

# **Activity Report of the ETUI**

## **1 April 2021 – 31 March 2022**

## Table of contents

<b>Mission statement</b> .....	2
Greening the ETUI .....	2
<b>Part 1 - Introduction</b> .....	3
A. Main activities of the ETUI.....	3
B. Contexts: pandemic, political and institutional .....	5
C. The Work Programme and the Covid-19 pandemic .....	6
D. Foresight projects .....	7
E. Main innovations in 2021-2022: transversal projects and strategic actions.....	8
1. Climate change and just transitions .....	10
2. Trade union renewal .....	11
3. The effects of the Covid-19 pandemic on the world of work .....	11
1. Research .....	12
2. Education .....	17
<b>Part 2 - Departmental projects</b> .....	23
Strategic priorities and projects .....	23
1. Priority 1 - A social-ecological transition and the digital revolution.....	23
2. Priority 2 - A new economic model .....	35
3. Priority 3: A renewed social contract .....	40
4. Priority 4: Democracy at all levels.....	52
5. Priority 5: Trade union renewal .....	60
<b>Part 3 – Publications and public engagement activities</b> .....	69
A. Publications .....	69
1. The main categories of ETUI publications .....	69
2. The journals <i>HesaMag</i> , <i>Transfer</i> and <i>SEER</i> .....	71
3. Databases .....	72
B. Conferences, workshops and other public events .....	73
C. Networks.....	74
D. Cooperation.....	75
<b>Part 4 - Communication strategy and visibility</b> .....	78
A – Websites, social media and blogs .....	78
Video productions .....	87
The Documentation Centre .....	89
Annexes .....	93
List of trainees and guest researchers .....	93

# Mission statement

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

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

## Greening the ETUI

Environmental sustainability is an overarching priority for the ETUI. The Institute is committed to engaging with the issue as part of its research and education activities, and also in terms of internal institutional action aimed at reducing its environmental footprint. In general, such action aims at promoting a constant internal awareness amongst staff regarding purchasing, water use, biodiversity and mobility.

# Part 1 - Introduction

## A. Main activities of the ETUI

In 2021-2022, in accordance with its Statutes, the main activities of the ETUI included:

1. monitoring major European developments of importance to workers and the European trade union movement;
2. collecting, storing and providing data and information on policy areas of relevance to the European trade union movement in its capacity as an actor in the European integration process;
3. conducting multidisciplinary and intellectually independent research on topics of importance to the European trade union movement and other social actors, and publishing the results of this research in books, working papers, journals, reports, guides, policy briefs and background analyses;
4. disseminating the results of this work at conferences and seminars;
5. establishing European networks of researchers, research bodies and universities in fields relevant to the work of the ETUI;
6. coordinating European networks of health and safety experts in a range of fields including technical standards, ergonomics, gender, psycho-social risks, nanomaterials and chemicals;
7. representing and supporting the European trade union movement in the field of health and safety in regard to European Union (EU) strategy, legislative acts and their implementation, collective agreements and technical standards;
8. improving cooperation between the European trade union movement and academic institutions, research institutes, EU specialised agencies and prevention 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 with a view to renewing and updating the trade union movement and challenging the needs and demands of members and organisations;
11. supporting the European trade union education community, which provides a forum for the strategic development of trade union education in Europe, and reinforcing the networks required for core and strategic activities and expertise;
12. adding a European dimension to national trade union education initiatives by providing basic and ongoing European training programmes for trainers and producing training resources;
13. providing expertise and advisory services for the design and delivery of European trade union education projects.

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

Both regional and gendered aspects of the issues arising from European integration were taken into consideration when drawing up and implementing the ETUI work programme. The ETUI offered a comprehensive and ongoing European training programme enabling trade union officers and representatives from all over Europe to participate in a series of unique learning experience and gain a broader European perspective on trade union issues.

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

Furthermore, the Foresight Unit continued to contribute its future-oriented dimension to the ETUI's work, examining new and future societal challenges and trends likely to affect the future of trade unionism and the ETUI's *modus operandi*. We helped stimulate dialogue between different actors and to break the ground for further research and educational activities, focusing on the two priorities defined when it was created: the multi-faceted impact of digitalisation on future jobs and the nature of work; and the need for a social-ecological transition in the face of climate change. The Unit helped to identify, through a cooperative and participatory internal foresight exercise, the ETUI's longer-term challenges, developing four scenarios and 12 strategic roadmaps to enhance the institute's internal resilience.

The ETUI continuously monitored and evaluated its activities in a bid to improve their delivery and impact. This monitoring exercise was used to plan and implement the work programme as described below, and to shape our subsequent programme and activities. The Institute's staff also promoted the dissemination of their research and educational resources through a wide range of different networks and events held at national, European, and international level.

In this activity report, the following conditions for subcontracting and financial support apply, as stipulated in the framework partnership agreement 2018-2021 (the eligibility criteria). A proposal was considered eligible only if:

- a) its content corresponded, wholly or in part, to the topic description in relation to which it was submitted, in the relevant part of the work programme;
- b) it complied with the eligibility criteria set out in the framework partnership agreement. Following the exit of the UK from the European Union, the expiry of the 'transition period' and the coming into force of the new EU-UK Cooperation and Trade Agreement, the ETUI ensured that contractual engagements with UK-

based providers continued on current terms until the end of the previous Work Programme, i.e., until 31 March 2021. Following that date, the ETUI continued to engage with UK experts, goods and service providers on an ‘as-needed and as-required basis’, in line with the treatment conferred to third countries and their nationals, and to the extent that such engagement offered substantial benefits to our organisation.

## B. Contexts: pandemic, political and institutional

Though the context in which the ETUI delivered its work programme was arguably less challenging than the first ‘pandemic’ year, it was to a certain extent impacted by the new ‘waves’ of the disease. The impact was mitigated by the successful deployment of a number of measures and actions. Our work continued to monitor and engage closely with a number of the political and institutional developments taking place at EU level. The suspension of some of the stringent fiscal requirements of the Growth and Stability Pact in March 2020, allowing Member States to temporarily depart from the medium-term budgetary objectives set by the Pact itself in order to deal with the consequences of the pandemic, and the introduction of an ambitious EU economic recovery package under the ‘Next Generation EU’ programme, reinforced the rather novel, and expansive, macroeconomic and fiscal landscape for Europe as a whole. Member States engaged with these initiatives by means of national recovery and resilience plans, often produced in genuine consultation with social partners.

The finalisation of the Brexit process and the conclusion of an EU-UK Trade and Cooperation Agreement effectively sealed what was a long and somewhat traumatic process that, for all its tensions, boosted political cohesion within the EU and the core role of the single market project, and its future resilience in the context of the EU’s open strategic autonomy. The continued presence of strong populist movements challenging EU integration remains a concern, even though the pandemic appears to have revised attitudes towards further economic and political integration along different fault lines, with some self-defined ‘frugal’ Member States demanding caution and restraint on the path to an ‘even closer Europe’. The works of the Conference on the Future of Europe progressed and gained some traction and visibility as the worst of the pandemic abated, opening up the prospect for reform in the coming years. The questions of democracy and democracy at work (the former underpinning the original rationale for the Conference, the latter somewhat side-lined) cannot be separated, as in reality they are inextricably related. The pandemic has also shaped Europe’s attitudes towards a greener and more sustainable future. While the initial impact of the pandemic-induced lockdowns produced a temporary and unexpected reduction in EU emissions and its overall carbon footprint, it is far from clear whether these trends will be maintained once the pandemic is over. Clearly, the recently adopted Just Transition Fund will have to be used to its maximum effect to assist the EU in pursuing its plans for a ‘European Green Deal’, launched in 2019, though it is clear that a process of ‘green mainstreaming’ must also be applied to other structural funds and Next Generation EU, something that ETUI monitors regularly as part of certain research and education activities.

In this context, the priorities identified in 2019 by the ETUC Congress, and revisited and updated during the mid-term conference in November 2021, remain relevant. Their focus is on issues such as the future of Europe and democracy, economic governance, taxation policy, wages and collective bargaining, social dialogue, democracy at work, the European Pillar of

Social Rights and the UN's 2030 Agenda, industrial policy and digitalisation, non-standard work, health and safety, sustainable development, climate change, energy policy, fair mobility, free movement and posting of workers, and migration. These issues will continue to be relevant in the months and years to come, as will the demands for a fair and socially sustainable recovery from the Covid-19 economic crisis and the cost-of-living crisis (partly aggravated by the Russian invasion of the Ukraine) put forward by the ETUC in recent weeks and months (see Macroeconomic Dialogue at Political level - Speaking notes of Luca Visentini and Liina Carr, 23 May 2022). We expect migration to become a pressing policy issue, partly as a consequence of the disruption to supply chains and food shortages aggravated by the Ukraine conflict.

Led by President Ursula von der Leyen, the Commission has been making progress in terms of the delivery of the ambitious work programme outlined last year, most notably with the presentation of a series of draft directives on topics such as platform work, pay transparency, and on combatting violence against women and domestic violence in the European Union. While far from perfect, these proposals have the merit of centre-staging demands for decent working conditions and gender equality, and of reinforcing demands for decent pay and adequate collective agreement coverage underpinning a previous proposal currently in the EU legislative pipeline (i.e., the draft directive on decent minimum wages). The Commission has also made progress on the Digital Services Act package, putting forward such key proposals as the 'A.I. Act', an aspect that our research and education experts continued to monitor closely. The revision of the European Pillar of Social Rights (EPSR) in 2021 provided additional input and levels of ambition for the development of a new phase of European social policy, and in the aftermath of the Conference on the Future of Europe, a debate about its possible 'constitutionalisation' is emerging.

These important advances have been closely monitored by ETUI experts over the years, with a view to ensuring evidence-based improvements in the course of their delivery and implementation. But the EU-level policy shift towards greater social progress also calls for new and socially ambitious ideas to be developed in order to continue to stimulate the policy debate, discourage complacency, and prevent a stalemate.

## C. The Work Programme and the Covid-19 pandemic

The 2021-2022 Work Programme was developed as the Covid-19 pandemic was still in progress and as the first viable vaccines provided hope of a credible way out of the current and ongoing health crisis. Despite a series of successfully delivered vaccination programmes, Europe and the world were still subject to successive 'waves' of the disease, with lockdowns again imposed in most EU countries throughout the autumn and winter months. For ETUI, this meant putting into effect a number of contingency plans for the delivery of its programme, including the online or 'hybrid' delivery of a number of its events. These uncertainties gave us an opportunity to further establish some of our new ways of interacting and collaborating while decreasing our carbon footprint. For instance, we remain determined to expand our successful webinars (making some of them fully hybrid), while the Education Department will continue to develop its online courses.

Delivery of our Work Programme took place in an equally uncertain and challenging economic and political climate. European economies and labour markets braved these continuing

challenges posed by Covid, lockdowns and social distancing measures, partly through an extension of some of the income support schemes experimented with in the previous year. Our economic forecasts predict substantial growth in the levels of government debt and deficits in the months and years to come, a rise in economic inequalities, and an asymmetric economic recovery across Europe's national economies, with strong inflationary pressures adversely affecting a series of macroeconomic and social indicators. While labour markets appeared to perform strongly in the immediate aftermath of the pandemic, job quality and income security appear to be greatly impacted. Most worryingly, the last few months of the Work Programme saw Europe confronted with the reality of the Russian military invasion of its neighbouring country, the Ukraine, resulting in additional pressure on prices, supply chains and energy costs, not to mention the incalculable loss of life in the Ukraine itself and the migration and refugee flows. We expect some of these developments to continue beyond the current emergency, with unclear prospects on the economic and political stability of Europe in the coming months.

Despite these challenges, we were of the view that the five broad mid-term priorities adopted for the 2021-2024 activities framework, and outlined below in the following subsection, remain relevant. They were relevant in the course of the delivery of our Programme and can adequately help us organise our work in the future, while continuing with our process of adapting to the changing social, economic and political reality.

As part of this process of adaptation, the Work Programme already envisaged developing one of last year's transversal themes (i.e. one of the three topics where we seek to develop cross-departmental synergies within the Institute), namely that of 'Covid-19 and the World of Work', into a broader area of study, focusing on 'The Future of Work'. The other two transversal themes, focusing on 'Climate Change and Just Transitions' and 'Trade union Renewal', were developed further, while our mainstreamed 'Gender Equality' area of work was also structured around the formalisation of an 'Equality Working Group' focusing on gender equality and inequalities at large.

The Education Department had already, in 2019, adopted an innovative four-year strategy that included a shift towards online learning. That strategy allowed the ETUI to adapt quickly to the changing circumstances initially dictated by the pandemic and social distancing rules and was enhanced and accelerated further in the last few months. As noted in greater detail below, additional steps have been taken to accelerate our internal digital transformation. The following subsection recalls the ETUI priorities, briefly mentions some of the future developments in the Institute's educational activities and outlines the transversal themes for this year.

## D. Foresight projects

The SARS-CoV-2 pandemic caused many upheavals in the world, not just in terms of health, but also politically, economically, socially, industrially and culturally. With the world and the EU entering a period of great uncertainty, the ETUI's Foresight Unit took a forward-planning approach enabling us to comprehend possible future developments and their probable implications with a view to making better decisions.



Our primary focus is now the future of work and the impact of new technologies and digitalisation. Among other risks, new technologies entail the risk of enhanced and undesirable workplace monitoring and stress. The pandemic has accelerated the impact of AI on managerial supervision and, therefore, on workers' rights. This topic was mainly dealt with in relation to two aspects: artificial intelligence in the workplace, and algorithmic management. We commissioned a technical investigation on how algorithms negatively impacted workers in a food delivery platform. This subsequently served as evidence for data protection authorities, followed by a publication. The ETUI also co-organized, together with the university KULeuven, an important conference (nearly 600 registrants) on the theme of algorithmic management and collective bargaining which allowed for exchanges of information and trade union experiences through the presentation of national contributions (DE, ES, FR, IT, PL, SE, UK) as well as the UNI-Europa trade union federation.

We have devoted a significant part of our foresight projects to developing training activities on strategic foresight for trade union organisations, in co-operation with our Education Department. In addition, we have cooperated with ITC-ILO on similar foresight programmes in different regions of the world. Foresight is an important tool for preparing organisations for alternative future scenarios.

Climate and digital transitions are transversal areas of work for the ETUI. Research on the role that the European social partners can play at sectoral level in these transitions has however had to be postponed to the next budget year. Research includes an analysis based on data held by the ETUI on joint texts of the sectoral social partners, and a qualitative assessment of this dimension in order to consider the role that these social partners can play in future transitions. Furthermore, a publication on Covid-19 and telework has been prepared and more particularly on the new ways in which the questions of autonomy and managerial control are being addressed in a post-Covid world.

## E. Main innovations in 2021-2022: transversal projects and strategic actions

The ETUI defined its research and training activities based on the five priorities agreed at the ETUC Executive Committee meeting held on 17/18 December 2019. These priorities reflect the outcome of the 2019 ETUC Congress and take into consideration the work programme of the European Commission. They also draw inspiration from the main work-related research questions currently being elaborated in the academic world.

The following priorities therefore continued to guide all ETUI activities in 2021-2022, but all of them also engaged with new challenges emerging from the Covid-19 pandemic:

1. The **social-ecological transition and the digital revolution**, which remain the two key challenges for the world of work and will continue to frame our future.
2. The search for a **new economic model** able to reduce inequality and foster upward convergence while at the same time respecting the sustainability of the planet.
3. The need for a **renewed social contract** which includes reduced working time, job quality, good wages, affordable and effective social protection and health and safety

4. **Reinforced industrial democracy at all levels**, focusing in particular on worker participation, collective bargaining, industrial democracy and the various information and consultation instruments.
5. **Stronger actors: trade union renewal**, including new ways of organising and innovative approaches for trade unions' own strategic development.

European social dialogue, as the ETUI's fundamental *raison d'être*, is relevant and instrumental in all five priorities and has therefore been mainstreamed and incorporated into each of the priority areas.

As well as developing distinct projects in these five priority areas, the ETUI has a long-established practice of identifying, from year to year, certain areas of work that are amenable to a certain degree of multidisciplinary and transversal cooperation between units and departments, as well as topics identified and prioritised as areas for strategic action. We refer to these areas as 'transversal themes'.

## Transversal themes

During the Work Programme 2021-2022 we decided to further accentuate this aspect of our activities, *inter alia* by identifying internal organisational and transversal funding streams helping in the coordination of projects focusing on the three 'transversal themes', namely climate change and just transitions, trade union renewal, and Covid-19 and its effects on the world of work. These transversal themes serve both to generate a number of self-standing research and education projects (including externally commissioned ones), and as conceptual hubs for colleagues to share, within ad hoc working groups, the findings and knowledge arising from their own research and training-related experiences. This in turn serves the purpose of coordinating individual projects with a view to avoiding overlaps and duplication.

### Main transversal themes and goals for 2021-2022

- Climate change and just transitions: the ETUI aspired to be the main reference point on the linkage between social and environmental policies (and with digital transformations) by 2023;
- Trade union renewal: the ETUI aimed to emerge as the main platform through which key actors can exchange experiences and strategies;
- Covid-19 and its effects on the world of work (including post-pandemic): the ETUI's goal was to develop reflections and narratives on the post-Covid society and economy and to expand our analysis to include a more genuine 'Future of Work' approach
- Gender equality: we migrated this mainstreamed priority under the umbrella of a dedicated 'transversal working group' progressively expanding its remit to broader inequalities (while retaining a focus on gender inequalities).

## 1. Climate change and just transitions

Dealing with the consequences and the challenges of climate change has not always been considered as a central part of the identity of trade union organisations. The ETUI has sought to challenge this general assumption by raising this as a major issue among stakeholders and disseminating expertise, knowledge and awareness in order to better prepare trade unions and influence upcoming developments. Our engagement with the issue of climate change dates back more than a decade, with the 2010 edition of our flagship publication *Benchmarking Working Europe* already making a first significant contribution to what was then still a rather ‘niche’ debate. On the basis of this longstanding commitment and interest in the topic, we aspire to become, by 2023, the key reference point for the integrated analysis of the climate change and technological development discourses.

To raise at least some basic awareness among specialist and non-specialist audiences, we launched a dedicated and topical newsletter in June 2020 (the ‘Green New Deal newsletter’), coordinated by an external consultant, in which we provide a synthesis of the latest information and thinking on this topic in an accessible format. In the course of this year, we produced seven newsletters, covering such topics as the social summit, COP 26, CAP reform, ‘ecocide’ and the latest IPCC report, to mention just a few. Our intention is not only to decode the sometimes complex and specialist jargon used at European level, but also to highlight the added value of trade union initiatives on just transition. We set ourselves the ambitious goal of more than doubling the number of subscribers (from 1,000 to more than 3,000) by the end of the reference period, a goal which was almost achieved with 2.935 active subscribers.

Through this working group we succeeded in fostering an integrated and multidimensional understanding of the issue beyond the current confines of its interaction with the theme of digital transitions, as our Priority 1 already does. It is increasingly clear that, in order to achieve a just transition towards a greener and carbon-neutral future, societies will need to approach the issue from a systemic perspective requiring an in-depth re-assessment of both our economic model (currently under Priority 2) and of the social contract underpinning its functioning (Priority 3).

As such, this transversal approach enabled the ETUI, through a number of projects and training activities discussed below in Part 2, to develop a new narrative that goes beyond just transition discourses to address key questions related to the economic model, digitalisation, the welfare state, jobs, working time and even some reflections on ‘beyond GDP’. As part of this approach, we also analysed the varieties of just transition and their limits, implementations and links with the concept of the ‘eco-social state’. In the same vein, we have provided an empirical mapping of the energy transition situation in selected Member States in terms of distributional and procedural justice criteria. We did this by critically analysing the 2030 National Energy and Climate Plans (NECP) of Member States through a ‘just transition’ lens. This included a consideration of procedural justice (i.e. the participation of citizens, the quality of social dialogue and energy democracy, pertaining to our Priorities 3 and 4) and the underlying principles and material/institutional basis, in order to establish a ‘just transition scoreboard’.

The ETUI also analysed the legal provisions and approaches taken by the EU in implementing the Green Deal, involving both our legal experts and our climate change team. To this end, we published several blogs and articles entries in the ETUI Green Newsletter.

A second objective greatly facilitated by our transversal approach was the engagement with external stakeholders whose core policy interests may differ from ours but who share a concern for climate and environment-related questions as developed by a cross-section of some of our ETUI experts. For example, in partnership with the European Climate Foundation (ECF) we developed a joint project assessing the extent to which welfare states need a new conceptual framework to deal with the paradigm shift to a zero-carbon economy. As part of this project, for example, we addressed such transversal questions as the extent to which different welfare state models can facilitate particular types of transition, for instance by providing income security during labour market transitions, or the role of a functioning social dialogue to manage restructuring processes. The impact of the paradigm shift associated with the green transformation on core institutions underpinning national social models (e.g. pension and health systems) has also been examined.

## 2. Trade union renewal

The ETUI aspires to be the core hub for activists and experts to exchange strategies, experiences and practices on the crucial theme of trade union renewal.

Considering the pandemic, priority was given to enhancing knowledge about emerging technologies transforming work and employment relations. Special attention was paid to the effects of Covid-19 in the development and deployment of workplace technologies and their impact on workers. A key objective of this project involved looking at the impact of new technologies on the governance system through the lens of worker protection, human rights and data protection. This project had two strands, research and education (a long-term training course addressing trade union concerns over algorithms at work and how to protect workers and help them gain a better understanding of the technology – “AI literacy”).

Mobilising resources across ETUI departments and units, a further transversal project in this domain was supposed to develop and identify effective practices to counter trade union hostility, in particular within MNCs. Unfortunately, this project had to be suspended due to the departure of our senior researcher.

## 3. The effects of the Covid-19 pandemic on the world of work

It is worth recalling that this transversal theme was identified as a self-standing theme but also, and crucially, as a key element underpinning a number of projects that we are developing in all five priorities mentioned above (and detailed further in Part 2). As such, pandemic-related projects arose both within individual units and departments, but also at a genuine transversal level.

From a transversal angle, we endeavoured to explore in greater detail the effects of the pandemic on remote working (including teleworking), both during and beyond the timeframe defined by the current health emergency and social distancing rules. Our key objective was to anticipate and shape the future debates on the post-pandemic society, while providing alternative and credible narratives and reform proposals. We also explored the role of workers’ voice and participation in social dialogue/decision-making during the pandemic, and in restructuring and work reorganisation processes. In this respect we produced a working paper on Covid-19-related restructuring and workers’ rights and a study on the impact of the pandemic on the dual burden sustained by women in the labour market and in the household

(based on the hypothesis that the two roles are starting to blur and could continue to do so, post-pandemic).

As discussed in greater detail in Part 2, several projects looked at the interactions between, and roles of, various institutions for information, consultation and interest representation in addressing the impact of Covid-19 at company or workplace level. For some of these projects the analytical focus converged on the interface between generalised interest representation and health and safety (H&S) representation in the workplace, thus developing research and analytical strands across our various priorities and research units. The goal was to understand the articulation between individual pieces of legislation and collective rights and how workers and their representatives can use available legislation to represent their interests and defend their rights. The special focus lay on the interaction between transnational worker representation (EWCs, SE WCs) and health and safety representatives, with the Covid-19 crisis as a test case scenario. Because the experience of the pandemic blurred the conventional division of labour between these different forms of worker participation, it was important to first understand how workers' representatives at all levels had addressed the pandemic in MNCs. A planned explorative expert seminar was supposed to enable a systematic exchange of experience about different forms and practices of health and safety representation across the EU and the links between OSH representation and more generalised forms of interest representation but had to be postponed to a later date. Instead, the EWPC Conference held in June 2021 explored the role of EWCs in the pandemic based on an e-survey of EWC members (see below), a point further elaborated in the 2022 EWPC Conference held in February. Our annual OSH conference 2021 on Occupational Safety & Health lessons learned from the pandemic was held on 13–14 December 2021 as a hybrid event in Brussels and online. The conference provided a forum for debate and discussion on a variety of issues, such as the role of OSH in protecting public health, the psychosocial risks of telework, and OSH beyond the pandemic, while taking stock of which lessons had been learned so far.

## F. Main Strategic Achievements in the Activity Report 2021-2022

### 1. Research

Beyond these transversal themes, the Institute also identified a number of **strategic actions within its five main priorities**, stimulating its activities in specific domains of research and education in the course of the past Work Programme. The strategic actions identified for the year were in the areas of **climate change, digitalisation, and the impact of Covid-19 on the world of work, taxation, industrial democracy, gender equality, fair trade, and foresight analysis**. These actions, and some of the outputs they are associated with, are discussed below. For a more detailed analysis of the projects pertaining to them, we refer our readers to Part 2 of the present document. In this section of the report, we highlight some of the main achievements associated with these strategic actions.

### **10 main strategic actions for 2021-2022 were**

- Climate change
- Digitalisation
- The impact of the Covid-19 pandemic on the world of work
- Psychosocial risks
- Fair and progressive taxation
- Democracy at work and the future of Europe
- Trade union renewal
- Gender equality
- Fair trade
- Foresight

As noted above, the ETUI first started engaging with the issue of climate change a decade ago, in 2010. Its current ambition is to become the leading reference point for the labour movement and beyond in the domain of analysing the **social implications of climate change**, *inter alia* for the purposes of education and training. To achieve these goals, our projects in this area focused on sectors such as the automotive and energy intensive sectors in order to be able to offer a more detailed and tailored analysis of the broader debate, especially as this typically suffers from a certain degree of granularity. The ETUI established collaborative links with other stakeholders and expert bodies specialising in climate change, such as the European Climate Foundation, the European Environmental Agency, and which operate outside the traditional sphere of influence linked to the trade union movement. In addition, we created new collaborative networks between climate change experts and experts from other domains, including labour law, social security and welfare studies, with a view to encouraging a ‘green mainstreaming’ approach across a range of other policy domains, as demonstrated by our ongoing collaborative project with the university of Aix-en-Provence.

The ETUI is also continuing to invest its research and training resources in the domain of digitalisation. Over the course of this Work Programme we emphasised further topics more closely related to the regulation of artificial intelligence and blockchain technology and their effects on the world of work. Issues of surveillance, algorithmic management, data and metadata ownership and control, were at the core of the projects driven by this strategic action. It also focused on drawing links between a range of seemingly unconnected regulatory instruments, some of them currently in the EU legislative pipeline. We also divulged and published the results of one of the most ambitious and methodologically rigorous comparative surveys on internet and platform work, mapping the precise extent to which the internet is used as a tool to generate income, how that income is generated and by whom, and offering a breakdown of the type of work relations prevailing in the sector.

