2020 YEARBOOK

Eurofound

Living and working in Europe

Living and working in Europe 2020

Eurofound

European Foundation
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Introduction

Everything changed in 2020 – some things temporarily, others forever.

Millions found themselves jobless within mere months of the COVID-19 virus appearing in Europe. Several millions more were laid off temporarily or had their working time cut, while businesses closed their doors, many uncertain whether they would open again. Households saw their finances whittled down through lack of income, and some sank below the poverty line. Yet, extraordinary interventions by governments across the board, and supported by the European Union, did much to mitigate the shock that the economic restrictions had on businesses, workers and families.

A telework revolution was triggered, with half the working population at some point working from their homes. This shift of workplace protected jobs, although for some, especially parents of young children, combining work and home life in the same space was a source of stress and conflict.

In this maelstrom of events, the well-being of Europeans foundered, their resilience was tested and their trust in their guiding institutions was thrown into doubt.

The enormity of the impact of the COVID-19 pandemic on the lives and work of Europeans is hard to capture, but Eurofound's priority in 2020 was to record and assess the experience of this societal upheaval across the Member States in all its detail, variety and modulation. In little more than a month, the Agency had designed the *Living, working and COVID-19* e-survey and deployed it online to reach tens of thousands of respondents across Europe. Simultaneously, it set up the COVID-19 EU PolicyWatch database to collect information on the measures introduced to cushion the pandemic's social and economic effects on businesses, workers and citizens.

The e-survey's April findings were one of the first sources of reliable facts on the impact of the crisis, and it painted a stark picture. It described high levels of loneliness among the population and low levels of optimism about the future. It detected a dramatic fall in trust in the EU and national governments. It confirmed the swing to telework, as well as increased job insecurity and sharp drops in working time. It recorded the worsening economic situation of respondents and their deep concern about their financial future.

A second survey round in July refreshed the picture, describing a partial rebound to better finances and states of mind as the lifting of restrictions began and life returned to some semblance of normality. That was not the end, by any means, of the pandemic rollercoaster. Weariness and frustration have taken over as the cycle of rising infection rates followed by renewed restrictions has dragged into the current year. The third round of the survey conducted in March 2021 will recount the ongoing impact of this most disruptive disease.

Despite the changed circumstances of 2020, Eurofound continued its planned annual programme of activities, reframing the implications of its research outputs in light of the pandemic and moving its face-to-face events online. One highlight was the release of the results of the 2019 European Company Survey, a project carried out jointly with sister Agency Cedefop. The findings are timely, coming as Europe begins the transition to a digitalised and climate-neutral economy. The conclusions are unambiguous about the conditions companies must nurture within their workplaces in order to unlock the quality of performance from their employees that will be required to meet the transformation ahead.

There is accumulating evidence that the shutdown of economic activity has disproportionately reduced women's employment and working hours, while the great telework shift appears to have had the unforeseen consequence of reviving their traditional role as principal carer in the home. This, along with the launch of the new Gender Equality Strategy in 2020, has given fresh impetus to the drive for gender equality and efforts to halt a backwards slide to the norms of times past. Eurofound shone a spotlight on gender inequality at work, specifically occupational segregation and the differences in job quality experienced by women and men across many dimensions of working conditions.

The lockdowns also highlighted the plight of workers in the platform economy. Among those who worked throughout the lockdowns, many found themselves having little protection from contracting the virus and without sick pay if forced to self-quarantine. An exercise by Eurofound described various plausible future scenarios for platform work and how policy might be shaped to achieve the most desirable.

Platform workers are counted among that segment of the labour force who work on the basis of insecure employment arrangements, often without the safety net of social protection coverage. These workers have been hit hard by the crisis, the first to lose their jobs as businesses closed. Precariousness in employment is a thorn in the side of EU social policy. A contentious issue, it nevertheless warrants more effective resolution.

2020 was also the last year of Eurofound's 2017–2020 programming period, and the Agency launched a new programme of work, *Towards recovery and resilience*, setting out its activities for the four years ahead. These activities respond to the major goals of EU social, employment and work-related policy. As ever, it is an ambitious programme, encompassing subjects as diverse as the changing structure of labour markets, the quality of life of older citizens, the participation of young people in employment and society, the socioeconomic effects of the transition to climate neutrality, and the challenges to social cohesion, to single out just a few. In that programme, however, Eurofound mirrors the ambition of the European Union itself.

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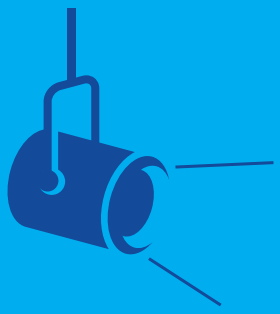


Spotlight on employment in Europe

1 Labour markets in limbo

The mobilisation against COVID-19 sent shockwaves through European labour markets in 2020. The shutdown of business in an attempt to contain transmission of the coronavirus led to the layoff of 5.7 million EU workers in the first six months of 2020; many millions more held on to their jobs thanks only to government schemes designed to shore up employment. But the ongoing rein on economic activity means that a precise reckoning of the outcome for employment cannot yet be made.

Up until the outbreak of the virus, the statistics had relayed a story of upward momentum in EU labour markets. The economic rebound after the 2008 global financial crash and its fallout brought five years of steady employment growth; compared to 2013, 15 million more people were in work in 2019 when employment reached a record high of 73.1%.

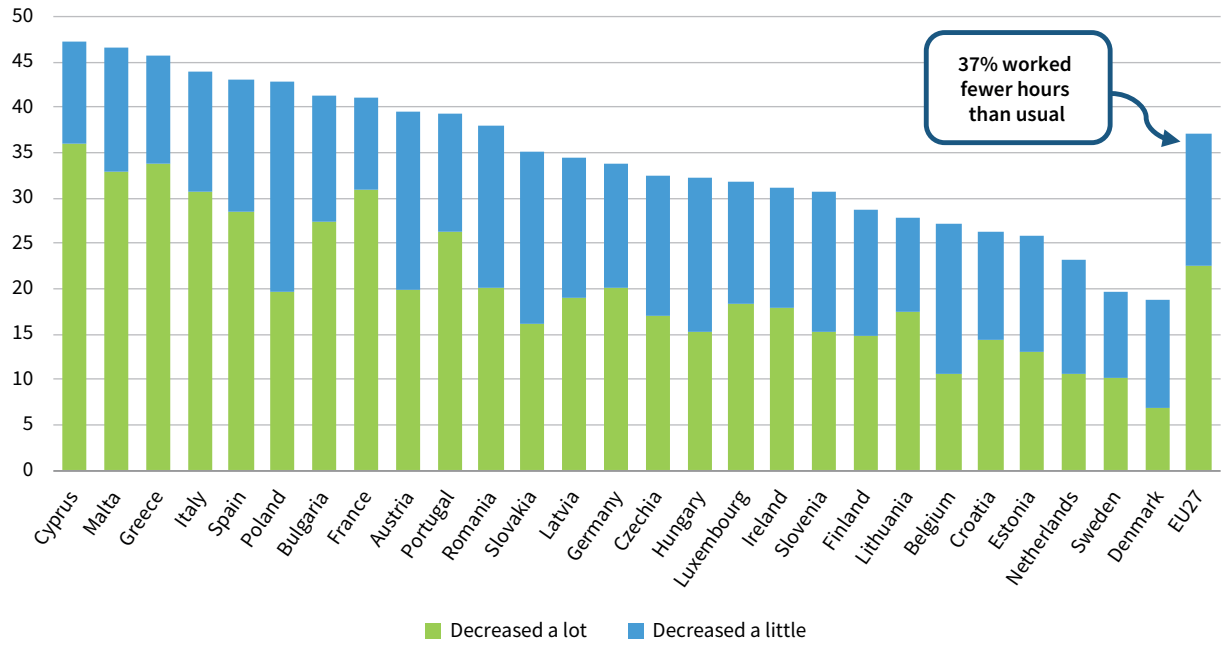
Remarkably, the EU unemployment rate rose only marginally in reaction to one of the most extraordinary disruptions to employment and work in living memory, edging up from 6.6% to 6.7% in the six months between Q4 2019 and Q2 2020. The discrepancy between this small rise in the unemployment rate and the large fall in employment arises from the fact that most of those who lost their jobs transitioned not into unemployment (seeking work and available for work) but inactivity (not seeking work and having left the labour market). The net flow out of employment into unemployment (+1.2 million) was less than half of the net flow from employment to inactivity (+2.6 million).

Safeguarding jobs

The last recession has driven home the importance of maintaining workers' attachment to the labour market for economic recovery once a crisis abates, enabling businesses to retain skills, expertise and labour. Hence the rapid implementation of short-time working and temporary layoff schemes and the extension of emergency support to workers not normally covered by unemployment protections – casual workers and self-employed people, for instance. These efforts were backed up by the EU SURE (Support to mitigate Unemployment Risks in an Emergency) instrument, which made €90.6 billion in loans available to 18 Member States on favourable terms. Some 40 million European workers were estimated to be in receipt of some state support in May 2020.

Eurofound's *Living, working and COVID-19* e-survey captured the fall in labour input in July 2020, with 37% of respondents reporting that their working hours had decreased during the pandemic (Figure 1).

Figure 1: Individuals reporting a decrease in working hours (%), by EU Member State, July 2020



Notes: *Low reliability for Cyprus, Latvia, Luxembourg, Malta and Poland. Min: Denmark – 19%; max: Cyprus – 47%.*
Source: *Living, working and COVID-19 e-survey, 2nd round*

Workers employed in commerce and hospitality and in construction were most affected by reductions in working time, with 52% of workers in both sectors on reduced hours. Similarly large numbers of workers in transport (48%) and in industry (47%) saw their working time fall.

Data from the EU Labour Force Survey (EU-LFS) estimate that working hours overall declined by 14–15% in the second quarter of 2020. Two-thirds of this decline is attributable to temporary layoffs, while the remainder is more or less evenly split between reductions in headcount employment and working hours.

Measuring a labour market in standstill

With many workers officially employed but not actually working for much of the year and more workers transitioning into inactivity than unemployment, the unemployment rate has proven to be an unreliable gauge of the labour market since the COVID-19 outbreak. Analysts have turned to other indicators to provide a truer picture. Principal among these is the percentage of EU workers not working in a specific reference week. This figure captures absences from work due to sickness, annual leave and so on, but in the context of the pandemic, it is a proxy for the workers on temporary layoff or short-time working. In pre-pandemic 2019, according to the EU-LFS, the percentage of workers not working in the reference week of Q2 2019 was around 7%. In the corresponding week of 2020, the percentage had more than doubled to 17%: one in six workers was not working in that second quarter. Those who were, were working one hour less a week on average.

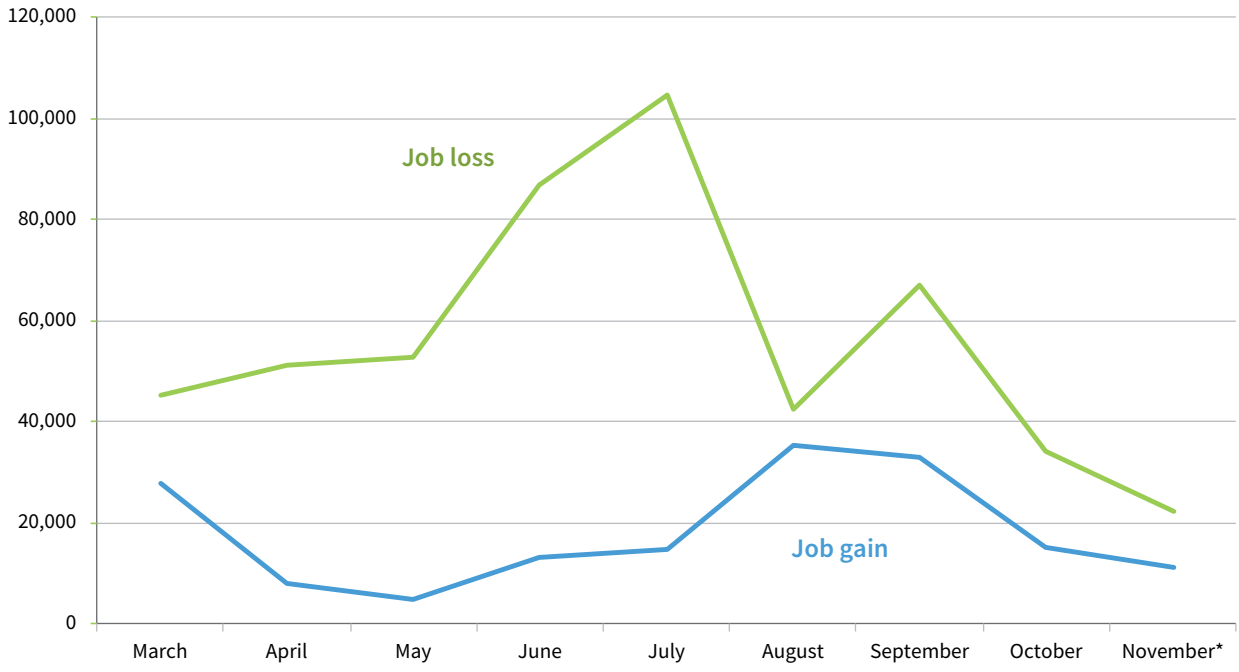
See-sawing of job loss

Eurofound's European Restructuring Monitor (ERM), which records large-scale company and public sector restructurings that are announced in European media, shows that job loss in 2020 began to rise steadily with the introduction of pandemic confinement measures in March, with a jump from May to mid-summer. Announced job losses peaked in July at 104,475, the highest figure recorded in any month since 2011, and then fell. There is as yet no evidence of a pick-up in restructuring job loss as a result of second and third waves of the pandemic. There is evidence, however, of some recovery in hiring and business expansion cases.

Overall, between 1 March and 23 November 2020, the ERM documented 506,168 jobs lost in large restructurings (Figure 2). It was estimated that around two-thirds of this restructuring job loss was attributable at least in part to the pandemic.

While businesses had recourse to employment protection schemes, this was not the only factor that suppressed job losses. In the initial stages of the pandemic, previously announced collective redundancies were deferred, either because firms were

Figure 2: Announced restructuring job losses and job gains, EU27, Norway and the UK, Q1 2019–Q2 2020



Note: * *Up to 23 November 2020.*
Source: *ERM 2020*

no longer in a position to administer dismissals, with staff on pandemic-related leave (as occurred with Ford in Valencia), or because governments suspended usual collective redundancy procedures (as occurred in Italy and elsewhere).

Furthermore, in most Member States, access to short-time working and similar schemes for companies was linked to protection against dismissal, either for employees individually or for the entire workforce of businesses claiming this form of government support. In September 2020, only Belgium, Finland, Germany, Hungary, Ireland and Sweden did not offer such protections in legislation. In Germany, however, protection against dismissal was part of many industry-level collective agreements regulating the terms and conditions linked to short-time working.

Contact-intensive sectors suffered most

Any sector involving the movement or interaction of people suffered a severe setback in 2020. Among the companies announcing job loss, a large number came from the travel and transport-related sectors. With flight frequency falling by over 90%, airlines including Air France, British Airways, KLM, SAS, Wizz Air and Ryanair all announced layoffs, while Flybe declared bankruptcy.

One of the largest restructuring announcements came from German airline Lufthansa, which announced in December that it would lay off more than a quarter of its workforce as a result of declining air travel during the pandemic. It anticipated that it would cut 10,000 jobs from its German workforce and 29,000 jobs outside Germany.

Businesses in leisure and entertainment sectors also came under exceptional strain. The world's second-largest cinema chain Cinemaworld announced in October 2020 that it would temporarily suspend operations in many countries, entailing 45,000 job losses. The group's primary brands in Europe are Cineworld and Picturehouse in Ireland and the UK and Cinema City in eastern and central Europe. The job losses are directly attributable to COVID-19 confinement measures that have mandated cinema closures.

EU-LFS data provide a broader view of the pandemic's impact on different sectors. The data show that the sector that felt the economic freeze more than any other up to the middle of 2020 was hospitality. And within hospitality, as Figure 3 illustrates, accommodation was hardest hit, losing a quarter of its workforce in the year from June 2019 to June 2020. Of the remaining workers, just over half were on furlough (temporary layoff) in a given week during the second quarter of 2020, and those who continued to work worked on average 5.4 hours less than in a customary working week. Taken together, these data imply that paid working hours dropped by around two-thirds in the accommodation sector.

Figure 3: Employment impact of COVID-19 – sectors most affected, EU27, Q2 2019–Q2 2020

	Headcount change (%)	Change in weekly hours worked	Employees not working (%)
	Q2 2019–Q2 2020	Q2 2019–Q2 2020	Q2 2020
Accommodation	-22.9	-5.4	50.9
Food and beverage service activities	-17.9	-2.9	47.4
Gambling and betting activities	-10.5	-1.3	49.3
Sports activities and amusement and recreation	-5.4	-2.2	42.6
Air transport	-9.3	-6.8	44.8
Travel agency and tour operators	-19.9	-7.2	39.5
Other personal service activities	6.6	-1.7	35.3
Manufacture of leather and related products	-9.2	-0.7	31.3
Creative, arts and entertainment activities	-7.0	-3.6	34.4
Manufacture of textiles	-1.3	-2.3	24.8

Note: *NACE Rev 2.0 classification of economic sectors.*
Source: *EU-LFS (Eurofound calculations)*

Figure 4: Employment impact of COVID-19 – sectors least affected, EU27, Q2 2019–Q2 2020

	Headcount change (%)	Change in weekly hours worked	Employees not working (%)
	Q2 2019–Q2 2020	Q2 2019–Q2 2020	Q2 2020
Telecommunications	20.6	-0.5	4.4
Computer programming, consultancy, etc.	18.5	-0.4	1.1
Insurance, reinsurance and pension funding	17.5	-0.8	2.8
Manufacture of basic pharmaceutical products	15.1	-0.2	2.3
Programming and broadcasting activities	12.5	-1.3	3.7
Information service activities	11.7	0.1	1.1

Note: *NACE Rev 2.0 classification of economic sectors.*
Source: *EU-LFS (Eurofound calculations)*

Food and beverages and travel agencies – two other hospitality sectors – suffered large job losses, while travel agencies and air transport saw big reductions in working hours.

Meanwhile, more knowledge-intensive service sectors, where many jobs are 'teleworkable', were less affected by the pandemic. There was robust headcount growth and less recourse to furloughing in telecommunications, computer programming and consultancy, broadcasting, and information service activities (Figure 4).

Nevertheless, as governments wind down support measures, the impact of COVID-19 is bound to be felt more keenly across all sectors and not just in a few particularly vulnerable areas. Once economies fully reopen, unemployment will surge if businesses kept afloat by publicly funded lifebelts find themselves no longer viable in the new economic climate and close their doors permanently.

Event: How COVID-19 affects Europeans and the EU labour market

25 June 2020

At a joint webinar hosted by the International Labour Organization (ILO) and Eurofound, a panel of experts from both organisations discussed their work on the initial effects of the COVID-19 pandemic on the European labour market, how Europeans were experiencing the crisis and the policy responses of EU Member States and social partners to the pandemic. The panellists noted that, compared to other regions, Europe experienced large losses in hours worked and that the crisis had hit young people hardest and fastest. They also considered possible solutions to mitigate labour market disruption in the wake of COVID-19.

- In the first six months of 2020, the employment headcount in the EU fell by 5.7 million. Twice as many workers became inactive (leaving the labour market entirely) as became unemployed as a result of job loss. Because of this and because many workers were furloughed or placed on short-time working schemes, the unemployment rate has not been a reliable measure of the state of labour markets during the COVID-19 pandemic.
- Large-scale job loss due to restructuring announced in the media peaked in July. From March to November 2020, two-thirds of restructuring job loss was attributable at least in part to the pandemic. But there was no evidence of a resurgence in job loss as a result of later waves of the pandemic.
- Any sector involving the movement or interaction of people suffered a severe setback in 2020. Several airlines announced job cuts, for instance. Hospitality was worst affected as a result of the restrictions placed on the physical proximity of people and economic activity. Within that sector, the accommodation subsector was hardest hit; it is estimated that paid working hours dropped by around two-thirds here.

