering them successive learning opportunities.

The second phase of the E-learning project is under way. Two pilot online courses have been designed, dealing respectively with 'European Works Councils – the rules of the game' (pilot version in English) and, 'Being a citizen in Europe today' (pilot version in French). Samples of both training courses were presented for testing to many ETUI stakeholders, and the feedback received has been taken on board with a view to making further improvements.

When this testing phase is over, these pilot courses will be implemented and launched during the upcoming budget year 2017-18.

### **QIS – Quality Improvement System**

This year, one priority is the Quality Improvement System (QIS), which will be system for evaluating the ETUI's training activities. It was designed with the involvement of all the participating attending the EDUDAYS 2016 event and will be improved step by step throughout the programme and validated at the next edition of the EDUDAYS in Paris in October 2017.

#### **Core training and certification process**

In practice, the main courses intended for officers from affiliated organisations cover:

- young trade union officers working at European level;

- members of European Works Councils (EWCs);
- project managers;
- Eurotrainers;
- languages (mostly EN).

These courses develop the skills required to carry out European trade union activities. They are systematised and specialised courses that draw on strategic intent to strengthen the educational quality and efficacy of the learning process.

Young people are a very significant target group within the ETUI'S overall activities.

The young leaders' course has been reformulated and updated, taking into consideration the findings of the impact study conducted over the last five years.

The certification and validation process applies to three of these courses, in accordance with the European framework and in cooperation with external certifying institutions.

General training is aimed at trade union officials and staff, elected or employed in national affiliated confederations or European federations. Based on the use of adult education methods, it is a tool that prepares trade union officials for topics of significance and work at the European level, while also facilitating the dissemination of information on European affairs and the spread of trade union goals regarding Social Europe. This broad-based target group means that we can exert a positive and influential impact on trade unions.

The ETUC Secretariat will continue to be a target group for high-level training, in cooperation with the London School of Economics (LSE).

European Works Councils, SE Works Councils and Special Negotiating Bodies form a specific target group. Participants in training for these bodies are not trade union officers but company representatives who generally include some non-unionised employees. Training objectives are set in coordination with the workers' chairperson and/or secretary of these bodies and the contact person at the relevant European Trade Union Federation (ETUF), but quite often also in consultation with the HR management of the company concerned.

Highly-experienced officers with long trade union careers will continue to receive appropriate training offers.

This ETUI's education programme includes a highly-varied set of training courses for workers' representatives with a view to developing the European dimension and better identifying the nature and needs of Social Europe.

As a result, apart from the training under the core training programme described above, further training and innovative courses will be organised on the following topics:

Priority 1: Policies and tools for the future of Europe

- The future of Europe
- What's new on the political economy?
- Special high-level training on political economy
- The European Pillar of Social Rights and the strengthening of European political integration

- European trade unions against the extreme right and right-wing populism
- CETA and TTIP: challenges or threats to trade unions?
- Planning for action: defending and promoting Europe's public services
- Strong social dialogue and social partners: added value for progress
- Strengthening trade unions' capacities for a better social dialogue
- Trade unions' role in integrating migrants and asylum seekers
- Promoting editorial independence in the newsroom
- Online training on citizenship

#### Priority 2: Worker participation and industrial relations

- Online training on EWC basics
- Rights for workers' representatives at company level
- Assistance and expertise for EWC-related initiatives from ETUC affiliates
- Training on the basics of financial data for EWC members
- EWCs as an instrument for organising and building trade union power
- Non-financial information – Directive 2014/95 and its impact on industrial relations
- EWC coordinators in the heart of transnational trade union strategies in multinationals.
- Manual 3 for European worker representatives 'How to make your EWC fit for change'

#### Priority 3: Sustainable development and industrial policy

- The earth is flat and the economy circular?
- Never follow an (unorganised) crowd!
- Leading the digital transformation of work
- Innovative forms of collective bargaining in the digital economy
- Free vs forced labour in the XXIst century