Turning to **Covid-19**, we developed a number of projects looking at the implications of the pandemic on the world of work, and on the social and macroeconomic stability of the EU as a whole. In collaboration with external experts, leading intellectuals, and influential policymakers, we established a new and alternative vision for a more equitable, sustainable, and democratic post-Covid society. This has already delivered some blog posts and will also lead to the publication of further high-visibility, high-impact outputs focusing on particular domains and areas of policy reform, collected under the topic ‘Reconstruction beyond the Pandemic: Transformative Ideas’.

Last year, the ETUI commissioned an extensive study on the costs arising from policy inaction in the domain of **psychosocial risks**. While the finalisation of this project was delayed by reasons beyond our control, it is expected that the results will be presented in the coming year, with original data covering most Member States. A longstanding ETUI project, the study of psychosocial risks is an innovative area of work in which its researchers have played a leading role for the best part of the last decade. In the past year we continued to analyse the topic, with particular reference to the psychosocial risks that emerged as a consequence of the pandemic, and the ones likely to arise in its aftermath, especially in relation to the expected developments in platform and digitally mediated work.

**Taxation** has also been identified as a further area of strategic investment and investigation for the Institute, with a view to identifying innovative, fair, sustainable and progressive sources and mechanisms of redistribution. The Institute explored in detail the feasibility of a carbon tax, including an analysis of the rationale for a border adjustment mechanism, while offering an appraisal and normative analysis of the ‘fair taxation’ agenda currently pursued by the OECD. A project on new but untapped sources of wealth and ‘rent’-based income currently concealed in patents and other intellectual property rights held and exploited by MNCs was unfortunately cancelled due to the departure of the lead researcher.

**Industrial democracy and democracy at work** are inextricably connected to the ETUI. In the course of this Work Programme the Institute invested strategically in the oversight of the EU’s launch of a Conference on the Future of Europe, to ensure that the debate on the future of Europe’s democratic institutions was informed by our studies on the values and mechanisms of democracy at work.

**Trade union renewal** is a vital priority for the labour movement, and one where ETUI researchers have been at the forefront of the debate for a number of years. The establishment of a new expert network, composed of internal researchers and educators and external experts and stakeholders, was delayed due to the ongoing pandemic.

The ETUI is taking the **gender dimension** into account in all its training and research activities. A detailed description of the activities undertaken under these priorities will follow in the next chapters, but we would like to note from the outset that we have convened a new ad hoc internal Working Group on Gender Equality, composed of colleagues from a cross-section of our departments and units and tasked with identifying, generating, coordinating, and commissioning research and educational activities in the field. Our 2021 edition of The Benchmarking focused on the topic of Equality, with gender equality analysis playing a prominent role.

The EU-UK Comprehensive Trade Agreement (CTA) reignited an interest in the analysis of **social clauses found in free trade agreements (FTAs) and in fair trade** more broadly. The ETUI was one of the first to criticise the inadequacy of the non-regression provisions contained in the CTA. In the course of the Work Programme, we established structured links with several trade and labour law experts in academia, practice and trade union institutions from both sides of the Channel in order to monitor any future social regression, with an annual conference to be held in Brussels or London to analyse the situation and disseminate the findings. The first of such conferences was held online in Brussels in February 2022. It also explored alternative approaches to trade and investment agreements

between the EU and third countries, underpinned by the principles of fairness and sustainability, with publications emerging in the course of the year.

Last but not least, we finalised our internal ‘**scenario and roadmapping**’ exercise which identified inequalities and climate change as the two single most important mid-to-long-term challenges for the ETUI. We disseminated our newly acquired knowledge in this area, internally through reflection papers and externally by making it available to our labour movement stakeholders, *inter alia* through specific actions to reinforce our established educational and training activities.

Besides our traditional two flagship publications (see Publications’ list below), see the list of our main publications:

### Main publications in 2021-2022

- Arabadjieva K. and Zwysen W. (2022) Gender inequality in performance-related pay: A gap in the EU equal pay agenda, Policy Brief 3/2022, Brussels, ETUI.
- Cucignatto G. et al. (2022) Covid-19 and industrial restructuring: What future for transnational value chains, Working Paper 2022.06, Brussels, ETUI.
- Degryse C. (2021) Holy union? Report 2021.04, Brussels, ETUI. EN, FR
- De Spiegelaere S. et al. (2021) European Works Councils: contested and still in the making, Brussels, ETUI.
- De Stefano V. and Taes V. (2021) Algorithmic management and collective bargaining, Foresight Brief #10–May 2021, Brussels, ETUI. EN, FR
- Drahokoupil J. and Müller T. (2021) Job retention schemes in Europe: A lifeline during the Covid-19 pandemic, Working Paper 2021.07, Brussels, ETUI.
- Jestl S. and Stehrer R. (2021) EU employment dynamics: The pandemic years and beyond, Working Paper 2021.09, Brussels, ETUI.
- Laurent E. (2021) From welfare to farewell: The European social-ecological state beyond economic growth, Working Paper 2021.04, Brussels, ETUI.
- Piasna A. et al. (2022) The platform economy in Europe: Results from the second ETUI Internet and Platform Work Survey (IPWS), Working Paper 2022.05, Brussels, ETUI.
- Van den Abeele E. (2021) Towards a new paradigm in open strategic autonomy?, Working Paper 2021.03, Brussels, ETUI.
- Zwysen W. and Drahokoupil J. (2022) Are collective agreements losing their bite? Collective bargaining and pay premia in Europe, 2002-2018, Working Paper 2022.07, Brussels, ETUI.

### Main ETUI conferences in 2021-2022

<b>Main conferences in 2021-2022</b>	
27 April 2021	Exploring interfaces between labour and environmental law
20 May 2021	Exploring the link between growth and welfare states



8 June 2021	Facing the challenges of a fast track transition to electromobility – What is at stake for Europe?
17 June 2021	The nexus of climate change and welfare: towards a new concept of the welfare state
29 June 2021	17 <sup>th</sup> seminar on workers' protection & chemicals
7 September 2021	The Recovery and Resilience Facility: have social actors been sidelined?
29 September 2021	Transforming care work within an era of changing priorities of care policy after the pandemic
18 October 2021	Employment effects of decarbonization pathways in energy intensive industries (workshop1 online)
28-29 October 2021	Labour rights & the digital transition
15 November 2021	EduDays 2021 on Building the new normality
19 November 2021	The future of (remote) work after Covid-19
13 December 2021	Annual OSH conference 2021
3 December 2021	Inequality in Europe, launch of Benchmarking Working Europe 2021
25 January 2022	The EU response to Covid-19: winners and losers
31 January 2022	Workers in a pandemic
17 February 2022	Working conditions in the platform economy
14 March 2022	Addressing transport poverty
21 March 2022	EWPPC Conference 2022 on how to improve the EWC Directive
24 March 2022	Conference on collective bargaining and algorithmic management

## 2. Education

The new ETUI Education strategy for 2020-2023 was created with the aim of anticipating trends and developing our capacity to act for the future. The three objectives of the strategy also mainstream the activities of the Education Department.

Increasing participation was our first objective. The target groups of our training activities are diverse, meaning that it is difficult to reach out to all member organisations. More trade unions from different countries have been encouraged to participate in our training in order to increase our multiplier effect and impact.

Making greater use of technology was the second objective of this strategy. The aim is to reach out to a larger target group through offering easily accessible and user-friendly platforms and to combine them with face-to-face courses with a view to presenting a blended learning offer and further developing online pre-course activities. This building block proved to be particularly farsighted in the context of the Covid-19 pandemic. The preparation work already performed by the ETUI between 2019 and 2020 allowed us to migrate online a substantial number of our training activities and courses on the basis of sound educational and distance learning methodologies and already tested technological solutions and platforms. A new space in the ITUH building (ground floor) in Brussels has been designed and equipped as the ETUI's Learning Lab. Due to the pressure to organise more hybrid and online events, we have developed and invested in our online facilities in this room and in other meeting rooms in the ITUH building. This also required more human resources for our IT team, more training for staff to be able to use the new facilities and more maintenance for the existing materials.

As its third objective, the ETUI endeavoured to maintain and further develop its potential and capacity to offer high-quality training, making greater use of its internal research expertise and establishing the ETUI as a key provider of trade union-oriented training. The synergy between the Education and Research Departments is a key success factor here.

### Nine strategic actions by ETUI Education

- Enlarge the diversity of trainers to better target those countries and organisations that participate less
- Better promote our EWC service through a multi-channel approach
- Constantly innovate through the use of technology, methodology, subjects, conceptual phases, personal approaches
- Accredite more courses
- Increase the participation of internal researchers in our courses
- Raise awareness to cope with change via training modules
- Use appropriate technology for better trade union development
- Produce quality content based on up-to-date and tailor-made expertise
- Have our own online learning platform
- Put in place standard quality procedures for online courses ("ISO" label)

The combination of the various constitutive elements results in a multiannual course programme. The validation of the programme through the pedagogical committee constitutes a guarantee for the trade union education community. The courses are designed and delivered in partnership with national and European trade union organisations. In the European context, the ETUI's training offer is unique. Its strength comes from its specific nature as a trade union-oriented training provider and its proximity to the ETUC and the EU policy-making institutions, and from the expertise of its trainers and the ETUI's own research capacities.

Following the Covid-19 outbreak in 2020, the implementation of our strategy was quickly revised and adapted to the new remote working realities. ETUI Education was able to accelerate the development of e-learning and make new plans to cope with the challenges arising from the online delivery of courses, on the basis of sound methodological approaches and tested technological solutions. A digital approach to learning and training involves more than just updating an existing plan for e-learning courses: we had to repackage some of our courses to be able to deliver them online, to create new courses and to develop new forms of training and learning. Our digital plan managed to combine decentralised face-to-face courses with online hybrid experiences.

The digital programme expanded significantly in 2020 and 2021, as seen in the doubling of digital courses, the doubling of participant numbers, more courses in four different languages, and a specific webinar programme created in response to Covid-19. This expansion continued in 2021 and 2022 with the development of an online platform, the outsourcing of technical and specialised design expertise, the production of documentation related to procedures, further expansion of the number of courses and participants in online learning, a greater emphasis on online courses, and a renewed focus on innovation in delivery with the goal to provide high-quality and up-to-date content tailored to trade union needs.

Innovation is key: every course, learning pathway or activity searches for innovative approaches, subjects and methodologies.

**E-learning programme:** Our training activities were delivered both 'face to face' and in a digital format. The latter includes synchronous activities (webinars, workshops, etc.) and asynchronous training (online instructor-led or self-paced courses). The programme of online courses covers the following main areas: European Works Councils, English language for trade unionists, Europe for trade unions, project management, migrants' rights as workers, digital psychosocial risks, self-paced pre-course activities:

During the Work Programme 2021-22, the ETUI delivered 21 online courses with a total of 1.709 participants who enrolled and were given access to the learning platform. In addition, ETUI designed and produced 5 new courses.

- **European Works Councils**
  - "EWC: the rules of the game" (instructor-led): five languages available - English, German, French, Italian and Spanish
  - "EWC Confidentiality" (instructor-led): three languages available - English, French and German
- **English language for trade unions**
  - "English for Trade Unionists – intermediate" (instructor-led)

- “English for Trade Unionists – basics” (instructor-led)
- “English for Worker Participation” – (instructor-led)
- “English for Digitalisation” – (instructor-led)
- “English for Health and Safety” – (instructor-led)
- **Europe and trade unionists**
  - “EU for trade unionists” – introductory level (instructor-led): revised and updated edition of an existing course, held in cooperation with our Research Department. One edition for each of the two languages available - English and French.
  - European Pillar of Social Rights (instructor-led): course designed in cooperation with the ETUC.
  - European Social Dialogue (self-paced): course designed in cooperation with the ETUC.
- **Others**
  - Project management (instructor-led)
  - Promoting the rights of migrants as workers (instructor-led)
  - Digital work and psychosocial risks (instructor-led)
  - Pre-course activity (self-paced): addressing all participants willing to attend ETUI training activities. Available in English, with an introduction to the ETUI and ETUC.

## Comparing key data with online courses run in the previous Work Programme

This table lists key data enabling a quick comparison between the above-mentioned courses and those run during the same period of the Work Programme 2020-2021:

Data	Period when the online courses were run	
	April 2020 – March 2021	April 2021 – March 2022
Number of participants enrolled	1.479	1.709
Enrolled participants who never accessed the platform - %	14,65%	18,45%
Enrolled participants who accessed the platform - %	85,35 %	81,55%
Participants who completed the course out of the total of the ones who accessed the platform - %	34,43 %	39,88%

The data shows that:

- the total number of places offered increased: staff and economic efforts were concentrated in building and piloting new online courses, with the aim to already enrich the online training catalogue available in the Work Programme 2021/22. A further focus was the strategic choice of a technical support partner to take charge of developing the future ETUI online learning platform;

- there was a 4% decrease in the number of participants who, after receiving the credentials to access the online learning platform, logged in to start the course. One possible reason for this is that people, after one year of the pandemic, were exposed to a much bigger offer of online training activities from several providers. The abundance of possibilities available might have had an influence of participants' attitudes;
- there was an increase of over 5% in the percentage of participants completing courses. This figure is quite significant for free online training. The mix of reasons reflects how these courses are delivered: high-quality course content responding to participants' expectations; the active role of online tutors and a good mix of assignments, forums and quizzes; course design and structure with appropriate learning curves.

In terms of processes and technology, one key improvement was implemented with the support of certified Moodle partners. Together with external experts, the ETUI created its new online learning platform (<https://learn.etui.org/>) hosted on the Moodle Workplace. Once the platform was set up and a period of testing successfully completed, the existing courses – previously hosted on different Moodle Clouds – were gradual migrated to the new platform. A set of standard operating procedures - involving ETUI staff, the certified Moodle partner and the external experts already working for years on ETUI online learning – is now in operation and being finetuned.

Now more effective and efficient, the system offers *inter alia* more automated actions, smoother procedures, better GDPR compliance, richer reporting, easier certificate issuing. All this paves the way for further integration with CRM software, as well as for the development of blended training formats.

Linked to this e-learning programme, the capacity-building training course for 'e-tutors' is an activity addressing trade union trainers wishing to better understand how to design, produce, run and assess online courses. The course, now in its fifth edition, was intended to provide trade union trainers with an overview of online learning activities, with a focus on asynchronous ones. Coming from 6 countries and 6 different unions, participants were also able to take stock of ETUI's experience before considering developing their own tools for online training. The course was also an opportunity for participants – many of them already actively involved in designing or delivering online training – to consider becoming actively involved in ETUI distance courses. Moreover, the course was an occasion for participants to share their e-learning experience and plans after two years of the pandemic. Design, delivery and assessment of online courses require specific skills and knowledge, with the roles and tasks of the teams involved differing from traditional face-to-face courses.

ETUI Education has had to make a significant shift to a more coherent and systemic approach to distance learning. We have created new programmes for courses and further developed our strategic position within the field of training trainers at European level.

Nevertheless, the exchange of practices and the ongoing process of co-creation are at the heart of our training approach. We now have a new 'Train the Trainers' structure, in cooperation with the ITCILO's Learning Innovation programme. This is meant to be a blended learning programme with learning and practice components that can be followed either separately or as part of a blended learning strategy. The programme combines different eLearning modules with face-to-face courses, where practice is consolidated and where exchanges with peers fuel

the individual acquisition of knowledge, practices and training plans. We aim at developing a consistent offer within both Institutions for capacity-building and learning innovation. An assessment of this programme was carried out throughout the process, from the first stage of planning and design to the evaluation of participants' achievements and their own perceptions and feedback on the learning process.

The **Eurotrainers** training programme was designed to develop the individual teaching skills of trainers from member organisations – as an investment in the future of the teaching strategies of their organisations. This learning pathway (Level 1 and Level 2) aimed to extend the scope of the learning programmes beyond the national level and to give them a European dimension, prioritising a European trade union identity.

As part of this Work Programme, we held the level-2 course, while next year we will be holding another level-1 course. Various pedagogical workshops were held. The ETUI trainers' guide – Design and implement effective learning and training events – was part of the base course and all learners had the opportunity to consult this guide at different moments during the course to deepen their understanding of the concepts and practices developed during the three days.

The programme of activities for ETT level 2 was quite challenging and intense. We are aware that the tasks the trainers have to develop when designing European-level training require a lot of training experience and specific skills which can only be applied if you are used to designing training. Nevertheless, everyone following this training pathway has to be in a position to plan, design and deliver courses at European level.

ETT level 2 is meant to deal with all the different levels in the design phase and prepare colleagues for any different issues that may have to be dealt with at the European level. Members of European teams came from different countries, and this obliged every team player to be very concise, organized, tolerant, respectful of others and efficient within the team. The sessions dedicated to the importance of using evaluation strategies, tools and moments within a training action were experienced as extremely useful and motivating for a change in the daily practices of trade union trainers. Participants acknowledged the importance of all the stages of the training management cycle and the interconnection among them all.

We developed a level 3 for participants who had completed levels 1 and 2. This level – 'Capacity-building on communication strategies, emotional competence and group management' – covered transversal fields of knowledge and was an important part of their personal development, greatly increasing their capacity as facilitators in any learning setting. This was the first edition of this workshop focusing on how to develop emotional competence in the context of training. As this workshop was the result of a cooperation between ETUI, CGT and CISL, the approach chosen to the topic was to directly link training practices – both from the tutors' and the participants' perception – to arrive at concrete proposals on how to identify and work within the concept of emotional competence. Not an easy concept, the approach taken was to start out from concrete examples, situations and experiences, analysing them in greater depth with a view to developing an awareness of the different dimensions linked to emotional competence.

In the design of this workshop, the tutors decided to work on specific topics to clarify the concept and to come up with concrete strategies and methods transposing this perspective into training. An important part of this workshop involved reflecting on how to integrate and link trade union values with emotional competence in training settings.

The interest shown in the topic and the engagement in the proposed activities attested to the increased upskilling of all tutors participating to this workshop.

**Accreditation:** 12 candidates presented themselves to a panel to have their competences accredited by means of the APEL procedure. The session at the university of Lille was held face-to-face, although some participants and coaches joined the session online. The panel - composed of professors from the university, the pedagogical coordinator from the ETUI education department and the coaches - analysed the reflective portfolios drafted by candidates and assessed their oral presentations. All candidates succeeded in achieving accreditation. The panel chairman was impressed by the quality of the portfolios presented and the oral presentations. The self-reflection and self-analysis of professional practices demonstrated that the itinerary followed by each candidate had strengthened their competencies as professional trade union trainers, training designers and facilitators.

We also wanted to develop trainers' competence in communication skills (verbal and non-verbal), making them aware of the different characteristics and moments in the development of a (multicultural) group and working on conflict resolution techniques to anticipate, tackle and avoid conflict. The importance of this pedagogical workshop derives from the fact that one of the key competences required of trainers engaged in delivering training is group management. In order for the learning to be efficient, trainers have to understand and master the lifecycle of a group and any tension or conflictual moments within it. It is important to know and manage the different phases of a group lifecycle: creation, integration, tension, maturation and dissolution. In a context of adult learning, the aim of managing a group is to facilitate the learning process and foster the development of participants' knowhow and knowledge.

In other fields of expertise, we have also enlarged the capacity of trainers. At the end of the Work Programme 2020-2021, we thought that it was time to build a critical mass of trade union trainers focused on the ETUI's green competences. This critical mass is a prerequisite to disseminate the ETUI green competence framework approach to national trade union organisations. Following this decision, the ETUI Education Department, in cooperation with CISL (Italy), ZSSS (Slovenia), UGT (Spain) and KOZ-SR (Slovakia), decided to propose to trade union trainers experienced or interested in environmental sustainability a capacity-building training on green competences related to just transition. Participants gained pedagogical knowledge about the ETUI's green competences framework approach with its 5 green meta-competences, designing and developing 12 case studies around these competences using active learning methodologies.

Finally, the capacity-building course 'EWCs: train the trainers' was designed to keep EWC training abreast of digitalisation advances, to respond to current needs and to deliver the training formats appropriate to the changed learning habits of EWC members. This training activity was designed for trade unionists wishing to become professional EWC trainers and deliver EWC training in their own organisations and for the ETUI. The course developed the EWC trainers' role, by experiencing the universe of EWC training courses, online and face-to-face. The course combined EWC-related learning opportunities and EWC online/offline pedagogy. As EWC trainers are rare to find – the EWC support scene consists mostly of experts and coordinators –, this course plays a key role in strengthening democracy at work.

## Part 2 - Departmental projects

As already mentioned in Part 1, the ETUI has decided to retain the five strategic priorities agreed at the ETUC Executive Committee meeting on 17 - 18 December 2019 (1. A social-ecological transition and the digital revolution; 2. The search for a new economic model; 3. The need for a renewed social contract; 4. Reinforced industrial democracy at all levels; 5. trade union renewal). The ETUI also identified the Covid-19 pandemic and its effects on the world of work as an essential contextual element with a far-reaching impact on each of the five strategic priorities outlined above.

At the same time, the ETUI, in consultation with a number of external stakeholders, identified three further priority themes to be developed in a transversal manner: a) the effects of the Covid-19 pandemic on the world of work; b) the social-ecological transition; and c) trade union renewal. It is worth recalling that the democracy at work and digitalisation themes have been internally coordinated for several years now and will continue to be coordinated between education and research.

The following Part 2 further elaborates on the outputs and actions related to these priorities and transversal activities. It offers a summary of the conceptual drivers underpinning each of our five strategic priorities, followed by a detailed presentation of the projects that the ETUI worked on and delivered in the course of the Work Programme. For reasons of presentational clarity, the projects and activities pertaining to each priority are separated into projects primarily pertaining to the work of the Research Department and projects and activities primarily delivered by the Education Department. It is, however, worth bearing in mind that, in the course of this year, the ETUI increasingly operated on the basis on a synergetic approach and the shared use of internal resources across departments and units, meaning that the separation is at times predominantly maintained for presentational purposes.

### Strategic priorities and projects

#### 1. Priority 1 - A social-ecological transition and the digital revolution

Over the past two years, the ETUI has followed a conscious decision to link the ecological and the digital transitions. The underlying rationale is that these two processes should not simply develop in parallel, as they have done - albeit at times tentatively - in recent years but should interact, with a view to developing mutually reinforcing synergies. Especially since the Covid-19 pandemic, there has been a growing realisation and understanding of the importance of this linkage, despite continuing to fall short of a proper 'integrated approach'. For instance, in recent months the EU Commission has routinely referred to the idea of 'the twin green and digital transitions' as a tool to accelerate Europe's post-pandemic recovery (cf. 'Europe's moment: Repair and Prepare for the Next Generation', COM(2020) 456 final). But these recent encouraging declarations arguably still do not go as far as offering a systematic and coherent conceptualisation of the integrated approach necessary to ensure a mutually reinforcing relationship between the two transitions. The ETUI has sought to elaborate further on this nexus, through workshops and a number of publications and policy documents.



Our key focus was on the effect of digitalisation and online platforms on the world of work, and on labour legislation in particular (with the launch of the second phase of the largest survey ever carried out by the Institute), the role of worker participation and labour law more generally in the European Green Deal and just transition contexts, the future of the automotive industry, a first assessment of whether (and if so, how) the national Recovery and Resilience Plans was able to balance the objectives of twin just transitions, recovery and upward social convergence, green finance activities (*inter alia* from a sustainable finance perspective), and the delivery of advanced training programmes on ‘green social dialogue’.

It is worth recalling that the theme of ‘Green Transitions’ was also identified as one of the three ‘transversal themes’ for 2021-2022. As such, it attracted additional interdepartmental resources for the purpose of facilitating the coordination of discrete projects across the Institute’s five traditional research priorities and across our units and departments, maximising synergies between them, as well as for the purposes of commissioning additional external expertise and fostering interdisciplinary exchanges between different communities of experts (for instance between environmental policy and environmental law experts or between the latter and labour law scholars). These tasks have been greatly facilitated by our Green New Deal newsletter.

#### *a. Research Department*

This first project exemplifies our integrated analysis of the ecological and technological dimensions.

**Labour market policies in Europe for just, green and digital transitions, and recovery, resilience and fairness:** This project, bringing together the ecological and digital threads, involved monitoring and assessing the evolution of labour market policies in Europe, with a particular focus on those reforms proposed in the national Recovery and Resilience Plans in the context of the twin digital and green transitions the recovery from the pandemic. Labour markets have been in constant evolution in the face of demographic change and the green and digital transitions, each of which requires tailored but coordinated policies to boost economic prosperity. On top of the two transitions, the recent Covid-19 pandemic has had severe negative impacts on economies, affecting many areas beyond public health. Various emergency measures at national and EU level were put in place to help economies cope with the crisis across Europe. Despite hopes of recovery surfacing after the recent roll-out of Covid-19 vaccines, it is considered likely that the pandemic will nevertheless leave deeper scars in European economies, meaning that labour market policies have a crucial role to play in addressing these challenges.

Looking at the previous budget year, work focused on a first assessment of the national RRP (Recovery and Resilience Plans) and on whether, and if so how, they proposed balancing economic objectives with green transition and social ones to promote a ‘just’ transition and effectively, equitably and collectively tackle social risks related to the green transition. Several RRP were closely studied and assessed from this perspective.

One output of this project was a working paper analysing the above. Finalised during the reference period, it is currently in print as an ETUI working paper, while an updated version

has been preliminarily accepted for publication in a peer-reviewed academic journal. Draft versions of the working paper were presented at the Labour Law Research Network 5 conference in June 2021 and at an ETUI-European Climate Foundation policy workshop held in December 2021. The findings provide the European labour movement with input and expert analysis on whether/how the much-coveted agreement on the MFF (Multiannual Financial Framework) and the NGEU (Next Generation EU) and in particular the Recovery and Resilience Facility are promoting the objectives of twin just transitions, recovery and greater fairness.

Another output of this project was an ETUI working paper updating on developments in national job retention schemes in the 27 Member States plus Norway, Switzerland and the UK. The researchers built on their widely cited earlier work on short-time working schemes to provide a typology of three ideal-type schemes (short-time working (STW) schemes, furlough schemes and wage subsidies) allowing the systematic examination of job retention schemes in Europe.

We go on to present the other projects under the headings ‘social-ecological transition’ (1.A) and ‘digitalisation’ (1 B).