Read more

Topic: *Employment and labour markets* eurofound.link/employment

Report: *COVID-19: Implications for employment and working life* eurofound.link/ef20050

Report: *ERM report 2020: Restructuring across borders* eurofound.link/ef20024

Report: *Living, working and COVID-19* eurofound.link/ef20059

First findings: *Living, working and COVID-19: First findings – April 2020 (PDF)* eurofound.link/ef20058

Blog post: *COVID-19: A tale of two service sectors* eurofound.link/ef21063

Blog post: *Coronavirus: A labour market earthquake* eurofound.link/ef20052

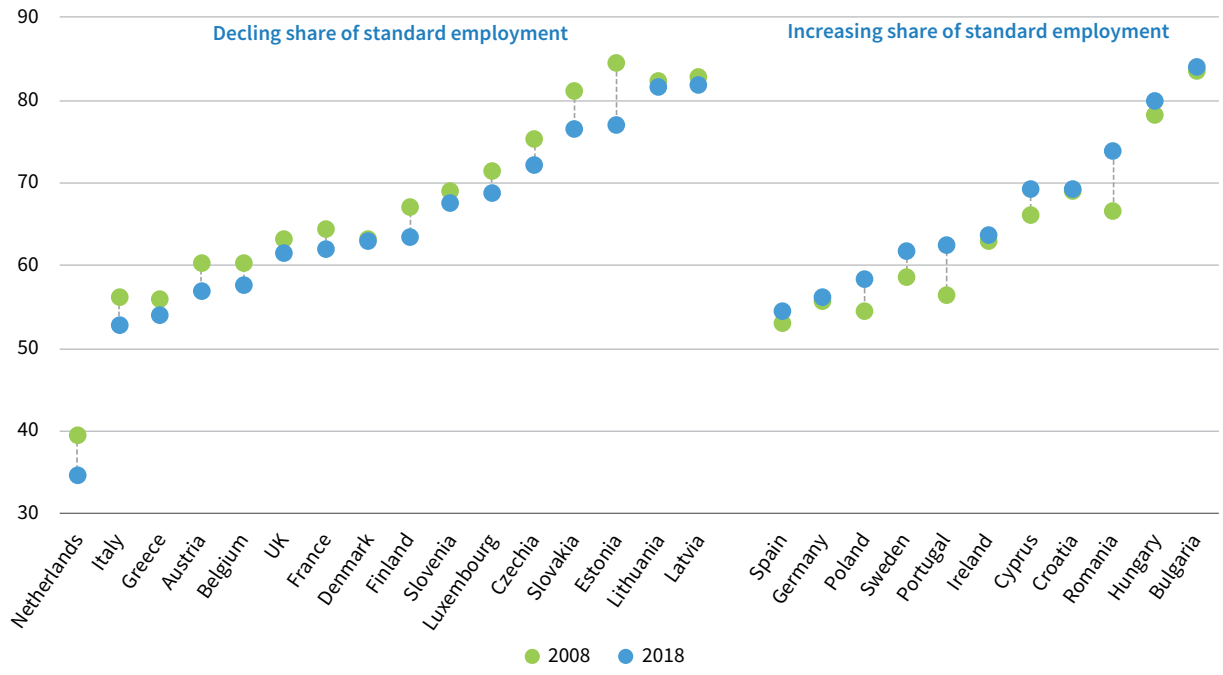
2 Flexibility versus fairness

While the level of job loss following the COVID-19 lockdowns has been modest so far, the cuts that have been made have affected temporary employees most. As in most crises, non-renewal of temporary contracts was the first workforce adjustment made by employers. The EU saw a 16.7% year-on-year fall in fixed-term employment up to June 2020, and this loss (amounting to 4.3 million jobs) accounted for well over three-quarters of the decline in EU employment. In Spain, where around one-quarter of all jobs are temporary, nearly a million such jobs disappeared in the 12-month period. Permanent employment remained stable during the pandemic, however, thanks to the extensive implementation of employment protection measures.

The resilience of the permanent full-time job during downturns in the business cycle explains why it remains the gold standard in employment. Designated as 'standard employment', permanent full-time jobs constitute 6 out of 10 jobs in the EU. Several Member States deviate from the average – one clear example is the Netherlands, where just one-third of the workforce is in a standard employment relationship – and, as Figure 5 demonstrates, a majority have experienced falls in the prevalence of this type of contract since 2008.

The rest of the labour market, 'non-standard employment', falls into three principal categories: temporary employment, part-time employment and self-employment. Part-time workers make up a substantial and growing part of the labour market, representing over 20% in 2018, a 2-percentage-point increase on 2008. 'Part-time' encompasses a wide range of working hours: a growing share of workers (4% in 2018) work very short hours (fewer than 10 hours per week), while 11% work 20 or fewer hours. The share of EU employees with a temporary contract was the same in 2018 as in 2008 (14%), although an increasing proportion of temporary arrangements are short term, of less than a year's duration. The share of self-employment has been stable, too, since 2008, at around 16% of the labour force, although part-time self-employed and self-employed people without employees account for increasing shares.

Figure 5: Relative size of standard employment (%), EU Member States and the UK, 2008 and 2018

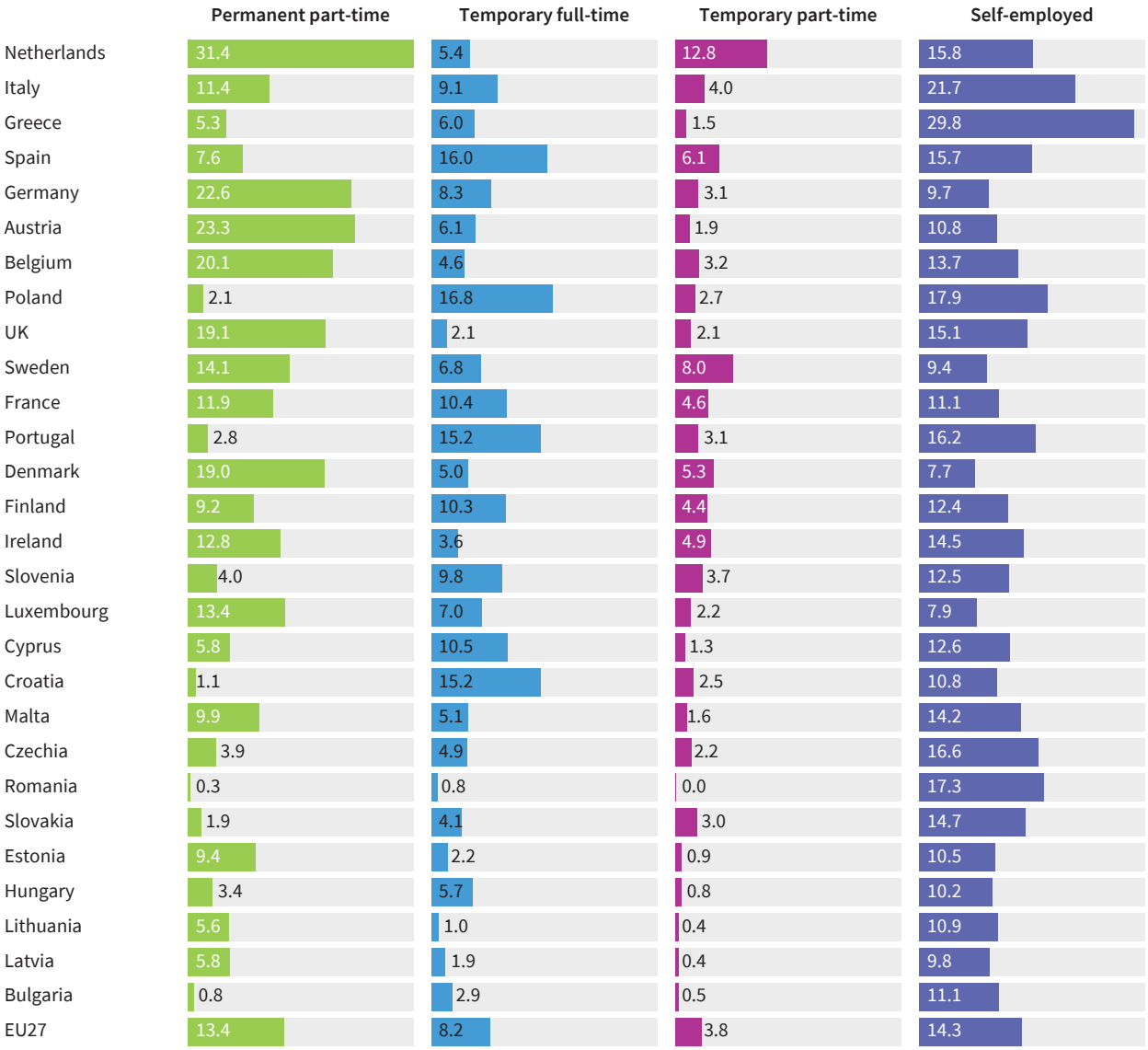


Notes: *Malta is excluded as data were not available for 2008. 2008 min: Netherlands – 39%; max: Estonia – 84%. 2018 min: Netherlands – 34%; max: Bulgaria – 84%.*
Source: *EU-LFS*

Member States differ in the proportions of different non-standard categories within their labour markets (Figure 6). Poland, Portugal and Spain, for instance, depend heavily on temporary employment, the Netherlands continues to have an exceptional level of part-time working, while one in three workers in Greece is self-employed.

A significant development over the past decade has been a shift towards jobs combining these statuses – particularly permanent part-time employment, temporary part-time employment and part-time self-employment. This 'compound non-standard employment', as Eurofound terms it, is manifested in precarious statuses including casual work, zero-hours contracts, platform work and dependent self-employment. The rise in these types of contracts has contributed to a deepening of labour market divisions between well-protected workers and those with limited access to social protection and employment rights and limited representation by trade unions.

Figure 6: Shares of different types of non-standard employment, EU Member States and the UK (%), 2018



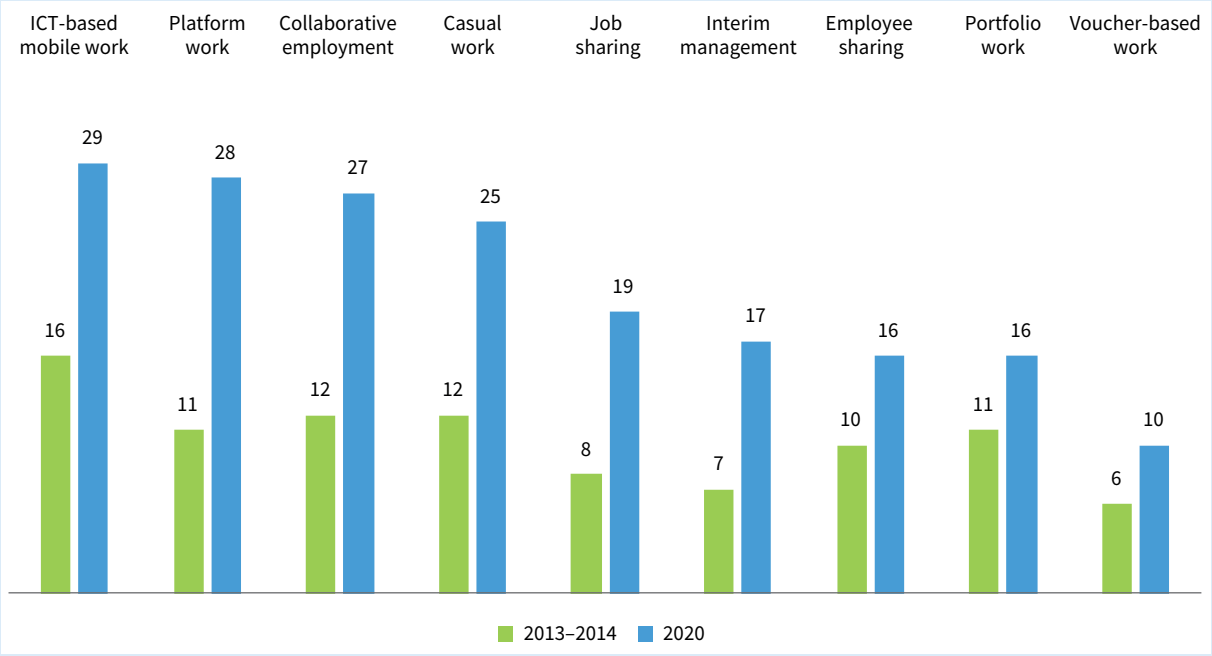
Notes: *Permanent part-time min: Romania – 0.3%; max: Netherlands – 31.4%. Temporary full-time min: Romania – 0.8%; max: Spain – 16.0%. Temporary part-time min: Romania – 0.03%; max: Netherlands – 12.8%. Self-employed min: Denmark – 7.7%; max: Greece – 29.8%.*
Source: *EU-LFS*

Emerging forms of employment

Although non-standard employment has expanded only modestly over several years, change afoot in areas of the employment landscape is transforming the traditional understanding of what a job is and how work might be configured in the future for many workers. To capture this change, Eurofound conducted a mapping exercise in 2013–2014 to identify new forms of employment that were emerging or becoming more significant in the EU. The study defined 'new' based on any of three criteria: a change in the traditional relationship between employer and employee, unconventional patterns or place of work, or the irregular provision of work. The exercise identified nine new forms, shown in Figure 7.

A follow-up study in 2020 showed that, since then, all these forms of employment have become more prevalent. ICT-based mobile work – work on the move, outside the employer's premises, enabled by ICT – was the most common form in 2013–2014, when it was present in 16 countries; it is now a significant presence in all EU countries as well as in Norway and the UK. Casual work, previously found to be new in 12 countries, exists in 27 as of 2020. The rise in platform work (discussed in the next chapter) is particularly striking; it is now present in 28 out of 29 countries surveyed.

Figure 7: New forms of employment, prevalence in 2013–2014 (26 European countries) compared with 2020 (28 European countries)



Notes: *The 2013–2014 mapping covered the EU28 except for Estonia and Latvia; the 2020 mapping covered the EU27, Norway and the UK. The questions asked also differed slightly: whether an employment form was new since about 2000 versus whether an employment form existed in the country in 2020.*
Sources: *Eurofound (2015),* New forms of employment; *Eurofound (2020),* New forms of employment: 2020 update.

The growth in these forms of employment is driven by societal and economic trends. Digitalisation is clearly a major impetus behind ICT-based mobile work and platform work, but demand by business for workforce flexibility around working time is also driving the growth in platform work, and casual work too.

Employment status not always a choice

Temporary and part-time forms of employment contribute to a balanced labour market that can match the demand for labour and respond to changes in that demand. Self-employment is at the heart of economic dynamism, the starting point of entrepreneurialism. But it is not uncommon for part-time, temporary or self-employed workers to be in that status involuntarily, to want a permanent full-time job because a decent income, stability or career prospects are unattainable in their non-standard status.

Most part-time workers choose to work reduced hours – often as a means of combining work with the care of children or other dependants, or of combining work with studies. Yet 25% of part-time workers want a full-time job, men more so than women (33% versus 22%, respectively, in 2018). Involuntary self-employment is at a similar level. Nearly a quarter of self-employed workers in the EU27 and the UK opted for self-employment because they had no other alternatives for work, according to the 2015 European Working Conditions Survey (EWCS).

> **Most temporary employment is involuntary: 60% of temporary workers say they are in temporary jobs because no permanent alternative is available.**

By contrast, most temporary employment is involuntary: 60% of temporary workers say they are in temporary jobs because no permanent alternative is available. The preference for standard employment stands to reason: temporary employees can very quickly find themselves without work when the economy enters a downturn, as it just did in 2020. Moreover, the spectre of insecurity is always present. Data from Eurofound's 2016 European Quality of Life Survey (EQLS) showed that 59% of workers with a fixed-term contract of less than 12 months and 34% of those with a fixed-term contract of more than 12 months expressed a moderate to high level of job insecurity – the belief that they could lose their jobs in the coming 6 months.

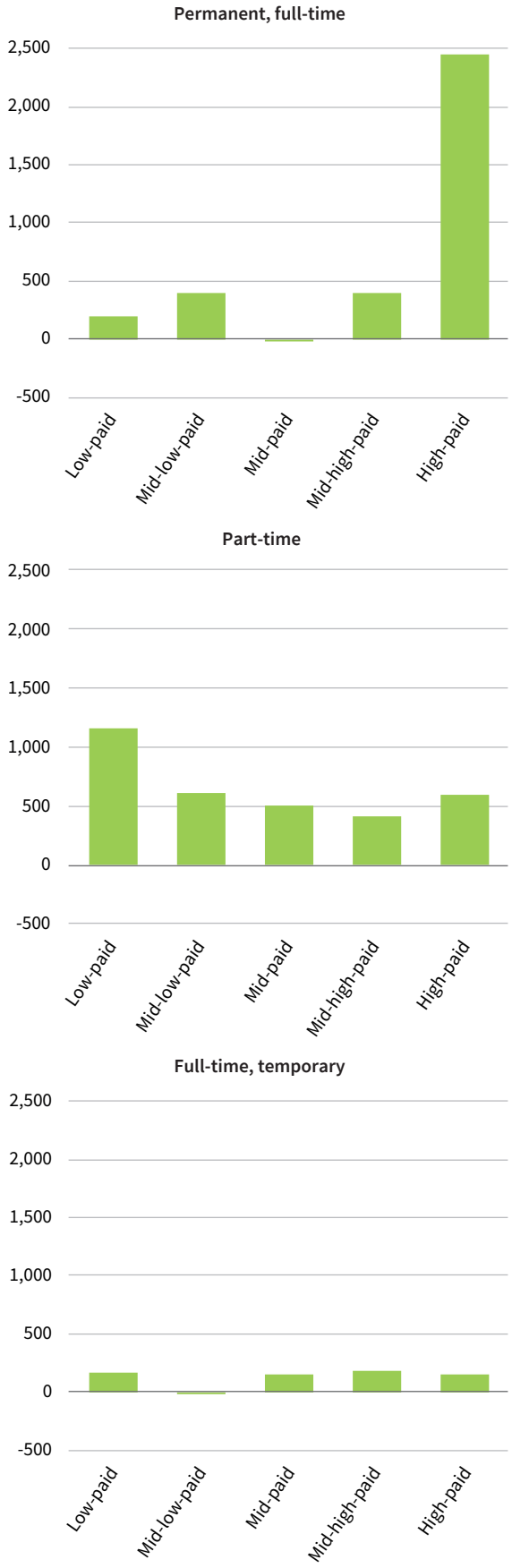
Incentivising transitions from temporary contracts to permanent contracts has become central to employment policy in some countries, especially those where temporary employment is prevalent and labour markets are segmented. The European Pillar of Social Rights, in stating that the 'transition towards open-ended forms of employment shall be fostered', puts an onus on all Member States to create a path out of temporary status for workers. However, workers remain stuck in temporary status despite policy efforts. Evidence from the EU-SILC highlights that countries where temporary employment constitutes a high proportion of the labour market, such as Spain (23% in 2016), tend to have low rates of transition to permanent contracts. Fewer than one in six temporary contract workers in Spain moved to a permanent contract in 2015–2016. Transition rates are also low in France, Greece and Malta. By contrast, Austria, Denmark, Latvia, Romania and Sweden have much lower shares of temporary employment (7% or less) and much more movement into permanent employment.

Pay disadvantage

Fair pay is an abiding issue in non-standard employment; the evidence consistently indicates that workers on non-standard contracts earn less than permanent employees for equivalent work. The European Commission in 2018 reported a significant wage gap, of between 13% and 21% depending on the Member State, to the disadvantage of temporary employees relative to permanent full-time staff.

The pay differential based on the standard–non-standard dichotomy is also illustrated by Eurofound's analysis of employment change across job–wage quintiles, which has found that the new high-paying employment is strongly biased towards permanent jobs. This analysis categorises all jobs in the EU into five categories of equal size (quintiles) according to wage, from lowest paid (quintile 1) to highest paid (quintile 5) and shows how employment has grown or contracted across the quintiles. The data from 2011 to 2016 indicate that most new net employment was created in non-standard employment. Furthermore, these data show that while non-standard employment contributed to employment growth across the wage distribution, most growth in permanent jobs occurred in the highest-paid quintile (Figure 8).