#### Priority 4: Working conditions and job quality

- Better rights and quality jobs for a more prosperous and fairer Europe
- The role of trade union representatives in cross-border employment disputes
- Stem the tide! The restriction of labour rights in Europe
- Breaking with gender segregation at work and in OSH
- WATCH! - Workers' Aging a Trade union Challenge!
- Working and living in capital regions
- Stepping-up trade union actions in prevention, control and enforcement
- Atypical workers and trade union representation
- International labour standards and their application in the EU

#### Priority 5: Trade union renewal

- Trade union organising and recruiting across Europe
- Democracy in trade unions and beyond
- Leadership and capacity building for trade unionists
- Reinforcing trade unions' communication and campaigning across Europe
- Verbal communication for effective trade union actions
- How to influence the EU decision-making process
- European training for young trade union leaders - week 1
- European training for young trade union leaders - week 2
- European training for young trade union leaders – week 3
- Youth training week
- Organising youth
- Developing negotiating skills to protect young workers
- Recruitment and organising public service workers
- The hydra of 'precarious work'. Re-examining strategies against precarious employment
- UNI Europa Winter school

#### Other

- EU funding for health and safety projects
- Managing EU grants under SD budget lines
- QIS – Quality Improvement System
- Training trainers on project work
- 70-20-10 – how to look at learning from a performance perspective.

Meanwhile, the role played by the networks is being stepped up; a pedagogical committee has been put in place to think strategically and take responsibility for monitoring the quality of our programme and practices; the annual EDUDAYS conferences evaluate and provide input for the next programme; the thematic networks constantly rethink and review the strategy and the usefulness of the programmes.

## **2. Research department**

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

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

The ETUI provides expertise for the PERC network and its economic expert group. The Institute's participation is focused mainly on the impact of economic integration on Eastern Europe. This entails attending key PERC events, in some cases involving an additional expert. More expertise is provided in the health and safety domain, the aims being to exchange information about health and safety management and collect data on safety representatives in the EU countries, compared with countries in the PERC network.

### **Networks, experts and dissemination**

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

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

The ETUI also cooperates with universities, through meetings, conferences and publications, in a bid to enhance the dialogue between trade unions and academics on issues of union relevance relating to the European integration process. Such cooperation affords the ETUI relatively easy access to high-quality research, an example of this kind of collaboration being the ad-hoc expert meetings with the London School of Economics, where LSE academics engage with ETUI staff on topics in which the Institute needs input.

## Glossary

<b>BLER</b>	Board-level employee representatives	<b>GOODCORP</b>	Network on corporate governance
<b>CAWIE</b>	Collectively agreed wages in Europe (project)	<b>GURN</b>	The Global Union Research Network
<b>CJEU</b>	European Court of Justice	<b>HBS</b>	Hans Böckler Stiftung
<b>CRIMT</b>	Centre de recherche interuniversitaire sur la mondialisation et le travail	<b>ILO</b>	International Labour Organisation
<b>CSR</b>	Country-specific recommendation	<b>IR</b>	Industrial relations
<b>ECHA</b>	European Chemicals Agency	<b>MNCs</b>	Multinational companies
<b>EGOS</b>	European Group for Organisational Studies	<b>N.E.T.</b>	Network of European Works Council Trainers
<b>ELFS</b>	European Labour Force Survey	<b>OSE</b>	Observatoire Social européen
<b>EPSU</b>	European Federation of Public Sector Unions	<b>PERC</b>	Pan-European Regional Council network
<b>EQF</b>	European Qualifications System	<b>PIAAC</b>	Programme for the International Assessment of Adult Competencies
<b>ESS</b>	European Social Survey	<b>REFIT</b>	Regulatory Fitness and Performance
<b>EWADB</b>	European Works Councils database	<b>SEER</b>	South East Europe Review on labour and social affairs
<b>EWCS</b>	European Working Conditions Survey	<b>SEEUROPE</b>	European Company network
<b>EWPC</b>	European Workers Participation Competence Centre	<b>TTUR</b>	Transnational Trade Union Rights (network)
<b>EWPF</b>	European Workers Participation Fund	<b>TURI</b>	Trade Union related research institutes