#### 1.A: A social-ecological transition

**Towards a new welfare state model:** How the Green Deal could become a social contract for Europe – This project was delivered as planned (with some extension). Clearly exemplifying our new transversal approach to research, its aim was to explore ways in which the Green Deal can become a social contract for Europe. To that end, the project, conducted in collaboration with the ECF, discussed and explored a new welfare policy framework in the wake of the Covid-19 pandemic, taking a long-term vision of a net-zero carbon economy into account. Concrete proposals were discussed at a workshop held in June 2021 with a view to bringing together different academic communities – in climate and environmental studies and in welfare and social studies – and trade unions with an outreach towards policymakers. A working paper was published on sustainability and justice in a new environmental economy perspective “From welfare to farewell”. A second working paper was published on “Pensions and the green transition: policy and political issues at stake” in February 2022. Another goal was to prepare analysis and suggestions on the role of public services in a post-Covid decarbonisation pathway, looking to an increased role for public goods. This was partially achieved due to some restructuring of the project. This work phase included a conceptualisation of a new welfare policy framework in preparation for a follow-up study on the changing role of public services in a post-Covid decarbonising world with an analysis on how to maintain investments in public goods (environment, social, etc.) at a high level. This work phase also included interdisciplinary debates on ‘Beyond GDP’ (instead of launching a separate project).

The debate over whether GDP (or GNI, gross national income) is the right indicator to measure ‘value creation’ (added value), social progress and wellbeing was conducted in the two workshops organised under this project (June and December 2021). A related debate reflected on the question of whether developed economies need sustained economic growth at all, and how a low-growth, no-growth or a de-growth development scenario could look like without giving up the idea of social progress. A working paper has been published on

redistribution and sustainable consumption – "Two scenarios for sustainable welfare". Going beyond discussions on sustainable consumption and redistribution, the ETUI public workshop in December 2021 also discussed how national recovery plans respond to both environmental and social concerns with discussions among climate and social communities and policymakers. A fourth working paper developed within this project on how post-pandemic policy responses and recovery plans respond to both environmental and social concerns was published in spring 2022. The "Beyond GDP" project was not carried out as planned, instead becoming part of the project "Towards a new welfare state model"

**Open strategic autonomy (OSA):** This emerging theme was a priority of the Portuguese Presidency. We continued our investigations on this topic based on the research done in the last Work Programme in conjunction with the Joint Research Centre (no transfer of funds) on the interlinkages between the social, economic and environmental dimensions of OSA. This topic was also linked to our foresight exercise and our reflections on a different economic model. Several publications including an internal policy brief and external blogpost were produced on this topic. A peer-reviewed policy article was published in an external journal. An event bringing together internal and external experts was also held to debate these issues.

**Future of the European automotive industry - is zero carbon possible with zero job losses?** This project was delivered as planned (albeit with more events than planned). Undertaken in association with the European Climate Foundation (ECF), its aim was to map the effects of decarbonisation, the gradual phasing-out of the combustion engine and the ramp-up of full electric car production across the value chain in European car manufacturing regions, with a focus on employment. Taking into consideration the accelerating pace of electrification (market shares of full electric vehicles), the length of an interim period based on hybrid technology, the pace of change in modes of transport, and the spread of connected autonomous vehicles, possible employment scenarios for 2030 were discussed. The focus of this project was however on electrification of individual transport and its consequences for the European automotive industry. The key questions to answer included: How can the employment impact of a 2050 transition to zero-emission vehicles be minimised? To what extent would slower electrification by European manufacturers jeopardise European technological leadership and undermine their global market positions? In the short term, would such a loss of market share lead to greater job losses than gains due to the higher labour intensity? Nine studies were prepared under this project: a European overview, a battery study and one on the role of key players and institutions, as well as country studies on Germany, France, Hungary, Romania and Poland, Czechia and Slovakia. A separate study looked at China as a market and competitor. Publication and the final workshop will follow in the next budget year. Three working papers, a policy brief and an edited book are in the planning. During the 2021-2022 budget year three workshops and a panel discussion as part of major ETUC-ETUI conference "Towards a new social contract" were held. Dissemination of the interim results included several contributions at external events organised by NGOs and trade unions. The results also fed into a number of EESC opinions linked to the Fit for 55 package.

**Taxing carbon in open economies: do we need a cross-border adjustment mechanism?** Implementing a carbon tax may result in carbon leakages. In such a case, the carbon tax may lead to a lose-lose situation: no improvement for the environment as carbon emissions are merely displaced but not reduced, while the country implementing the carbon

tax loses the economic activity and jobs associated with the displaced industries. This raises the question of border adjustment. The paper discussed the rationale for border adjustment, the legal issues (briefly), and various implementation options, among others 'The carbon pricing proposals of the 'Fit for 55' package'.

**The missing dimensions of sustainable finance – towards a social and green taxonomy:** In June 2020 the EU adopted Regulation 2020/852 on the establishment of a framework to facilitate sustainable investment, often referred to as the "Taxonomy Regulation". This instrument sets out the legal provisions to define the criteria for determining whether an economic activity qualifies as environmentally sustainable, and for establishing an EU-wide classification system for sustainable economic activities (the "EU Taxonomy") for the purpose of facilitating sustainable investment. For the EU this taxonomy is an important tool to facilitate sustainable investment and help it deliver the European Green Deal. The instrument identifies six key areas, or objectives, against which activities are to be assessed in terms of their sustainability (climate change mitigation; climate change adaptation; sustainable use and protection of water and marine resources; transition to a circular economy; pollution prevention and control; protection and restoration of biodiversity and ecosystems). The regulation, however, contained one glaring omission. While some of the criteria referred to under Article 3 indirectly refer to certain ILO instruments, and while its Article 26, a review clause, could allow for the possibility to extend the taxonomy to 'other sustainability objectives, such as social objectives' at a later stage, the Regulation offers neither an elaboration of this particular point nor a framework for integrating the green and social aspects of 'sustainable finance'. The project highlighted this gap, providing an analysis of this missing link and discussing possible 'social safeguards', while also looking at some of the risks inherent to the 'financialisation' of the Green Agenda. Deliverables include a blog, a number of workshops and the participation of ETUI staff in the European Sustainability Standards (EFRAG) expert group (in the social and climate policy parts) .

**Mapping National Climate and Energy Plans (NCEPs) through the lens of just transition** – The project planned to provide an empirical mapping of the energy transition situation in selected Member States from a perspective of distributional and procedural justice. A critical evaluation of the 2030 National Climate and Energy Plans (NCEPs) by Member States was elaborated through the lens of 'just transition'. According to the European Commission regulation on the governance of the energy union and climate action (2018), Member States are required to develop integrated NECPs covering the five dimensions of the energy union for the period 2021 to 2030. This project was reorganised in view of the fast-moving policy agenda and in recognition of the new priorities and time pressure dictated by it. This led to a restructuring and partial merger with a parallel project launched under the title "Towards a new welfare state model". As described above, an analysis was performed on the just transition dimension of National Recovery and Resilience Plans (NRRP). Finally, a working paper prepared under this project was delivered in good time and is currently being published. It maps EU and national level policies linked to just transition in the context of National Energy and Climate Plans. A workshop belonging to the project 'Towards a new welfare state model' discussed the just transition dimension of NRRPs and NECPs. The research project fits into this policy cycle, contributing to a more socially balanced vision of the green transformation. For trade unions the main message is the need to strike a balance between high-ambition climate policy objectives and social and environmental justice.

**Mapping the employment effects of different decarbonisation pathways for energy-intensive industries in the EU:** A joint project of the European Trade Union Institute and the European Climate Foundation was set up to analyse the main pathways for the transformation of these industries with regard to the expected employment effects, recognising that de-industrialisation is not the appropriate method and that the EU needs to maintain a strong competence base in these industries. Decarbonisation pathways offer solutions for the necessary emissions reductions but are applicable to different materials (steel, cement, plastics, etc.) to different extents. As Member States and regions are exposed differently to these particular industries and also differ in their ability to access specific of emissions reduction technologies (e.g., clean hydrogen or long-term carbon capture and storage), country studies explored vulnerabilities and opportunities related to the policies. Employment effects for regions and Member States were the focus of the national studies. By the end of March 2022, draft reports had been prepared for Germany, France, Spain, Italy and Poland. Paying particular attention to the role and policies of trade unions, a case study on an Italian region (Taranto) was conducted. Econometric analyses related to the employment effects were carried out for the EU27, while a specific analysis looked at the potential employment effect of a future Carbon Border Adjustment Mechanism (CBAM). A working paper on the CBAM is under preparation. Mapping support measures for energy-intensive industries, a further working paper entitled “A fair and effective industrial climate transition” was published in August 2021. Other working papers based on the country studies have been prepared and will be published in the following budget year. A project workshop was held in May 2021, while a larger-scale public event is due to take place in June 2022.

**Work and labour market perspectives of climate change and the green transition in Europe:** This project looked at the relationship between working hours and environmental impacts (e.g. carbon footprint, greenhouse gas emissions) at cross-country level in Europe. The key starting point was the strong correlation between economic growth, working hours and the environmental footprint. The methodological approach involved an empirical perspective, with econometric techniques using the most recent datasets. The proposed model estimated the impact of working hours on the environment using several indicators and taking other relevant national statistics into account in a multivariable regression framework. However, due to a shift in priorities and an unexpected workload from other projects, work on this paper was not concluded during the planned timeframe. Nevertheless, data preparation and preliminary empirical analysis started as planned. The paper has since been prepared and delivered and will be published in the next budget year. Moreover, ongoing research and analyses on the green agenda and climate change were used to feed the ETUI Green Newsletter with occasional shorter pieces.

**Labour law and climate change:** The aim of this project is (1) to encourage scholars in the field of labour law to engage with the topic of climate change and just transitions, and (2) to encourage discussions between labour and environmental lawyers with the aim of identifying common interests and goals and defining a shared field of research between the two fields/research communities in the context of just transitions. The long-term intention is to create a research community around the topic of ‘just transition for workers,’ a move of interest to both labour and environmental lawyers and leading to a series of ETUI events and publications. Following a seminar on labour law in the environment undertaken during the previous work programme, an afternoon workshop ‘Exploring interfaces between labour and

environmental law’ was held on 27 April 2021, bringing together labour and environmental lawyers to discuss common interests and research questions. The workshop attracted considerable online attention, resulting in the labour law scholars involved, Aix-Marseille University and the ETUI working together on organising an international forum (to take place in October 2022). As part of the 2021/2022 Work Programme, meetings were held between the ETUI and external collaborators to plan the conference (concept, call for papers, invitation of keynote and other speakers), whereas the selection of papers, the conference and follow-up are planned for the next work programme. The workshop has also led to a collaboration between an ETUI researcher and an environmental law scholar at Oxford University on a joint paper exploring the intersections between labour and environmental law in the context of the European Green Deal, the planning of which is underway.

**Heat stress as an occupational hazard:** This project aimed to finalise and publish a report on heat events as an occupational hazard, an issue that is becoming increasingly urgent due to climate change. Exploring the occurrence and health effects of heat events, the report analysed their occupational health and safety aspects, including exposure scenarios, occupational exposure as a factor of deepening social inequalities, and the links between heat stress with other occupational risks. Finally, risk management and preventive policies on the issue were explored and recommendations made for better addressing the risk. A working paper was published in November 2021. A Spanish version is being prepared and will be published in the next budget year.

**The European Green Deal and workers’ participation:** Achieving the goals set out in the European Green Deal will require structural changes in the way production, consumption, transportation, housing and many other aspects of the economy and society are organised. Up to now the EU has not outlined the role that worker participation could and should play in the Green New Deal. However, the necessary transformation will not be possible without the active involvement of workers and their representatives. Drawing on previous work at the ETUI on the challenges of climate change for labour law, this project built on the experiences of previous workshop-driven projects on sustainability and worker participation. It applied a workshop format to focus on aspects of the Green New Deal. In particular, the workshops identified what the Green New Deal meant for workers and what role worker representatives could play in implementing various aspects of it. Two online workshops took place in the 2021-2022 budget year: the first one (in November 2021) focused on the role that workers’ participation can play in improving the quality of sustainability reporting by companies (i.e. reporting on their environmental and social impacts). Good sustainability reporting is seen as a key component for successful implementation of the Green New Deal. The second workshop (in January 2022) focused on the role that workers’ participation can play in encouraging upskilling in the construction sector. As buildings account for about 40% of energy consumed, it will be necessary for new buildings to be more energy-efficient and for old buildings to be renovated to reduce energy consumption. Worker participation can support an increase in the amount of training needed for sustainable construction.

## 1.B: Digitalisation

The ETUI has a strong and visible presence in the domain of digitalisation and platform work. We have invested additional resources in this domain, especially with reference to the analysis of AI and the questions of surveillance and algorithmic management. In the domain of

digitalisation and platform work, the ETUI is playing an important role. A handbook on platform work with contributions from a network of prominent academic researchers in the field was published by Edward Elgar Publishing in October 2021.

**Work on platforms, comparing patterns across EU Member States:** The objective of this project was to provide new empirical evidence, to further our understanding of the digital platform economy and explore the regulatory responses and the role of institutions, with the aim of providing guidance for social partners and policymakers on how to ensure quality of work and social inclusion in platform work. The second wave of the ETUI Internet and Platform Work Survey was completed, and its results analysed. As planned, the survey covered 14 countries (Austria, Bulgaria, Czechia, Estonia, France, Germany, Greece, Hungary, Italy, Ireland, Poland, Romania, Slovakia and Spain), with fieldwork carried out in March-May 2021. Together with a research consultancy, an extensive analysis of the data was undertaken, revealing a need to repeat the fieldwork in some countries. Within the framework of the same contract, fieldwork was then repeated in 8 countries in autumn (Bulgaria, Czechia, Estonia, France, Germany, Italy, Slovakia and Spain). The objective of the survey was to map the extent to which the internet is used as a tool to generate income, exploring a broad range of paid activities that can be found or carried out online and that fall outside a standard employment relationship. The aim was to record the prevalence of such activities in the surveyed countries, incomes achieved from this type of work, and the socio-economic status of the workers concerned. Activities included harmonising, weighting and cleaning the data, data analysis, summary and presentation of the results in an ETUI working paper, and dissemination of findings. An ETUI working paper with the findings was published and launched at a widely attended event in Brussels in February 2022, accompanied by a podcast for further dissemination. Results were also disseminated at other meetings, seminars and interviews, reaching diverse audiences.

**The transformative effect of digitalisation on labour law:** This project explored the effect of digitalisation on the world of work. It covered a publication (originally intended as a journal article and then turned into a book chapter and a blog) on how the EU legal framework could support national legal and judicial strategies to strengthen the position of platform workers and other workers in the digital economy (*inter alia* vis-a-vis competition authorities). In the context of this project, a policy brief on self-employment, collective bargaining and competition law was produced and research work and the first preparatory steps for the creation of an edited volume initiated. This project also included a two-day event addressing a number of challenges that digitalisation brings to the world of work. The event touched upon platform work, the increasing market power of digital market players and possible legal solution to address these phenomena. Finally, the proliferation of collective bargaining initiatives among platform workers and the increasing institutional attention that platform work has been receiving at the EU policymaking level suggested the opportunity to outsource a study to an external expert mapping different collective bargaining experiences in the platform economy. This research activity will be reflected in a publication in the next budget year (2022-2023).

**Fair taxation – the OECD and the G20 agenda:** The ‘inclusive framework’ set up by the OECD and the G20 was expected to be finalised by June 2021, with its proposals relating to the ‘Tax issues arising from the digitalisation of the economy’. The project was built on two pillars: Pillar 1 on the reallocation of taxing rights between jurisdictions and Pillar 2 on

minimum effective taxation. Technical discussions are well-advanced, and the impact assessment has been conducted and published. The research focused on the extent to which, beyond the specific case of ‘GAFA’, Pillar 1 constitutes a significant step towards reallocating rights and tax revenue to the jurisdictions where ‘value is created’, and whether Pillar 2 can put a stop to, or at least significantly reduce, harmful tax competition.

**Health and safety in the new world of work:** This project built on the findings of the ETUI report *Psychosocial risks in the gig economy. A systematic literature review* (Pierre Bérastégui, 2021), in which the author identified several research gaps in the existing literature and analysis surrounding platform work. The aim which exemplified our transversal approach, was to further investigate specific aspects of the psychosocial risks arising in the platform work environment. A comprehensive screening tool has been developed, assessing several psychosocial risk factors related to three main types of activities mediated through digital platforms: crowdwork, online freelancing and physical services. The outputs of the project contributed to the strengthening of research knowledge on OSH and working conditions in the platform economy, with a view to developing recommendations on PSR prevention and mitigation.

**Health and safety in the new world of work:** Building on the on the findings of the ETUI report on *Psychosocial risks in the gig economy* (Bérastégui, 2021), this project developed further knowledge on the broader context of the Fourth Industrial Revolution or Industry 4.0. The aim was two-fold: first to build a conceptual framework integrating Industry 4.0 technologies in broader technological trends; and second to discuss how these trends may or already are impacting working conditions in terms of safety and ergonomics. For this purpose, we completed a desk research review of the scholarly literature on Industry 4.0 technologies with a focus on the human factor. Publication of the deliverable is foreseen for the next budget year.

**Occupational health and safety law in the new world of work:** This multi-annual project focuses on the applicability and relevance of occupational safety and health law in the new world of work and the legal adjustments needed to improve applicability and relevance. Some new developments arising as a consequence of technology-mediated labour provision may need new legislation, while other developments may lead to the need to adapt existing legislation or extend its scope to newly emerging forms of work or categories of workers. It is worth noting that this is a multi-annual project, and that this year our work focused mainly on platform work and the challenges it represents for OSH. Platform work is an example of new work organisation that extends pre-existing trends: greater control and surveillance, greater job precarity, and greater worker isolation and workplace fragmentation. Platform work stands out for its unique usage of algorithmic management software to constantly monitor, organise and evaluate workers – a development now being seen in other “traditional sectors”. This exposure impacts workers’ physical and mental health. The platform economy highlights various modern challenges/aggravating factors regarding occupational health and safety. Instead of the mapping exercise initially planned, this project developed further the analysis of challenges (and ongoing political responses at European level) that platform work represents for the OSH legal framework, and possible avenues to address it. For this purpose, academic publications are under review, addressing the following aspects: (1) strategic litigation as a path to improve gig workers' health and safety, (2) the applicability of OSH legislation to risks faced by gig workers, (3) an assessment of the proposed Directive on improving working conditions in platform work.



**Foresight Unit:** This project investigated two issues, (a) the need for and specific features of participatory foresight methods in the EU strategic decision-making agenda and, (b) the use of foresight methods by trade unions in Europe. The ETUI took part in the OECD Technology in and for Society conference, providing expertise in the setting of goals and agendas through foresight and participatory processes. We also provided expertise to the EESC for the EESC INT/918 on the Commission's communication Strategic Foresight – Charting the course towards a more resilient Europe. The ETUI contributed by providing new knowledge in this field on the role of civil society in participatory foresight and by presenting case studies on how national trade unions in Europe have used foresight methods to anticipate change.

A project carried out by the researchers of our Foresight Unit explored the hypothesis that personal data now plays a key role in the employment relationship, especially when linked to automated, AI-facilitated, decision-making processes. The work involved conducting research on the implications of the collection of personal data at work, the application and implementation of the GDPR, and other guidance from the European Data Protection Authorities. Expertise was provided on the assessment of the AI Act and the Directive on Platform Work. The critical assessment was taken up in discussions with EU policymakers within the EU Commission and Parliament. It also served as input to the EESC's Opinion on Digital Labour Platforms.

This project also supported the transversal project 'The effect of the Covid-19 pandemic on the world of work'. The research investigated the social implications of data sharing 'for Covid-19' – a trend pushed by governments but also by private companies that is usually referred to as 'sharing public good' – for trade unions and workers. The research also investigated data ownership at the workplace, exploring the possibilities for and concerns of workers and trade unions alike.

Another project focused on the theme of 'surveillance at work', partly taking the new forms of remote work emerging during the pandemic into account. Specific case studies were performed on worker surveillance and presented at international academic conferences such as the "4S Annual Meeting". We changed the project title from "surveillance capitalism" to "AI Talks", reflecting a series of monthly webinars in which the Foresight Unit discussed AI issues with distinguished international experts to explore their environmental, social and labour implications.

The ETUI provided expert advice to trade union federations, helping them negotiate AI, implement the AI chapter in the Autonomous Agreement on Digitalisation, address workplace surveillance and negotiate AI systems and data at company level.

A further project looked into the numerous technological devices and IT-powered tracking methods now being introduced in workplaces, affecting the conditions under which workers perform their jobs, as well as invading their privacy. AI systems and algorithmic management tools are increasingly used to hire workers, organise their work automatically, monitor them, control their movements, scan their emails, evaluate them and, if necessary, dismiss them.

The Foresight Unit conducted an analysis of the more than 20 legislative initiatives of the EC's Digital Agenda. The result was published in a book chapter in the "Social policy in the European Union: state of play 2021". The intention of this chapter was to answer the question

of whether the Digital Agenda contributes to a more or less social Europe. Using an STS approach, we identified and analysed key social issues and challenges at the intersection of the social and digital worlds and identified key social challenges related to the legislative initiatives.

The pandemic has accelerated the impact of AI on managerial supervision and, therefore, on workers' rights. It is this gap that a Foresight research project aimed to fill (see above "Foresight Project"). The ETUI co-organised this project on "Algorithmic management and collective bargaining" with the university KULeuven and an external expert, allowing an exchange of information and trade union experiences through the presentation of national/European contributions. Finally, we explored the effects that digital technology and the development of AI are having on the very idea and concept of work, *inter alia* with regard to the concept of 'heteromated' work (originally developed by such authors as Ekbja and Nardi) through public events with distinguished experts, among other means.

### *b. Education Department*

The ETUI's Education Department planned four advanced training courses dealing with the social-ecological transition. Through the course entitled 'Union environmental representatives', we introduced innovative roles for union representatives at company level, whereas the course entitled "Green social dialogue" explored new models of industrial relations, including "green social dialogue". Held online, the latter course explored the role of collective bargaining and social dialogue in response to climate change and sustainable development. More precisely, it advocated environmental sustainability as a goal for collective bargaining and social dialogue and discussed difficulties in incorporating measures for environmental protection in collective agreements. The course explored green clauses in collective agreements: what are they and how are they implemented? It offered a unique opportunity to present a comparative analysis of the Italian, Polish and Bulgarian collective bargaining systems to see if they contained space for green collective bargaining. It also compared experiences of "green social dialogue" between Italy and Bulgaria.

- **Capacity-building: green competences**

This project aimed at building a network of trainers able to use the ETUI's green competence framework approach in practice. In cooperation with CISL (Italy), ZSSS (Slovenia), UGT (Spain), and KOZ-SR (Slovakia) we proposed to trade union trainers experienced with or interested in environmental sustainability a capacity-building training programme on green competences related to just transition. Participants designed and developed 12 case studies around the 5 green meta-competences using active learning methodologies approaches and animated training activities.

- **Union environmental representatives**

The course aims at encouraging trade union representatives to take action to influence company management on environmental policies and at strengthening the capacity of trade union representatives on environmental issues in the consultation and negotiation bodies of their respective companies. Innovative industrial relations including "green social dialogue" at European, national, sectoral and regional level have the potential to support a just transition to a low-carbon economy. Before the course, participants had to find out information on the

environmental situation in their workplaces or sectors. This info was used in working groups during which participants identified current working practices of Union Environmental Representatives throughout Europe. They reviewed their company/sector environmental and sustainability policies and drafted an environmental/sustainable action plan at workplace/sectoral level.

- **European Skills Agenda for sustainable competitiveness, social fairness and resilience**

The training course explored what is at stake in the European Skill Agenda and more precisely the Pact for Skills. It provided concrete initiatives developed by unions to motivate workers to participate in training (“The Learning Ambassador”) or to negotiate workers’ upskilling and reskilling (a case from the Chamber of Employees of Luxembourg) with employers.

The integrated approach put forward by the ETUI regarding the green transition is reflected in various education activities linked with other priorities, such as corporate social responsibility and non-financial reporting: this includes enlarging the range of EWC and SE-WC activities as well as the training course ‘Revitalisation of trade unions through cooperation and alliances with environmental NGOs and social forces’. These activities are described further on in this document.

The ETUI Education Department has wide training experience on various aspects of digitalisation. In this Work Programme, we further explored the questions of AI at the workplace. These training activities were designed and implemented in partnership with the Foresight Unit.

- **AI system at the workplace and ‘AI explainability’: what does it mean for the worker?**

The course brought together 18 trade union representatives and officers with basic knowledge of AI technologies and their workplace application. During the 3-day course, participants learned what data is, how it is used and the impact it can have on the workplace and workers, what AI can and cannot do in the world of work. One very good trade union example on data protection and digital rights in trade unions and collective bargaining was presented by the expert on the matter: about how to collect and exploit evidence of digital violations, how to protect platform workers, especially couriers, from apps which violate privacy rights. During this course we used active methods, like gamification, *inter alia* piloting the game introducing AI to workers’ representatives. Well received by the participants, the game was created in two parts: the first, in the format of a canvas, aiming to discover the main applications of AI in different sectors, their benefits and risks, and the challenges and opportunities for trade union. The second part of the game, designed as a role-playing board game, looked at ways of solving given challenges from different perspectives. Participants were so enthusiastic and interested in the new game and all the information received that many of them expressed their willingness to disseminate it, with many of them also wanting to use the game in their respective organisations.

- **Building trade union capacity for AI surveillance**

This course on AI at work focused on algorithms and their application in the surveillance of workers. Held face-to-face, the course brought together 18 participants from 8 countries. Its first part started with a mapping exercise on how AI applications are used in the workplace, what trade union need to be aware of and associated geopolitical aspects. These were then discussed with Prof Antonio Casilli who presented the various aspects of digital labour and how surveillance permeates our lives. Looking at the practical aspects of AI at work, the Association of Nordic Engineers presented its ethical recommendations and what a Nordic approach to AI looked like. One session was dedicated to understanding AI and its workplace applications, where participants, playing different roles, were able to solve challenges induced by AI. The ETUI AI games were welcomed by participants, with many requests to disseminate the knowledge to different TU organisation levels tabled. Participants also expressed their need for recommendations and lists of issues when bargaining on AI. These elements will be collected in next year's training course.

## 2. Priority 2 - A new economic model

The pandemic offered additional evidence of the many structural failures of the current economic model and its inability to generate shared (sustainable) prosperity for all. Beyond this consensus, however, we needed to debate the merits of alternative model(s) able to drastically reduce inequality and foster upward convergence. We particularly recognised this need in a context of growing macroeconomic imbalances and inequalities, partly fostered by the Covid-19 pandemic, which has clearly benefitted a few to the detriment of many.

One of our key research priorities was to coordinate the development of a new progressive agenda for the reconstruction of Europe's social and economic fabric in the aftermath of the Covid-19 crisis. The elements of this agenda were composed of internal contributions and externally commissioned contributions, to be collected and published as an edited volume ('Reconstruction after the Pandemic – Proposals for the Future'). We envisaged this series to lay the foundations for a more coherent document including recommendations and prescriptions for changing and reforming the economic model, to be developed in the forthcoming years. As part of this discussion, we also engaged with the 'beyond growth'/new indicators debate and the shorter working week/working time reduction discussions (*inter alia* in collaboration with such external stakeholders as EPSU and the Réseau Roosevelt, as noted in the previous subsection).