Figure 8: Net employment change (in thousands), by contract type, EU27 and the UK, 2011–2016



Source: *EU-LFS and Structure of Earnings Survey (SES), Eurofound calculations*

Less access to benefits and training

Non-standard employment is disadvantageous compared to permanent full-time work in other areas, such as access to training, occupational health and safety, and social protection. EWCS 2015 data, for instance, show a gap of 14 percentage points between the proportions of permanent and temporary employees who attended a training course in the 12 months prior to being surveyed (Figure 9). Similarly, 32% of part-time workers had attended training compared to 41% of full-time workers. These gaps have widened since 2005, despite the introduction of EU legislation to ensure equal treatment for part-time workers in 1997 and temporary workers in 1999.

Figure 9: Participation in paid training (%), by contractual status, EU27 and the UK, 2005, 2010 and 2015

Source: *EWCS 2005, 2010, 2015*

Table 1: Share of non-standard workers not covered by social benefit schemes, EU27 and the UK, 2014

	Sickness benefit (%)	Unemployment benefit (%)	Maternity benefit (%)
Temporary full-time workers	5.1	31.9	8.5
Temporary part-time workers	9.7	38.7	12.7
Permanent part-time workers	1.8	0.6	1.8
Self-employed individuals	38.0	54.5	46.1
Permanent full-time workers	0.0	0.1	0.1

Source: *European Commission, adapted from* Non-standard employment and access to social security benefits*, Research note 8/2015 and* Impact assessment: Proposal for a Council Recommendation on access to social protection for workers and the self-employed*, SWD(2018)70 final*

Workers on non-standard contracts and the self-employed often have less formal or less effective coverage by social protection schemes. Table 1 shows the estimated percentages in the different categories who are not eligible for sickness, unemployment or maternity benefit. Such limited coverage results from a number of factors, including income thresholds and qualification periods.

> The COVID-19 crisis is similar to the economic crisis of 2008–2013 insofar as short-time working schemes primarily benefited workers on standard contracts.

Employment protection schemes typically do not include workers on non-standard contracts. However, during the COVID-19 pandemic, most Member States extended eligibility criteria temporarily to include temporary workers; only seven explicitly included some categories of casual worker, however. In light of the high degree of job loss among temporary workers, these actions do not appear to have significantly contributed to safeguarding their employment. In this respect, the COVID-19 crisis is similar to the economic crisis of 2008–2013, during which short-time working schemes primarily benefited workers on standard contracts.

Non-standard surge in store?

The Part-time Work and the Fixed-term Work Directives underdelivered on their goals of equal treatment of workers on non-standard contracts, as inequalities and differences in access to benefits persist across the EU. The failure is unlikely to rest only with the provisions of these directives; the amount of leeway accorded to Member States in shaping specific measures – for instance, with regard to the prevention of abuse of fixed-term contracts – is also a factor. New legislation in response to the European Pillar of Social Rights may help to rectify the situation, including the Directive on Transparent and Predictable Working Conditions and the Work–life Balance Directive, both adopted in 2019. The Council Recommendation on access to social protection for workers and the self-employed should also make a difference if Member States follow through.

If, as predicted, unemployment rises in 2021 as the pandemic ebbs and interventions to support employment are phased out, experience suggests that employers will default to temporary hiring practices in response to the uncertain economic climate. A loose labour market with a large pool of workers competing for the same jobs could lead to poorer employment conditions, as employers are less obliged to concede to workers' preferences. We may see a surge in involuntary flexible work arrangements, making it all the more important that legislative protections are enforced across the bloc.

- Temporary workers continue to be the most vulnerable group of workers when a crisis strikes the economy: 17% of temporary workers lost their employment in the year to June 2020; the overall fall in employment was 2.4%.
- Six in 10 temporary workers choose a temporary job only because a permanent job is not available. Policies to incentivise transitions from temporary contracts to permanent contracts have shown limited success in countries where temporary employment is prevalent and labour markets are segmented.
- Despite EU directives to ensure equal treatment of part-time and temporary workers, workers employed on these contracts continue to be disadvantaged in terms of pay, social protection benefits and access to training.

Read more

Topic: *Non-standard employment* eurofound.link/nonstandardemployment

Flagship report: *Labour market change: Trends and policy approaches towards flexibilisation* eurofound.link/ef19034

Report: *New forms of employment: 2020 update* eurofound.link/ef20027

Policy brief: *Does employment status matter for job quality?* eurofound.link/ef18021

Policy brief: *At your service: Working conditions of interactive service workers* eurofound.link/ef20016

Blog post: *Economic downturns expose the vulnerability of a growing number of precarious workers* eurofound.link/ef20055

Blog post: *New forms of employment in Europe – How new is new?* eurofound.link/ef20086

3 Tilting the scales in platform work

If any doubts lingered over the vulnerability of platform workers in hard times, COVID-19 surely dispelled them. When government orders restricted the public to accessing essential services only, large numbers of platform workers doing customer-facing tasks, such as giving lifts or cleaning houses, lost their access to work overnight. Those operating as independent contractors – which is most – were unlikely to have been covered by social protection insurance, and how they fared financially depended on the catchment of the emergency benefit schemes instituted by governments.

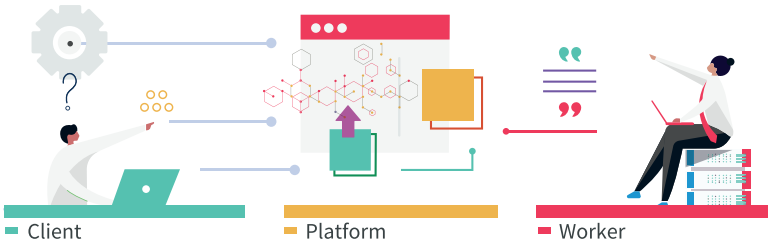
On the other hand, platforms that provided services designated as essential – food and parcel delivery, for instance – saw escalating demand, and many broadened their offerings to take advantage of the changed climate. The workers providing these services helped to keep society ticking over during lockdowns, yet they cannot be said to have had a 'good pandemic'. For some, competition for work intensified as other newly unemployed workers swelled their ranks, and so take-home pay dropped, or they experienced long and unsocial working hours, higher work intensity and stress. For all, there was the risk of exposure to the virus to contend with, and the prospect of unpaid self-quarantine if confirmed as a close contact of someone with the virus. For those who fell ill with COVID-19, the refusal of platforms to cover sick pay left them reliant on their own resources or forced them to return to work before they had fully recovered.

But with public concern over the risk posed by infected workers and the seriousness of the pandemic becoming apparent, a number of platforms revised their policies, in some cases providing income support to sick workers and guaranteeing the retention of bonus or incentive levels if they had to withdraw from work temporarily. Other platforms gave more limited support, providing workers with advice on safe delivery procedures and personal protective equipment. However, the actual accessibility and effectiveness of such initiatives is unclear.

What is platform work?

Platform work uses an online platform to enable organisations or individuals to access other organisations or individuals to solve specific problems or to provide specific services in exchange for payment.

Therefore, there are three parties involved, connected thanks to an advanced algorithm.

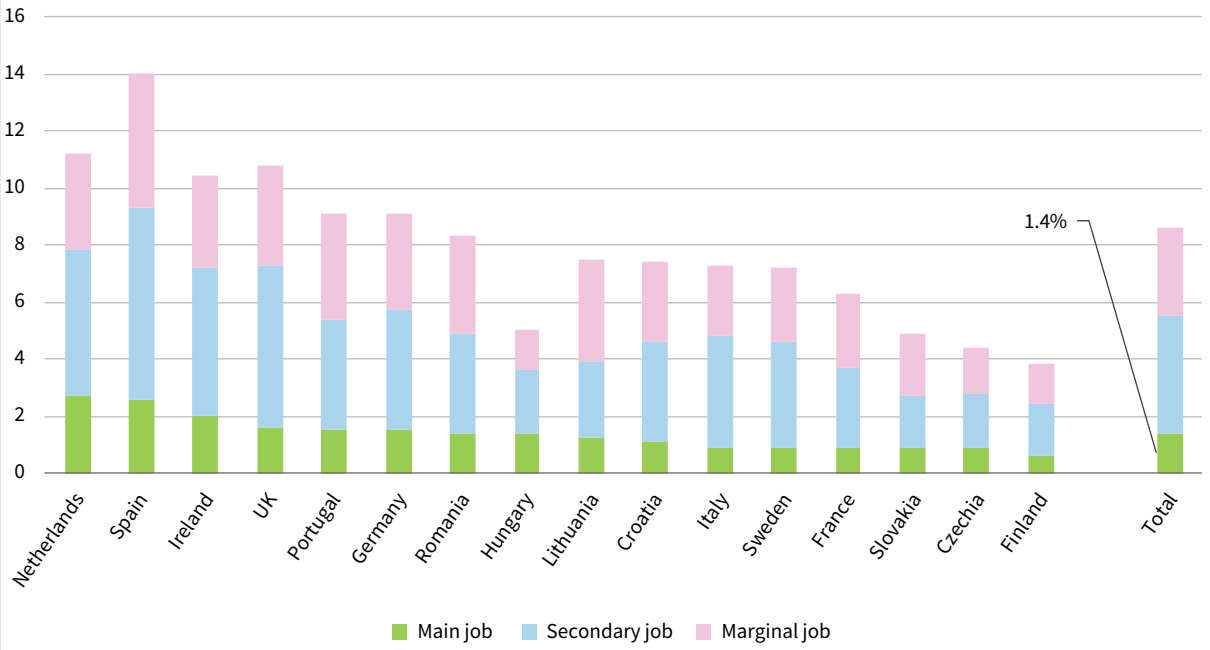


Larger tasks are divided into independent smaller tasks, which are carried out on-demand by platform workers, resulting in a widespread division of labour.

Platform work – A growing economic force

Platform work has made visible inroads into European labour markets but does not yet represent a major segment. Current best estimates are that 1–2% of Europeans are doing this form of work as their main job (Figure 10). As the economy and society digitalises and more services become available through this channel, online platforms are expected to take over an increasing share of commerce, with a corresponding expansion of the number of platform workers.

Figure 10: Prevalence of platform work (%), by intensity of involvement, in 15 Member States and the UK, 2018



Notes: *Min (total): Finland – 3.8%; max (total): Spain – 14%.*
Source: *European Commission (2020),* New evidence on platform workers in Europe: Results from the second COLLEEM survey

Platform work redefines long-held understandings of work: for instance, there is no job but a discrete set of tasks; there is no line manager but a digital algorithm that matches workers and clients, and to some extent defines work organisation and monitors performance; there is no performance assessment but a system of ratings.

It can take several forms, depending on the characteristics of tasks and the business models of the platforms. Eurofound has identified 10 main types across Europe, and a major distinguishing feature centres around which of the three participants in the relationship decides the allocation of tasks. In one type, for instance, the decision-maker is the client, who selects a worker to perform a task, based on a profile posted on the platform – this task could be performed online (writing a text, for example) or in person (such as fixing a dripping tap). The dominant type at present, in terms of market size and numbers working in it, is the type where the platform is the decision-maker and an algorithm assigns tasks – the type epitomised by the likes of Uber and Deliveroo, platforms often in the media spotlight because of the fractious relationships they have with workers and the traditional economy.

Platforms calling the shots

The pandemic has added further heat to the burning question around platform work: what is the status of workers? Platforms refused to cover sick pay because their stance is that workers are independent contractors and, hence, responsible for their own social insurance. But workers have repeatedly disputed that they should be treated as contractors when the relationship is one where a platform acts to all intents and purposes as an employer – subordinating them, controlling when and where they work, and monitoring their performance of tasks. The issue has been argued in dozens of court cases across Europe, and the majority of recent rulings have come down in favour of the workers.

Working conditions in platform work are often poor: insecure work, low income, elevated risk to health and safety, and little by way of career development. But if the pandemic leads to large-scale job loss, platform work, with its low entry barriers and ostensible flexibility, is likely to attract unemployed jobseekers and provide work for those who are always worst hit by economic slumps – young, low-skilled and migrant workers mostly. And while the creation of jobs is welcome, the power of the platforms to dictate terms and conditions will be strengthened further when labour supply exceeds demand and workers compete for work.

The fragmentary approach to regulation on the part of Member States and the EU has strengthened the hand of the platforms in the labour market. Gaps in labour law have given platforms a space in which to operate according to their own rules. These gaps are why the platform determines the status of workers, not labour law; why clients might have no comeback if there is any damage, delay or failure in the performance of the service; why platforms are not burdened by the same rules that competitors in the traditional economy must comply with.

Pinning down worker status

Removing ambiguity around the employment status of platform workers would clarify the responsibilities of platforms towards the people who work through them. This demands a nuanced solution, though, because of the many forms platform work takes. A plumber operating as a sole trader and using the platform as a tool to connect with clients is in a different position from the person signed up with a food-delivery platform receiving task alerts on their smartphone, who is different again from the person doing online micro-tasks as a side-hustle.

Effort could be directed towards establishing a default employment status by type of platform work: for example, ‘employee’ status in cases where the platform strongly determines work organisation, income or the use of surveillance or ‘self-employed’ status for workers using the platform as an intermediary. Platforms and workers could have the option to apply for a more appropriate status if the default were inappropriate.

More clarity around the criteria differentiating between employees and self-employed people – an issue that some Member States are already working on, in the broader context of the labour legislation, to deal with inadequacies in the current definitions – could have the outcome that different types of platform work would more clearly fit in one or the other category. At the very least, regulations guaranteeing minimum employment standards, including social protection, irrespective of employment status, could be implemented, a move that would benefit all workers.

Squaring the circle

Regulation is a delicate line to tread. If it is overly rigid, it might squeeze the platform providers, which could drive them from the market and deter new entrants. It might also stifle innovation in the economy and cut off avenues to growth and job creation. The Commission took the first steps towards regulation at EU level in February 2021, launching a consultation of the social partners on how to improve the working conditions of platform work. In her remarks on the initiative, Executive Vice-President of the Commission Margrethe Vestager stated that the new opportunities arising from the digital economy ‘must not come with different rights’. At the same time, the business model that many of the most powerful platforms currently apply, and which has not yet yielded profits for several, relies on having thousands of workers doing low-paid tasks without incurring the overheads of having them on the payroll. How to square the circle of securing the employment rights that platform workers seek without crippling the platform companies whose business model is based on workers not having those rights may exercise policymakers for some time to come.

- Delivery platforms have been instrumental in the platform economy gaining a firmer foothold during the COVID-19 pandemic. Such is the current growth rate of online platforms, they are expected to channel an increasing amount of work in the future economy.
- The business model of the most prominent platforms – those that provide ride-hailing and food-delivery services – is built upon defining workers as independent contractors who are engaged by the platforms for the provision of services. But in practice, the platforms tend to act as employers, and workers are subordinate to and dependent upon them.
- As workers across Europe challenge the refusal of platforms to recognise their dependent status, calls have mounted for measures to tackle the poor working conditions in platform work. The European Commission has launched a consultation with the social partners at EU level on how to improve the working conditions of platform workers. It is difficult to see, however, how better working conditions could be secured within the current business model applied by the dominant platforms.

Read more

Topic: *Anticipating and managing the impact of change* eurofound.link/change
Topic: *Platform work* eurofound.link/platformwork
Resource: *Platform economy repository* eurofound.link/platformeconomy
Resource: *Future scenarios of platform work* eurofound.link/scenarios
Flagship report: *Labour market change: Trends and policy approaches towards flexibilisation* eurofound.link/ef19034
Report: *Back to the future: Policy pointers from platform work scenarios* eurofound.link/ef20012
Blog post: *Charting a positive path for platform workers* eurofound.link/ef21067

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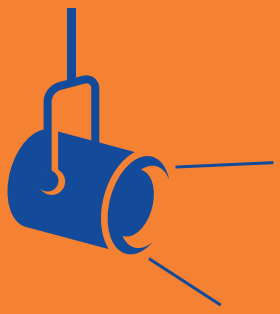


Spotlight on workplaces

4 Unlocking employee potential for a successful transition

A successful European transition to a green and digital economy is contingent upon the ability of the public and private economic realms to transform what they do and how they do it. And this in turn will depend on a workforce that not only has the skills and competencies to take on the new tasks and technologies of the future but one that is also motivated to apply those skills and competencies insightfully and creatively to generate the optimal solutions for the road ahead.

There is untapped potential within the human resources of organisations. It arises, in part, from employees' skills not being put to full use – half of EU companies have some degree of overskilling in their workforce. It arises, too, because of inadequate skills – in only 16% of companies do all workers have the necessary skills to match the job requirements. In addition, companies often fail to unlock the full potential of their employees, because they insufficiently motivate employees to give the discretionary effort ('going the extra mile') that really is the catalyst for outstanding performance. The challenge for organisations, then, is to create the right conditions for employees to apply the skills they have effectively, to ensure that they acquire the skills they need, and to motivate them to give more than the job description requires.

Those 'right conditions' are known: they are based on workplace practices that invest in employees and involve them in the decision-making of the business. Eurofound has identified these practices by analysing successive waves of data gathered by its European Company Survey (ECS) and by looking at the different approaches companies take to job design, organising work, assigning responsibility, rewarding performance, mobilising training and so on. Because Eurofound's work gives equal weight to beneficial outcomes for workers, it has been able to distinguish those practices that not only reward companies through enhanced performance but that benefit employees through enhanced workplace well-being.

Seven practices employed by win–win organisations

Eurofound's findings highlight seven key people-centred practices of successful organisations.

Job design

1. Jobs give workers challenging tasks and scope to exercise autonomy, facilitated by supportive managers.

Workplace culture

2. Employees are expected to go above and beyond narrowly defined job tasks by showing flexibility, helping and supporting colleagues, and sharing their ideas on how to improve operations.

3. Employees are motivated to make extra efforts through the liberal use of monetary and non-monetary incentives, including strong mission and vision statements, stimulating and challenging work, opportunities for training and development.

Skills development

4. Training is valued as a means to achieve organisational goals: providing workers with the skills for their current jobs, preparing workers to move to other positions within the establishment, encouraging worker contributions to workplace improvement.

5. Jobs offer comprehensive learning opportunities; management provides extensive work-related training and is willing to change work schedules to allow participation in training.

Employee participation

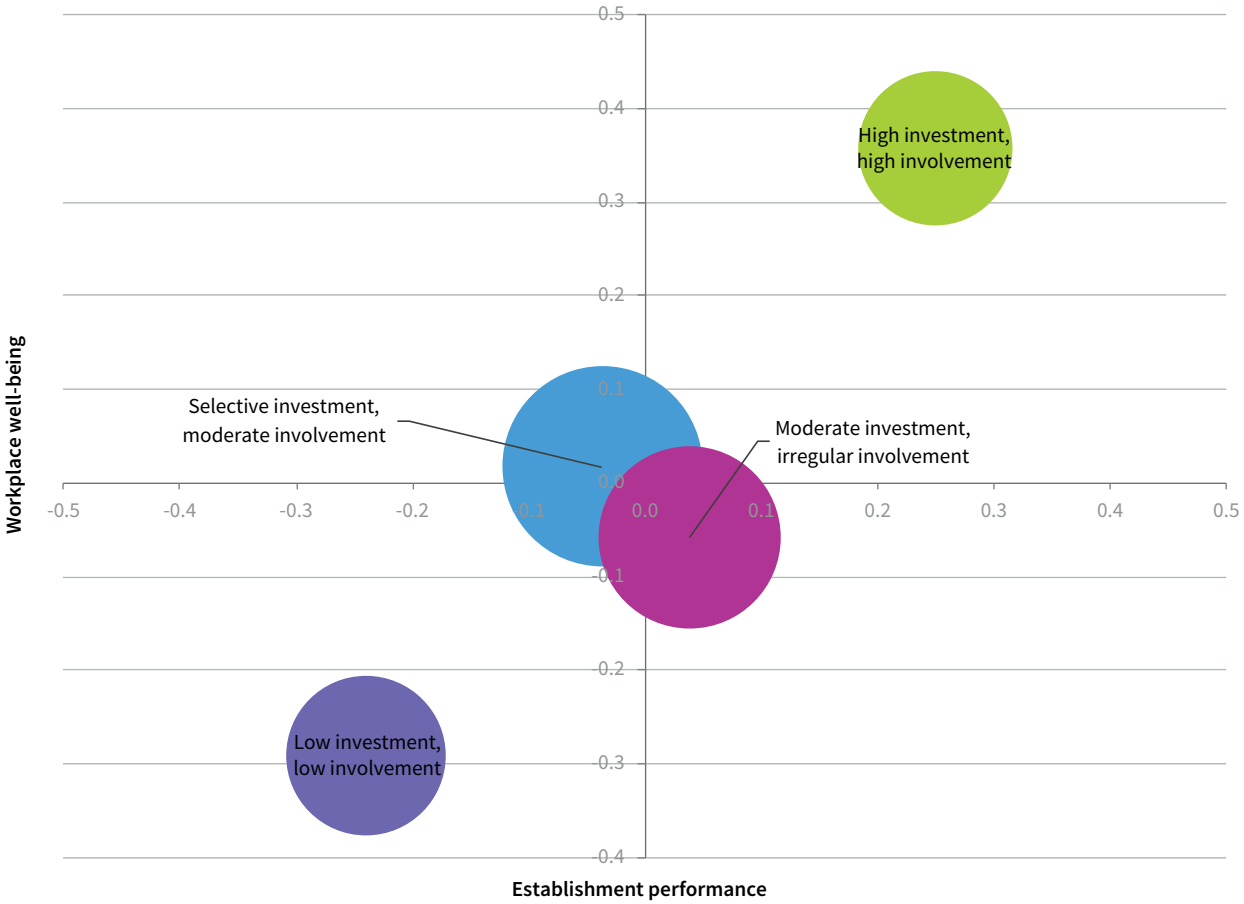
6. Employees are consulted regularly and are able to influence management decisions; management recognises the competitive advantage employee involvement can offer.