A further priority revolves around the issues of public indebtedness, its middle- to long-term sustainability and the redistribution of wealth by means of fair and progressive taxation mechanisms. Our focus on the EU's recovery and resilience instruments offered an opportunity to discuss the impact of the Covid-19 pandemic on the macroeconomic and fiscal framework of the EU, especially in light of the partial suspension of the Stability and Growth Pact. We continued to monitor wage and collective bargaining developments within the EU, and the effects of Covid-related business restructuring processes on the world of work, from both a quantitative and qualitative point of view. We focused on MNCs, in terms of both our analysis of their global value chains and their staffing strategies and use of migrant labour. Concomitantly we offered training on the role of trade unions in the context of the recovery and resilience plans, and on the drivers of in-work poverty.

### *a. Research Department*

**European economic policies and EU economic governance:** Developments in EU economic governance and its policies are central to the public health measures taken to stem the Covid-19 pandemic, to the shaping of the ecological transition, and to influencing the way we create and share prosperity both within and between EU Member States. This ongoing project has dealt broadly, from a macro perspective, with the question of how the mix of European and national economic policies, along with EU economic governance processes (particularly regarding their outputs and their reform), impact economic, labour market and social developments. These are important areas in which expertise and research are needed, particularly because of the central place that questions concerning macroeconomics and economic governance have within ETUC, European Commission, European Council and ETUI priorities. The output of this project consisted of analyses, commentaries and recommendations. The researcher provided direct input to ETUC resolutions on EU economic governance reform and contributed articles on the EU Green Bond Standard and the reformed ECB monetary policy strategy to the ETUI's European Green Deal newsletter. The evolution of the economic and social aspects of the national resilience and recovery plans was tracked, complementing an analysis made elsewhere of labour market and social policies (see for example the working paper on 'Labour market policies in Europe for just, green and digital transitions, and the recovery, resilience and fairness' project). The evolution of national fiscal policies and EMU reform is also being closely followed (in association with the TUREC project, the annual meeting of which was dedicated to this question), as there are widespread concerns that, once the pandemic is over and the application of fiscal rules reinstated, there could be a return to fiscal austerity in Europe. An external partner was commissioned to produce an ETUI working paper on the modalities of a future 'Social Imbalances Procedure' as a complement to the Macroeconomic Imbalances Procedure in the EU's economic governance. The establishment of the procedure has been a subject of debate in the EU since spring 2021 in an attempt to balance the EU's economic and social dimensions.

Moreover, a study of future EU employment dynamics under different scenarios, concerning the evolution of the pandemic, structural transformations (from digitalisation, automation to the rise of remote work) and policy developments (the deployment of the NGEU and the reform of the EU economic governance), was assigned to (also on the technical advice of an external independent expert) and concluded by the Vienna Institute for International Economics (WIIW). This resulted in the publication of a policy brief in July, while the final report went into publication production during the reference period (and was published in early October 2021). The results of this exercise fed into the consultation between the ETUC and the European Commission, ahead of the launch of the 2022 European Semester.

In the course of the reference period, a policy brief was assigned to and completed by the OFCE (Paris) on the macroeconomic gains and democratic limits of embedding the Recovery and Resilience Facility into the European Semester.

Last but not least, a journal article was produced and published online examining whether, and, if so how, conditionality in financial assistance programmes to Greece from the previous decade has shaped, or even constrained, the country's Recovery and Resilience Plan and its potential to support Greece in establishing a more sustainable growth model. Greece is a key

case for studying the evolution of inter-state solidarity among EU Member States, an element crucial to predicting whether, and if so how, the necessary reforms of the EU's economic governance and the EMU are likely to take place. Earlier versions of the article were presented at a virtual workshop organised by the Copenhagen Business School and at the 27<sup>th</sup> International Conference of the Europeanists (virtual) in June 2021.

Due to increased workload in other areas, the planned commissioning of an external study on the potential role of the ECB in supporting the objectives of the European Green Deal was postponed until the following budget year.

**ETUI-CELSI Covid-19 Observatory initiative:** Launched in 2020 in the context of the pandemic, this project was completed in 2021-2022. It aimed at monitoring and analysing national policy responses to the Covid-19 pandemic across Europe, with a focus on labour markets, employment relations, working conditions, and employment and economic policies across the EU27, the UK, possible candidate countries and, when relevant, selected countries from the rest of the world.

The objectives of the Observatory's activities were:

- to fill identified gaps and gather data on selected policy responses to the Covid-19 pandemic, most notably in the aforementioned policy and research areas;
- to enhance our understanding of the policies adopted in the context of welfare states, labour markets, employment relations and macroeconomic policy frameworks;
- to enable and promote the study and evaluation of their economic and social impact;
- and to effectively disseminate this knowledge to the relevant stakeholders, including trade unions, employer representatives, policymakers, and interested professionals.

The above objectives were to be met by the collection, processing and analysis of information and data on national policy responses to the Covid-19 pandemic in the aforementioned policy areas, as well as their appropriate visualisation and coding to facilitate sharing with interested stakeholders on the two institutes' websites.

During the reference period, a survey was assigned to a network of more than 30 national experts in all 27 EU Member States plus Norway, Switzerland and the UK to collect information and data on national job retention schemes and their evolution between March and December 2020. Based on a typology of three ideal-type schemes (short-time working (STW) schemes, furlough schemes and wage subsidies), the survey provided data on quantitative features, such as differences in terms of expenditure and take-up of the schemes, as well as qualitative key properties of the various schemes such as eligibility criteria, the level of support for employees and employers, the role of collective bargaining and worker participation, dismissal protection, measures to avoid misuse, and training provisions. The results of the research were published as an ETUI Working Paper (see 'Labour market policies in Europe for just, green and digital transitions, and recovery, resilience and fairness') and a chapter in a German Yearbook (see 'Mapping collective bargaining developments in Europe'). In line with the project's commitment, the ETUI published each individual country report on its website. The research formed the basis for providing expertise to trade unions in various countries for their national debates on the implementation of permanent job retention schemes or the reform of already existing permanent schemes.

**Taxing rents and income from capital:** The expanding role of intangibles in value chains generates increasing rents for intellectual property, thus constituting an increasing component of ‘income from capital’. While there is a case, from an economic point of view, for taxing rents, most countries have been competing for the location of intellectual property (the patents) by introducing patent boxes, the main effect of which has been to incentivise profit-shifting and, for MNCs, a significant reduction in effective taxation. There is without doubt an issue of fairness at stake when it comes to reducing taxation in an emerging form of income from capital. In addition, we are observing increasing divergences in the various forms of returns from financial assets (higher returns for shares, low returns for interest-bearing assets). How can taxation of income from capital be designed to be fair and effective, while taking into account the expanding coverage of the automatic exchange of information.

**Shipping off labour: changing staffing strategies in globalised workplaces:** The ETUI participated in a multi-annual cross-national comparative research project led by the Institute for Social Research in Oslo (Norway). The research covers different levels of the European political economy: the company level, the national sectoral level and the EU level. A study is in progress on how the change in regional economic integration (Eastern enlargement) impacts production and staffing strategies in the shipbuilding industry, how these changes are negotiated by those involved, and how technological changes affect employers’ strategies. In the context of the study, interviews were conducted with players involved in the European Social Dialogue, both on the trade union and the employers’ side. To this end, the ETUI developed an interview guide and conducted interviews. Only eligible costs were incurred.

**Covid-19 and EWCs: analysis of the results of an e-survey on whether and how EWCs were involved in Covid-19 measures:** We continued to monitor the social and labour dimension of the EU policymaking response to the Covid-19 crisis. Building on the results of an e-survey and a conference with EWC members and trade union experts, a working paper on the role of EWCs in addressing the transnational impact of employment, work organisation and health and safety measures introduced during the pandemic was prepared. The expected outcomes are an ETUI working paper mapping and assessing the social and labour policy effects of the EU recovery strategy, a closer analysis of one selected policy instrument adopted or proposed by the EU legislators as part of the recovery strategy, and an academic publication on the effects of Covid-19 on EU workers’ rights.

**Restructuring and MNCs:** This long-term project investigates the nature of multinational corporations (MNCs) and value chain restructuring and their impact on working conditions, employment, and industrial relations. The project also analyses the strategies that trade unions and employees can use to shape outcomes. The Covid-19 crisis represents just another phase of value chain restructuring, driven by MNC strategies transforming economic structures in the EU. We advanced research on the reorganisation of the production network that we had started to develop in 2020-2021. We started to map different forms of outsourcing and offshoring and where value was added, captured and distributed in the value chains, using quantitative data from the world input-output database. We focused on four themes, including the impact of the green transition and the changing structure of demand caused by the COVID crisis. These analyses were prepared for publication in this budget year, resulting in four working papers. Additional studies were planned for 2021-2022, but the decision was taken to discontinue this project due to the departure of the lead researcher.

## *b. Education Department*

The training activities developed to address this priority (a new economic model) are of great importance for the trade union movement in a pandemic crisis situation. Constructing and strengthening the capacity of trade unions to play a decisive role in the recovery is their key objective.

- **Trade unions and Recovery and Resilience Plans**

The main objective of this training course is to build capacity regarding Recovery and Resilience Plans and to contribute to their design, implementation and monitoring. The participants discussed, on the one hand, trade union priorities in analysing the plans and, on the other hand, strategies for trade union involvement in their implementation, monitoring, and adjustment phases. Testimonies from Italy, Slovakia and Lithuania revealed that trade unions had been side-lined during NRRP consultation and implementation phases.

- **Trade unions' role in the European Semester**

In the Commission's view, the European Semester should be one of the implementation tools of the European Green Deal and in particular, of the UN SDGs. But this is also the best lever for actions on wages and economic incentives. Studies show that the availability of 'cognitive resources' is critical for trade unions to be able to influence decisions taken in the European Semester framework. Trade unions must be aware of what is at stake for them in the European Semester. This online training course contributed to national trade union capacity-building to better influence policies designed within the framework of the European Semester. During this course, designed in partnership with CCOO (Spain) and ACV-CSC (Belgium), participants identified the objectives, content and key moments of the European Semester, making them able to engage in a budget debate related to the European Semester.

- **In-work poverty webinar**

The COVID-19 pandemic worsened the economic situation of many people. It pushed more into extreme poverty, while creating more in-work poverty. The webinar analysed the involvement/experience of trade unions in their fight for fair income distribution and equal access to social services. Held on 24 – 25 June, the webinar was very well received by the 18 participants from 7 countries. They shared different aspects of the in-work poverty actions taken by various trade unions. An interesting example was presented by a colleague from UGT Spain, referring to the case of riders and their precarious employment status which automatically lead to in-work poverty. He mentioned the recently won trade union fight (and now concretised in new legislation) to recognise these group of workers as employees. This case and other good experiences inspired participants to continue the debate after the webinar and plan follow-up meetings on the matter (notably in the two partner countries, Lithuania and Hungary).

- **Semi-conductors: strategic restructuring in the EU?**

Semi-conductors are cutting-edge technology, essential for high-performance computing, artificial intelligence and mobile applications. In short, they are at the core of the Digital Transformation. This was the first time this topic was addressed in a training activity. The



topic is very important, as the EC is addressing the issue of dependency on foreign providers by encouraging EU production (see CHIP act). The situation worldwide and its geopolitical environment were presented and debated with an external expert from Stiftung NV. He explained how resilient the global semiconductor value chain was to external shocks and how Europe's competitiveness could be strengthened. He also debated with participants the European CHIP act and its impact on various sectors. Together with IndustriAll, we explored how sectors will restructure in the coming years to reflect semi-conductor developments.

### 3. Priority 3: A renewed social contract

We had, and still have, a social contract. However, several of its express and implied terms have come under increasing pressure in recent decades, even more visibly since the Great Recession of 2008. The workforce is also changing (in terms of gender, age, ethnic diversity, etc.) in ways that are constantly shaking the kaleidoscope of participants and beneficiaries. This priority covered the main potential elements of a renewed social contract, including working time, job quality, wages, social protection, and – crucially for the ETUI – health and safety. It is fair to say that the pandemic has further modified some of the terms of the (constantly renegotiated) social contract. Any 'small state' discourse appears painfully obsolete at a time when public funds are sustaining the livelihoods of more than 40 million European workers and their families. But economic challenges and rising inequalities (including gender and race inequalities) loom large, and the social contract will need to address these pressing societal questions in order to ensure social and political stability. New harms and risks have emerged, in connection with both the pandemic and the increased use of teleworking and remote working patterns. Within this priority, the gender dimension of the social contract is a key element in our training and research activities. The ETUI set up a working group to ensure that we develop a genuine gender mainstreaming approach in all our activities, while also dedicating specific focus and attention to the issue of gender equality. The ETUI continued to monitor developments in the domain of sectoral social dialogue (SSD), especially in the context of the pandemic.

#### *a. Research Department*

**European Pillar of Social Rights (EPSR):** At a policy level, the Portuguese Presidency of the EU announced that the response to the social impact of the crisis through a strengthening of the European Pillar of Social Rights (EPSR) was among the three main themes that preoccupied the Council in the previous year. The ETUI published a number of working papers, journal articles, book chapters and blog posts on the EPSR and its implementation in previous budget years. In 2021-2022, the ETUI continued its project 'The European Pillar of Social Rights: paving the way out of the crisis or lagging behind?' and the monitoring and critical analysis of developments surrounding this policy at both EU and national level, with a special emphasis on the role of the EPSR in addressing the crisis induced by the Covid-19 pandemic. The researchers participated in various virtual events. The ETUI also continued to monitor EU social and labour policies through a project on "The social and labour policy dimension of the EU response to Covid-19". This project led to a series of research outputs (ETUI policy brief, external publications and coordination of an international conference panel) on the role of the EPSR and the Action Plan to strengthen the social sensitivity of the European economic governance and on the social dimension of the EU recovery strategy, NextGeneration EU. Moreover, the impact of the EPSR in socialising the EU was also

addressed in a couple of (originally unforeseen) commentaries on the EPSU v Commission case. The case touched upon social dialogue and the involvement of workers (EPSR Principle no. 8) and was deemed to be significant in showing the Commission's approach vis-à-vis the policymaking and institutional role of social partners in defining the European social model.

**National social protection policies for non-standard employees and the self-employed in the era of COVID-19:** This is a project which began in the budget year 2020-21, in cooperation with the Observatoire Social Européen. The study mapped, analysed and assessed the impact of national policy measures aimed at expanding social protection coverage to non-standard employees and the self-employed, with a particular emphasis on gender. In November 2019, the Council of Ministers issued a Recommendation to Member States on access to social protection for workers and the self-employed. According to the timetable proposed in the Regulation, the European Commission and the Social Protection Committee should establish by 15 November 2020 a monitoring framework and develop agreed common quantitative and qualitative indicators to assess implementation of this Recommendation, enabling its review, whereby Member States were supposed to submit plans for its implementation by 15 May 2021. The public health measures to stop the spread of COVID-19 prompted governments in Europe to step up their efforts to expand social protection coverage to people in employment not previously or sufficiently covered, although the extent and specifics of these efforts varied.

For the reference budget year, an in-depth analysis of 8 Member States allowing a comparative assessment of developments was published, while a working paper for disseminating the findings to a wider ETUI audience was prepared and sent to print.

**Mapping and explaining wage inequalities in Europe:** This research maps out and seeks to explain the causes of increasing income inequality in European countries and to assess the impact of various public policies (including migration policies). The focus is on analysing data at sectoral and company level and continues previous work on the decoupling of productivity from real compensation growth. In this project, we gained access to several European micro-datasets which have since been used in several studies. This project on explaining wage inequalities through the analysis of detailed secondary data and information at country and sectoral level was expanded to focus on different structural inequalities (e.g. migrant status, ethnicity, gender, etc.). It included a focus on institutional changes (such as labour market policies) and the way they affect wages and wage inequality. The project produced two working papers directly, as well as one manuscript currently under peer review. Based on this work, the researcher concerned also provided support to trade unions and presented this work on wage inequality between companies at an event in Brussels and at several conferences. The Brussels event included a discussion of the findings by experts from the OECD and ILO, as well as the ETUC. A The project included research into closing gender gaps in the labour market, as a priority for European trade unions. In particular, persistent gender pay gaps in the EU are a cause for concern, with long-term consequences such as the accumulation of disadvantages in the labour market, gender pension gaps and a higher risk of poverty among women. However, these issues tend to receive insufficient attention in gender equality strategies, while progress on the EU Pay Transparency Directive has been slower than expected. As part of this study the researcher co-published a policy brief on performance pay and the gender pay gap. Another part of the project tackled collective wage agreement coverage, already at a low level and declining further in several countries. This means that collectively agreed wage rates are more likely to be undercut, resulting in lower wages (and

worker welfare) as well as fewer resources for the state through income tax and social security contributions. This project went beyond simple collective wage agreement coverage, also considering which types of agreements exist: national, sectoral or company. These different types have been shown to affect wage inequality very differently. One working paper – with a version currently under peer review – was published as part of this work.

**Mapping collective bargaining developments in Europe:** The objective of this project was to map and analyse collective bargaining and wage developments across Europe. In view of the far-reaching economic implications of the Covid-19 pandemic, the key focus was on institutional and collectively negotiated responses to support employment and workers' wages. An article was prepared for the special issue of *Transfer* on 'Unemployment Benefit Systems, Industrial Relations and Covid-19'. The article, delivered within the programme's deadline, was eventually published online at the beginning of April 2022. Other planned research covered the following dimensions:

(1) an update of the development of job retention schemes in Europe as a means to protect employment, safeguard workers' wages and at the same time provide companies with the flexibility to adapt working hours to the drop in demand. In addition, a book chapter on job retention schemes was published in a German Economy and Society Yearbook (see also the work under the ETUI-CELSI Covid-19 Observatory initiative' project). The originally intended second round of updates on job retention schemes for the previous budget year did not take place due to the fact that the first round in the context of the ETUI-CELSI Observatory took on an unforeseen scale, to the progressive suspension of a number of job-retention schemes as the pandemic eased, and to the developments of the European minimum wage directive which had to be prioritised.

(2) the originally intended research on collectively agreed working time reductions as a means to redistribute work and to support industrial transition processes had to be postponed to the next budget year because of the work on the European Minimum Wage Directive;

(3) the development of minimum wages across Europe. In light of the Commission's proposal for a directive to establish adequate minimum wages in Europe, the research analysed the policy process of the proposed directive and the various national trade union initiatives in the EU27 to turn minimum wages into living wages from which a worker can actually make ends meet. The results of the research served to assist the ETUC, the European Parliament and the European Economic and Social Committee in their attempts to come up with a Directive improving the situation of workers in Europe. The results of the research were published in the form of three articles / book chapters and a blog (see list of external publications). Furthermore, various unpublished briefing notes were formulated for the ETUC and other political players. The research results were presented at various events organised by the European Parliament, the ETUC, national trade unions and other organisations such as the Friedrich Ebert Foundation.

**Guaranteed minimum income for retirees:** The consequences of the declining relevance of the standard employment relationship model (SER), and the parallel growth of non-standard forms of work – coupled with decades of socially regressive pension reforms – are now coming home to roost, with a new generation of retirees, most of them women, unable to rely on a decent pension income. Precarious and intermittent career structures, low or part-time working hours, lower contributions linked to non-standard employment relationships and statuses, and the privatisation and financialisation of pension systems have all contributed

to the emergence of this new ‘generational emergency’ that is progressively acquiring structural dimensions in a number of EU Member States. EU Commission data suggests that in 2017 the proportion of pensioners at risk of poverty in the European Union (EU) was 14.2%. The rate has been rising gradually since 2013, when it was 12.6%. But this average figure masks the fact that extreme variations are present among EU Member States, with the proportion of pensioners at risk of poverty significantly higher in countries like Estonia (46%), Latvia (44%), Lithuania (37%) and Bulgaria (32%) and much lower in other countries like France (7%), Slovakia (8%) and Denmark (9 %). Across the EU as a whole, between 2010 and 2017 the proportion of female pensioners at risk of poverty was around 2-3 percentage points higher than the rate for male pensioners, again with substantial national variations. Commissioned from a group of academic experts, a working paper explored these issues from a social policy and comparative point of view, establishing links between incomes in old age and the provision of decent pensions, wages and services.

**The impact of Covid-19 on gender equality and the EU equal pay and work-life balance frameworks:**

Emerging evidence clearly shows that the Covid-19 pandemic has had a disproportionate negative impact on women in the workplace and the domestic sphere. The aim of this project was to draw on available evidence of the effects of the pandemic on female workers as a basis for critique of the EU equal pay and work-life balance legal frameworks (recently subject to a review) in order to put forward proposals regarding their enforcement and reform. This research resulted in an ETUI working paper published in January 2022 with the title ‘Reshaping the Work-Life Balance Directive with Covid-19 lessons in mind’, which makes proposals for strengthening the EU work-life balance framework. The EU equal pay framework is mentioned but not discussed at length within the remit of this paper, to ensure sufficient space for in-depth analysis of the work-life balance Directive, and because the proposed EU pay transparency Directive is still going through the legislative process. However, the research conducted under this project was useful in providing regular technical expertise to the ETUC on the proposed Directive. In addition, a paper on emerging equal pay standards in EU law and under the European Social Charter was written in conjunction with an external researcher, presented at an international conference on social rights and is currently undergoing review for publication in a special issue of a peer-reviewed journal.

**Gender equality in employment:** This project provided ongoing support and expertise to social partners, in particular the ETUC and affiliates as well as EU institutions and bodies, on ways to improve gender equality in EU labour markets, work-life balance policies, current developments and gender-specific outcomes in employment. Outputs delivered as planned in this budget year included providing ongoing expertise and support in response to requests from social partners and other policy players (in particular, ongoing support to the ETUC, as well as Eurofound within the scope of policies for gender equality in digital labour markets and work-life balance policies). In addition, over and above the planned outputs, an article on prospects for women’s employment after the pandemic was prepared and published in the Social Europe dossier on ‘Women and the Coronavirus crisis’. However, planned in-person presentations at conferences and seminars did not take place due to ongoing health restrictions.

**Gender and working conditions:** Women account for 75% of the human health and social care sector in the EU, and 89% of nurses in Europe. Due to demographic change, a high level of chronic illnesses, and the strain placed on health systems in Europe by Covid-19, this ‘care

economy' will need to create high numbers of jobs in the coming years. However, care work remains characterised by poor working conditions, few benefits and social protections, precarious working conditions, low wages, high levels of sexual harassment and violence, and psychosocial risks. This results in staff shortages and negative health impacts on workers. This project developed knowledge on working conditions in the health and social care sector through qualitative data collection, while semi-structured online interviews were conducted with trade union officials responsible for occupational health and safety (OSH) and officials with responsibility for collective bargaining in Germany, Spain and Sweden. In total, 21 interviews were conducted. Publication of the deliverables is foreseen in the next budget year.

**Posting of workers and temporary intra-EU mobility: mapping the flows and working conditions of seasonal and border workers in the EU:** The Covid-19 crisis has brought into sharp focus how important the temporary intra-EU mobility flows are to some sectors, such as agriculture and meat-processing, but also transport and construction work. Anecdotal evidence shows that these flows are large, and that the working conditions of these workers are often abysmal (as the ETUC and affiliates have also pointed out). Little is known about this, however, and little data is available. Given its importance and relevance for working conditions – both for the mobile workers and for other workers in these sectors at risk of being undercut –, this gap needed to be filled. Based on a literature review and an analysis of the available secondary data, this project described the current situation and knowledge regarding the flows and labour market situation of temporary intra-EU mobile workers. Due to an unforeseen heavier workload, there were no project outputs. A start has been made on the working paper and this will be developed further in the coming year.

**Posting and short-term migration rules for third-country nationals (including the impact of Covid-19):** The Covid-19 pandemic has also exposed the vulnerability of third-country nationals (TCNs) working in the EU. While often working on the frontlines of the pandemic, they have not received adequate support and protection. Building on a previous multiannual project on posted workers, the focus this year was on posting and short-term migration of TCNs. The employment and posting of TCNs is an exceptional and fast-developing labour market phenomenon in the EU characterised by a very complex set of rules on gaining access to the European labour market and living and working within it. The objective of this project was to assess and compare provisions governing posting and short-term migration of TCNs in the EU27 and Norway and Iceland. In this context, 29 country reports were commissioned from 29 national experts in the previous budget year 2020-2021. In 2021-2022 an online seminar was held with all participants to discuss the main findings and to decide how to proceed with publishing the results. Most of the work was carried out in order to prepare two ETUI reports: one on the interaction between immigration and labour law in the case of short-term migrants from third countries, and the other on the interaction between immigration law and social security rules. Due to delays in the preparatory work, publication of the project outcomes has been postponed to the beginning of the next budgetary year.

**Labour market integration of asylum-seekers and refugees:** Migration is one of the key topics of European policies and a crucial issue for trade unions, in particular as regards asylum seekers and refugees. The refugee wave that caught Europe unprepared in 2015 still needs supporting policies and above all successful labour market integration. This is an ongoing project following a book publication in January 2021. In this cycle of the project the

emphasis was placed on disseminating findings during events, which led to the setting up of a collaboration with Warsaw University. We expect this area of research to be bolstered by the pressures emerging in the aftermath of the Ukraine conflict as well as global food shortages.

**Developments in job quality in Europe:** This project was dedicated to analysing developments in job quality, employment and related labour market policies from a comparative cross-national perspective. In view of the challenges facing labour markets in Europe, it is crucial to ensure that we do not lose sight of the quality of jobs of European workers, because better jobs translate into better health and wellbeing of workers, as well as a more competitive and resilient economy. Therefore, the objectives of this project were as follows: to provide empirical evidence on and new insights into developments in job quality across the EU; to draw attention to a growing risk of precariousness and the situation of precarious workers in the current crisis; to evaluate EU employment policy and crisis response measures in the area of job quality. Work on updating the European Job Quality Index was planned, but not undertaken due to unavailability of the data from the seventh European Working Conditions Survey (Eurofound). Building on networks developed in previous years, a collaborative work on the concept of 'precariousness' was undertaken. A chapter on vulnerable workers in new forms of employment was drafted for the edited volume *Critical Approaches to Precarity*, to be published by Bristol University Press. Within the scope of the project, expertise and support to social partners were provided as planned, notably in the area of job quality, in-work poverty, and the impact of the Covid-19 crisis. Expert input was also provided in a range of webinars and interviews, as well as to the advisory board of the Respectme research project. Beyond planned outputs, work on a book chapter on the issue of employment protection legislation was undertaken and completed, with the chapter awaiting publication in the Handbook of Labour Market Policies and Institutions. Finally, a collaborative research project was undertaken focusing on the role of job quality in employment trajectories of women, based on the econometric analysis of longitudinal British data. Based on the analysis, an article was submitted to a journal.