Social dialogue

7. Where social dialogue is present, the relationship between the employee representation and management is constructive and characterised by a high degree of trust. Management prefers to consult with employees and their representatives when making decisions.

The evidence also shows that companies that implement several or all of these practices perform over and above companies that implement any single practice, implying that these practices are most effective when implemented as a bundle. Eurofound has labelled such companies 'high investment, high involvement' and has found that one-fifth of EU companies are of this type. In Figure 11, these companies are represented by the green circle, and the figure shows how this type scores on workplace well-being and establishment performance. It also shows how they compare to the three other types into which the analysis classified companies. (Note: The ECS surveys single establishments or units, but for ease of reading and since most companies are single establishments, the text refers to companies.)

Figure 11: Workplace well-being and establishment performance of four types of companies, EU27, 2019



Note: *The unit of measure is the z-score, a standard score representing the number of standard deviations of the raw score from the mean score.*
Source: *ECS 2019*

Taking a people-centred approach

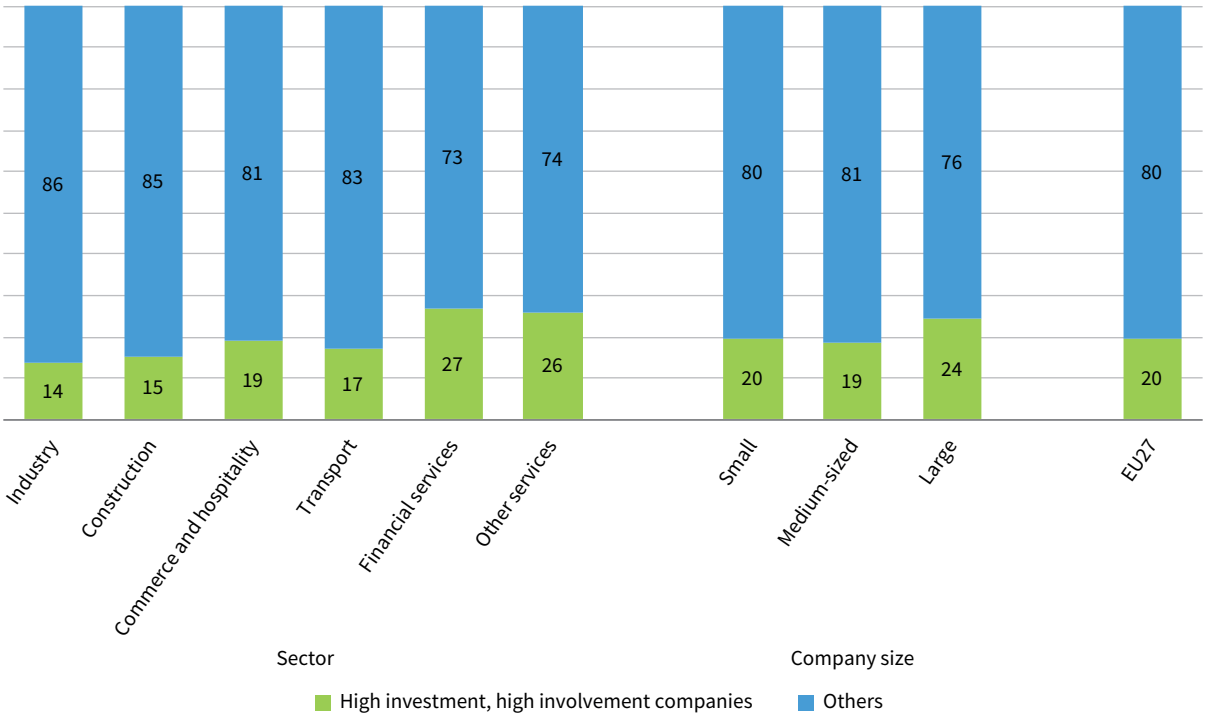
In these most successful firms, jobs are designed to be challenging, but employees have the autonomy to tackle those challenges. Learning is valued, so opportunities for learning are extensive, and work schedules are adjusted to encourage participation. Employees are expected to go beyond their job descriptions by showing flexibility, supporting their colleagues and contributing to workplace improvements. Companies back up these expectations, though, through non-monetary incentives, including investment in training and application of performance-related pay schemes.

In the vast majority of such companies, there is regular interaction between management and employees, through one-to-one meetings with line managers, staff meetings, and dissemination channels such as newsletters and email. Such mechanisms enable employees to have a say in decision-making. These companies are also more likely than average to have an employee representative body and to be members of an employer association. In terms of business strategy, they tend to be highly digitalised, are more likely to be innovative, and are able to use product innovation as a competitive strategy.

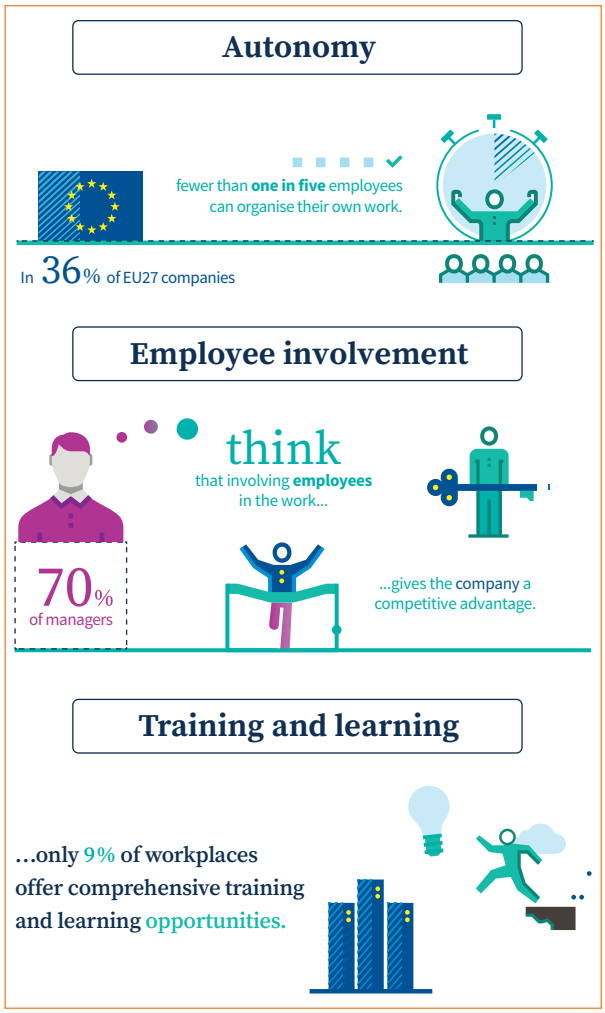
'High investment, high involvement' businesses are found pretty much everywhere (Figure 12). While they are most common in Finland and Sweden, in financial services, and among businesses that compete on quality, they can be found in all European countries, in all sectors of activity and even among businesses that compete primarily on price.

The feasibility of configuring workplaces to serve the interests of workers and bosses simultaneously holds much promise. It is dispiriting, therefore, to find that companies that take the opposite approach to investing in their workforces are just as prevalent. These companies, labelled 'low investment, low involvement', appear in the mirror quadrant to 'high investment, high involvement' companies in Figure 11. Companies in this group are likely to take a command-and-control approach to work organisation, meaning less problem-solving and exercise of autonomy on the part of employees. They are also more likely than average to offer limited training and learning opportunities. Most do not encourage their staff to perform outside the parameters of their job description, and this limited expectation is matched by a low use of incentives. In a sizeable minority, however, management's expectations of employees are high while the rewards offered remain low. Management is much less likely than average to engage with employees and seek their input; hence, employees have little influence.

Figure 12: Percentage of 'high investment, high involvement' companies by sector and size, EU27, 2019



Source: *ECS 2019*



Upskilling management

If the benefits of investing in employees are so clear-cut, why have more companies not adopted this approach? One reason is that company management is not always aware of the merits of doing so, or that it is aware but is not sufficiently skilled itself to implement change successfully. People-centred management is not only about putting facilitating practices in place but having a management layer able to support it. Poor implementation of changed practices is a recipe for failure and can lead to the abandonment of innovation in workplace practices. Therefore, upgrading the skills base of general and line managers and improving leadership skills, especially for managers who rise through the company ranks without formal management training, is critical.

Policymaking could make a key contribution here. Through the new Skills Agenda, the Commission is placing an enormous emphasis on the role of upskilling and reskilling the European workforce for a successful transition to a green and digital future. NextGenerationEU, the recovery plan to lead the EU out of the COVID-19 crisis, is equally emphatic on skills. It is likely that combining that drive for skills with a corresponding effort to create the right conditions for the most effective application of those skills could help companies develop that elusive edge to strive ahead of the rest.

Employee involvement

The findings from the ECS are echoed in research based on the European Working Conditions Survey (EWCS). The EWCS – unlike the ECS, which captures the perspectives of human resources managers – records the subjective experiences of employees themselves and provides more insight into the influence that autonomy and input in decision-making have on workers' performance. It enables exploration of the concept of employee involvement – the ability of workers to exercise independent initiative in carrying out their job and tasks, on the one hand, and to participate in decisions that affect the wider organisation, on the other. There is broad consensus that workplaces where employee involvement is high are more successful in developing the capacity for high performance in workers than workplaces with lower levels of involvement.

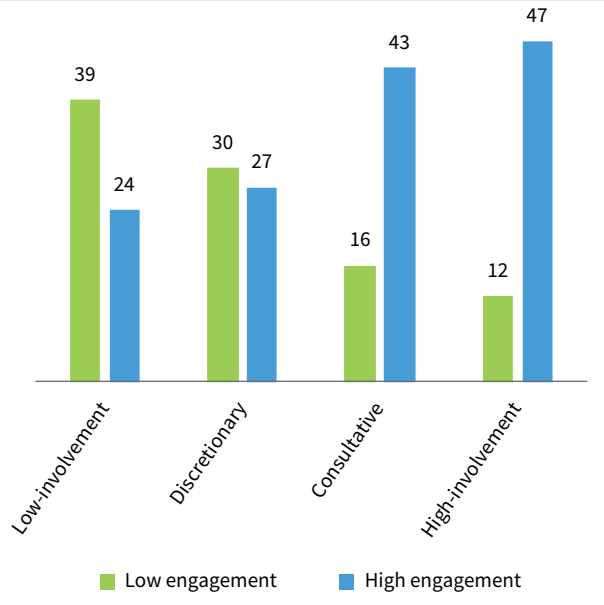
This is borne out by a Eurofound study examining whether workers in high-involvement organisations exhibit two characteristics thought to be critical for business success in a knowledge-intensive economy: work engagement and skills development.

Work engagement is indicative of a high level of employee motivation at work, which is believed to be associated with well-being, openness to learning and skills development, innovativeness and high performance. Skills development includes both formal training and informal learning that take place at work. Having the right skill set enables employees to work effectively, adjust to new task structures, contribute to innovation and retain their employability.

Work engagement

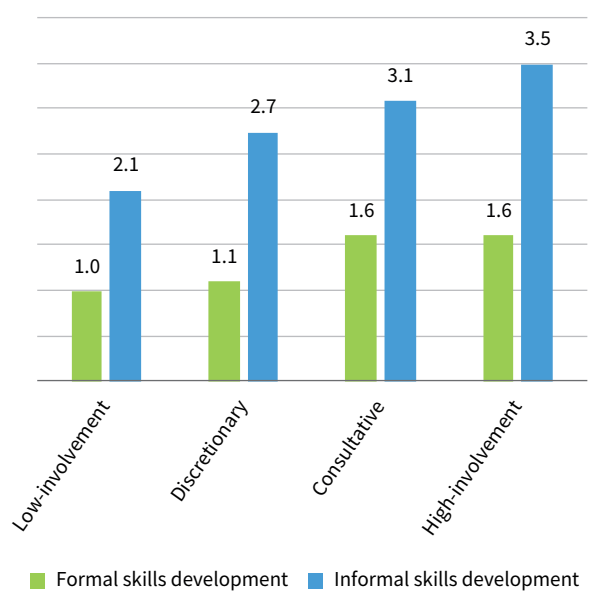
On work engagement, Figure 13 shows that nearly half of employees (47%) working in a high-involvement organisation report a high level of work engagement, almost double the share working in low-involvement organisations (24%).

Figure 13: Percentage of employees reporting low and high work engagement in four organisation types, EU27 and the UK, 2015



Source: *EWCS 2015*

Figure 14: Employee scores on formal and informal skills development indices, by organisation type, EU27 and the UK, 2015



Note: *Scale of 0–4.*
Source: *EWCS 2015*

The contrast between discretionary and consultative organisations is telling. In a discretionary organisation, employees may act autonomously in carrying out the tasks that comprise their job but have little input at organisational level. Conversely, in a consultative organisation, task autonomy is limited but employees have the opportunity to contribute to organisational decision-making. The gap between the two in the proportions of highly engaged employees (27% of discretionary organisations and 43% of consultative organisations) underlines the limitations of organisations in which employees do not participate in decisions above and beyond their immediate work task.

The analysis also found that employees who are highly engaged are more positive towards their work, are absent less often, are more likely to put in extra effort, prefer a later retirement age, and report higher levels of well-being.

Skills development

Opportunities for skills development are also greater in consultative and high-involvement organisations (Figure 14). However, the patterns for formal and informal skills development differ, with high-involvement practices being more strongly related to informal than to formal skills development. Scores on informal skills development increase substantially and linearly with the level of employee involvement.

The research also found that employee involvement makes a significant contribution to reducing the gaps in skills development between occupations at different levels of the organisational hierarchy.

High-involvement trumps on many fronts

High-involvement forms of work organisation offer a better working environment overall. Working conditions are favourable, with less physical risk, lower work intensity and greater job security. The organisational climate is more employee-oriented, and management is more supportive, acting as an enabler rather than as controller, while workers have more autonomy in their work. And this type of organisation is more likely to have employee representation, such as a trade union or works council.

Event: Workplace practices unlocking employee potential

13 October 2020

October 2020 saw the launch of the report based on the European Company Survey 2019, a project conducted jointly by Eurofound and the European Centre for the Development of Vocational Training (Cedefop). Report authors Gijs van Houten, Eurofound, and Giovanni Russo, Cedefop, presented the main findings from the survey in the first of three webinars, highlighting the workplace practices and policies that were found to facilitate and motivate employees to use their skills and knowledge to the full.

Joost Korte, Director-General of DG Employment, Social Affairs and Inclusion provided the Commission perspective alongside contributions from Agency Directors Juan Menéndez-Valdés of Eurofound and Jürgen Siebel of Cedefop. Participants joined the discussions via a Q&A and live online chat.

- The transition to a green and digital economy will be more successful if organisations can unlock the full potential of their employees so that they apply the skills they have effectively and are motivated to give more than the job description requires of them.
- The ECS 2019 provides sound evidence that companies that embrace people-centred workplace practices are more likely to achieve mutually beneficial outcomes for both themselves and the people they employ, in terms of better workplace well-being and company performance.
- Such workplace practices include designing challenging jobs that enable workers to act and problem-solve autonomously, investing in training, setting high expectations of employees and employing performance-related pay schemes as motivational tools.

Read more

Topic: *Innovation* eurofound.link/innovation

Topic: *Innovation and job creation in companies* eurofound.link/innovationjobcreation

Topic: *Work organisation* eurofound.link/workorganisation

Flagship report: *European Company Survey 2019: Workplace practices unlocking employee potential* eurofound.link/ef20001

Policy brief: *How does employee involvement in decision-making benefit organisations?* eurofound.link/ef19006

Blog post: *Managing skills requires skilled managers* eurofound.link/ef20081

5 Social dialogue: A patchwork of erosion and stability

The foundations of social dialogue have been under pressure for some time. While a high degree of stability is evident in the institutional industrial relations frameworks of many Member States, the strength of trade unions particularly is being eroded by falling membership and an ongoing decline in the numbers of workers covered by collective bargaining. The ECS 2019 found an official structure for employee representation in barely one-third of EU27 companies, be it a works council, a non-union staff representation, a trade union delegation, or some mix of the different forms.

Yet the challenges ahead make a persuasive case for strong social dialogue, where collective bargaining could be the means of securing the fair treatment of workers while providing a stable and predictable framework for companies. The most immediate challenge is the need to support employment as the pandemic situation evolves, to avoid massive job loss if large-scale business failure ensues, causing the living standards of millions to collapse. Then there is the longer-term work to manage a just transition to a green economy, to ensure that the employers and workers who have a stake in carbon-emitting industries don't lose out. And there is the latest iteration of power imbalance between capital and labour as new digital age providers of work emerge, specifically online platforms, and dictate the terms of employment, yielding little ground to the workers' side.

EU level: A fractured relationship

Social dialogue is a fundamental component of the European social model, its role in employment and social policymaking defined in the Treaty on the Functioning of the European Union. Under the treaty, the social partners can pause social legislation initiated by the Commission to deal with the issue through bipartite social dialogue. The resulting agreement, known as an autonomous agreement, may be implemented by the social partners at national level or through EU legislation.

The European Commission included social dialogue at the forefront of its strategy to strengthen the social framework of the EU in the wake of the economic crisis, launching 'A new start for social dialogue' in 2015 to strengthen the involvement of the social partners in EU policymaking. The European Pillar of Social Rights in 2017 reaffirmed the place of social dialogue in 'the design and implementation of economic, employment and social policies'.

Yet the social partners have difficulty finding the common ground necessary to exercise their influence. A review of developments by Eurofound over 2015–2019 found that social dialogue was strong insofar as the social partners issued joint opinions and texts on several social and employment issues, including digitalisation, migration, demographic change, the green economy and apprenticeships. However, they produced just one autonomous agreement at cross-industry level: on active ageing in 2017. (In 2020, outside the scope of the review, the social partners signed an autonomous framework agreement on digitalisation.)

This shift away from agreements towards other forms of joint texts and declarations is a sign of weakness in the relationship between the social partners. Autonomous negotiations on important issues, such as the revision of the Working Time Directive and the Written Statement Directive, failed. Furthermore, the social partners were unable to deliver joint positions on issues such as parental leave and work–life balance, the review of the European Works Council Directive, and the review of the EU Quality Framework for anticipation of change and restructuring.

These examples of failed dialogue or unwillingness on the part of cross-industry social partners to engage in negotiations seem to illustrate a significant gap between the social partners and a lack of joint concerns and interests as regards the need for regulation and common European minimum standards.