**Working time reduction:** Working time reductions have the potential to deliver not only a better quality of working life, but also life in general, as well as a more sustainable, just and equal society. These ambitions rest on a capability to provide an overarching vision with concrete solutions on how working time reductions should be implemented, as well as the willingness of social partners and society at large to pursue these goals. This project aimed at stimulating and informing this debate - What are good strategies and motivations for collective working time reductions? What can we learn from research and existing practice? As planned, several publications on policies for working time reduction were prepared and published in this financial period, including a book chapter (published by ÖGB Verlag) and a journal article (published by the Institut wallon de l'évaluation, de la prospective et de la statistique). Results of an ongoing mapping and analysis of initiatives on a shorter working week were presented at various webinars and online events.

**Good regulation on psychosocial risks (PSRs):** The ETUC adopted a resolution in 2018 demanding an EU Directive on PSRs. ETUI's longstanding research on the topic supports this kind of demand. During the budget year, the project explored good examples of national regulation on PSRs to serve as a source of knowledge and inspiration for developing the content of a European Directive on PSRs. The OSH Framework Directive (89/391/EEC) sets general rules for protection against all occupational risks, including psychosocial risks. However, unlike most physical risks that are also regulated more specifically in so-called

'daughter directives', psychosocial risks lack ad hoc protection. This leads to a situation in which a category of risks that is one of the main causes of work-related diseases, sick leave and incapacity for work is neither regulated at EU level nor in many EU Member States. The issue is often wrongly perceived as 'vague', difficult to regulate and as a problem of individual resilience instead of one of work organisation. In reality, some Member States have well-developed legislation on the issue based on an organisational preventive point of view. National experts from 26 Member States were asked to contribute to an overview of national legislation, collective agreements, and jurisprudence applicable to work-related PSRs. A 2.5-day workshop was held on the issue to discuss the (interim) results and develop ideas on making them as input to an EU Directive in January 2022. While the publication of the full report is foreseen for the next budget year (2022-2023), a policy brief "*Psychosocial risks in Europe: National examples as inspiration for a future directive*" was published in December 2021

**The costs of psychosocial risks:** It has long been proven that occupational safety and health (OSH) legislation benefits workers by preventing work-related accidents and occupational illnesses. Ensuring safe and healthy working conditions has long been an important part of our social contract. However, for different reasons – among others, the 'administrative burden' argument in the context of the REFIT (Regulatory Fitness and Performance) Programme, but also the fact that psychosocial risks are often perceived as an individual instead of an organisational problem, and on top of that as 'vague' and difficult to regulate – psychosocial risks in the workplace have remained the 'poor relatives' of OSH in EU-level regulation. While most other OSH risks have dedicated EU directives, psychosocial risks are not specifically regulated at EU level. These risks, however, are one of the main causes of sick leave among workers. Moreover, the Covid-19 pandemic has highlighted the urgency of addressing these risks in the world of work.

The objective of this important study covering most EU Member States is to estimate the costs of inaction on this increasingly concerning OSH issue. The expert concerned presented the main findings based on the Interim Report 2 in the ETUI Psycho-Social Risks Trade Union and Research Network webinar. Due to health issues, the expert requested that delivery of the final report be rescheduled from December 2021 to September 2022.

**Network on the development of knowledge on psychosocial risks:** A two-day webinar was held with the ETUI Psycho-Social Risks Trade Union and Research Network on 13 - 14 October 2021. The meeting '*Psychosocial risks in times of Covid-19: Emerging issues and ways forward*' took stock of recent developments in the field of PSR research, particularly in relation to the Covid-19 pandemic. Topics included teleworking, frontline workers, workers in vulnerable situations and the related legislative developments. The seminar contributions from the experts were published as a meeting report.

**Enforcement of and compliance with OSH legislation:** The general aim of this new multi-annual project is to investigate ways to improve compliance with and enforcement of OSH legislation. During the budget year, preliminary research was conducted on the possibility for workers to contact OSH authorities in cases where they believe that their employers have breached OSH principles (Art. 11.6 of the OSH Framework Directive (89/391/EEC). Instead of the planned one-day expert meeting, the paper: "*Whistleblowing as a complementary path to improve the application of occupational safety and health principles*" was presented at the Labour Law Research Network Conference in June 2021.

**Strategic litigation on occupational health and safety:** The body of regulation on OSH developed at both EU and national levels provides us with the basic principles to properly

organise the prevention of safety and health hazards. However, these basic OSH preventive principles are not being sufficiently and/or correctly applied. Labour inspectorates are increasingly understaffed and unable to adequately enforce OSH legislation. Therefore, judicial enforcement is an alternative worth examining. Going to court can give trade unions the possibility to seek enforcement. If this is done in a strategic manner, a clearer understanding of the basic preventive principles of the existing OSH *acquis*, at both EU and national level, will be achieved, thereby providing a basis for its further development (law creation). This forms the background for this multi-annual project on OSH litigation in the EU and its Member States started in 2019-2020.

Two previous events (workshop in January 2020 and conference in February 2021) provided an overview of OSH litigation at EU level and an exploration at national level. They covered the elements needing to be taken into consideration, such as the causality link and the burden of proof, as well as the role of other stakeholders. In 2021, the accumulated knowledge was disseminated via a report on ECJ OSH cases. The workshop “*Occupational Safety and Health (OSH) Strategic Litigation at a legal crossroads*” took place on 30-31 May 2022, instead of February 2022.

**Cooperation between trade unions to develop strategic OSH approaches:** The objective of this project is to provide the Workers' Interest Group (WIG) of the tripartite Advisory Committee on Safety and Health (ACSH) with professional coordination and expert support to carry out its activities in an orderly, effective and efficient way. The ETUI prepared the WIG meetings in cooperation with its spokesperson, provided (ETUI or external) expert input when needed, and attended the meetings of the Bureau of DG Jobs in Luxembourg, the WIG meetings and the Plenary Meetings of the ACSH. We also coordinated the staffing and the work of the working groups on behalf of the WIG. Other ETUI colleagues acted as experts and/or members of working groups in their field of expertise. During the budget year, ETUI participated in the Standing Working Group (Extract Industry), the Machinery Directive Working Group, the Workplaces Directive Working Group, the Display Screen Directive Working Group, the Chemicals Working Group and the Pandemic and OSH-related issues Working Group. The project produced the following outputs: effective and efficient meetings in which affiliates were able to have their say, well-informed, transparent and fair decision making, well-staffed and well-informed WGs, and political results reflecting union views. This recurrent project targets national trade union representatives in the WIG and the EU Commission.

**Annual strategic meeting for the ACSH Workers' Interest Group:** Consultation and participation of workers are a predominant requirement enshrined in European Union legislation on occupational health and safety. The Advisory Committee for Safety and Health (ACSH) is the tripartite advisory committee for the European Commission. Its Workers' Interest Group (WIG) is coordinated by the ETUI (see ‘Cooperation between trade unions for an OSH strategy’). The ETUI annual WIG meeting was held online on 27 and 28 September 2021. Open to all affiliates, the 2-day meeting gave the WIG the opportunity to evaluate its work, reflect on current developments and policies, exchange ideas and plan its work for the coming year. The agenda was related to the EU Strategic Framework on OSH and covered, among others, the issue of the world of work from a post-Covid perspective and implications for health and safety at the workplace

**OSH Annual Conference:** The annual ETUI OSH conference was dedicated to the lessons learned for OSH from the Covid-19 pandemic. A 2-day annual conference on this topic was held in December 2021.



**Covid-19 and OSH:** The project continued monitoring the OSH developments related to the Covid-19 crisis. Presentations were given, organised by the ETUI and on-demand. One of the topics closely followed was the Biological Agents Directive (BAD). The current pandemic and more specifically the classification of the Covid-19 virus in the context of the BAD made clear that this Directive was not fit-for-purpose in a pandemic situation. The ETUI continued its analysis and actions on possibilities for improving the Directive, both content-wise and in the political arena (ACSH and EU Institutions). Target audiences were the ETUC, ETUC affiliates, (WIG) ACSH, EU Institutions (EP, Council, Commission), the wider OSH community and the media.

**Covid-19 as an occupational disease (COD):** This project aimed to contribute to the discussion on the recognition of Covid-19 as an occupational disease. Many workers were exposed to Covid-19 in the workplace – including but not limited to frontline workers in health and social care, police officers, firefighters, shop assistants, teachers, etc. Other workers were exposed to the virus because of the specificity of their jobs, like miners, or due to weak protection and the breaking of OSH rules by their employers. Following the first one held as part of the previous Work Programme, two further seminars were held on 10 June 2021 and 17 January 2022. The project covered an exchange of information between participants, for the most part members of the Advisory Committee for Safety and Health (ACSH), external experts and trade unions. The COD project collected a) data (i.e. collection of information, questionnaires, and virtual meetings); b) examples of cases where Covid-19 was recognised as an occupational disease (what, where, how; job, sector, exposure, damage, compensation, unions' role, etc.); c) monitored developments in this area (with external support); d) focused on national approaches to the issue (systems of recognition, lists of occupational diseases, biological risks). The project contributed to the discussions on Covid-19 and other occupational diseases attributable to biological hazards at European level. It also contributed to discussions in the Advisory Committee for Safety and Health and especially to the Working Party 'Pandemic OSH-related issues'.

**Improving the quality, transparency and inclusivity of European standardisation: networking and monitoring:** The operating grant agreement established between the ETUC and DG GROW has enabled the ETUC to engage in the work on standardisation and to represent social interests at a European level. The division of work between the ETUC and the ETUI was carefully and rigorously determined. The ETUI is continuing its work on machine standards and ergonomics, thereby improving health and safety standards. In general, the ETUI engages with standards on occupational health and safety (OSH) that have been provided with a European mandate as well as with standards that directly support the EU OSH *acquis*, whilst the ETUC deals with service standardisation and broader industry issues. From time to time, health and safety issues crop up within the ETUC's field of action. When this happens, the ETUI is typically consulted to ensure that there is no duplication of effort. The ETUI reported transparently both on its activities on standardisation and on any interaction with the ETUC on health and safety issues. The activities were organised in a manner guaranteeing transparency and complementarity and avoiding any risk of double-funding. The ETUI focused on harmonised occupational health and safety standards initiated by a standardisation request from the European Commission and, as mentioned above, on standards in direct support of the EU OSH *acquis*. The ETUI coordinated European trade union federations and national trade unions and cooperated with the ETUC on horizontal standardisation issues. Workers' feedback was sought and collected in order to contribute to the periodic revision of selected standards. In parallel, the ETUI monitors

implementation of Regulation (EU) No 1025/2012 on Standardisation and its Vademecum; it also participates in the activities of the CEN and CENELEC Governing Bodies, a task performed in cooperation with ANEC, ECOS and the ETUC.

**Safe design and use of machines: directives, harmonised standards, emerging technologies and workers' feedback:** The ETUI tapped the knowledge of workers using machines via the 'feedback method' and shared this information with other European stakeholders: European trade union federations, market surveillance authorities, employers, research bodies, insurance organisations, labour inspectors, the European Commission, and other EU institutions. The ETUI regularly initiated cooperative projects to raise awareness on selected topics like the introduction of new machine technologies, human-machine interaction, machine-related accidents and long-term illness and diseases, the quality of harmonised machinery standards, and enforcement of legislative machinery ergonomic requirements. The ETUI participated in the Machinery Working Group and contributed to the revision of the Machinery Directive. In this context, the ETUI revised the EU Guide for the application of the ergonomic requirements of the Machinery Directive by once again bringing together the ErgoMach Group. A particularly topical debate that the ETUI followed within this ongoing project was the interrelationship between the Machinery Directive revision process and the issue of artificial intelligence.

**CEN TC Ergonomics:** This project was aimed at monitoring the activities of CEN 122 & ISO TC 159 – Ergonomics.

**European network on chemicals:** The use of chemicals takes a heavy toll on European workers in all sectors: up to 50% of all recognised occupational diseases and half of all work-related deaths each year are caused by exposure to hazardous substances. In particular, occupational cancers account for more than 100,000 deaths a year in the EU, yet many of these could be avoided by eliminating carcinogens in production processes. Trade unions have an important role to play at EU and national level to frame and help implement prevention strategies. The objectives of this project were to consolidate the ETUI network of national trade union experts on chemicals, exchange information on EU legislation (in preparation or in force) related to chemical safety at the workplace (Chemical Agents Directive, Carcinogens & Mutagens Directive, REACH, CLP, Pesticides, etc.) and coordinate trade union activities on key issues for the protection of workers from chemical risks. Since 2006, the ETUI has been organising an annual one- or two-day seminar on workers' protection and chemicals, presenting an opportunity for trade union experts across Europe to meet and exchange information and experiences, but also to coordinate their actions for prevention. The 17<sup>th</sup> ETUI seminar on workers' protection and chemicals was held online on 29 June 2021. It brought together some 30 trade unionists from across Europe to discuss the revision of three OSH directives: the Carcinogens & Mutagens Directive, the Chemical Agents Directive and the Asbestos Directive. A representative from EU-OSHA was also invited to present the work of the Bilbao Agency on hazardous substances.

**Development of knowledge on chemical risks and the implementation of EU legislation on chemicals:** The ETUI is also a permanent Stakeholder Observer in the various Scientific Committees of the European Chemicals Agency (ECHA), the EU Authority managing the REACH, Classification, Labelling & Packaging and Biocide Products regulations. In 2021, the ETUI participated in the meetings of the ECHA Risk Assessment Committee to

discuss *inter alia* limit values to protect workers from exposure to asbestos, lead compounds and diisocyanates. The ETUI runs and maintains RISCTOX, a database of hazardous substances developed to provide clear, organised and concise information about health and environmental risks caused by chemicals contained in products used or handled by workers. The dataset was last updated in March 2022. The ETUI supports the ETUC in the Roadmap on Carcinogens, an EU initiative where Member States, the EU Commission, EU agencies and EU social partners join forces to prevent occupational cancers by publishing solutions and good practices. This year the focus was on the substitution of carcinogens with safer alternatives through the creation of a dedicated section on the website of the Roadmap on Carcinogens. The ETUI has also regularly published information on existing and new chemical risks (e.g. endocrine disruptors, carcinogens, etc.) on its website. EU and national legislation and initiatives on chemicals are in a state of constant evolution. The EU OSH legislation provides for the social partners to be consulted when existing directives are revised or updated to take account of technical progress. In 2021, the ETUI coordinated the European trade union responses to the social partner consultation on the revision of EU occupational exposure limit values on asbestos, lead compounds and diisocyanates.

The expected output was to provide expertise and make sure workers' voices are heard in all these initiatives and legislations aimed at improving working conditions and the health and safety of workers exposed to chemicals. Target audiences were the EU Commission, the tripartite Advisory Committee on Health & Safety, the European Chemicals Agency, the EU-OSHA, the EU Parliament, the Ministries of Labour and Social Affairs in the different Member States, national trade unions, occupational health and safety representatives in companies, and OSH practitioners. The ETUI also provided expertise for an EESC exploratory opinion requested by the French Presidency on "Social dialogue as a tool for promoting health and safety at work" (SOC/703), adopted on 20 January 2022.

**Regional meetings:** This project focused on a regional dimension for OSH. Compared to other EU countries, Baltic and Balkan countries are more vulnerable with respect to the OSH of their workers, a fact confirmed by OSH surveys conducted by EU-OSHA, Eurofound and Eurostat. The aim of the project was thus to promote a fruitful cooperation and exchange between neighbouring countries in these regions and provide support through the introduction of improvements in health and safety and working conditions. Representatives from other regions of the EU were involved in the project, injecting their expertise. Regional cooperation contributed to the appropriate implementation of the national and trade union OSH strategies. One of the key issues in the project was to share information on trade union interventions at national, sector and company level, with respect to occupational diseases. In addition, the project aimed at the inclusion of EU OSH priorities, without removing national priorities from the agenda. The meetings had a strong network function, useful for the unions involved as well as for the ETUI. The Balkan network held an online meeting on 23 November 2021 and the Baltic network on 2 February 2022.

#### *b. Education Department*

The renewed social contract, including working time, job quality, wages, social protection, and health and safety, has been further modified by the pandemic.

As described above, women's jobs are almost twice as vulnerable to the crisis as men's. The successive Covid-19 waves led to an increase in childcare burdens, attitudinal biases, a slow recovery, reduced public and private spending on services, and greater unemployment

amongst women, compounding the large pre-crisis gender gap across Europe. To address these issues, we worked closely with the ETUC's Women Committee and started an interdepartmental debate of how to better engage with these challenges. We also offered a specific training activity (see below).

- **Gender equality after the pandemic**

In this training course, participants mapped the current gender equality situation in the participating countries and exchanged good practices on empowering women after the pandemic. This proved to be a valuable contribution to ETUC policy on this issue and led to the designing of innovative trade union actions to promote gender equality. Attended by participants from 12 countries, they appreciated the interactive activities and the discussions with the experts, in particular the Austrian MEP Evelyn Regner, chair of the Committee on Women's Rights and gender equality.

- **Collective bargaining and wage-setting**

Building on trade union priorities for strengthening collective bargaining and social dialogue as part of the social contract, we designed a training activity aiming to strengthen cross-sector and sectoral collective bargaining throughout Europe by building the capacity of trade unions (especially in the CEEC) and providing them with support and tools for overcoming the challenges they are facing particularly at national level, with a view to preparing the ground for enforcing the European Pillar of Social Rights via collective agreements. Designed and delivered in a hybrid format, the main aim of this course was to analyse and compare how the Covid crisis was affecting collective bargaining in the participating countries. Interesting debates and exchanges of ideas focused on the institutional characteristics of the bargaining system and to what extent these were affected by the Covid crisis. The course was a good opportunity to share and discuss ETUC initiatives on the topic, like the project work entitled "new frontiers", the position on the Directive on adequate minimum wages in the EU, etc. The interactivity, exchanges and debates with and between the participants was supported by Howspace, an AI-powered digital facilitation platform coordinating follow-up interaction between participants. At the end of the course, participants expressed their willingness to continue exchanges on the topic and also requested further training, including debates on working time arrangements, union renewal and OSH. Based on these demands, further education activities were introduced.

- **Occupational health and safety**

The aim of an online, instructor-led language course, 'English for Health and Safety', was to help participants communicate more effectively in English on a series of topics relating to occupational health and safety, including different kinds of hazards, stress and mental health, toxic work and occupational diseases, fatigue, bullying and harassment. The course ran for a period of 55 days, followed by an extra period where participants remained able to access the platform. The training was facilitated by two online tutors, moderating forums and providing individual feedback to participants' assignments. One external expert provided technical support. Of the 61 participants enrolled, 12 never accessed the platform. Considering the 49 active participants, 20 (or 33%) completed at least three-quarters of the course. A series of synchronous activities – including webinars and conversation corners - with the tutors were organised to give participants a chance to communicate on the subjects covered by the course.

- **Digital work and psychosocial risks**

Digital work creates new working models that challenge our previous standards on working hours, workplaces and OSH. These changes require OSH legal systems able to protect workers against emerging psychosocial risks. Entitled “Digital stress: Tackling psychosocial risks in platform and gig work”, the aim of this course was to assess the impacts of emerging psychosocial risks in digital work and also to recommend appropriate measures to identify, prevent and manage psychosocial risks associated with digital technologies used in a workplace environment. During this Work Programme, the course was designed, produced and piloted, and is set to run in the next work programme

## 4. Priority 4: Democracy at all levels

Democracy and the rule of law are under attack across a number of dimensions and, as the tense discussions surrounding the approval of this year’s EU budget demonstrate, this reality can no longer be ignored. Trade unions are not being spared from such attacks, and it is as important as ever to ensure the protection of trade unionists and their ability to act freely in pursuing protected union activities. The ETUI concentrated on the question of workplace democracy, covering workers’ participation, collective bargaining, industrial democracy, board-level participation and the various instruments for information and consultation. This year’s programme offered new and original projects exploring these dimensions and a range of training and educational activities to further the labour movement’s understanding and use of the tools of democracy at work.

In several research projects, the ETUI further developed and applied its prior research on democracy at work to better understand the contribution of workers’ participation in addressing the impact of the pandemic itself as well as in shaping responses to its consequences. The members of the Workers Participation in Europe contributed to mapping the role of trade unions and workers’ representatives in negotiating job retention schemes such as short time work, the results of which were published as part of an ETUI publication on job retention schemes in the EU. The project on the horizontal articulation of various instruments of information and consultation prepared the ground for addressing the interface between generalised workers’ participation on the one hand and specialised health and safety representation on the other, for coping with the impact of Covid-19 and the measures taken to mitigate its spread in the workplace. The results of an e-survey of EWCs which sought to understand the role played by EWCs in shaping companies’ responses to the pandemic were integrated into an analytical database. A working paper on the role of EWCs in the pandemic was finalised. These findings were combined and discussed with practitioners and policymakers at the 2021 EWPCC conference. A training seminar also addressed the role of EWCs in addressing the aftermath of the Covid-19 crisis. Our Worker Participation databases also represent one of the ETUI’s key contributions to the study and analysis of the various forms of industrial democracy in Europe. As also reported below in Part 3, the ETUI continued to develop and update these datasets.

### *a. Research Department*

**Democracy at work: promoting narratives and innovative practices:** The ETUI maintained its networks with which it engaged in discussions with other social actors working in this field, with a view to putting forward trade union and European perspectives on the

debate, and also to linking it with other streams of research we conduct on workers' participation and ETUC goals (e.g. BLER, EWCs, information and consultation rights, and health and safety representation) and democracy at work projects and campaigns. Our active involvement in the online and multidisciplinary Global Forum Democratizing Work in October 2021 helped connect trade unions with academics, field activists, practitioners, policymakers and journalists from different countries interested in promoting workplace democracy. This meeting allowed us to discuss, network and situate democracy at work in the public agenda of several countries. In the same vein, ETUI invested and worked in several networks to enrich the Democracy at Work narrative and support it with positive initiatives from companies, think tanks and local trade unions (e.g. Roche's global seminar for labour relations' directors in February 2021 to promote better relations with trade unions and a more participatory workplace; Práxis' workshop on codetermination in state-owned enterprises in October 2021; a webinar and meeting organised by Endesa's national trade union delegation in May and June 2021 and providing a narrative on democracy at work supporting collective action in the workplace; the Conference Direct II organised by Fundación 1º de Mayo in Madrid in February 2022..Under the umbrella of this project, due to the departure of the lead researcher, only contacts and initial steps were made towards preparing the theoretical contribution and literature review on democracy at work for the next work programme, as well as the preparatory work for commissioning a guide on agile methods and their implications, risks and opportunities for workers participation. The guide will address practitioners, trade unions and worker representatives, as an output linked with this project. The research initially foreseen under this project was ultimately financed by the industry federation of CCOO.

**Horizontal articulation between various EU information and consultation instruments:** The ETUI has long focused on the interplay between different tools and levels of workers' participation, from the local to the transnational level. The ways in which the pandemic has upended so many policymaking areas at company level, ranging from employment policies to working conditions and health and safety, have confronted workers' representatives with new challenges in their attempts to exercise their rights to information and consultation. Addressing the challenge of Covid-19 allowed us to pursue the existing aims of this long-term project with new urgency and topical relevance. How comprehensive is the EU framework for workers' participation? Do the individual pieces of legislation interact, and if so, how? And how can workers and their representatives use the available legislation to represent their interests and defend their rights? Special focus was given to the interaction between transnational workers' representation (EWCs and SE-WCs) and health and safety representatives, with the Covid-19 crisis as a test case scenario. The planned explorative expert seminar (including in-house OSH experts at the ETUI and their specialist networks) devoted to various forms of workers' participation, with a particular focus on health and safety during the Covid-19 pandemic, had to be postponed since it was felt that the objective to fully explore the different roles and interfaces with health and safety representatives required a face-to-face meeting. The transnational dimension of the relationship between workers' participation and health and safety representation was developed further in an EWC seminar on 'OSH as an EWC issue' run by the Education Department.

**EWC and SE-WC analysis:** Under this umbrella project for research related to the European Works Councils and SE Works Councils, we built on the results of the EWC survey. We re-engineered the dataset by creating a structured SQL database populated by the survey responses and linked to the EWCdb EWC entries. This enables the analysis and dissemination

of the results of the online survey conducted in the previous work programme about how EWCs were involved in addressing the impact of the pandemic on work in their companies. Project outputs included the 2022 publication of the book ‘European Works Councils: contested and still in the making’, as well as further dissemination activities in expert seminars and trainings among EWC members and European Trade Union Federations. An advanced draft of an ETUI Working Paper comparing information and consultation processes and outcomes in pre-Covid times (based on the 2018 EWC survey) and the situation of EWCs in the pandemic (e-survey among EWC members) was also completed and awaits publication (due in the budget year 2022-23), along with a promotional infographic. The data is now consolidated in a single database cloud. The analysis of the EWC survey data also led to the publication of the policy brief ‘Friends in high places’ on the articulation between EWCs and board-level employee representatives.

**EWPPC Conferences 2021 and 2022:** The annual EWPPC Conferences bring together employee representatives and other practitioners, academic experts, trade unions and policymakers to discuss relevant research and debate topical issues around workers’ participation. Due to strike action in March 2021, the 2021 EWPPC Conference on the role of EWCs in the pandemic had to be postponed until June 2021. Using a range of interactive methods in plenary sessions and breakout sessions, and drawing on ETUI research and expertise, nearly 240 participants attending the online EWPPC Conference were able to explore three aspects in particular: the role of EWCs in general; the role of the EWC and local representatives in addressing the health and safety impact of the pandemic; and the role of the EWC and local representatives in addressing its employment impact. The 2022 EWPPC conference entitled *Our Experience Matters: How to improve the EWC Directive* was held as scheduled in March 2022. Building on the successful implementation and positive feedback from the 2021 conference, interactive methods and tools were applied to enable the nearly 240 online participants to take stock of the experience of EWCs operating on the basis of the 1996 and 2009 EWC Directives. Expert input was provided by experts from the ETUI, KU Leuven, and SBI Formaat. A panel discussion with representatives from the ETUC and the European Parliament about the prospects for a revision of the EWC Directive rounded off the programme.