National level: Addressing lack of capacity

At national level, the social partners in some Member States struggle to contribute effectively to social policymaking, and a lack of capacity has been identified as the core of the problem. An exercise conducted by Eurofound to map the capacity-building needs of the social partners identified the following structural gaps and barriers in one or more Member States:

- weakness of the social partners and lack of representativeness and mandate to negotiate
- limited sectoral collective bargaining and low collective bargaining coverage
- limited tripartism (exchanges between the social partners and European public authorities) and frameworks for effective social dialogue

- lack of social partner autonomy and a dominant role of the state
- lack of trust between the social partners and between them and government

Rebuilding capacity

Increasing the capacity of the social partners involves enhancing their skills, abilities and power to engage effectively from establishment up to EU level. The needs that capacity building must address are several:

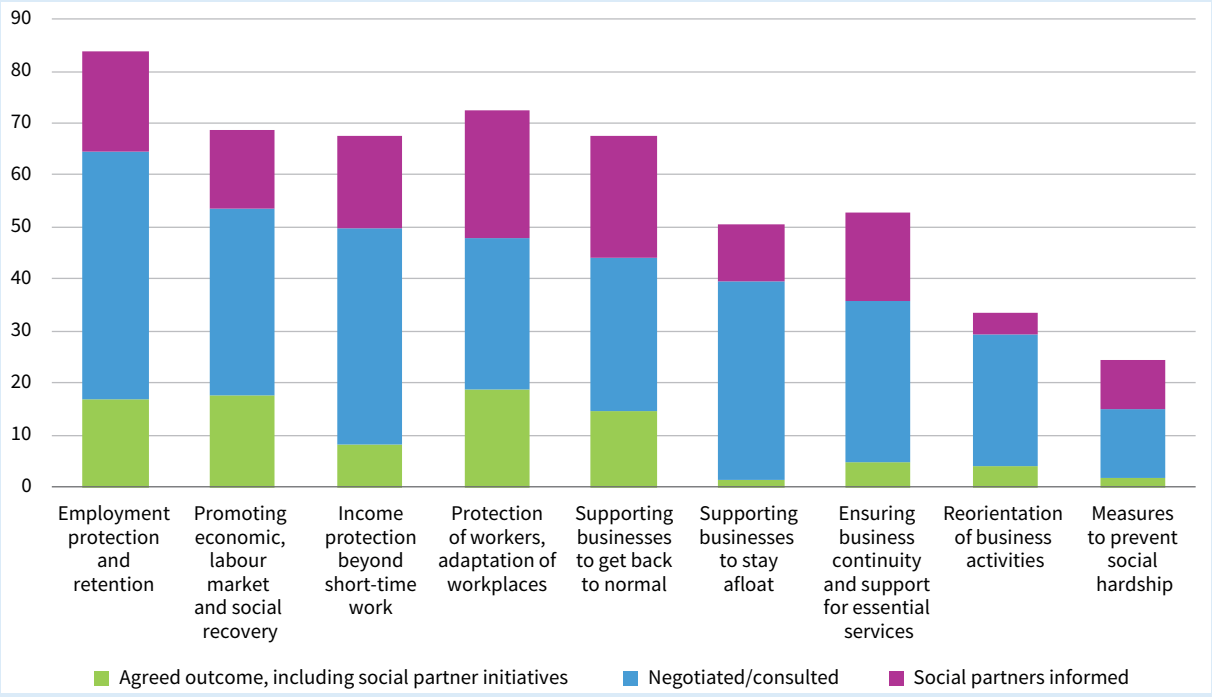
- legislative reforms to promote social dialogue and collective bargaining
- a supportive state that respects the principles of autonomy and subsidiarity
- increased membership, representativeness and capacity, and mandate to negotiate
- technical and financial assistance from the public authorities
- skills and expertise in areas such as industrial relations, negotiation, research and analysis, policymaking, advocacy, and soft and digital skills
- mutual trust for a more effective social dialogue

Social partner involvement in COVID-19 policymaking

By 5 November 2020, Eurofound's COVID-19 EU PolicyWatch database had recorded 659 policy measures, collective agreements and company practices put in place by governments, social partners and others to cushion the socioeconomic effects of the COVID-19 crisis. Analysis of these shows that in half of the cases where a government passed legislation or issued other (non-binding) texts, the social partners were involved in some way in the design of the measure. This means that they were consulted, had negotiated with the government or ultimately even agreed on the measure. The level and meaningfulness of this involvement differ between countries and even within the same country, depending on each specific measure. However, the involvement of the social partners was stronger in those countries where social dialogue has traditionally played a more important role.

Figure 15 shows how this involvement varied, depending on the target of the measures. The largest degree of social partner involvement was found in the area of employment protection and retention, which includes several income protection schemes for employees (for example, short-time working schemes) and measures promoting recovery. The lowest degree of involvement was found in measures aimed at preventing social hardship (in this category, the majority of cases were deemed not to fall into the social partners' domain).

Figure 15: Social partner involvement in designing COVID-19 socioeconomic policy measures (%), EU27, November 2020



Source: *Eurofound, COVID-19 EU PolicyWatch database*

While the existence of a strong tradition of bipartite and tripartite social dialogue contributed to a high level of involvement of social partners in some countries, the speed with which measures had to be implemented meant that, even when such processes were normally in place, involvement was not always guaranteed in the early phases of the pandemic. In spite of this, the common desire to find a rapid and effective response to the challenges brought about by the COVID-19 crisis also contributed to dialogue processes being reinvigorated in some countries.

By contrast, in many other countries, although social dialogue remained in place, it was severely restricted. In this regard, the health crisis has revealed the structural weaknesses of the social dialogue foundation in some industrial relations systems.

The experience gained during the crisis shows that efforts to include social partners and other key stakeholders in decision-making produce favourable outcomes in the longer term, as this can prevent anomalies, potential deadweight effects and the dissemination of confusing or conflicting information around new or amended policy measures.

Company level: Harnessing social dialogue

While an official employee representative body is present in just one-third of EU companies, this one-third benefits substantially from social dialogue in the workplace, according to the findings of the ECS 2019. It is a dimension of employee voice that contributes to the success of companies: the types of companies that excel in workplace well-being and establishment performance, the 'high investment, high involvement' type, are more likely than average to have a formal structure for employee representation.

Positive relationships

The data gathered by the ECS show that, in those companies where an official employee representative body exists, relations between it and management are positive in the large majority, with managers in 80% of companies saying that the employee representative body has a constructive attitude. Trust exists between the two sides, somewhat more on the manager side (in 87% of companies) than the employee representation side (76% of representatives).

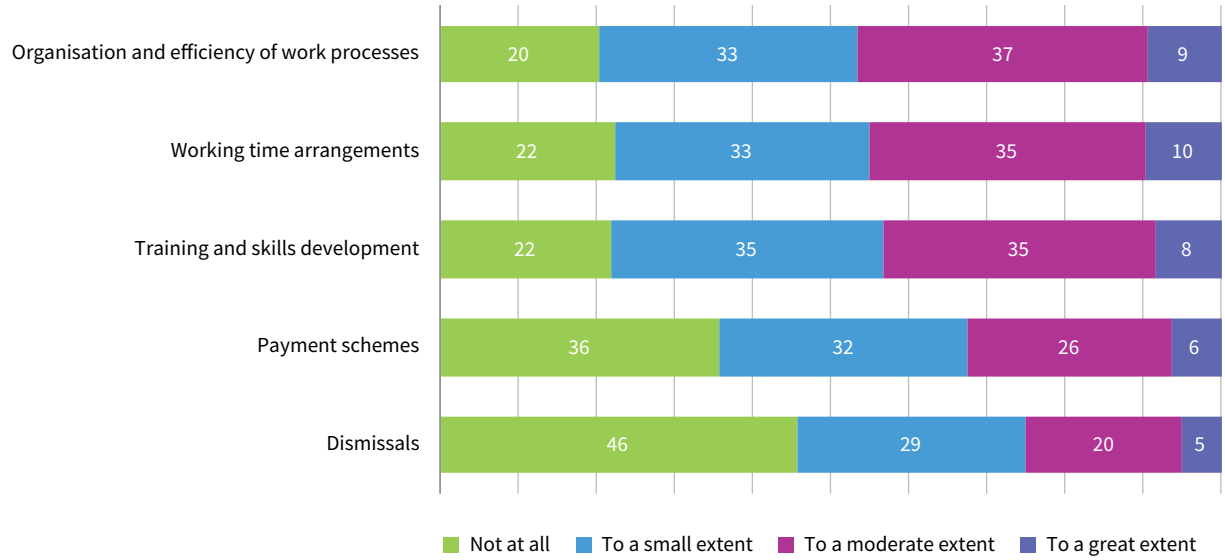
> The area where the employee representation has most influence is on the organisation and efficiency of work processes: 47% of managers reported that it influenced these decisions to a moderate or great extent.

However, in that same subset of companies, when it comes to consultation, management desire for engagement with the employee representation is less than these figures would suggest. Even though 65% of managers prefer to involve the employee representation, either on its own or in combination with direct consultation with employees, a sizeable proportion of companies (31%) prefer to consult with just the employees directly. Furthermore, 36% of employee representatives doubt the sincerity of management efforts to involve them in solving problems.

Influence on decision-making

The influence of the employee representation on management decision-making is quite variable and depends on the issue (Figure 16). The area where it has most influence is on the organisation and efficiency of work processes: 47% of managers reported that the employee representation influenced these decisions to a moderate or great extent. The employee representation is least influential on decisions concerning dismissals, either individual or collective.

Figure 16: Employee representation's influence on types of management decisions (%), EU27 and the UK, 2019

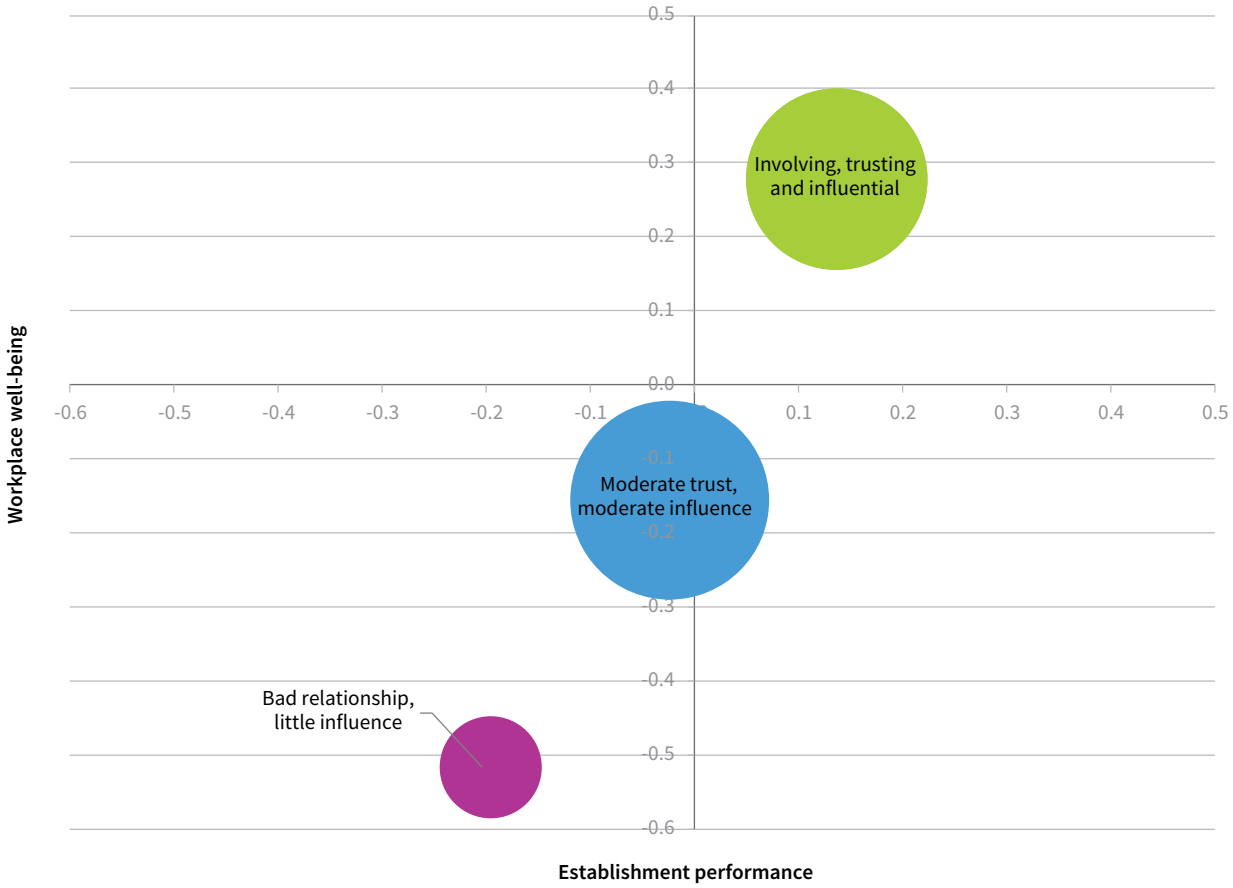


Note: *Data refer to companies where an official structure for employee representation is present.*
Source: *ECS 2019*

Well-being and performance

When workplace well-being and company performance are mapped against the approach taken by the establishment to social dialogue, the companies with the best outcomes are those categorised as 'involving, trusting and influential' – see Figure 17. These are companies where the relationship between management and the employee representation is constructive and characterised by a high degree of trust, and where management prefers to consult with employees and their representatives and takes account of the employee representation when making decisions. Such companies account for a sizeable proportion of the total – 41%. It is also salutary to note that in the 12% described as 'bad relationship, little influence', workplace well-being is poor and company performance is well below average.

Figure 17: Workplace well-being and establishment performance, by establishment approach to social dialogue, EU27 and the UK, 2019



Source: *ECS 2019*

- Despite EU backing for a strong role for social dialogue in employment and social policymaking, the social partners at EU level have had ongoing difficulty finding common ground on important issues. In the past five years, there has been a shift away from autonomous agreements towards joint texts and declarations. In addition, they have been unable to deliver joint positions on issues such as parental leave and work–life balance.
- Lack of capacity has been identified as a key factor inhibiting the social partners at national level from engaging effectively in social policymaking. Several factors contribute to this lack of capacity including low membership, lack of representativeness, limited collective bargaining coverage and lack of social partner autonomy.
- However, the ECS 2019 vindicates the contribution that social dialogue makes to well-functioning companies. The most successful companies in terms of workplace well-being and company performance are characterised by a constructive and trusting relationship between management and the employee representation structure, where management involves the employee representation when making decisions.

COVID-19 and minimum wages

Minimum wage

1 in 10 workers in the EU earned around the minimum wage in 2017

- Various regulatory restrictions of the lowest rate payable by employers to workers

Statutory minimum wages: Regulated by formal laws or statutes

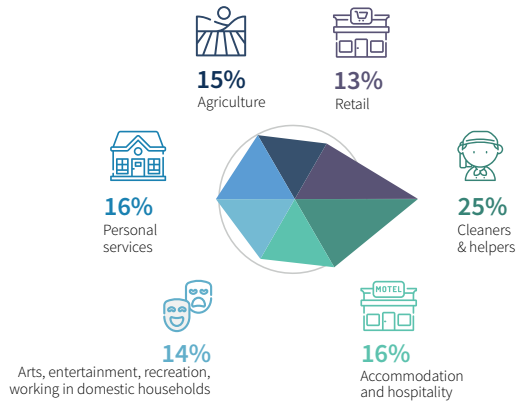
Collectively agreed minima: Stipulated within collective agreements between trade unions and employers

COVID-19 impact for low-wage earners

Eurofound's e-survey on Living, working and COVID-19 shows that nearly half of households are struggling to make ends meet.

- **What are governments doing?**
  Income stabilisation measures for those most affected
- **Where is the strongest impact of COVID-19?**
  Sectors and occupations with larger shares of minimum wage workers
- **What role for minimum wages?**
  Could contribute to the policy mix to stabilise incomes
  Could help counteract a downward spiral into recession or depression

Minimum wage workers per sector and occupation in 2017



Read more

Topic: *Industrial relations and social dialogue* eurofound.link/industrialrelationsocialdialogue
Resource: *COVID-19 EU PolicyWatch database* eurofound.link/covid19eupolicywatch
Flagship report: *Industrial relations: Developments 2015–2019* eurofound.link/ef20023
Report: *COVID-19: Policy responses across Europe* eurofound.link/ef20064
Report: *COVID-19: Implications for employment and working life* eurofound.link/ef20050
Report: *Capacity building for effective social dialogue in the European Union* eurofound.link/ef20002
Report: *Involvement of national social partners in policymaking – 2019* eurofound.link/ef19017
Report: *Involvement of social partners in policymaking during the COVID-19 outbreak* eurofound.link/ef20035

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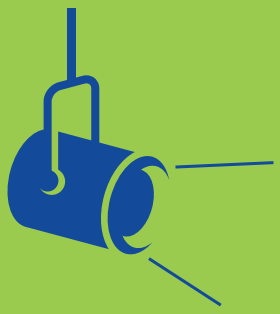


Spotlight on work

6 Playing to win on gender equality

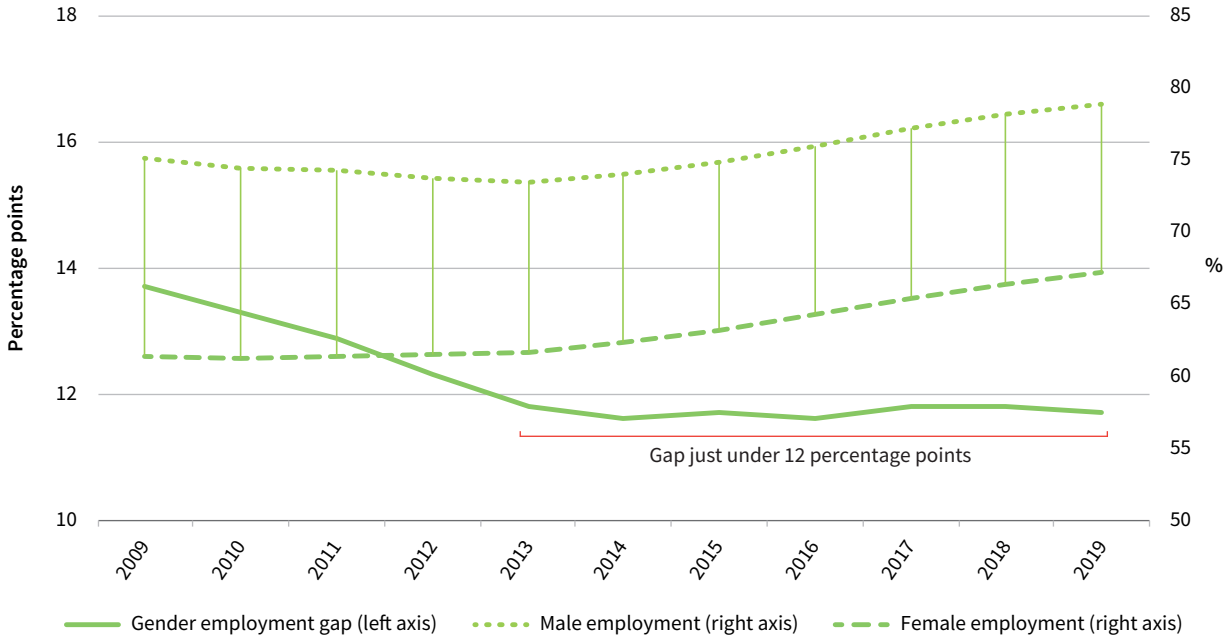
As the COVID-19 pandemic played out over 2020, one consequence that came sharply into focus was the setback to women's employment. The gender employment gap, which has hovered just below 12 percentage points since the end of the last economic crisis (Figure 18), may well start to widen if the pattern of job loss among women is prolonged. This gap cost the EU an estimated €320 billion in 2018.

As Figure 19 shows, employment losses in the first phase of the pandemic were sharpest in low-paying jobs and affected women more than men. These were, in large part, jobs in service sectors where activity was curtailed severely by lockdown measures – jobs that typically involve a high level of one-to-one contact between workers and clients, such as sales assistant or hairdresser. Eurofound calls this 'interactive service work', and it's a female-dominated area, with women accounting for 61% of the workforce. Frontline health employees, who have played a critical role during the pandemic, make up one-fifth of interactive service workers, and this subgroup is even more gender-imbalanced, comprising 85% of women.