**Democracy at work: information and consultation rights and EWC litigation:**

Following repeated requests from practitioners and stakeholders, the ETUI was expected to produce brief and accessible publications drawing largely from its own work in the areas of research, health and safety, and education. Due to a higher than anticipated workload related to the backend architecture of the EWC databases (general database and website; EWC litigation db) and the rhythm of the political process, the foreseen outputs including an interactive online version of the infographic “Palette of workers’ rights to information and consultation” displaying the contents of the relevant information and consultation legislation was not completed and may be carried over to 2022-23 when its publication is expected to better support the discussions on the planned revision of the EWC Directive. For the same reasons, a manual on judicial review procedures, access to courts and other legal remedies (including alternative dispute resolution mechanisms) in cases of conflict with management or of litigation was postponed. The EWC court case section of the EWCdb was upgraded from late 2021 onwards. In cooperation with the ETUI, an expert team from KU Leuven has completed updating the existing collection of all relevant jurisprudence, translating all

judgements into English and providing structured case assessment through the use of an analytical template.

**Confidentiality of information and consultation:** This project continued activities from previous years (including activities suspended due to the Covid-19 pandemic) and extended the analysis to other EU Member States. The goal is to explore the nature of the confidentiality challenge and its consequences for how workers' representatives operate under confidentiality rules and what implications this has for workers' participation at large. Taking a comparative perspective, the focus lies on national legal frameworks. The planned activities included collating the national country reports into a single publication and an expert workshop. In this regard a journal article providing an overview of the selected 10 national legal frameworks was completed for submission for publication in a legal journal. This work also contributed to ETUI training activities, with ETUI researchers providing expertise to practitioners in several online training seminars.

**Board-level employee representation: developments at national and EU level:** As part of the momentum for democratising work and the economy in Europe, we continued to follow the development of BLER as one of the strategic areas for trade unions to gain and maintain influence and supervision over corporate decision-making. The ETUI has built an exceptional body of expertise on this topic over past years and is in the privileged position to promote comparative research, feed BLER debates locally and at EU level, and orient them towards a European approach to upgrade collective labour rights and institution-building. This project merged two long-standing umbrella projects to monitor the state of play and developments in board-level employee representation in Europe at both national and EU levels, as the boundaries between these two levels has become increasingly blurred. This entails monitoring legislation, case law, political debates and implementation at both levels, and analysing the structures and dynamics of Europeanisation. Legislation, case law, political debates and implementation at both levels were monitored, and the structures and dynamics of Europeanisation analysed.

Under this project, work was done on preparing an edited book on the debates around BLER and its implementation in Europe. National experts were commissioned to prepare chapters about the state of BLER regulations, practice and implementation, as well as the state of play of political debates around workers' participation on corporate boards in countries where BLER is only weakly established. A kick-off meeting was held online in April 2021. The subsequent workshop where draft chapters were presented and discussed between the authors similarly took place online in January 2022; due to Covid restrictions, it was ultimately not held in person as initially foreseen. The proofreading could not be done in this budget year as the revision period was extended until the end of March; this will take place under the next work programme.

Other activities included ongoing monitoring activities, such as the follow-up of national law developments and their implementation, and EU case law affecting national BLER regulations and practice. The focus was on better understanding the application and scope of the prohibition under French law for board-level representatives to combine mandates with other representative mandates as trade unionists or work councillors within the same company. For that purpose, intensive work was done on the report commissioned from an external French lawyer. This report was translated into German and English to make it accessible to interested



practitioners in other countries, as representatives from outside France are increasingly affected by this rule. The report is currently in layout and will be published under the next work programme.

Final work was done on the analysis, draft and revision of a working paper devoted to explaining and understanding the role of French EWCs in appointing board-level employee representatives under the French system, clarifying the workings of the national law and its implementation, but also advancing reflections on the Europeanisation and articulation of BLER and EWCs.

The present project also entailed supporting the ETUC in its work on a horizontal framework directive on information, consultation and board-level participation. This was partly done by attending strategic ETUC meetings on democracy at work, helping in the organisation of a local event related to BLER in Spain and providing expertise directly to the ETUC but also to other actors at national level, such as European employee and trade union representatives in French multinationals, and deputies working on the transposition of corporate law directives. Part of the support involved taking part in the task force put in place to follow up and assess the SAP case before the CJEU, which affected trade union rights of nomination under the German codetermination system. Finally, under this project, the ETUI contributed to the national debates on BLER by infusing a European perspective to the approach of workers' participation on company boards. An article was published in *Alternativas Económicas*, putting Spanish codetermination practices into perspective and clarifying some typical confusions on this institution, when compared to other practices in Europe and especially the German one. In addition, an external expert was tasked with analysing the BLER-specific data gathered by the ETUI-funded CbCM project. The expert conducted a meta-analysis and reported on the BLER-relevant cross-border company mobility cases, as well as analysing and classifying the transaction documents according to their impact on employee involvement/participation rights. The report and accompanying data analysis and visualisation have been submitted to the ETUI team for further review.

**Company Law Package: workers' rights and anti-abuse provisions:** Preparations for the transposition of the Company Law Package began in 2020. The GoodCorp network and our own BLER experts, in close cooperation with the ETUC, began work on developing a guide on the transposition for unions to apply at national level. This work not only covered the workers' rights laid down in the Company Law Package but looked closely at the anti-abuse provisions intended to preclude the establishment of letterbox companies and other abuses. The Institute's work on corporate governance and company law is supported by an external expert. We note that, within this project, the GoodCorp network undertakes a number of activities: 1) two network meetings a year to discuss topical issues and coordinate activities – in the 2021-2022 budget year these took place in May 2021 and February 2022, 2) exchange on research, 3) the production of policy briefs on topical issues relating to company law and workers' rights, 4) ad-hoc projects, and 5) advising the ETUC and European trade unions on company law and corporate governance issues. A new activity was the establishment of a network project entitled MonACo – Monitoring, Analysis and Transposition of European Company Law – composed of experts in different Member States. These experts monitor on a monthly basis the transposition of EU company law and related directives and, once transposed, analyse the transposition. Three Directives are initially being analysed - the two Directives in the Company Law Package (the Digital Tools and Processes in Company Law

Directive and the Cross-border Conversions, Mergers and Divisions Directive) and the Restructuring and Insolvency Directive. Other directives or draft instruments were added as they were adopted (e.g. the draft Corporate Sustainability Reporting Directive and the Corporate Sustainability Due Diligence Directive). Only eligible costs were incurred in this work programme. Both of the two regular network meetings took place online. This work is coordinated by external experts.

**[www.worker-participation.eu](http://www.worker-participation.eu):** The ETUI continued to update its worker-participation.eu website, providing targeted users and the general public with comprehensive information on workers' information, consultation and participation structures and developments across the EU. The ETUI undertook preparatory work (including rethinking the website's purpose and adjustments, redeveloping the website structure and selected contents, developing a new user interface, developing a new content management system and transferring the contents/data to the new website) with the designated website development company- The aim was to improve the output format and entirely rebuild the website (frontend and backend architecture, new Content Management System) to improve user experience and make the already highly appreciated contents, such as the collection of cross-EU comparative data on industrial relations and descriptive data containing reliable information on the components of the European system of industrial relations: employees' rights to information, consultation, co-determination, social dialogue, company law and corporate governance, health and safety, and board-level representation, more easily accessible. Due to delays in re-designing the website's architecture, the planned activities in 2021-2022 that included translating updates of the National Industrial Relations section in the past year into French and German were postponed until the next year in order to allow better decisions with regard to the parts to be made accessible in these languages; at the same time structural decisions with regard to publishing multilingual contents on the website need to be taken first.

In 2021, the ETUI also launched its latest database on European Social Dialogue agreements. This database collects joint social dialogue documents, thereby enabling analysis of the sectoral social partners' 'output'. It enables comparisons between sectors, the levels of social dialogue activity and the topics addressed. The database is freely accessible at <https://esddb.eu/en> and resulted in the May 2021 publication of a working paper titled *Holy union? The sectoral social partners and the Covid 19 crisis in Europe*.

**The EWPF Board of Trustees** met once to oversee the administration of the European Workers' Participation Fund and the European Workers Participation Competence Centre. The mandates held by employee representative on the boards of SEs were continually monitored and systematically updated in the summer of 2021. Contributions to the EWPF were also monitored.

### *Education Department*

Giving us a competitive advantage over commercial training suppliers, one of our main tools for designing EWC training courses is the EWC database ([ewcdb.eu](http://ewcdb.eu)). We strongly support the diligent work carried out to collect the great diversity and large number of EWC and SE-WC agreements and other related documents.

EWC training activities empower participants to fully claim their (information, consultation & participation) rights as EWC members and thus help strengthen democracy in multinational companies.

- **Confidentiality of information and consultation**

Confidentiality was a keyword in EWC company training in the past year. We are increasingly observing EWCs being thwarted in their attempts to take effective action by confidentiality rules imposed by management. Growing demand for a clear position on this issue has been met by both the Research Department (exploring the subject, resulting in publication of a confidentiality manual) and the Education Department (designing a separate training module, offering open webinars and producing an e-learning module devoted to ‘confidentiality’). In the next programme we will continue with more activities: e-learning modules in two language versions will be developed, along with a ‘confidentiality’ module.

- **Democracy at work and transnational solidarity**

EWC training courses approach this subject by observing rivalries between country representatives and national company branches represented in EWCs/SE-WCs. This problem is especially visible in restructuring processes, now accelerated by Covid-19 and the digital revolution. The tool we have developed to tackle this subject is a training module on ‘transnationality’, followed by a webinar on the same subject and the broader webinar on ‘Restructuring measures’.

- **Reinforced democracy at all levels: ETUI training support and responses**

The ETUI’s Education Department organised a large number of training activities for trade union members on this priority at all levels.

- **Open seminars** on various EWC themes

We have further honed the skills and knowledge of delegates from various sectors, countries and organisations. Special attention is paid to new and untrained EWC members just beginning their mandates or who have not had the possibility to participate in EWC company training before. We held 4 webinars for new EWC members, counting more than 250 participants.

- **CSR and non-financial reporting: enlarging the scope of EWC and SE-WC activities**

Directive 2014/95 on the ‘disclosure of non-financial and diversity information by certain large undertakings and groups’, though conceived as a management reporting tool, also introduced a new possibility for worker representatives to check company practices on matters related to corporate social responsibility. This seminar encouraged EWC members to take action to monitor and influence company management on CSR and environmental policies.

- **EWC basics for candidate Member States**

This training activity prepares worker representatives and trade union representatives from candidate Member States (i.e. Albania, Montenegro, North Macedonia, Serbia and Turkey) to

be able to join an EWC and to prepare future implementation of EU EWC legislation in their home countries. We held a seminar using a decentralised methodology: one training programme delivered in different countries at the same time and some parts of the programme delivered online simultaneously. The national groups differed in terms of numbers and seating arrangements, meaning that their dynamics differed: from the large Turkish group with over 40 participants in a school setting and run by a local trainer, to the small Montenegrin delegation interacting intensively online. All groups were able to benefit from the expertise of the Macedonian professor.

- **Training for board-level employee representatives in European Companies (SE) and European multinationals**

An online training course was held in February 2022 targeting board-level employee representatives and their EWC counterparts from European multinationals. The seminar focused on the opportunities and limits to cooperation between board-level representatives and EWC members in the same company, with a focus on French and German models. The objective was to enable representatives and trade union experts to share their experience, but most importantly, to identify the main problems and possible solutions and strategies for them to communicate more efficiently and work better together, and thus counter their isolation (especially for BLER members). Topics included working within the constraints of confidentiality obligations, the impact of the ban on combining mandates under French law, and the emerging role of the EWC in French-based multinationals in appointing BLER.

- **European social dialogue and European trade unionism for EWC chairpersons**

This seminar has been postponed until the next work programme.

- **How far is America? Challenges of European Works Councils in US-based companies**

US-based multinational companies are the largest group of non-EU EWCs (over 400 in operation). In many cases, the problems faced by their representatives are common, regardless of the sector. Common challenges include union and EWC busting, geographical distance to decision-makers, constant restructuring and a specific approach to confidentiality. This training seminar highlighted all those burning issues and provided some answers on how to deal with US managers.

### **Other training activities**

Training seminars were held for company members of European Works Councils, SE Representative Bodies and Special Negotiating Bodies. They were delivered by the ETUI's own in-house trainers and through the Network of European Works Council Trainers (the N.E.T., a network of trainers coordinated by ETUI Education), drawing on a wide range of ETUI in-house researchers and external experts.

Special training seminars focused on **assistance and expertise for EWC/SE-WC-related initiatives from ETUC affiliates** support European, national and regional

trade union organisations in their own training initiatives, workshops and conferences for EWC members and promote the expertise and services offered by the ETUI.

**E-learning** has recently become a highly appreciated form of EWC learning, and has been under constant development by ETUI Education for the past couple of years. We will continue to offer our basic e-learning course ‘EWC: rules of the game’, reinforcing it with the ‘Confidentiality’ course; both are available in several language versions.

- **Fight against racism**

Many recent reports confirm that racism, a persistent problem in every area of society, is a challenge for all sectors. It is thus a key topic for the European trade union movement and its education community. Using a hybrid format, we organised the training activity for 24 trade union officers dealing with democracy at work and/or the fight against right-wing populism/extremism and fascism and also trade union trainers from 10 countries. The main aims of the activity were to create a platform to exchange trade union practices on combating far-right extremism and to break the ground for establishing and maintaining networks. After an interesting and comprehensive presentation on populism, its dimensions, ideology and consequences, participants discussed the role of alliances in fighting the far-right. The central point of the training was the dissemination of good practices providing inspiration for participants, leading to certain organisations starting to apply training and actions to combat far-right extremism. The foundations of a trade union trainers’ network were laid with the help of the online collaborative platform (Howspace), while more follow-up exchanges took place online.

## 5. Priority 5: Trade union renewal

None of the aforementioned priorities can be properly addressed without strong collective actors, in particular trade unions. Trade union organisations are constantly exploring new ways of engaging with an increasingly diverse and fragmented labour force, an increasingly segmented labour market, and at times in the face of growing employer hostility towards union recognition and involvement in the workplace. Our research and training projects seek to enhance our stakeholders’ understanding of different organisational practices and union renewal strategies. The ETUI also focused some of its resources on the issue of union hostility, a growing concern especially in some MNCs that have greatly benefited from the pandemic. ETUI work on trade union renewal and organising is supported by an external expert. We also consider this topic as one of our ‘transversal themes’.

### *a. Research Department*

#### **The organising approach as a strategy for trade union revitalisation in Europe:**

This is a new long-term project seeking to understand the potential of transnational (European) union organisations for promoting organising within national trade unions, to analyse existing organising policies and strategies, to assess the (contextual) conditions and characteristics of successful organising campaigns, to set up an online depository of organising campaigns in Europe, to stimulate exchange between research and practice, to strengthen

capacity-building, and to establish the ETUI as a leading institute in the debate and discussion about the organising approach and trade union ‘revitalisation’ or ‘renewal’ in general. A kick-off network event for selected academics, trainers, practitioners and interested parties had to be cancelled due to the pandemic, although initial exchanges took place with selected parties. The exchanges are also expected to stimulate capacity-building by disseminating good practices in organising campaigns, providing input to the ETUI field research programme on trade union revitalisation, and building an epistemic community around these issues.

Within the context of this project an external book chapter on ‘collective resistance and organizational creativity amongst Europe’s platform workers’ and an external report on ‘building workers’ power in digital capitalism’ were published. Moreover, a Transfer article on the ‘labour unrest in health and social care in Europe before and since the Covid-19 pandemic’ was published, also resulting in a number of blogs. The ETUI’s database on industrial action in Europe was updated (including publication of a short statistical appendix as well on 2020 developments of industrial action in Belgium). Furthermore, a first exploration of the characteristics of ex-union members and non-union members across Europe took place, and the survey results will be further analysed and published in the next budget year. An article on ‘young workers and unionism’ had to be cancelled due to the poor quality of the survey data. Finally, a number of blogs, some of them in cooperation with IndustriAll Europe, were curated on the theme of union revitalisation.

***Trade Unions in Europe:*** A four-volume book comprising a chapter on each Member State and one on European trade union organisations, has been prepared and will be published by Peter Lang Publishing in September 2022.

**Breaking a taboo: trade unions representing self-employed workers:** This project approaches the theme of trade union revitalisation in conjunction with the expansion of the working arrangements falling outside the scope of the employment contract, in acknowledgement of the fact that more and more workers are not covered by individual and collective labour rights. This is a multiannual project; in this budget year the project analysed the normative and legal barriers preventing self-employed workers from accessing collective bargaining and provided constructive reflection on possible normative avenues to overcoming these barriers and ultimately expanding the reach of unionisation and collective rights. The outputs were an ETUI publication (policy brief) and a book chapter in a forthcoming publication in spring 2022, rather than the initially planned journal article.

**Transnational industrial action and solidarity:** This 2-year project aimed to map transnational industrial action in Europe by providing case study analysis on this kind of action and its short- and longer-term effectiveness. However, it had to be cancelled due to the departure of the lead researcher.

**Trade unions and collective bargaining in Western European multinational corporations operating in new Member States in Eastern and East-Central Europe:** This project investigated the nature and implications of the approaches taken by Western European multinational corporations (MNCs) towards trade unions and collective bargaining in new Member States in Eastern and East-Central Europe. This complemented studies undertaken in the USA by the AFL-CIO on the practices of European MNCs in the southern US states. The project is also intended to help in formulating trade union strategies

across Europe and in proposals for possible changes to the legal frameworks that could be beneficial to trade unions. An edited volume summarising the results of case studies in Eastern and East-Central European countries was prepared for publication. This and other forms of dissemination of the results have both contributed to the academic understanding of MNC behaviour. They also help trade unions in identifying the best responses in the face of varying MNC practices.

**Monitoring economic and policy developments in new Member States of Central and Eastern Europe:** The aim of this project was to support social dialogue in East European countries by developing links and providing assistance to local trade union organisations in their efforts to provide input for policymaking in individual countries and at European level. The planned activities included providing advice to trade unions and policymakers, inputs to conferences and expert meetings in East European countries. Activities in this project were put on hold due to the continuing travel restrictions.

**Litigating for trade union rights during Covid-19:** The Covid-19 pandemic raised specific issues that have been reason for workers and/or their unions to go to court, both at national and EU level. The ETUI planned to explore the developments and choose a few exemplary cases to analyse in more detail, both for its own purposes as well as in their possible relation to existing litigation patterns. It was planned to disseminate findings in an ETUI publication or a journal article. Due to shifting priorities, the data gathered in this project was used in preparing the publication ‘Effective Enforcement of EU Labour Law’ (forthcoming with Hart Publishing in 2022). In addition, work was carried out on the topic of strategic litigation and collective redress. In this context a special issue of the European Labour Law Journal was published, focusing on options for introducing collective redress mechanisms into labour law at EU level. This project was especially timely due to collective redress (representative actions) being introduced in other areas of EU law (consumer protection). The special issue explored not only the legal opportunity structure for introducing collective redress into labour law at EU level but also offered an insight into four jurisdictions within the EU where collective redress mechanisms for labour law claims already exist (Sweden, Austria, Slovenia and the Netherlands).

**Trade union foresight:** The ETUI continued to assist directly or indirectly trade unions interested in conducting foresight exercises by finetuning the methodology and making it more accessible to a trade union audience. With the help of a trainer from the Education Department, we for example launched a medium-term process of European trade union foresight with the heads of departments of a Belgian trade union organisation. The aim is to put into practice foresight expertise through our in-house training courses. We are collecting cases of trade unions using our methodology and carrying out foresight projects. We finalised the ETUI strategic foresight project and made the results available as an interactive webpage. Several training courses were planned, including ‘Strategic thinking for leaders’, ‘Foresight for facilitators’, a self-paced online module to practice strategic thinking, and foresight focus groups (to dig deeper with foresight practitioners).

**Trade union finances: a comparative study on how trade unions finance their activities:** Due to persistent obstacles in accessing relevant data, and a shift in the priorities of the researchers involved, the planned compilation of a data series for six trade unions (two each from Germany, the UK and US) coupled with data from a number of trade union confederations was cancelled.

### **50 years of the ETUC and the visual history of the European labour movement:**

In the context of the ETUC's 50th anniversary in 2023, the ETUI commissioned a research project from an external expert to enrich the historical analysis of the European trade union movement through collecting oral testimonies from former key players, as well as through research work to be carried out by a consortium of European academic researchers. This research project will last for a total of 3 years and result in academic publications, as well as a digital platform accessible via the ETUI website and containing historical documents, audio-visual testimonies, various archives (photos, documents, videos...), in particular for future researchers wishing to advance the analysis of the history of the European trade union movement. Four major sections are planned: the history of the ETUC in the context of European integration; the history of the ETUC and European industry federations; the history of the ETUC and national trade unions; and an interactive section on the future challenges of the ETUC in the light of its half a century of existence. Several interviews with selected figures have been prepared.

### *Education Department*

Uncertainties about the future as a result of rapidly changing conditions were reinforced by the pandemic. Being able to think strategically is increasingly becoming an essential skill for trade unionists, in particular for those leaders willing to drive their organisations towards new ways of representing, mobilising and organising workers.

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

For this purpose, a new Network for Strategic TU Development met to set, review and update the tools, methodologies and best practices to be used in ETUI training supporting strategic TU development.

### **• Training for the future - next leader generation**

The Education department developed a specific programme targeting the next leader generation. This specific group participates in the ETUC Executive Committee and prepares the positions of their organisation. The objective of this year's high-level training activity was to jointly develop visions in the areas of environmental and digital transitions. In particular, participants reflected on the transitions, developed (better) transition strategies, and created a common line of interest. The participants were eight directors/coordinators of European Affairs departments from national trade union organisations (4 women and 4 men).

The environmental and digital transitions can be discussed and analysed either as two separate topics or jointly. It was decided that the intersections between the two transitions would be discussed by the group in a combined, not separate manner. Bridges between the environmental and the digital transitions were made explicit and analysed. Considering that we were looking at the changes that trade unions would need to make in order to implement the environmental and digital transitions, it was decided that the workshop would focus on transitional strategies. These would be articulated in three steps: where do we (trade unions)



stand today? where do we want to be in 2027? and which steps do we need to take to move from here to there?

- **Leadership and capacity-building for women trade unionists**

This course was designed to encourage women to step up to take leadership roles in their organisations and to further develop their skills and confidence. The course was designed in a blended format, accompanied by an online platform where the 25 participants were able not only to re-visit the documents produced during the training, but also to contribute to the forums and discussions, and receive guidance from the tutors. Between April and the end of December, 2 webinars were held, in June and September. “Being a women leader can be challenging” was the first webinar, where the aim was to let participants discover potential obstacles (internal and external to the organisation) and how to overcome them. The second webinar was called “the leadership role in anticipating change”. We know that strategic thinking is challenging conventional thinking and that trade union leaders need to develop their capacity to change and envision the positive impact it may have. This training session was started to develop participants’ capacity to anticipate change by using foresight. It served as an introduction to the activities following up the topic in the first residential week. 11 of the 20 participants were recently elected or appointed women trade unionists, or ones considering running for a leadership position at regional /sectoral or national level. They actively participated in the innovation activities proposed during the 3-day course. This activity was organised in partnership with CGIL (Italy) and CGT (France). During the course, participants learned more on different leadership styles and identified their predominant style. They also developed/strengthened their skills in communication, using social media but also supporting their confidence-growing and fulfilment potential.

- **Strategic foresight for trade union leaders**

In a fast-changing world, thinking strategically has become a key skill for trade unions, helping them to strengthen their vision, build their own strategies and make their own futures. Based on the framework of the ETUI foresight and education activities, in November 2021 we conducted a second edition of the course entitled “Strategic foresight for trade unions leaders”. Our aim was to strengthen leaders’ competences to think strategically and to invest in building foresight competences. This 3-day activity was organised in partnership with the TCO (Sweden) and TSL (Finland). It was delivered via Zoom, but the aims could not be met without using the AI-powered digital facilitation tool which also helped provide a dynamic learning space. 18 participants from 10 countries actively participated in the foresight and innovation activities offered. A novel aspect of the training in terms of training methods and tools was its use of symbols and contemporary art. As a follow-up to the training, a number of participants, namely organisations, took up the challenge and would like to conduct, with the help of the ETUI, their own foresight projects.

- **Analytic and strategic thinking for trade unions**

The main purpose of this course was to boost unions’ capacity-building in this area, providing appropriate tools and methods to facilitators appointed by their organisations, who will later support TU leadership teams in their strategic decision-making. The main objective was to understand the key steps of analytic and strategic thinking. The training course was developed in cooperation with the Foresight Unit and based on ETUI work on strategic foresight. The 19

participants from 6 EU countries had the chance to exchange some concrete experiences of strategic development projects planned or ongoing in their unions.

- **Trade union renewal**

The webinar, co-designed with BNS (Romania), ZSSS (Slovenia) and FGTB (Belgium), brought together 31 participants from 9 countries. It was a continuation of the training done on collective bargaining, looked at from the perspective of union renewal. After mapping different trade union organisations from the point of view of membership, collective bargaining coverage, communication channels and organisation strength, participants discussed their experiences in maintaining and strengthening organising power. We heard about different trade union initiatives to include and protect platform and independent workers in the last two years of pandemic. At the end of the webinar, participants were challenged to look at possible actions or strategies to build trade union power.

- **Developing teachers' skills on organising and renewal**

This course was designed within the framework of the implementation of the ETUCE Action Plan on Organising and Renewal and the priorities on renewal set in the ETUCE Work Programme 2021-2024. Participants had the opportunity to discuss and share knowledge on issues identified as priority areas of engagement by education trade unions on the topic of “trade union renewal”. The activities helped participants develop skills and capacities to promote diversity within union structures, focusing on young members. The tutor team also worked on key points linked to the development of union members’ activism and leadership. Brainstorming and exchanges of practices allowed participants to address teachers’ challenges in their work and in their profession and to better engage with the community. With this joint ETUI-ETUCE training, a strong accent is put on supporting ETUCE member organisations in developing joint work to further strengthen union membership, union members’ participation and engagement, their skills and capacities for union organising and leading, and their identification within the union. One of the main expected outcomes of this course were possible solutions to improve collaboration with allies at national level to maximise bargaining power. Another key aspect analysed and developed was working on essential skills to improve communication strategies to engage with more members and under-represented individuals, and addressing their needs within the union agenda.

- **Trade union strategic development network**

The aim here was to develop trade unions’ capacity to explore new areas of the labour market, to think and act strategically, to find new ways to organise workers, to lead change, and to innovate for their own strategic development. This network brings together national trainers and practitioners experienced in organising, strategic thinking and organisational change, with the aim of sharing experiences, developing new materials and supporting the ETUI in delivering training in this field.

- **Trade union renewal for public service unions in CEE**

This training course “R&O Strategic Workshops for trade union leaders in CEE: Organizing strategy for an organizing union” continued the efforts of EPSU and the ETUI over the past four years to support the strategic development of unions in CEE countries in their efforts to

develop strategies and campaigns for organising and recruiting new members. The training activities targeted the Baltic countries.

- **Training for young trade union leaders**

Designed to boost trade union knowledge and action in Europe, these training activities target young trade union officers (with an age limit of 35). A special youth training week was organised for the members of the ETUC Youth Committee to boost networking between members, discuss the ETUC's priorities and action plan, develop project-oriented strategies and action plans for future activity and enhance cooperation at EU level.

Fondazione Di Vittorio developed a research project aimed at evaluating the relevance, impact and added value of the training programme for young European trade union leaders carried out by the ETUI in the last five years, in which an approximate number of about 120 people was trained. The key results took the 6 dimensions of analysis into account: relevance, coherence, effectiveness, efficiency, added value and impact. Overall, the course contents were considered very relevant by the participants, confirming the high level of usefulness of the knowledge and skills acquired in their work and in reference to career advancement. Participation in the course was more directly relevant for those organisations that consider it important to include and promote European issues internally and that consider it essential to understand the impacts of European policies on trade unions.

On the basis of the results of this assessment, we will propose a new capacity-building programme for youth.

At sectoral level, a training course on youth empowerment was organised for the EFFAT Youth Committee. The course is part of the new multiannual training strategy agreed by EFFAT and ETUI in the aftermath of EFFAT 2019 Congress. The general aim was to invest and support young EFFAT trade unionists. As the first module, this course aimed at building the foundations of a pathway. The pandemic has shown how important occupational health and safety is for protecting workers' health, for creating safe and healthy working environments, and for promoting a workplace safety culture. This course offered participants the opportunity to analyse and develop organising strategies and actions focused on health and safety in the Food, Agriculture, Tourism, Hospitality, Domestic Workers, and Fast-Food sectors. Health and safety proved to be an incredibly good throughline to talk about organising and campaigning, also being aware of the potential of the topic to attract and involve more people in the workplace.

An action-oriented training course, 'Building trade union power: empowering young organisers', for the Youth Working Group of IndustriAll Europe was held to support young unionists in their activities of building trade union power and to contribute to trade union renewal. The Youth Working Group is one of IndustriAll Europe's 3 horizontal working groups. Youth participation is fundamental to trade union renewal. Young voices need to be heard both to secure the future of trade unions and to improve the working conditions of younger workers who have entered the labour market in the post-crisis era. The focus of the course was on learning how to lead other young organisers and support them in setting up and implementing an organising campaign at company level. Participants were able to share and exchange different methodologies used in their trade unions to organise and campaign. Thanks to the fact that the group was a mix of experienced organisers and new ones, the learning environment was appropriate to introduce new methods, learn from other colleagues,

talk about the good practices and make clear the role of IndustriAll and its support in implementing organising strategies.

Designed for the European Federation of Journalists (EFJ), the course “Together for a collective bargaining in the media sector” trained journalists’ unions’ key representatives in leadership skills, trade union mobilising skills, and leading change in unions. As a methodology, we used a “classe inversée” (inverted pedagogy) and active learning process. This involved reading (a webography was offered weekly), writing, discussion, practical activities and engagement in solving problems, simulations, presential and remote working groups, debate, analysis and critical thinking, synthesis and evaluation. The input from certain experts contributed to the course’s success. Online support and coaching were permanently available from the trainers.

- **Revitalisation of trade unions through cooperation and alliances with environmental NGOs and social forces**

One way to revitalise trade unions is to enter into coalitions and alliances with environmental NGOs and social forces. However, while trade unions, environmental NGOs and social forces have common objectives for improving communities, they also have their specific goals and priorities. These three half-day online training sessions were a unique opportunity to stimulate dialogue between environmental NGOs and trade unions, considering their similarities and differences. Participants investigated areas and issues where trade unions and environmental NGOs could cooperate, and the conditions unions to be met to strengthen cooperation. The last day was dedicated to concrete actions and measures needed to be taken by trade unions to build alliances with environmental NGOs. This activity brought together the perspective of a coalition of NGOs (Climate Action Network), a trade union (UGT) and an organisation (Reset.Vlaanderen), which promotes such an alliance.

- **Social integration of migrant workers and refugees through reskilling and upskilling**

On 7 September 2020, the European social and economic partners and the European Commission renewed their commitment to the European Partnership for Integration. According to the signatories of the joint statement, ‘migrant workers and entrepreneurs can play an important role in the recovery phase following the Covid-19 crisis’. A better approach to tapping the skills and potential of refugees will be key to making our labour markets more inclusive and contributing to the prosperity and cohesion of European societies in the long run. This training activity brought diverse and progressive views on the issue of migration and refugees: for example, good practices from UGT to promote the inclusion and non-discrimination of migrant workers and refugees in the labour market; experience from Greece (Holistic Approach to the Labour Integration of Refugees/Migrants through a multi-stakeholder cooperation), Belgium (projects providing guidance and counselling to migrant workers and refugees) or the ETUC (The Labour-INT model: a multi-stakeholder approach for the labour market integration of migrants and refugees).

The training course ‘Working and living in capital regions (ECTUN)’ was held online for trade union leaders in capital regions. Its aim was to empower trade union leaders in terms of developing knowledge of the realities at local/regional capital level, to share collective experiences of the main problems faced by local trade unions, to strengthen the network of trade union organisations active at the capital regional level, and finally to discuss organising

strategies. The ETUI Education Department and the Confederation of Autonomous Trade Unions of the city of Belgrade (CATUB) in cooperation with the European Capital Trade Unions Network (ECTUN) organised a series of virtual courses on “Digitalization of Capitals and the Role of Trade Unions”. This training programme consisted of 4 live sessions led by two trainers and 5 remote collaborative working groups. Finally, a digital conference “Digital transition in the capital cities and the role of the trade unions” was held in January 2022 in cooperation with the ETUC and CATUB (Belgrade, Serbia). This ECTUN Conference brought together 44 trade unionists from 20 European capitals, meaning that diversity of capital cities and European regions was assured.

### **Digital tools for organising and mobilising (EFBWW)**

The activities developed highlight the ways in which unions can utilise a range of digital tools to assist with organising, campaigning and mobilisation. Unions should think of digital tools as part of a toolbox of tactics and techniques to be used in conjunction with more traditional organising methods. Compiled by EFBWW, the resulting report provides an overview of how unions are currently using digital tools, drawing on evidence from academic literature. It goes on to provide a summary of recent EFBWW conference on the use of digital tools, and the results of a survey of participants. It is argued that unions should continue to develop their work with digital tools following a clearly defined strategy. By working together, affiliates and the EFBWW were able to lobby affiliate union leaderships for future investment and resources for the development and expansion of digital tools for union activities. These recommendations and the information contained in this report were useful in helping the EFBWW and affiliated unions in terms of continuing their work on the use of digital tools for organising and campaigning.

## Part 3 – Publications and public engagement activities

### A. Publications

The ETUI published over 40 publications, including books, working papers, reports, policy briefs, foresight briefs, guides and manuals, on key topical issues concerning the world of work, in addition to dozens of articles in academic journals and magazines.

We further developed our communication strategy to prioritise the visibility of some publications, events, training activities so as to give them a longer ‘lifespan’, also by staggering the presentation of some of their findings over a longer period of time.

On top of these publications, our researchers and education officers also regularly contributed to external academic journals, conferences and other events. Collectively, ETUI researchers were quoted more than 6,500 times on Google Scholar over the last five years, or on average 1,300 times a year.

#### 1. The main categories of ETUI publications

The ETUI publications were disseminated in a wide range of formats, allowing them to target and speak to specific audiences in a meaningful and impactful way. The table below identifies the ten main formats or types of publications that we produce as well as an estimate of the number of items produced, for each output, on a yearly basis.

Type of publication	Number of units published during the reference period
Each category has precise aims in terms of communication and target audience. The numbers of units expected to be published are purely indicative and may change depending on various internal and external factors.	
<b>Newsletters:</b> The general newsletter etui.news is sent out on a monthly basis, sharing alerts of activities and publications with over 7,700 contacts. Specific newsletters are designed for a more specialised and clearly identified audience: on collective bargaining (CBN), on health and safety at work (etui.hesamail), and on the Green New Deal (etui.greennewdeal).	30
<b>Policy briefs:</b> 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 political decision-makers, trade unionists and members of European think tanks.	10

<b>Foresight briefs:</b> These briefs focus on strategic thinking on future challenges for the world of work and have two priority areas: climate change and new technologies.	3
<b>Working papers:</b> These papers present research that is either ongoing or recently concluded. They primarily target academics, think tanks, European institutions, trade union organisations and non-governmental organisations.	10
<b>Reports:</b> These are more technical documents targeting readers with a specialised knowledge of the area in question. In some cases, they serve to present the results of conferences.	3
<b>Books:</b> These demonstrate the ETUI's academic quality and dependability in relation to issues of key importance to the labour movement. Depending on the topic and objective of the publication, they target either specialists or a broader readership. They also provide an opportunity to focus on activities conducted by ETUI research networks.	3
<b>Guides:</b> This category is designed for trainers to support their work or to outline a question or issue in a clear and simple manner.	4
<p><b>The periodicals <i>Transfer</i>, <i>SEER</i> and <i>HesaMag</i>:</b></p> <ul style="list-style-type: none"> <li>· <i>Transfer</i> – the European Review of Labour and Research – has been published by SAGE since 2010, but the ETUI remains responsible for the journal's general editorial line, contents and meetings of its editorial committee. Four <i>Transfer</i> issues were published during the budget year.</li> <li>· The <i>South-East Europe Review for Labour and Social Affairs</i> (SEER) is published by Nomos Publishing House. The aim 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.</li> <li>· The working conditions and health and safety periodical <i>HesaMag</i> is a topical information magazine simultaneously targeting specialists and a broader audience. Each issue covers a specific topic.</li> </ul>	4 2 2
<b>Other materials</b> are produced both digitally for online presentation (infographics, data visualisation, etc.) and in printed form for presentation at relevant events (conferences, seminars, etc.) or for training purposes.	4

The ETUI also produced two regular annual publications that are identified internally and externally as ‘**Flagship publications**’ on account of their strategic relevance, wider public dissemination, and general impact in both public and policy debates.

### *Flagship publications*

#### ***Benchmarking Working Europe 2021***

Published annually since 2001, *Benchmarking Working Europe* puts workers' concerns firmly at the centre of its analysis and policy proposals. In 2021, the 'Unequal Europe' edition was launched in cooperation with the ETUC, AK Europa and ÖGB at an event in Brussels.

#### ***Social policy in the European Union 2021***

This ETUI publication co-produced with the OSE is a reference work for anyone interested in the development of European social policy and the main events and challenges of the year. It was promoted throughout the year via all our communication channels and tools.

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

### *a. HesaMag*

Working conditions are a major determinant of social inequalities. ***HesaMag*** is ETUI's flagship publication on working conditions and health and safety, with a large readership among academic researchers, trade unionists, policymakers and OSH practitioners. It covers developments in EU OSH policy, trade union actions and initiatives in this field, and international developments. It approaches health and safety-specific questions in their broader social context. Last year's two thematic issues covered 'OSH lessons learnt from the Covid-19 pandemic' and 'health and safety issues in the transport sector'. We continued to develop *HesaMag Plus* (the online version) by uploading articles in various European languages and exclusive audio-visual material (photos, videos or audio excerpts) for online readers.

### *b. Transfer (European Review of Labour and Research)*

The *Transfer* journal was ranked amongst the 25% most quoted peer-reviewed academic journals in the field of industrial relations and labour studies. ***Transfer*** continued to be published and distributed by publishing house SAGE. In 2021–2022, three thematic issues of *Transfer* focused on 'Industrial relations and inequality', 'Multiple jobholding in Europe' and 'Transforming care work within an era of changing priorities of care policy'. One issue was a non-thematic 'open' issue publishing a selection of articles submitted to the journal and accepted for publication. SAGE informed the Institute that *Transfer* articles has been downloaded in excess of 100,000 times in the course of the previous year. In spite of this it was decided to give the journal additional visibility and so a specific Twitter account has been created. The goal was to have more than 500 followers by the end of the period. This was achieved quickly.



### c. SEER

Two issues were published in the 2021-2022 budget year (in July and December 2021). SEER 2021 No.1 “Repercussions of the Covid-19 pandemic” dealt with the impact of Covid-19 and related national responses in Southern-Eastern Europe. SEER 2021 No.2 “Lessons from the pandemic” summarised labour market impacts in the Western Balkans and also framed workplace health and safety issues.

The two issues were disseminated via the publishing house Nomos and ETUI websites, as well as through the postal distribution of printed copies to a regularly updated distribution list, across the region and in EU Member States. The project was carried out as planned.

## 3. Databases

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

The ETUI improved and modernised the access and content of our numerous exclusive **databases**: the Cross-Border Company Mobility database called CBCMdb, the European Works Councils database (EWCdb), the RiscTox database, Labourline and Wikilabour

The Institute continued developing its worker participation databases, as evidenced by some of the research projects referred to in Part 2 above. This umbrella project regroups ongoing ETUI activities related to the collection, processing and dissemination of relevant data on workers' representation regrouped in three databases. These in turn provide the foundation for the ETUI's own research as well as a service for stakeholders (trade unions, practitioners, works council members, experts and academia) and the general public (policymakers and academia).

- **CBCMdb**: Cross-border Company Mobility database: This unique database of cross-border company mergers, divisions, and transfers of seat was continually updated by an external team of experts. The focus of the ETUI analysis lies in identifying the impact of cross-border company mobility on workers' participation and governance. The former ECdb had to be discontinued due to data and database access security issues and was integrated into the Cbcmdb. The database hosting was migrated to a secure Cloud warehousing solution, which also enables the linking of the datasets (EWC-survey, EWCdb and Cbcmdb) and continuous data collection (such as web-scrapers).
- **EWCdb** is a database of EWC and SE-WC agreements and EWC jurisprudence. The EWCdb portal was migrated to Drupal 9, which is mostly completed with database access rights structuring. Redaction of EWC agreements on the portal has started and is currently ongoing for GDPR compliance to eliminate liability exposure. Document access will be provided to stakeholders upon completion of the exercise. Additional database restructuring of the EWC court case section was launched with the support of an external expert in late 2021; this work consisted of the systematic collection of all relevant jurisprudence, the translation of all judgements into English and structured case assessments through the use of an analytical template.

- In cooperation with ISTAS and EEB, the ETUI runs and maintains Riscetox, a database of hazardous substances developed to provide clear, organised and concise information on health and environmental risks caused by chemicals contained in products used or handled by workers.
- Labourline is the online catalogue of the ETUI documentation centre, providing access to more than 84,000 bibliographical references of books, articles, reports, proceedings of colloquia, audio-visual materials, etc. related to the world of work (including some 30,000 items available in full text). Labourline is updated daily.
- Wikilabour, the online glossary of trade union terms developed by the ETUI will be reviewed and updated. This glossary offers a systematic breakdown of the industry's jargon and helps trade unionists to better communicate in multinational environments.
- ESSDdb.eu: The ETUI database on the sectoral social dialogue was launched and is available at [www.esddb.eu](http://www.esddb.eu). This review resulted in the May 2021 publication of a working paper called *Holy union? The sectoral social partners and the Covid 19 crisis in Europe*.

## B. Conferences, workshops and other public events

Public engagement and the widest dissemination of the ideas and debates generated by the Institute are at the heart of the ETUI's mission. In the aftermath of Covid-19 and social distancing measures, we successfully managed to migrate online most of our conferences, workshops and public events. This allowed us to attract larger audiences than the ones we typically attracted in 'face to face' settings prior to the pandemic. We anticipate that the next challenge the ETUI will be confronted with is to migrate its current fully online activities to a hybrid mode. We had already experimented with and tested a number of technologies and online conference platforms, *inter alia* for the purposes of hosting our ETUC/ETUI 'Big Conference' on climate change in February 2021. We also greatly benefited from the new dedicated infrastructure developed post-pandemic, including our Edu Centre that hosted both the ETUI's training programmes and a number of other hybrid events organised by other ETUI departments and by the ETUC. The ETUI is determined to maintain an online element for all its future events, regardless of the possibility of holding them face to face once the pandemic is over.

EduDays 2021 "Building the new normality in learning and training", was held in November 2021 with a focus on new forms of learning. It provided a space for exchanging practices, expertise, innovative approaches and experiences of challenges. Significant changes in training and learning have been amplified as a result of COVID-19. This major shift concerned us all. We experienced, at national and European level, new forms of training and learning. Training institutions were forced to reconsider skills development, both for trainers and learners. Provided that our learning approach - active and learner-centric - does not change, we are here to build the "new normality". There's a common need to reflect on what happened since 2020 before looking to the future with awareness and plans. The "new normality" will include a constant process of innovation, to be achieved with different tools and approaches. Whatever innovations we choose, we have to consider their consequences on many aspects, including the training cycle process (from design to assessment), all people involved (in particular learners) and, of course, pedagogy. We believe that innovation should not be done just for the sake of it. Innovation should rather be an attitude. And it has to serve our unchanged purposes: reinforce, stimulate and support the trade union movement through

education. Offering accessible training to our target audience, with high level of quality, is a strategic priority: innovation can help us in achieving it, whatever future challenges look like.

## C. Networks

As part of its mission, the ETUI organises, coordinates and facilitates a range of expert networks in fields as diverse as training and education for trade unionists, labour law and human rights, industrial relations, corporate governance, and – since 2020 – the effects of Covid-19 on the world of work. The stakeholders involved in these networks range from academic experts to national trade union research institutions and other partner organisations focusing on the study of labour regulation and industrial relations. The table below provides a list of the more established and permanent networks coordinated by the Institute (in alphabetical order).

- **Ellen:** This is a specialised network for education professionals, with contributions from qualified trainers. Its members meet once a year.
- **EToT** (the European Training of trainers network): Members of this network are experienced trade union educators who have already completed the Eurotrainers training pathway and who work closely with the ETUI Education officer in charge of running the network and related activities.
- **GoodCorp:** This research network on corporate governance is a longstanding European network of trade union and academic experts in company law and corporate governance. The GoodCorp network met twice during the reporting period and also contributed actively to several ETUC meetings. In addition, a new sub-network, called MonACo, was launched to monitor the transposition of key company law directives.
- **NET** (Network of European Works Council Trainers): To respond to the ever-increasing demand for training, the ETUI can count on the assistance of a multinational team of trainers who all have experience with adult education and working with multicultural groups. They have excellent knowledge of transnational issues and many of them have practical experience with EWC or SE Works Council activities
- **TUREC** (Trade union-related economists' network): This network continued its knowledge-sharing activities on questions of European economic policy for a new economic model, most notably in the context of its annual meeting, which this year had to take place virtually in December 2021 due to travel restrictions.
- **TURI** (Trade Union Related Research Institutes) - The annual conference of the TURI network took place on 23 September 2021 in Brussels. Due to the continuing Covid pandemic and the restrictions introduced by the public authorities, only very few of the members were willing to travel, so the conference was held predominantly online, with just a few participants gathered in the ETUI meeting room in Brussels. In the run-up to this conference, the Teams webpage of the network was further developed in order to facilitate cooperation between members. The conference enjoyed a very good attendance, with more than 70 participants from 27 TURI member organisations. As it was a long time since so many of the members had been able to come together, the conference devoted the whole morning to the presentation of the main research priorities and project highlights of the different institutes. In the afternoon, participants discussed common topics and possible collaboration projects. Three main

ideas to continue the cooperation were discussed – the impact of Covid on workers, trade union renewal and a historical project on the occasion of the 50th anniversary of the ETUC. It was decided to hold a 1.5-day hybrid public TURI conference in Brussels on how Covid has impacted the labour market and the workplace. The main aim of this project was to give visibility to the network and showcase the impressive amount of work performed by members during the Covid-crisis. The conference was planned to take place on 1 February and was almost fully organised when we had to cancel it due to the new surge of Covid and the establishment of new restrictions throughout Europe. While we could have organised this conference again in the spring of 2022, the quickly evolving European agenda made us take the decision to plan the next annual TURI conference instead. This is scheduled to take place on 22-23 September 2022 in Vilnius, kindly hosted by our Lithuanian network member - Lithuanian Centre for Social Sciences (LCSS) -, as was the plan back in 2020.

- **TTUR:** The Transnational Trade Union Rights Experts Network is a network of selected leading European experts in European labour law with a particular emphasis on fundamental social rights and trade union rights. The TTUR met four times last year and held several additional online thematic meetings when necessary and required for ongoing projects. In 2021/2022 TTUR members finalised the edited volume on the 'Effective enforcement of EU labour law', a topic often neglected but extremely relevant in order to turn rights into reality for workers in Europe. This book will be published in summer 2022 by Hart/Bloomsbury publishing. The Network also started preparatory work on a publication on the International Covenant on Economic, Social and Cultural Rights and the employment relation. In addition, the TTUR Network continued to disseminate its previous work as well as to provide expert/research support to the ETUC upon request, in line with the ETUC priorities and in relation to the promotion of trade union/social rights in Europe.
- **WPEurope:** the WPE participation in Europe Network, composed of national industrial relations experts, met online in November 2021 and in March 2022. Key issues addressed included the transposition of the Company Law Package, the impact of cross-border company mobility and national law on board-level employee representation, ETUC and EP initiatives on democracy at work and the revision of the EWC Directive, and EU legal initiatives in the area of due diligence and sustainability reporting and their impact on workers' participation.

## D. Cooperation

The ETUI's collaboration with other institutions and organisations had a multiplying effect, with its efforts bearing fruit for all parties.

The ETUI is increasingly perceived as an important partner in organising debates on European integration and building consensus on what the future of Europe could look like. The ETUI seized the opportunities at both European and national level to engage with trade unions and other key players in order to organise events on the social dimension of European integration.

We continued our partnerships with research projects already underway and, in particular, within the framework of the 'Centre de recherche interuniversitaire sur la mondialisation et le travail' (CRIMT) with the Université de Montréal, Laval and HEC Montréal. The ETUI

contributed to the 2021 edition of the "Magog" virtual meeting (21-29 October 2021) in the framework of workshops for the development of social experimentation cases, on the topics: which trade unions for workers in the gig economy; and which collective representation for platform delivery workers?

The ETUI also continued to be involved in external steering/follow-up committees such as the SEAD-project consortium ('Sustainable Employment in the Age of Digitalisation'), funded by Belspo (the Belgian Science Policy Office) and involving the VUB, KULeuven, ULB and ULiège.

The ETUI has a partnership agreement with the Bureau for Workers' Activities (ACTRAV) of the International Training Centre of the International Labour Organisation (ITCILO). In establishing such an agreement, ACTRAV and ETUI Education are seeking to reinforce a strong and positive relationship. Its primary purpose is to share knowledge, skills and training activities that benefit workers' organisations. Moreover, in conjunction with the LIP (Learning and Innovation) Department of the ITCILO, the ETUI has established a cooperation for the development of a 'Train the Trainer' programme.

The ETUI continued its 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 and social integration of Western Balkan countries and on cooperation with Eastern Europe. This entails attending key PERC events, and in some cases involving an additional expert. Expertise is provided in the health and safety domain, the aims being to exchange information on health and safety management and to collect data on safety representatives in EU countries, compared with countries in the PERC network.

#### 1. EU projects

The ETUI participated in the following projects supported by the European Union: EPOG+ Economic Policies for the global transition / InGRID-2 - Integrating Research Infrastructure for European expertise on Inclusive Growth from data to policy / EUSocialCIT - The Future of European Social Citizenship / SODITREC - Social Dialogue in the Transforming economy. Only eligible costs will be incurred in the work programme.

#### 2. Associated researchers

The ETUI cooperated with many experts who were able to contribute to ongoing research and training priorities or reinforce existing projects. It also has structural and long-term relations with a few of them through our associate researcher status. This is based on an individual request which is evaluated and agreed upon by the directors committee. The associated researchers were the following: Magdalena Bernaciak (Blagoevgrad), Denis Bouget (Nantes), Margherita Bussi (Louvain), Christelle Casse (Lyon), Vera Glassner (Vienna), Maarten Keune (Amsterdam), Vassil Kirov (Sofia), Martin Myant (UK), Jean-Paul Tricart (EU), Gérard Valenduc (Namur), Christian Valenduc (Namur), Eric Van Den Abeele (Brussels), Pascale Vielle (Louvain), Sigurt Vitols (Berlin), Laurent Vogel (Brussels), and Jeremy Waddington (Manchester).

### 3. Trainees

We welcomed 7 trainees this fiscal year (Masters or PhD students). Some come from universities with which we have an agreement and others are selected case by case. Trainees come with their own research programme linked to their university. The Institute's aim in this respect is to provide students and researchers across the EU with a unique experience at European level. We also have guest researchers who come for a few weeks or several months. The trainees and guest researchers are listed below.

## Part 4 - Communication strategy and visibility

The ETUI's overall communication strategy was based on different types of printed and online outputs: research publications, training courses and materials, events and conferences, websites, social media and expert databases, newsletters, networks and journals. The pandemic forced us to rethink our communication strategy and to accelerate our shift to the digital and online dimensions of communication and engagement. The pandemic also presented us with new, hitherto unexplored opportunities that have proved to be both successful and effective in reaching new audiences. For instance, our websites, webinars, podcasts and newsletters have played a key role in engaging remotely with usual and unusual audiences. We gradually reverted to some traditional forms of physical communication (conferences, monthly forums, network meetings, visitors' group) while keeping on some hybrid forms of communication. Our main focus was linked to our key performance indicators: we enhanced the impact of the ETUI by promoting actions on a regular basis using in-house resources or via partnership with external media organisations such as Social Europe, Voxeurop and others.

Depending on the publication topic, we aimed either to participate in the European debate or to shape it. Each publication entered the dissemination cycle developed by the ETUI which follows trending topics in the European media landscape and connects our research to them. Publications were disseminated physically at major events in Europe or elsewhere, or during a specific hybrid event organised by the ETUI (such as monthly forum, brown bag lunches, conferences, etc.), but also virtually: bite-size versions of our research are disseminated widely through our extensive activities on social media, newsletters, blogging and press releases to specialised journalists.

More generally, the ETUI put in place a '3-wave' strategy. This approach involved, in the first instance, the communications team focusing on immediately communicating the launch (via our website, social media, etc.), followed by a second wave (mid-term outreach) aimed at reaching non-connected targets (newsletters, emailing, postal deliveries, etc.), and then a third wave (long-term communication) focusing on permanent and archived knowledge (clouds, libraries, archives). One example illustrating this approach was the communication around the publication *Benchmarking Working Europe 2021* where we used this 3-wave strategy as an effective way to reach different type of audiences.