On the other hand, apart from healthcare, the economic activities that were designated as essential, and therefore less subject to operational restrictions during the lockdowns, tend to be male-dominated, such as transport, security and fire services, farming, or maintenance and repairs.

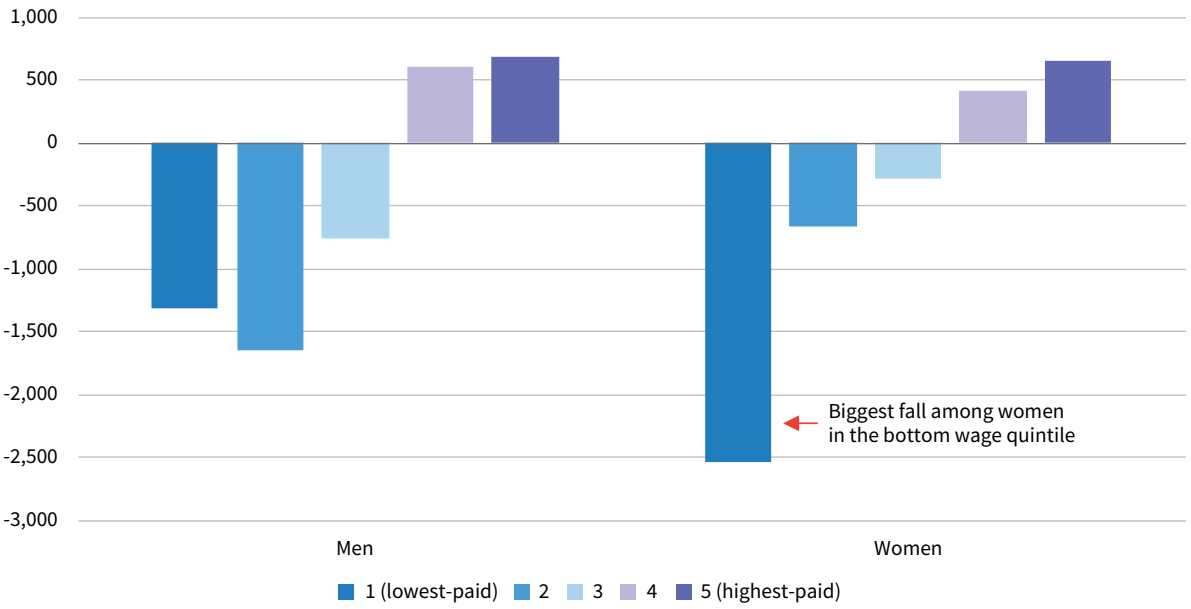
Lockdowns also pushed more women than men into inactivity (meaning that they dropped out of the labour market). Between the first and second quarters of 2020, the transition from employment to inactivity (as a percentage of total employment) increased by 0.9 percentage points for women (from 3.2%), compared to 0.7 percentage points for men (from 2.1%).

Figure 18: Gender employment gap, EU27, 2002–2019



Source: *EU-LFS*

Figure 19: Employment shifts (in thousands), by gender and job–wage quintile, EU27, Q2 2019–Q2 2020



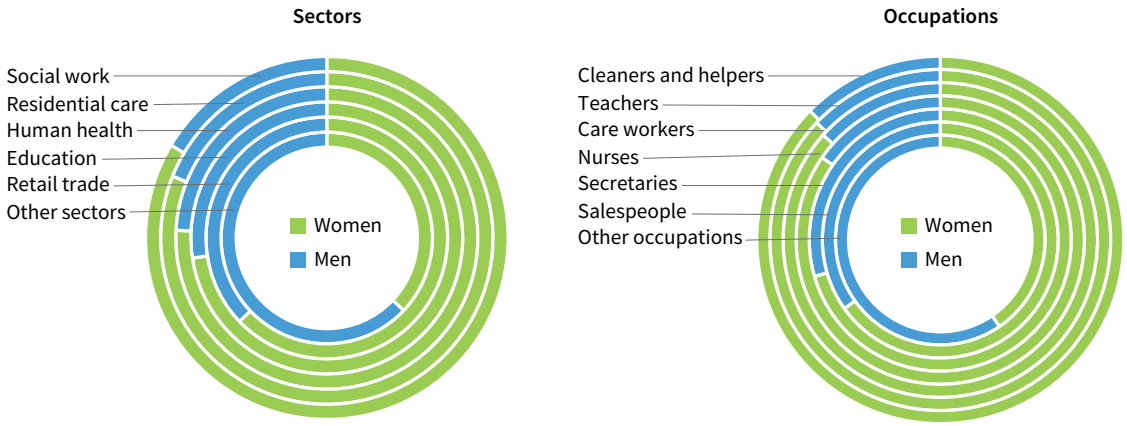
Source: *EU-LFS (Eurofound calculations)*

Gender patterns in sectors and occupations

Sectors and occupations in the EU are highly segregated according to gender, despite legislation outlawing discrimination in hiring practices and efforts by the Commission and the sectoral social partners to increase the employment rate of women in sectors where their presence is low: for example, transport and the digital economy. Figure 20 shows the sectors and occupations in the EU with the highest presence of women. Around a quarter of all female employment is concentrated in the six occupations shown, while more than 85% of cleaners and helpers, early childhood teachers, care workers and nurses are women. Social work, residential care and human health combined absorb more than a third of the total female labour force.

The numbers of men and women working in occupations composed predominantly of their own gender remain very high, and this is changing only very slowly. In 2015, 57% of male workers worked in male-dominated occupations, while 64% of female workers worked in female-dominated occupations. Mixed occupations, where the balance of men and women is relatively even, account for just under 25% of employees – these include jobs such as lawyer, actor, librarian, bookkeeper and waiter.

Figure 20: Female-dominated sectors and occupations, by proportions of women and men employed, EU27, 2018 (occupations) and 2019 (sectors)



Notes: *20–64 age group. Sectors defined according to NACE Rev. 2 (two-digit level) and occupations defined according to ISCO-08 (three-digit level).*
Source: *Eurostat (lfsa_ean22d) and EU-LFS microdata*

Many of the occupations in which women dominate numerically are among the lowest paying. While this may in part be attributable to the unskilled nature of the work, it is also due to the systemic undervaluation of women's work, regardless of skill level. Eurofound's annual review of minimum wages in 2019 found that women constitute a much larger proportion of minimum wage earners – 58% – than men, even though they represent 48% of employees. Women are at a further disadvantage because they work in sectors where employment contracts are often temporary or non-standard in some other way, or non-existent, meaning that their job security is precarious and they miss out on the full range of employment-related social welfare entitlements available to employees with permanent contracts. The pandemic is likely to have eroded the living standards of many workers in such arrangements who lost their jobs.

Gender affects job quality

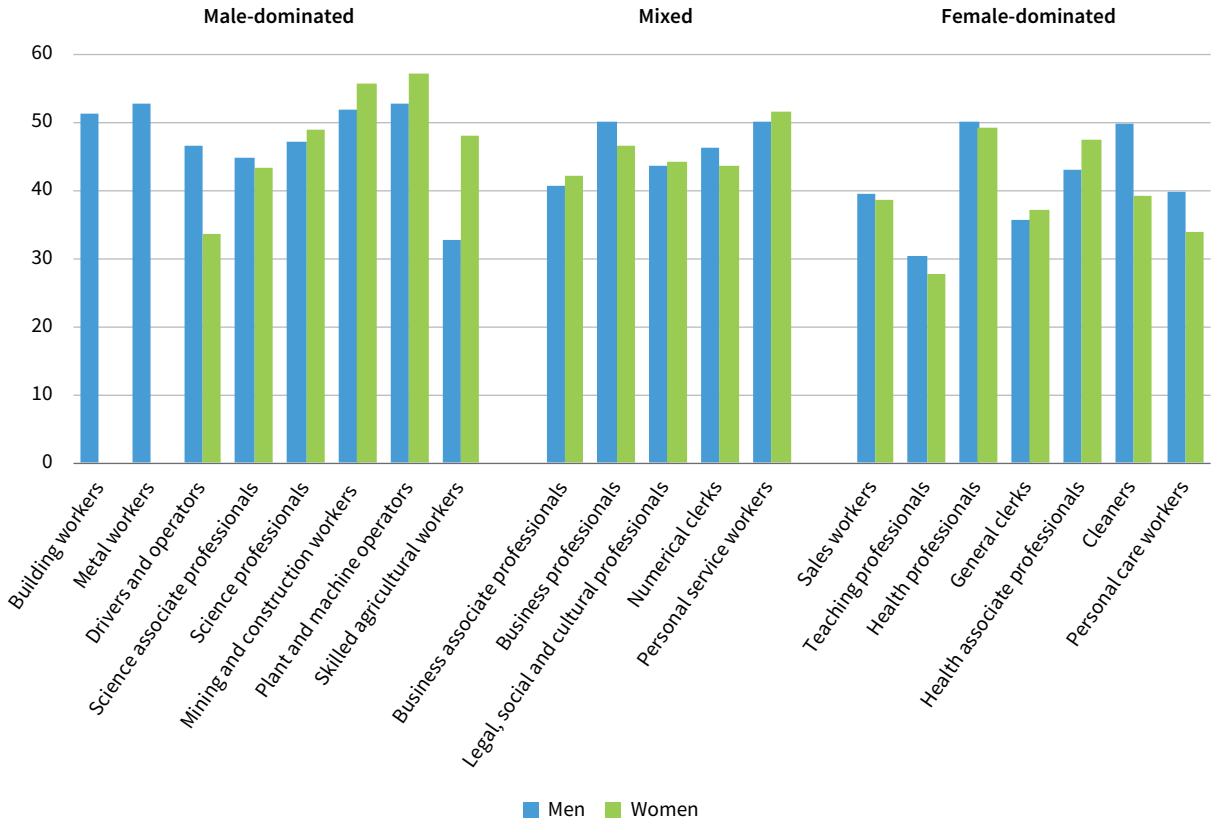
Occupational segregation has implications for job quality. Eurofound's research on working conditions, based on the European Working Conditions Survey (EWCS), has found that job quality overall is better in mixed occupations, and the differences between men and women are smaller when compared to male- and female-dominated occupations. This suggests that benefits would accrue for both women and men if the occupational landscape were more gender-balanced.

Emotional versus quantitative demands

One occupation-related area where Eurofound has found big gender-based differences is in the types of job demands experienced by workers. Because women more commonly work in jobs that involve dealing with people (particularly those giving care), they are more exposed to emotional demands than male workers. In 2015, 26% of all female employees reported having to regularly deal with someone who is angry, while 36% held jobs requiring them to hide their feelings; the corresponding figures for male employees were 18% and 27%, respectively. A high level of emotional demands at work can have a health impact, being a predictor of mental health problems, fatigue and burnout, as well as musculoskeletal disorders.

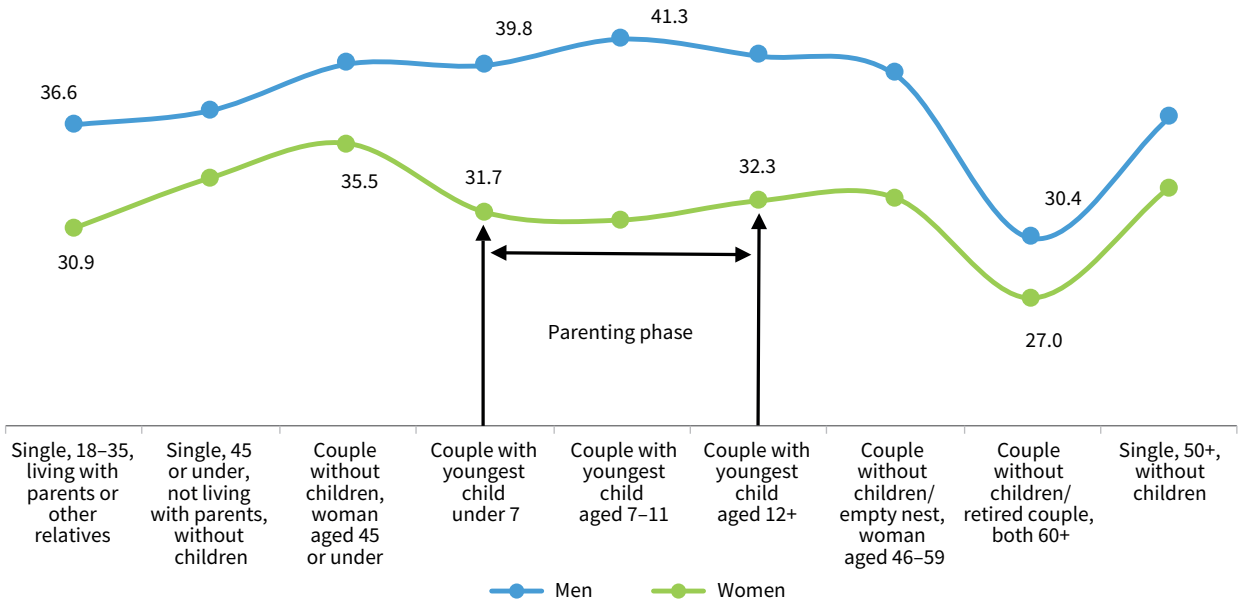
Men, on the other hand, experience quantitative demands to a greater degree than women (Figure 21) – these include having to work at very high speed or to tight deadlines and not having enough time to get the job done. Quantitative demands are more prevalent in occupations dominated by men, and male workers score three points higher than women on a quantitative demands index. Like emotional demands, a high level of quantitative demands can cause health problems, such as cardiovascular disease, musculoskeletal disease and depression.

Figure 21: Quantitative demands in the 20 largest occupations, by gender, 2015



Note: *Based on a quantitative demands index, mean scores, 0–100 range.*
Source: *EWCS 2015*

Figure 22: Average weekly working hours of employees across the life course, by gender, EU27 and the UK, 2015



Source: *EWCS 2015*

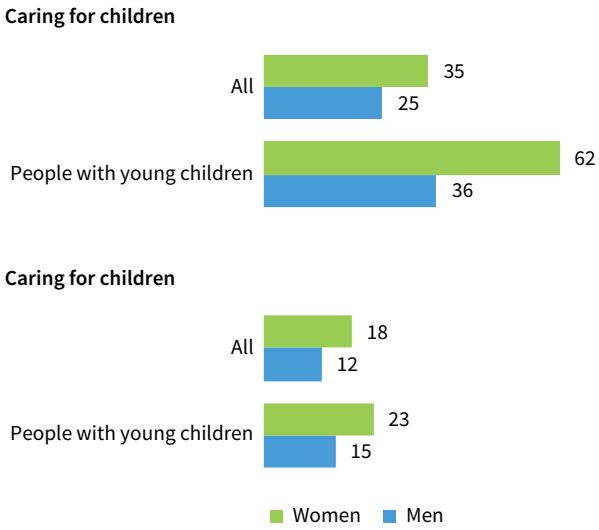
The evidence indicates that the level of quantitative demands has remained relatively stable since the turn of the millennium, but emotional demands in the workplace are increasing.

Working time imbalance

Significant differences in the working conditions of men and women also persist in relation to working time. Imbalances in working time arise not so much as a result of occupation, but from societal norms, particularly the entrenched traditional division of labour in the home and how responsibility for the care of children is shared. As Figure 22 shows, a gap in the average hours worked by women and men exists across the life course. Women's average weekly hours are consistently fewer than men's and drop when women start having children. The pattern is quite the opposite for men during the parenting period, when working time rises. Women's working hours never recover, and while the shorter hours worked by women benefit their well-being, it reduces their incomes, which in turn reduces their pension entitlements when they retire from work. In 2018, women aged over 65 received a pension that was on average 30% lower than that of men, a disparity that can significantly affect women's quality of life after retirement.

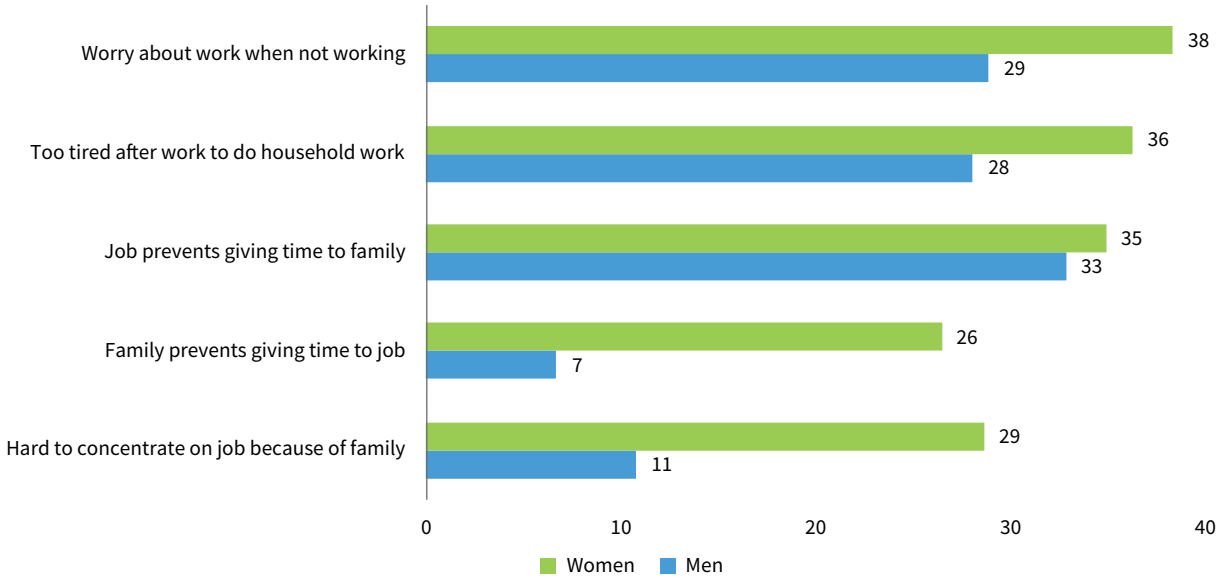
Focusing only on the paid hours that women work obscures the extra hours of unpaid work at home that they put in compared to men. Although the COVID-19 pandemic disrupted working time arrangements for possibly all workers, women continued to spend substantially more time on domestic labour than men. In the July round of the *Living, working and COVID-19* e-survey, women, on average, reported spending 35 hours per week caring for children or grandchildren while men reported 25 hours. Women also spent 18 hours per week on housework compared to 12 hours for men. Figure 23 shows that the differences are particularly stark for couples with children under 12 – women in these couples clearly bore the lion's share of responsibility for the care of children when schools and childcare centres closed, spending 62 hours per week on childcare, compared to 36 hours spent by men.

Figure 23: Hours spent on caring for children and housework, EU27, July 2020



Note: *Young children are defined as children under the age of 12.*
Source: *Living, working and COVID-19 survey, 2nd round*

Figure 24: Experience of work–life conflicts among women and men with young children in the household (%), EU27, July 2020



Source: *Living, working and COVID-19 e-survey, 2nd round*

EU-LFS data indicate that while weekly working hours decreased more for men than for women, women were more likely to have temporarily stopped working altogether. One reason for the difference could be that, in dual-worker households where there was some degree of choice regarding changes in work arrangements, women were more likely to avail of furlough opportunities than their male partners to meet the increased need to care for children.

Overall, however, the fall in hours worked in the EU during the pandemic was greater for women than for men. Eurostat's index of total actual hours worked in the main job (computed using 2006 as a reference, with an index of 100 points) dropped from 101.8 index points to 86 between the last quarter of 2019 and the second quarter of 2020. This drop was more marked for women (-18.1%) than men (-14.3%).