### A – Websites, social media and blogs

Optimised for viewing on mobile devices, the ETUI websites became a platform from which to promote our social media activities. In 2021-2022, the renewal of the second part of our satellite websites was implemented and the topics page on [etui.org](http://etui.org) was further developed with the support of external contractors.

In terms of metrics, the traffic to our main website [etui.org](http://etui.org) continued to grow steadily: our pages were viewed 536,000 times between April 2021 and March 2022 and we counted over 356,000 new users. Although still under development, the worker participation website received 341,000 pages views over the same period, with around 155,000 new users.

The ETUI has one main website, [www.etui.org](http://www.etui.org), and the following ten satellite websites:

CBCMdb.eu / CBNarchive.eu / ESSDdb.eu / Europeanparticipationindex.eu /  
EWCdb.eu / EWCtraining.eu / Labourline.org / Risctox / Wikilabour.org /  
Worker-participation.eu

As noted above in Part 2 of this document, the ETUI also curated [worker-participation.eu](http://worker-participation.eu), offering up-to-date and comprehensive information on workers' information, consultation and participation structures across the EU.

Our social media impact also grew considerably; the ETUI reached the milestone of more than 13,000 followers on Twitter. We have continued our intensive use of social media (Twitter, Facebook, LinkedIn, YouTube, Medium, Flickr and Instagram) to alert target audiences to our activities, research and education results. Facebook page analytics show an increase of this audience (2,388 likes and 2,993 followers). In parallel we have been experimenting with Instagram and organised two internal expert-led training activities on how to optimise our use of LinkedIn, a more professional social media network relevant for the ETUI's outputs. Our researchers and education officers provided information on their work by contributing to major blogging sites, such as the Social Europe Journal and Equal Times. The [etui.org](http://etui.org) website was also used to publish our own blog pieces. The ETUI continued to use the following external third-party channels to disseminate its publications: Social Europe, Voxeurop, Academia.edu, ResearchGate, Google Scholar, SSRN and RePec. These popular websites increased the visibility of ETUI publications and training activities and intensified traffic to the ETUI website more generally.

Comparing the metrics in 2021 and 2022 for [etui.org](http://etui.org), we see positive returns of our new online strategy. While unable to compare figures with previous years, users' feedback throughout the year has been entirely positive.

Our main focus was to provide easier access to publications, education activities, databases, reports and newsletters. Our aim is to deliver the highest levels of security, user-friendliness, and a fully accessible user experience; to provide intuitive website navigation for online visitors and ETUI staff by proposing an improved version of the information architecture; and to create new functionalities crucial for a successful outcome without overloading the web system with unnecessary modules and functions. The ETUI website was also optimised for viewing on mobile devices and is becoming a platform from which to promote our social media activities. The website's aim is to be a focal point of information to stimulate debate, analysis and discussion for all those interested in (in)equality, social justice, the future of work and the socio-ecological transition.

The ETUI enhanced its visibility through the use of more innovative means of presenting information and educational material, increasingly using infographics on social media and short video interviews as a means to visually explain complex topics in an accessible and informative manner. The evolving online communication strategy was mainly driven by the necessity to better connect our audience to the ETUI's expertise, publications, training, events, networks and databases. The philosophy underlying this expansion into new media was twofold: first, to reach the broadest possible audience of trade unionists, who may not have the time to read in full our research publications, particularly those mainly targeting



academics; and, second, to reach out to younger generations of trade union activists who may be more comfortable with these forms of communications. With the support of several new colleagues, we have managed to better target the policymaker communities (EU Parliament, Commission, Council, working groups and think tanks, Education community, academics), which was important for working to change narratives.

### Media partnerships

To be consistent in our strategy, we have refreshed and extended our media database to address the right media outlets for both our publications and our audience. In parallel, we have also encouraged ETUI researchers to write op-eds each stemming from a research output. Along with these two initiatives, we have decided to initiate or consolidate media partnerships with specific outlets such as Social Europe, Voxeurop, Kontrast and Mediapart and have built closer relations with others like the Green European Journal, the Progressive Post, Le Soir and Merce.

### Social media targets:

	<b>Situation in March 2021</b>	<b>2021-2022 targets</b>	<b>results in April 2022</b>
Twitter	10,100 followers	> 12,000 followers	13,000 followers
Facebook	2,684 followers	Remain steady on ~ 2,000 followers	2,993 followers
LinkedIn	2,446 followers	>3,000 followers	3,320 followers
Instagram	600 followers	> 800 followers	704

### Newsletters

The ETUI produced four **newsletters** informing targeted audiences on latest publications, events, training and other activities: etui.news, etui.hesamail, the Collective Bargaining newsletter and etui.greennewdeal.

**etui.news** is the Institute's general newsletter sent out at the end of each month to over 8,000 subscribers. The newsletter was launched over five years ago and aims to inform its readers about the latest publications, training, events, job vacancies, calls for tenders, press coverage and the latest news. **etui.hesamail** is a specialised newsletter keeping readers regularly updated on news and developments in the area of European and international occupational health and safety. It is published once a month and sent out to over 3,000 subscribers. In 2020, subscriptions were actively promoted. In addition, the newsletter's layout has been reviewed to better align it with the other ETUI monthly newsletters.

For more than ten years, the **Collective Bargaining Newsletter** (CBN) has been the ETUI's tool to provide up-to-date information on collective bargaining developments across Europe. The CBN is compiled by an external research team from the *Stichting de Burcht* at Amsterdam University. To ensure that the information presented is as comprehensible as possible, the research team utilises a number of different sources including (inter)national press agencies, the internet more generally, and extensive personal networks within the European trade union movement and beyond. The searchable archives of the CBN newsletter (cbnarchive.eu) were technically updated online with the support of an external expert and additional support was given to staff to manage all upcoming monthly issues.

In 2020, we launched a fourth newsletter **etui.greennewdeal** focusing on the EU's Green New Deal. It was developed with the help of an external consultant.

Newsletters from the ETUI are a key element in developing stronger relations with our core audiences, which is why we have actively promoted subscriptions throughout all of our online channels.

	<b>Status in March 2020</b>	<b>2020-2021 targets</b>	<b>Results in May 2021</b>
etui.news	6,600 subscribers	> 8,000 subscribers	8,371
etui.hesamail	2,000 subscribers	> 3,000 subscribers	3,689
Collective Bargaining newsletter	3,600 subscribers	> 4,000 subscribers	4,903
etui.greennewdeal	Inactive	> 2,000 subscribers	2,935

## Publications

The ETUI releases around 40 publications each year on critical issues concerning workers in the world of work. During the reference period, we issued 18 policy briefs, 22 working papers, 4 books, 1 guide, 3 reports and 1 foresight brief. On top of these ETUI publications, our researchers also contributed on a regular basis to external academic journals and conferences. According to Google Scholar analytics, in total, ETUI researchers have been cited more than 6500 times.

The ETUI has ten publication categories. Please find here under a detailed overview of the released publications during the reference period.

<b>Type of publication</b> <i>Each category has precise aims in terms of communication and target audience</i>	Number published in 2021-2022
<b>Newsletters:</b> The general newsletter etui.news was sent out on a monthly basis with over 10,000 contacts. Specific newsletters continued to be sent out electronically every month: on collective bargaining (CBN) and health and safety at work (etui.hesamail). There is a total of three monthly newsletters (which are not published in August) and one periodical newsletter etui.greennewdeal which is sent every two months.	40
<b>Policy briefs:</b> 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 political decision-makers, trade unionists and members of European think tanks.	18
<b>Guides:</b> This category is designed for trainers to support their work or to outline a question or issue in a clear and simple manner.	1
<b>Working Papers:</b> Working papers present research that is either still ongoing or has recently been concluded. These papers are aimed primarily at academics,	22

think tanks, European institutions, trade union organisations and non-governmental organisations.	
<b>Reports:</b> 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.	3
<b>Books:</b> Books demonstrate the ETUI's academic quality and dependability in relation to issues of key importance to the labour movement. Depending on the topic and objective of the publication, they are aimed either at specialists or at a broader readership. They also provide an opportunity to focus on activities conducted by ETUI research networks.	4
<b>Foresight briefs:</b> The Foresight Brief focuses on strategic thinking about the future challenges for the world of work and has two priority areas: climate change and new technologies. The ETUI widened the audience of the newsletter by better identifying the public likely to be interested in this publication (via networks and the ETUI website, but also by exploring new means of dissemination such as social media, press coverage, etc.).	1
The <b>periodicals</b> <i>Transfer</i> , <i>SEER</i> and <i>HesaMag</i> :	8
<i>Transfer</i> – the European Review of Labour and Research	4
The <i>South-East Europe Review for Labour and Social Affairs</i> (SEER). One SEER issue was published during the reference period.	2
The working conditions and health and safety periodical <i>HesaMag</i>	2

The comprehensive list of publications produced by the ETUI during the reference period is available below.

Our aim was to make publications available to the widest readership possible – trade unions, researchers, journalists and media organisations, policymakers, younger researchers interested in trade unions and university students – in order to foster debate and equip unions with the facts and data they need to win arguments over the need for better jobs and working conditions in Europe. In line with the document on the future of the ETUC adopted by the 2019 Congress, we are working closely with the ETUC's communications team to best support each other for upcoming actions. Each publication output enters the evolving dissemination cycle developed by ComPub, which follows the trending topics in the European media landscape and connects our research to those topics promoted by major media organisations. Due to the pandemic, we have put on hold the dissemination of our publications at major events in Europe or elsewhere. Instead, we have enhanced their online dissemination through our extensive activities in social media, newsletters, blogging and press releases to specialised journalists. We have enhanced our free-of-charge, user-friendly formats developed to contribute to the greening of the Institute and due to the restrictions linked to the pandemic.

#### *Flagship publications*

##### **Benchmarking Working Europe 2021**

Published annually since 2001, Benchmarking Working Europe puts workers' concerns firmly at the centre of our analysis and policy proposals. The 2021 edition, 'Unequal

Europe', was launched on 3/12/2021 in cooperation with the ETUC. The layout and the content structure for this edition underwent a complete remake to improve readability and better align our research with the new Commission's main priorities. The publication was extensively disseminated across various media, audiences and formats (social media, ETUI educational courses, podcasts). It was launched during a hybrid conference with the participation of key political stakeholders (including Barbara Kauffmann, Director for Employment and Social Governance, Analysis at DG Employment, European Commission,, the ETUC Secretary General Luca Visentini, Evelyn Regner, MEP, Group of the Progressive Alliance of Socialists and Democrats in the European Parliament, and the President of the EESC Workers' Group Oliver Röpke) and leading experts (academics, MEPs and trade union leaders).

### **Social policy in the European Union: state of play 2021**

#### **Re-emerging social ambitions as the EU recovers from the pandemic – Bilan Social**

This publication is seen as the reference for anyone interested in European social policy. It has been promoted during the whole year via all our communication channels and tools. Three separate online webinars were held to promote different policy domains.

### Audiovisual and podcasts products

A total of 9 podcast episodes were produced in the reference period. In them, the ETUI offers new perspectives, debates and discussions on ongoing research and education on social Europe, worker participation, health and safety, the wider labour movement and the world of work. We disseminated the episodes through all podcast platforms (Anchor, Breaker, Google Podcasts, Apple Podcasts, Pocket Casts, RadioPublic, and Spotify). Collectively the episodes were played more than 6,246 times (up from 4,400 in 2020-2021) during the reference period.

### Databases

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

The ETUI has improved and modernised the access and content of our numerous exclusive databases: the European Company database, European Works Councils database, Facts and Figures database, RiscTox database, Strikes Map of Europe, Labourline and the European Social Dialogue database. These databases have been better exploited (for example, graphics, data, interactive tools easily accessible and through newsletters). ETUI is tackling the industry's jargon and helping trade unionists to better communicate in multinational environments.

The contacts relationship database (CiviCRM) used by the ETUI is regularly updated and cleaned. It is now a much more flexible, user-friendly and efficient system, offering a smooth and easy interface. It is greatly helping us target and reach new audiences and better serve existing ones while fully respecting GDPR rules.

### Web-based services

- ETUI website: [www.etui.org](http://www.etui.org)
- Worker Participation website, [www.worker-participation.eu](http://www.worker-participation.eu)

- European Company (SE) Database web site, [www.ecdb.worker-participation.eu](http://www.ecdb.worker-participation.eu)
- The European Works Councils database (EWCdb), [www.ewcdb.eu/](http://www.ewcdb.eu/)
- EWC training, tailor-made training for your EWC, SE works council and SNB [www.ewctraining.eu/](http://www.ewctraining.eu/)
- Labourline [www.labourline.org/](http://www.labourline.org/)
- Wikilabour [www.wikilabour.org](http://www.wikilabour.org)
- Risctox, a comprehensive database on toxic and hazardous substances, in cooperation with ISTAS [www.risctox.istas.net/en/](http://www.risctox.istas.net/en/)
- CBN archive [www.cbnarchive.eu/](http://www.cbnarchive.eu/)
- European Social Dialogue Database: <https://esddb.eu/en>

## List of publications

### Periodicals

#### HesaMag – Health and safety at work magazine

- HesaMag #24, Autumn – Winter 2021, Special report: Workplaces in a pandemic, EN-FR, 56 pages.
- HesaMag #23, Spring – Summer 2021, Special report: Workers in the food chain, EN-FR, 60 pages.

#### SEER – Journal on Labour and Social Affairs in Eastern Europe

- SEER 2/2021, Lessons from the pandemic, October 2021.
- SEER 1/2021, Repercussions of the Covid-19 pandemic, August 2021.

#### Transfer – European Review of Labour and Research

- Transfer 1/2021, Industrial relations and inequality: the many conditions of a crucial relationship, February 2021
- Transfer 2/2021, Multiple jobholding in Europe, May 2021.
- Transfer 3/2021, Transforming care work within an era of changing priorities of care policy, August 2021.
- Transfer 4/2021, Open issue, November 2021.

### Books

- Vanhercke B. and Spasova S. (ed.) (2021) Social policy in the European Union: state of play 2021, Brussels, ETUI. EN, FR
- De Spiegelaere S. et al. (2021) European Works Councils: contested and still in the making, Brussels, ETUI.
- Countouris N. et al. (ed.) (2021) Benchmarking Working Europe 2021, Brussels, ETUI.
- Akgüç M. (ed.) (2021) Continuing at work. Long-term illness, return to work schemes and the role of industrial relations, Brussels, ETUI.

### Working papers

- Spasova S. et al. (2022) Social protection for atypical workers during the pandemic: Measures, policy debates and trade union involvement in eight member states, Working Paper 2022.10, Brussels, ETUI.

- Sabato S. et al. (2022) A ‘Social Imbalances Procedure’ for the EU: Towards operationalisation, Working Paper 2022.09, Brussels, ETUI.
- Myant M. (2022) Labour rights in trade agreements: five new stories, Working Paper 2022.08, Brussels, ETUI.
- Zwysen W. and Drahokoupil J. (2022) Are collective agreements losing their bite? Collective bargaining and pay premia in Europe, 2002-2018, Working Paper 2022.07, Brussels, ETUI.
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- De Stefano V. and Taes V. (2021) Algorithmic management and collective bargaining, Foresight Brief #10–May 2021, Brussels, ETUI. EN, FR

### Video productions

The full list of 49 videos published during the reference period can be found on the ETUI's YouTube channel [www.youtube.com/etuivideos](http://www.youtube.com/etuivideos).

### Monthly forum

Due to the Covid-19, all monthly forums were transformed into ETUI online webinars. Below is the list of all online webinars organised during the reference period. All recordings were simultaneously live-streamed via Zoom and Facebook, the recordings of which are all to be found on our YouTube channel, thereby maximising the cumulative impact of our debates and discussions. We also promoted the events via social media platforms like Twitter, YouTube, Facebook, Instagram and LinkedIn.

Type of events	# of units	Topics covered	Date
<b>Webinars and hybrid events</b>	24	Exploring interfaces between labour and environmental law	April 27, 2021
		Exploring the link between growth and welfare states	May 20, 2021
		What kind of agriculture do we want for tomorrow's world?	May 26, 2021
		Facing the challenges of a fast track transition to electromobility – What is at stake for Europe?	June 08, 2021
		Subcontracting in the meat industry: a chance for true reform?	June 08, 2021
		The nexus of climate change and welfare: towards a new concept of the welfare state	June 17, 2021



		A l'Est, les supermarchés à l'assaut de la nourriture authentique et bio	June 24, 2021
		SEER Journal Workshop: The consequences of the Dayton Peace Agreement	July 02, 2021
		How fit is Next Generation EU in addressing the challenges ahead?	August 31, 2021
		The Recovery and Resilience Facility: have social actors been sidelined?	September 07, 2021
		Climate change mitigation and adaptation	September 13, 2021
		The future of democracy in times of planetary crises	September 16, 2021
		Transforming care work within an era of changing priorities of care policy after the pandemic	September 29, 2021
		Ecocide: a new path to address environmental abuse?	November 15, 2021
		New frontiers for social Europe: Europe's open strategic autonomy	November 29, 2021
		Inequality in Europe	December 03, 2021
		The EU response to Covid-19: winners and losers	January 25, 2022
		Launch of HesaMag#24: 'Workers in a pandemic'	January 31, 2022
		The UK-EU Trade and Cooperation Agreement one year on	February 09, 2022
		The role of firms in wage inequality	March 01, 2022
		Challenges and perspectives of a just transition in Europe	March 07, 2022
		Addressing transport poverty: the key to a socially balanced green transformation	March 14, 2022
		The green and digital transitions: how can the EU deliver on its promises?	March 16, 2022
		Collective bargaining and algorithmic management	March 24, 2022

## BBL and visitor groups

No visitor groups were allowed due to the Covid crisis. Face-to-face and hybrid internal brown-bag lunch (BBL) events with the staff were held once health conditions improved. Here is the list of the nine BBL events held during the reporting period:

- 1. BBL: ETUI Internet and Platform Work Survey**  
 Tuesday 21 December 2021 from 11.00  
 Agnieszka Piasna  
 Jan Drahokoupil  
 Wouter Zwysen
- 2. BBL: Plus ça change? Continuity and Change in European Governance of Labour After the Covid-19 Pandemic.**  
 Tuesday 30 November 2021 from 11.30 am  
 Vincenzo Maccarrone
- 3. BBL: Mapping exercise on collective bargaining initiatives in the gig and platform economy**  
 Monday 8 November 2021 from 11.30 am  
 Mariagrazia Lamannis
- 4. BBL - Présentation sur le développement historique de l'action juridique et judiciaire de la CES**

Thursday 30 Septembre 2021 from 11.30  
Julien Louis

**5. BBL: Corporate Sustainability Reporting in the EU: Where is ETUI research relevant for the development of European Sustainability Reporting Standards**

Wednesday 15 September 2021 from 11.00 am  
Sigurt Vitols

**6. BBL Conference on the Future of Europe – what, how and where?**

Tuesday 6 July 2021 from 12.30 pm  
Zane Rasnaca

**7. BBL on “Economic activation and the government of equality: the case of public promotion programmes for women entrepreneurs in Spain”**

Tuesday 11 May 2021 from 1.30 pm  
Carlota Carretero, trainee

**8. BBL PART II: Trends in wage inequality in Europe: the role of firms and pay setting**

Thursday 6 May 2021 from 13.30 pm  
Wouter Zwysen

**9. BBL PART I: Trends in wage inequality in Europe: the role of firms and pay setting**

Thursday 1 April 2021 from 13.30 pm.  
Wouter Zwysen

## The Documentation Centre

The 2021-2022 activities of the Documentation Centre continued to contribute to the ETUI's collection of literature and information. Its main activities concentrated on fully supporting the ongoing work and projects of the Institute. This included the continuous development of the reference database Labourline ([www.labourline.org](http://www.labourline.org)).

In the second half of 2021, the software used to manage our database was upgraded to version V4. In the process, the Labourline layout was modified to be as close as possible to that of the Institute's website. A total of 2 871 new entries to the database were made during the reference period. In total, Labourline provides access to 85 538 references (47 511 of which are books, 35 901 articles, 1 845 book chapters and 220 multimedia) including 34 852 electronic documents directly readable by users (according to the rights assigned to the document: public/restricted).

A partnership project with the European University Institute (EUI – Firenze) was concluded. The Institute's first publications (only the English versions), not available in PDF format, have now been digitalised. Those digital versions were added to our reference database and are now available to the public via [www.labourline.org](http://www.labourline.org).

The Centre continued to be a member of the EDC network (European Documentation Centres) and of the International Association of Labour History Institutions (IALHI), a data provider for the European common catalogue of EIGE (European Institute for Gender Equality - Vilnius), and for the Social History Portal (IALHI).

Between 1 April 2021 and 30 March 2022, the Centre's total holdings increased by 1029 monographs, paper and electronic (919); of the new acquisitions, 98 books were purchased. The number of articles indexed totalled 1 743, of which 1 649 are available in digital format (full text). The Centre managed 133 subscriptions: 84 specialised journals, 36 titles of daily and weekly newspapers (of which 34 are in electronic format only) and 8 information and monitoring databases. 191 loans of books were recorded, meaning that 791 books are currently on loan. Following the health and ecological crisis, the documentalists have continued to collect daily all documents concerning Covid-19 that might be of interest to researchers. As a result, 1 110 references were found and indexed in Labourline (including articles, books, working papers, web sites, ...). This information was disseminated via a weekly internal newsletter called Covid-19 and via one section displayed on the homepage of Labourline. Another weekly newsletter called Climate change disseminated the references collected on the issue of climate change, just transition and the Green Deal.

Three issues of the electronic bulletin 'Labourline new acquisitions' were distributed to ETUI and ETUC staff.

Despite teleworking, all new staff members and trainees received virtually or physically a personal introduction to the Documentation Centre and a demonstration of the use of Labourline. Due to Covid-19, there were only 2 external visitors, although the documentalists continued to receive and answer external requests.

The Documentation Centre was actively involved in the reference and bibliography check of all ETUI publications in production as well as in updating those parts of the ETUI website relating to these publications.

### Words of thanks

The European Union continued to be the ETUI's most important provider of support. Without continuing support from and cooperation with the European Commission, the European Parliament and other European bodies, the research, expertise and training activities carried out by the ETUI would simply not be possible. We are extremely grateful for this support, which is also 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 was given by Germany's Hans Böckler Foundation (HBS), and additional funding was provided by national affiliates, governments and agencies. Furthermore, the ETUI welcomed the cooperation agreements with various European Industry Federations and the projects financed by national affiliates. We very much appreciate such financial support and collaboration.

## Glossary

<b>ACTRAV</b>	The Bureau for Workers 'Activities	<b>H&amp;S</b>	Health and Safety
<b>ACSH</b>	Advisory Committee on Safety and Health	<b>GAFA</b>	Google, Apple, Facebook, Amazon
<b>AI</b>	Artificial Intelligence	<b>GNI</b>	Gross National Income
<b>ANEC</b>	European Association for the Coordination of Consumer Representation in Standardisation	<b>GDP</b>	Gross Domestic Product
<b>BLER</b>	Board-level employee representatives	<b>GDPR</b>	General Data Protection Regulation
<b>CEEC</b>	Central and Eastern European Countries	<b>GOODCORP</b>	Network on corporate governance
<b>CELSI</b>	Central European Labour Studies Institute	<b>HBS</b>	Hans Böckler Stiftung
<b>CEN</b>	European Committee for Standardization	<b>ILO</b>	International Labour Organisation
<b>CENELEC</b>	The European Committee for Electrotechnical Standardization	<b>ISO</b>	International Organisation for Standardisation standards
<b>CLP</b>	Classification, Labelling and Packaging	<b>ITCILO</b>	International Training Centre of the International Labour Organization
<b>CLP</b>	EU Company Law Package	<b>MFF</b>	Multiannual Financial Framework
<b>CRIMT</b>	Centre de recherche interuniversitaire sur la mondialisation et le travail	<b>NCEPs</b>	National Climate and Energy Plans
<b>CSR</b>	Country-specific recommendation	<b>N.E.T.</b>	Network of European Works Council Trainers
<b>CTA</b>	Comprehensive Trade Agreement	<b>NGEU</b>	Next Generation EU
<b>ECHA</b>	European Chemicals Agency	<b>NGO</b>	Non-Governmental Organisation
<b>ECB</b>	European Central Bank	<b>OECD</b>	Organisation for Economic Co-operation and Development
<b>ECJ</b>	European Court of Justice	<b>OSA</b>	Open Strategic Autonomy

<b>ETT</b>			
<b>ECF</b>	European Climate Foundation	<b>OSE</b>	Observatoire social européen
<b>ECOS</b>	European Environmental Citizens' Organisation for Standardisation	<b>OSH</b>	Occupational Safety and Health
<b>ECTUN</b>	European Capitals Trade Unions Network	<b>PERC</b>	Pan-European Regional Council network
<b>EEA</b>	European Economic Area	<b>PSR</b>	Psychosocial Risks
<b>EFFAT</b>	European Federation of Trade Unions in the Food, Agriculture and Tourism	<b>REFIT</b>	Regulatory Fitness and Performance
<b>EFJ</b>	European Federation of Journalists	<b>REACH</b>	Registration, Evaluation, Authorisation and Restriction of Chemicals
<b>EMU</b>	Economic and Monetary Union of the European Union	<b>RISCTOX</b>	A comprehensive database on toxic and hazardous substances
<b>EPSU</b>	European Federation of Public Sector Unions	<b>RRP</b>	Recovery and Resilience Plan
<b>EPSR</b>	European Pillar of Social Rights	<b>SEER</b>	South-East Europe Review on labour and social affairs
<b>ESS</b>	European Social Survey	<b>SER</b>	Standard Employment Relationship
<b>EU</b>	European Union	<b>SDGs</b>	Sustainable Development Goals
<b>EWC</b>	European Works Councils	<b>TCN</b>	Third Country National
		<b>STS</b>	Science and Technology Studies
<b>EWPPC</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
<b>FTA</b>	Free Trade Agreement	<b>WIG</b>	Workers' Interests Group

## Annexes

### List of trainees and guest researchers

- 01/03/21 - 31/05/21 Clara Goerlich: Utrecht University Germany
- 01/04/21 - 31/05/21 Wall Jacob: University Bocconi Milan Italy
- 01/04/21 - 30/06/21 Carlota Carretero: Universidad Complutense de Madrid Spain
- 21/06/21 - 15/08/21 Gonca Acaray: Global Labor University - Penn State University Pennsylvania USA
- 28/06/21- 27/07/21 Alexander Evans: UCL London UK
- 01/08/21 - 31/10/21 Mariagrazia Lamannis: University “Magna Graecia” of Catanzaro (Italy)
- 01/09/21 - 01/12/21 Katharine Shaw: Masters at SciencesPo Paris France
- 20/09/21 - 20/12/21 Maccarrone Vincenzo (guest researcher): University College of Dublin, Dublin Ireland