Work–life balance

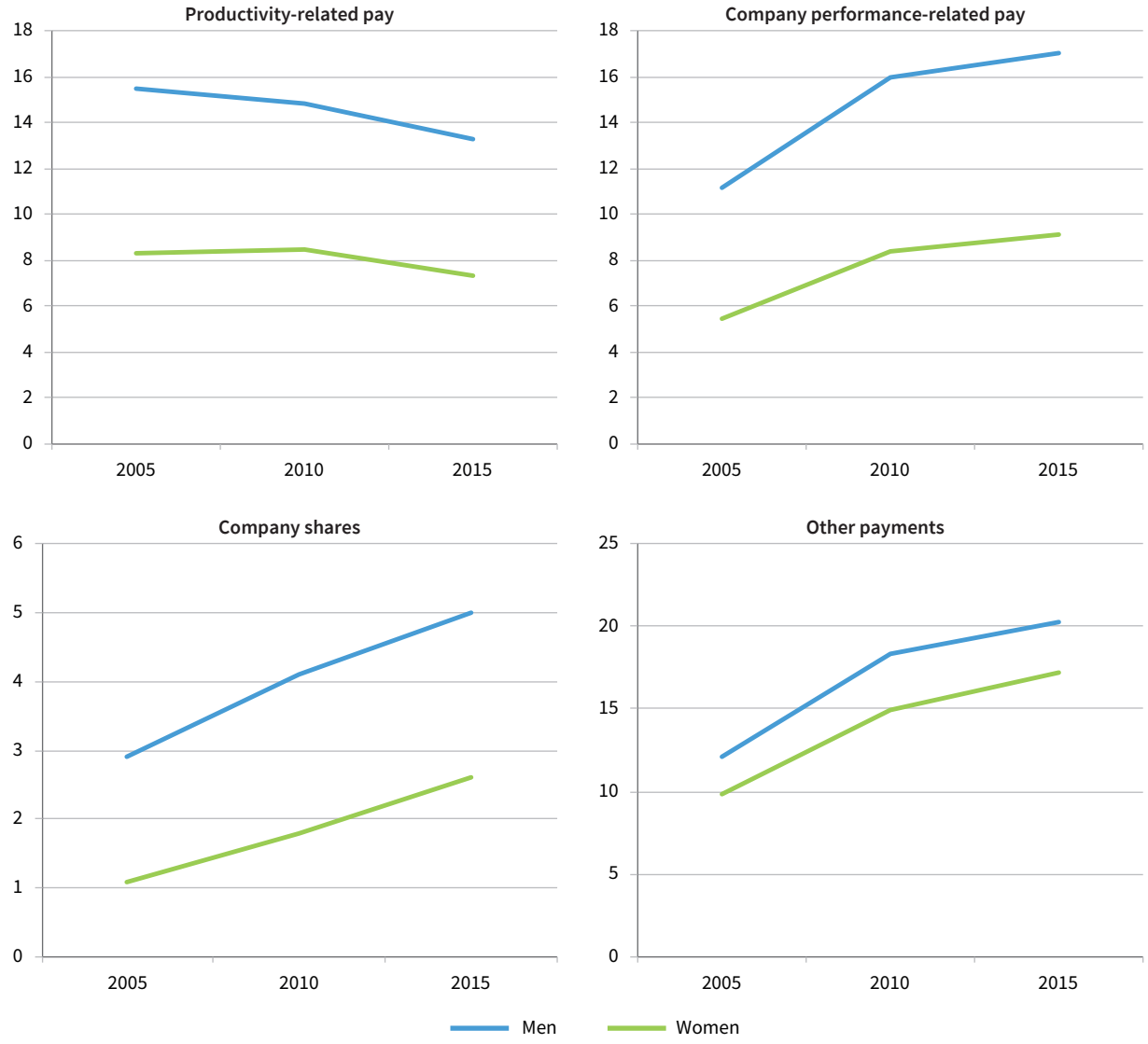
While the concentration of activity at home during the pandemic led to a general deterioration of work–life balance, women have struggled more than men. In particular, women with children under 12 years of age in the household reported more work–life conflicts than men in the same category. Among the July respondents to the e-survey, as Figure 24 illustrates, the largest differences between women and men with young children concerned the difficulty in concentrating on the job because of family responsibilities (29% vs 11%, respectively) and whether family prevented them from giving time to the job (26% vs 7%, respectively)

Gender pay gap

The gap in pay between women and men for work of equal value is probably the most pernicious gender inequality in working conditions; it signals a pervasive assumption that women's work is of lower value than men's. The EU's attempt to counter discriminatory pay practices by means of the 2014 recommendation on pay transparency has met with little success, as many Member States have been slow to act upon it or have only minimally implemented its provisions. Not to be deflected, in 2020, the Commission included binding pay transparency as a key action in its Gender Equality Strategy 2020–2025, and in March 2021, the Commission tabled a proposal for a directive to give it legal underpinning.

In 2018, women earned 15% less per hour than men, a gap that has decreased by just 1 percentage point since 2010. The EWCS sheds light on an often-neglected aspect of the gender pay gap: performance-related pay. This includes any form of pay on top of the basic wage that is in some way related to individual, team or company performance. The award of such pay is more open to the discretion of managers than the basic wage. As Figure 25 illustrates, regardless of type or year, the shares of male employees who received these types of pay are always significantly larger than those of their female counterparts. Furthermore, the differences between men and women do not appear to be diminishing; if anything, they appear to be growing. Gender pay gaps could be widening rather than closing as a result of the more widespread use of variable forms of pay, underscoring that measures to reduce the gender pay gap cannot focus exclusively on basic pay.

Figure 25: Receipt of additional pay components (%), by gender, EU27 and the UK, 2005, 2010 and 2015



Source: *EWCS 2005, 2010, 2015*

Risk of losing fragile gains

The COVID-19 crisis has exposed the fragility of the progress made in gender equality, where the consequences have unfolded along the underlying and apparently intractable divisions between women and men in the labour market and society itself. Those assigned the tasks of restoration in the aftermath of the pandemic must gauge the gender implications of what has happened, as the risks of women disengaging from the labour market and of the re-emergence of gender stereotypes around work and parental responsibilities are tangible. For instance, if, as predicted, working from home becomes more common, will responsibility for the care of children shift back to women, increasing their share of unpaid work in the household? Gender must be mainstreamed in policies and recovery packages, entailing investment in social infrastructure, particularly care provision for preschool children and for the elderly. Measures must also be instituted to incentivise women to return to the labour market. Such measures could include targeted fiscal reliefs, subsidised childcare and parental leave.

Impact of the COVID-19 pandemic

Low-paid female workers in service sectors hit most by job loss

Working hours reduced more for women than men

Young women more likely to lose their job than men

Higher volume of women workers in healthcare means greater emotional demands

- Gender segregation in labour markets persists: three-quarters of workers hold occupations performed by people of the same gender. Many aspects of job quality differ for women and men, even in similar occupations or the same occupation. Gender disparities are especially apparent in relation to pay, working time and the types of job demands experienced.
- Gender pay gaps could be widening rather than closing as a result of the more widespread use of variable forms of pay, such as company shares and payments based on company or individual performance, which women receive less frequently than men.
- Progress in gender equality at work has been dealt a blow in the fallout from the COVID-19 pandemic. Job loss has been greatest among low-paid female workers because of their overrepresentation in contact-intensive service sectors, which were hit hardest by lockdown measures. Furthermore, lockdowns have reinforced traditional gender relationships in the home insofar as working mothers have borne the brunt of increased domestic care responsibilities because of the closure of workplaces, schools and childcare centres.

Read more

Topic: *Working conditions and sustainable work* eurofound.link/workingconditionsustainablework

Topic: *Gender equality* eurofound.link/genderequality

Topic: *Job quality* eurofound.link/jobquality

Flagship report: *Working conditions and sustainable work: An analysis using the job quality framework* eurofound.link/ef20021

Report: *Gender equality at work* eurofound.link/ef19003

Policy brief: *At your service: Working conditions of interactive service workers* eurofound.link/ef20016

Policy brief: *Women and labour market equality: Has COVID-19 rolled back recent gains?* eurofound.link/ef20068

Blog post: *COVID-19: A tale of two service sectors* eurofound.link/ef21063

Blog post: *Could COVID-19 unravel years of progress on gender equality in employment?* eurofound.link/ef20085

7 From workplace to cyberspace

No one could have predicted that a pandemic would be the spark for telework to catch fire. By July 2020, nearly half of all employees in the EU had worked from home to some extent during the COVID-19 outbreak, while one-third of employees worked exclusively from home, according to the *Living, working and Covid-19* e-survey. This was a dramatic leap from pre-pandemic levels: in 2015, 12% of EU employees worked from home occasionally, while just 3% did so daily, according to the EWCS.

Although technology has made most of the tasks of an office-based job 'teleworkable' since the 1990s, working from home has been slow to take off. Employees would have been keen to embrace it, surveys suggest, taking advantage of the flexibility to organise their work and home lives better. But employers were lukewarm, including many of the tech giants that had developed the technology in the first place.

Telework: No looking back

Now it seems that there will be no turning the clock back once the health crisis recedes, and the futurologists' visions will come to pass. In 2020, work, or at least white-collar work, detached from location and moved into the digital sphere; where a person was physically sitting, in theory, no longer mattered. Many high-profile internet companies such as Facebook and Twitter have stated their intention to permit employees to work from home indefinitely. Most employees surveyed by Eurofound in July 2020 said that, under normal conditions, they would like a combination of working from home and working from the office; the largest group (32%) would like to work from home several times a week (Figure 26).

Yet, the value of the social side of work should not be underestimated, and the indications are that most workers have a need for some face-to-face interaction, confirmed by the finding that only 13% of employees want to work exclusively from home.

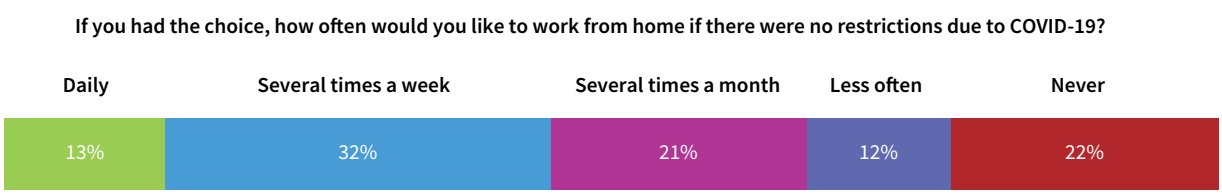
Anecdotally, it seems likely that most employers will row in behind the shift of workplace location. The learning-by-doing forced by lockdowns has persuaded previously sceptical managers and employers that making telework more accessible to staff is both feasible and desirable. In fact, they may have little choice but to facilitate telework if its availability becomes a significant factor in employees' decisions to stay or in organisations' ability to hire.

Digital divide

Not all jobs can be done remotely – only 37% of jobs currently being performed in the EU are teleworkable, according to a joint study conducted by Eurofound and the European Commission's Joint Research Centre. Most of these are found in white-collar employment: ISCO-08 occupational groups 1 to 4 (managers, professionals, technicians and associate professionals, clerical support workers).

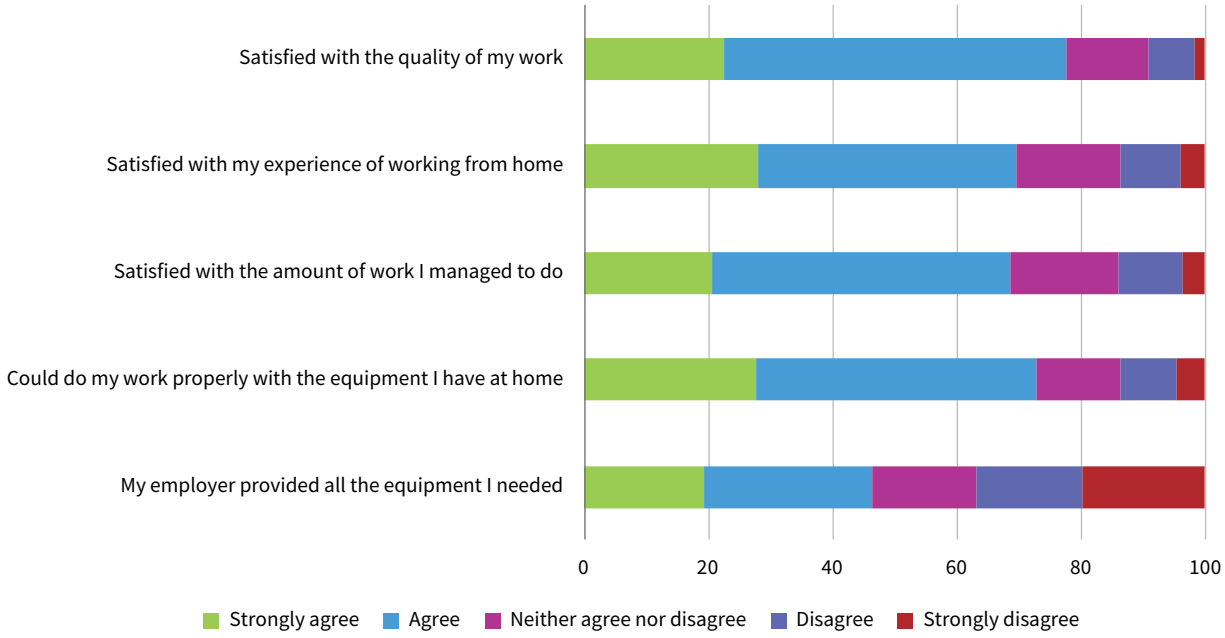
The great telework shift has therefore crystallised a 'digital divide', separating well-educated, well-paid knowledge workers from workers with lower educational attainment on lower pay in manual jobs. There are dramatic differences by wage and by education level in the teleworkability of jobs. Nearly three-quarters of those in the top wage quintile could potentially telework compared to around 1 in 20 in the bottom wage quintile, while those with third-level qualifications are around three times as likely to telework as those without.

Figure 26: Employees' telework preferences, EU27, July 2020



Source: *Living, working and COVID-19 e-survey, 2nd round*

Figure 27: Experience of telework (%), EU27, July 2020



Source: *Living, working and COVID-19 e-survey, 2nd round*

Trade-offs in telework

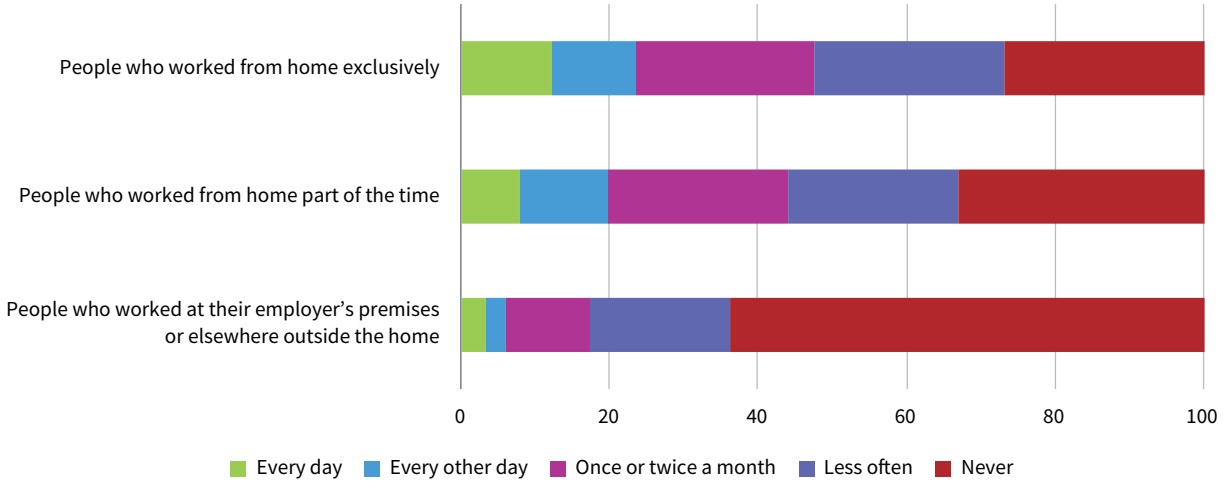
It seems that the change of location worked out well for most employees and did not interfere with their ability to work nor their performance, as Figure 27 illustrates.

However, just under half indicated that their employer had provided all the equipment they needed. This is understandable, given the suddenness of the switch to remote working, but it is something employers will have to address in a post-COVID time.

Working in free time

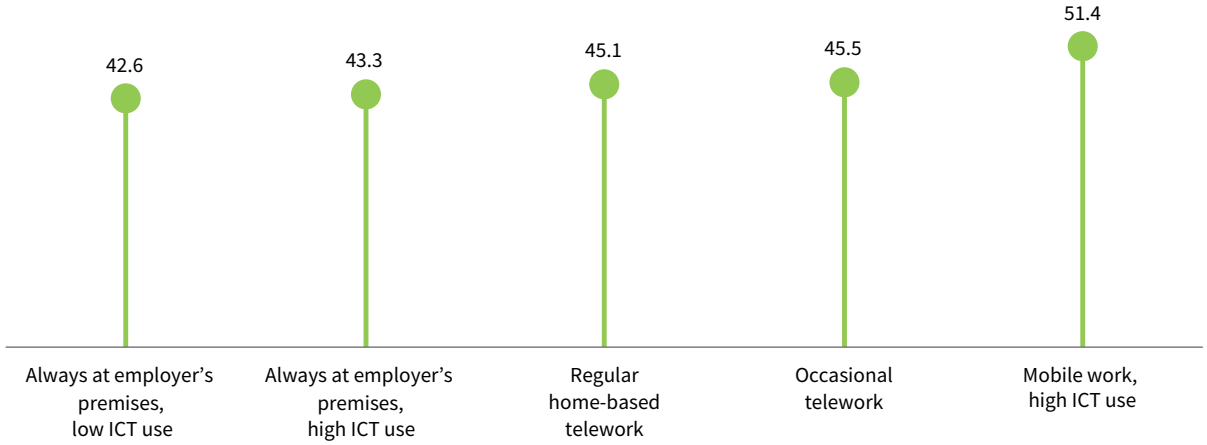
If there is to be a significant shift to telework, workers and their managers will need to manage the arrangement consciously. When the same physical space is both home and place of work, the boundary between the two worlds blurs easily, creating conflict and stress. Permanent connectivity of devices promotes an 'always-on' work ethic so that workers end up checking their email and responding to messages long after the working day has passed. Over one-fifth of teleworkers in the e-survey reported working during their free time, compared to 6% of those who worked only at their employer's premises or locations outside the home (Figure 28).

Figure 28: Extent of working during free time, by work location (%), EU27, July 2020



Source: *Living, working and COVID-19 e-survey, 2nd round*

Figure 29: Scores on work intensity index, by workplace location, four EU Member States and the UK, 2015



Notes: *Scale 1–100. The five countries are Belgium, France, Slovenia, Spain and the UK.*
Source: *EWCS 2015*

Earlier work by Eurofound indicates that this is not just a pandemic blip. Analysis of data from the 2015 EWCS showed that employees who work from locations outside their employer's premises and particularly teleworkers (employees who work regularly from home) were much more likely to work in their free time than those based at the employer's premises. But the survey also found that teleworkers had less trouble concentrating at work than other groups, which is a productivity plus.

More autonomy, more work intensity

Many workers are likely to have felt more autonomous in their work because of the distance from colleagues and managers. Autonomy, as we have noted, is motivational and enhances the sense of reward from work. More autonomy, however, can have the drawback of possibly increasing the intensity of work – this is the autonomy paradox in telework: autonomy can turn from being an asset (a resource that gives workers the freedom to choose when, where and how to work) into a liability (the obligation to deal with an increased workload).

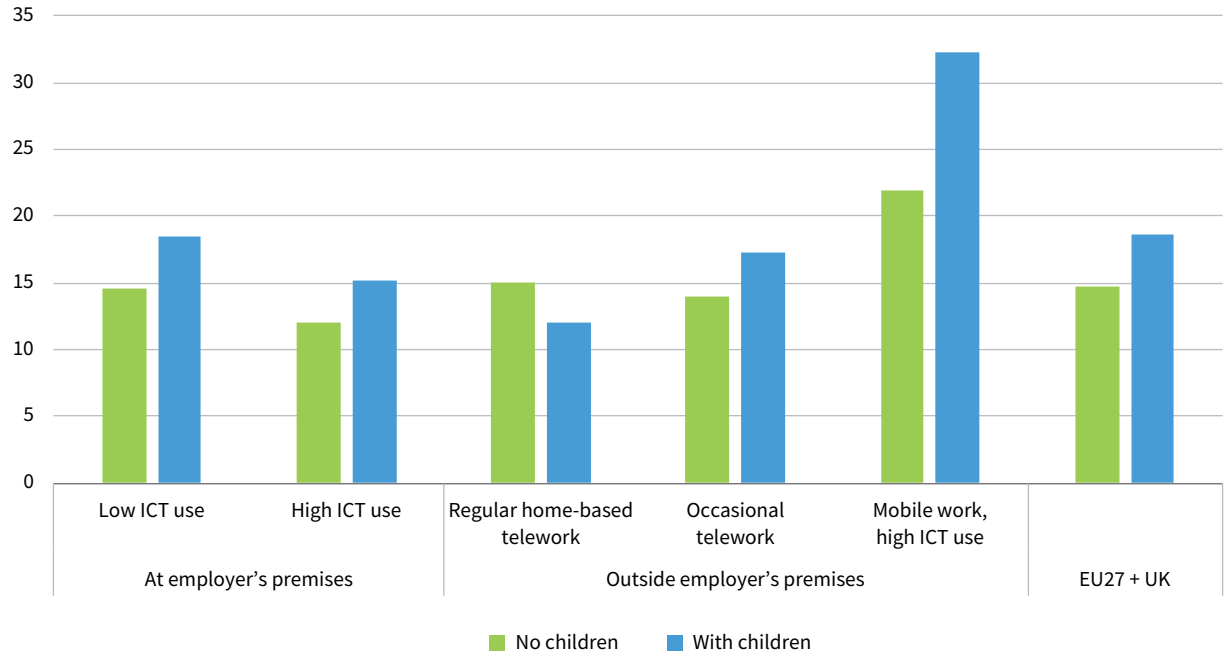
There is some evidence that increased work intensity results in teleworkers putting in informal overtime. Workload, permanent connectivity, email overload, regular interruptions and a perceived need to prove that being at home has not reduced one's productivity all contribute to increased pressure to perform. An index of work intensity constructed from such indicators confirms that teleworkers do experience higher levels of work intensity than employees working from their employers' premises (Figure 29). But it also shows that the group with the highest level of work intensity are the highly mobile employees, who use ICT to work from multiple locations.

Maintaining work–life balance

Despite the increased work intensity associated with telework, work–life imbalances are no more common among people who work regularly from home than among workers in other arrangements. In fact, among workers with children, regular teleworkers are least likely to report problems with the fit between their working hours and their personal and family commitments (Figure 30).

The statistics from the pandemic period tell a different story, however, one that underlines how circumstances make all the difference to the benefits of telework. Because of the widespread closure of schools across Europe, many parents were forced to combine telework with caring for children and home-schooling them. This took a toll. Data from the *Living, working and COVID-19* e-survey indicate that people with children who worked from home during the pandemic were much more likely to report conflicts between work and family responsibilities than others. For instance, among respondents who worked exclusively from home, 22% of those with children had difficulty concentrating on their work because of their family responsibilities compared to 5% of those without children. Among employees working from other locations, 8% reported such conflicts.

Figure 30: Percentage of workers who experienced work–life balance problems, by work arrangement and presence or absence of children, EU27 and the UK, 2015



Source: *EWCS 2015*

Switching off

Undeniably, work tends to spill over into home life in a telework environment, and it's not uncommon for workers to feel that switching off creates a bad impression for their manager. Concern about the creeping normalisation of an always-on work culture has been in the air for some time but has been heightened by the telework explosion. It has given rise to advocacy in several countries for legislation on a right to disconnect, to prevent the intrusion of work into personal time. France led the way by establishing a right to disconnect in law in 2016. Since then just three more countries – Belgium, Italy and Spain – have placed a right to disconnect on the statute book. In April 2021, Ireland introduced a more limited measure – a code of practice for employers and employees – that is not legally binding.

There has been some progress on the issue within companies, where social partner agreements have been reached to implement a variety of hard and soft measures to apply the right to disconnect. Hard measures include shutting down employees' internet connections after a certain time or blocking incoming messages; softer measures include pop-up messages reminding workers (or clients) that they are not required to reply to emails out of hours. While the different approaches provide companies with the flexibility to tailor solutions to their needs, the implications and impact of hard and soft measures differ. A hard approach can be more effective and places the onus on the employer to take action, but it may limit the flexibility of both employers and workers around working time. The soft approach relies on the employee to disconnect, which they may be reluctant to do if the work culture remains one where responsiveness is rewarded.

Several Member States are currently moving towards legislation. In the Netherlands and Portugal, legislative proposals have been made, but the process has stalled. A further seven countries (Finland, Germany, Lithuania, Luxembourg, Malta, Slovenia and Sweden) are debating the issue. In the remaining Member States, there was no debate on the matter prior to the pandemic, due in part to the low prevalence of telework. With the rise in telework, increasing attention is now being paid to the issue. However, matters may be taken out of the hands of individual countries with the passing of a European Parliament resolution in January 2021 calling on the Commission to introduce an EU-wide law to ensure that workers are able to disconnect from work outside working hours. It also called for the law to establish minimum requirements for remote working and clarify working conditions, hours and rest periods.

Trust is best

Paradoxically, despite much evidence that employees who work remotely put in extra time and have higher productivity, some employers feel compelled to ensure their staff are not shirking off. The shift to teleworking and the sudden invisibility of staff has stepped up the electronic monitoring of employees. Such tools have been present in workplaces for some time: data from the ECS 2019 indicate that prior to the pandemic 27% of companies used data analytics for monitoring employee performance.

Mass telework, however, has boosted interest in software that can, for example, monitor employees' keystrokes or take webcam shots to track their presence at their computer. The more remote work becomes mainstream, the more likely it is that companies will invest in these types of tools. But such monitoring practices may infringe on workers' rights to privacy, and while legislation might require employers to obtain employees' consent to being monitored, that consent can hardly be meaningful given the imbalance of power in the employment relationship.

Regardless of what may be permissible under the law, a controlling and untrusting management culture is ultimately counterproductive to the goals of business. Close supervision is demotivating and saps the impulse to think creatively. Chapter 4 presented evidence demonstrating that the most successful organisations are run by managers who facilitate employees to work independently. The challenge for employers in the post-COVID world of telework is not to find the best software for gathering employee metrics, but rather to design jobs that engage them and tap their skills and talents.

Event: EU Presidency Conference – BeyondWork 2020

21–22 October 2020

EU policymakers, researchers, business people and the social partners met at the BeyondWork 2020 online conference, held under the auspices of the German EU Presidency. The purpose of the conference was to examine the transformation of work and how companies can prepare their employees for the future world of work.

Eurofound ran a panel session at the event on the topic of platform work. Moderated by Communication Manager Cristina Arigho, Eurofound's Head of Unit for Employment Irene Mandl presented the Agency's research findings on platform work and joined in a live discussion with guests Joscha Moeller, platform worker; Yannis Sidiropoulos, policy advisor at the Hellenic Federation of Enterprises; Thorkild Holmboe-Hay, policy and communications advisor at the Danish trade union 3F; and Uma Rani, senior economist at the International Institute of Labour Studies.

- The shutdown of workplaces as a measure to control the spread of the COVID-19 virus triggered a mass shift to telework. By July 2020, nearly half of all employees in the EU had worked from home to some extent during the pandemic, while one-third of employees worked exclusively from home.
- The strong preference of employees is to continue to work from home to some extent; most would like a combination of working from home and working from the office.
- Permanent connectivity of devices tends to promote an always-on work culture, and teleworkers are more likely to put in unpaid overtime than workers who work only from their employers' premises. The recent explosion in telework has increased pressure on governments across the EU to introduce legislation for a right to disconnect, giving employees the right not to respond to communications from work in their free time.
- Around 37% of jobs currently being performed in the EU can be performed remotely. Most of these are white-collar jobs. The great telework shift has therefore crystallised a 'digital divide', separating well-educated, well-paid knowledge workers from workers with lower educational attainment on lower pay in manual jobs.

Read more

Topic: *Teleworking* eurofound.link/teleworking
Report: *Living, working and COVID-19* eurofound.link/ef20059
Report: *Telework and ICT-based mobile work: Flexible working in the digital age* eurofound.link/ef19032
Report: *Employee monitoring and surveillance: The challenges of digitalisation* eurofound.link/ef20008
Blog post: *Does the new telework generation need a right to disconnect?* eurofound.link/ef20082
Blog post: *COVID-19: Fast-forward to a new era of employee surveillance* eurofound.link/ef20084
Blog post: *COVID-19, Big Brother and the business case for doing better* eurofound.link/ef21013

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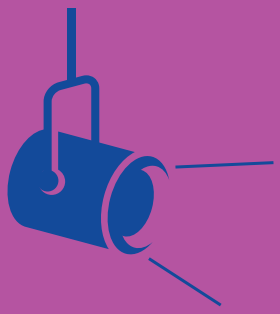


Spotlight on living in Europe

8 Solving the conundrum of access to care

While a healthy national income may be a precondition for a sustainable, fair and inclusive society in the 21st century, this goal is not achieved by raising GDP alone: improving the well-being of citizens must also be part of the picture. The European Pillar of Social Rights acknowledges as much, and within the framework of rights it sets out is the right of citizens to access the care services essential to their quality of life. Improving access is useful to both the direct recipients of services and society more broadly. Universal access to formal childcare services, for instance, not only aids children's development and helps to redress disadvantage, it also advances gender equality by enabling parents and especially women to work outside the home.

Nevertheless, a significant segment of people in several Member States encounter barriers to receiving the services they need. This is clear from the guidance given annually to countries on improving access to services in the country-specific recommendations (CSRs) issued in the course of the European Semester. Seven countries, for instance, received recommendations on access to healthcare in the 2019 CSRs, while for 17, healthcare access is discussed in the accompanying text.

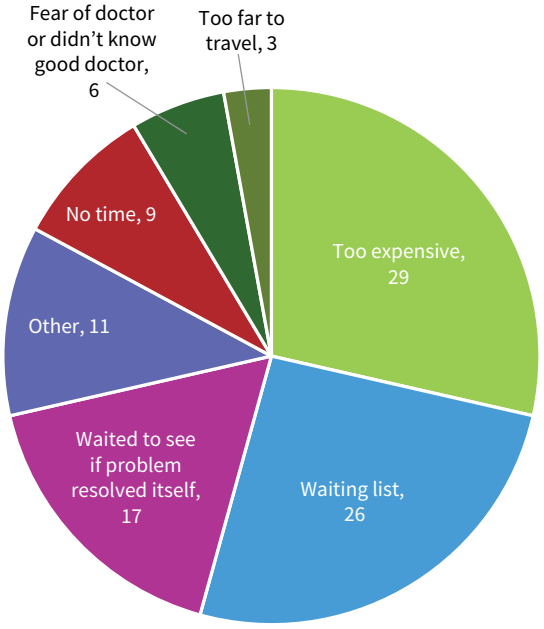
EU population surveys such as the EU-SILC and the EU-LFS ask respondents who have failed to access services the reasons why, and they give the anticipated answers: cost, lack of availability, waiting lists and so on. However, the research undertaken by Eurofound around access should prompt policymakers to look deeper and recognise that barriers to access result from a complex interaction of factors. A narrow view of access problems creates the risk that policy measures developed in response are ineffective. For instance, lowering the cost of care services may not address unaffordability if household income and expenditure, under-the-table payments and transport costs are not considered.

Healthcare: Access too dependent on employment

The main indicator used for measuring access to healthcare is the percentage of people who report that they did not receive the medical care they needed. In 2018, 3.5% of people in the EU27 and the UK had an unmet medical need, according to the EU-SILC. But Member States vary quite a bit in this measure, and the proportion was much higher, more than 10%, in three: Estonia (18.9%), Latvia (11.2%) and Greece (10.2%). Meanwhile, the figure was below 1% in Austria, Germany, Luxembourg, the Netherlands, Malta and Spain.

Figure 31 shows the reasons people gave for their inability to access healthcare, cost and waiting lists being the most common. Each of these reasons could conceal other barriers. For instance, some people said that they waited to see if their condition would resolve itself, but they may have been taking cost into account when they made that decision – had it been less costly to seek help, they might not have waited. Or they might have delayed because the service they needed was a distance away or they expected to have a long wait before being seen – had it been closer or a less lengthy prospect, again they might not have waited.

Figure 31: Main reasons given for not having a medical condition attended to (%), EU27 and the UK, 2018



Source: *EU-SILC, 2018*

Access difficulties differ depending on the type of service being sought, as the European Quality of Life Survey (EQLS) 2016 has shown. For instance, cost is a less frequent obstacle to seeking primary care; access problems here stem mainly from waiting times and

delays in getting an appointment. On the other hand, cost is a particularly common barrier to dental care and mental health services.

With improving economic performance in recent years, cost has become less of a barrier overall. Rising employment means that more people have sufficient income to cover medical costs; some are covered by supplementary insurance, paid for by themselves or as a benefit in kind provided by their employer. Research suggests that in many Member States such payments or insurance coverage have become increasingly necessary in addition to the basic public provision to prevent access problems, helping to circumvent waiting lists, shorten waiting times or reduce consultation fees. It follows that people without supplementary insurance do not have that cushion, such as many of those who are not in work: in 2018, unemployed people were five times more likely to report unmet needs due to unaffordability than employees (a 2.1-percentage-point difference), according to EU-SILC data.

This dependency on private insurance is something that policymakers need to take account of should unemployment rates escalate in the wake of the COVID-19 pandemic. Even over three months in 2020, Eurofound found a small but significant increase in arrears in healthcare and health insurance payments, rising from 6.5% in April to 7.9% in July, suggesting that the negative income and employment impact of the pandemic will promptly translate into reduced access to healthcare.

Long-term care: Large gaps in provision

Formal long-term care provision needs to be expanded substantially in most EU countries, especially in Member States with the lowest average incomes, and more options made available to meet people's differing needs. Where long-term care services are scarce, they tend to be prioritised for groups deemed to have the greatest care needs, such as people with severe long-term dependency, meaning that those with moderate or low needs are not catered for.

Over 40% of people aged 65 or older who are limited in their daily activities did not receive the assistance they needed with personal care or with household activities in 2014, according to the latest data available from the European Health Interview Survey (EHIC) (Figure 32). The percentage is much lower in countries with well-developed long-term care systems, such as Austria, Denmark, Finland, the Netherlands and Sweden. It is also low in countries where the provision of home-care services is patchy (at least as of 2014), for example Estonia and Latvia, which may indicate that people are cared for mostly by their relatives. While this informal care may meet many people's needs, it also suggests that these countries rely heavily on non-professional care.

Improving access through e-healthcare

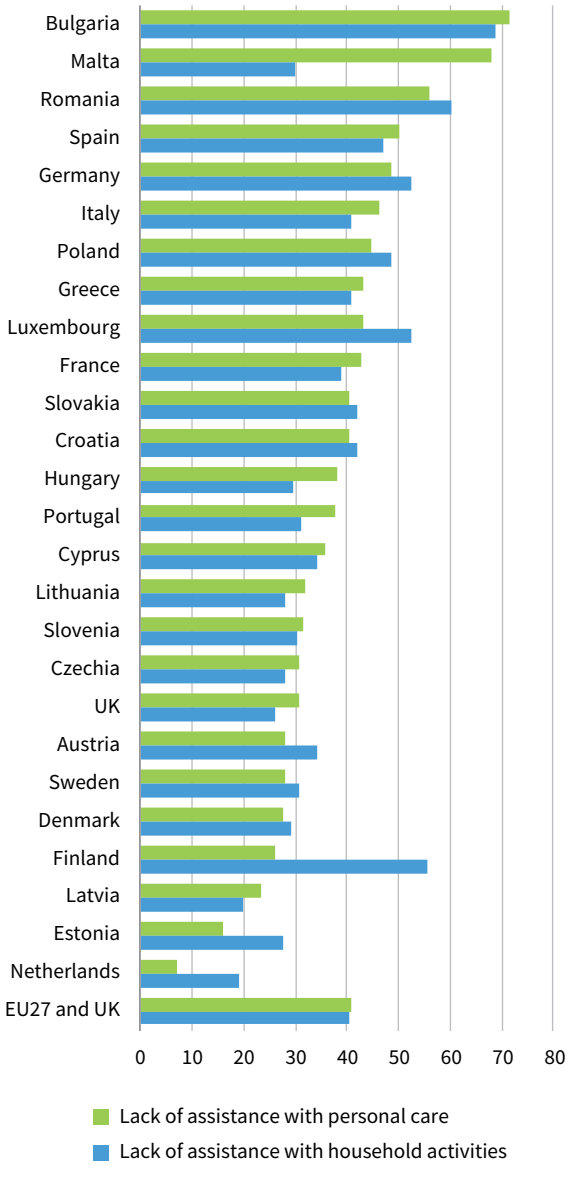
Access to healthcare could be broadened if more services were delivered over the phone or through digital devices; this would help to overcome barriers such as lack of time, distance, lack of transport, poor mobility and, in some cases, cost. But EU countries have been slow to embrace e-healthcare. Until the COVID pandemic hit, e-consultations were mainstream only in Denmark and Sweden, mainly in primary care; Austria, Estonia and Latvia have set up nationwide first-contact telephone lines to provide out-of-hours advice or to guide people to the service they need.

Ideally, though, public healthcare systems should be aiming to offer face-to-face online consultations with clients. France took the step of rolling out a national system for screen-to-screen consultation with GPs and specialists in 2018; the service also operates through pharmacies, to provide access to ICT and diagnostic equipment. In most other Member States, public initiatives have usually been restricted to small-scale pilots and specific facilities, for instance, to connect a particularly remote area to a hospital elsewhere. The COVID-19 pandemic forced many service providers to move to electronic consultations, but solutions provided were usually temporary, developed ad hoc and often restricted to telephone consultations.

Many initiatives are coming from private health insurance companies or private healthcare providers. While these are rarely covered by the public system, they can nevertheless reduce the cost of access to healthcare. For instance, in Ireland, some private providers offer e-consultations for prescriptions at between €25 and €30 per consultation – around half the cost of obtaining a prescription by visiting a GP.

Among people who have a limitation to their activities, around one-third say they do not need formal services. This reported absence of need, however, does not mean the need is absent. Societal norms and expectations play a significant part in people's perception of their need for formal home care. But even in a predominantly informal system, formal services can have a role and help to prevent functional decline in older people if available early on.

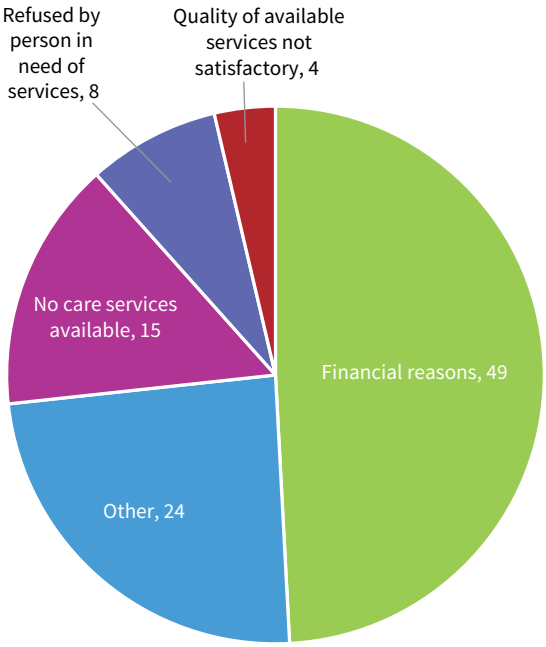
Figure 32: People aged 65+ with some or severe activity limitations who lack assistance (%), EU Member States and the UK, 2014



Notes: *No data available for Belgium and Ireland. Lack of assistance with personal care min: Netherlands – 7%; max: Bulgaria – 72%. Lack of assistance with household activities min: Netherlands – 19%; max: Bulgaria – 69%.*
Source: *European Health Interview Survey 2014*

Cost is the prevailing reason that households in need of formal services do not receive them, a reason given by 49% of people in the EU on average (Figure 33), although this figure should be interpreted cautiously as access may be affected substantially by other factors, and the severity of the potential recipients' limitations is not known. The percentage of people deterred by cost varies widely between individual countries, from 85% in Cyprus to 15% in Ireland and Sweden.

Figure 33: Main reasons behind unmet need for professional home care (%), EU27 and the UK, 2016



Source: *EU-SILC 2016 ad hoc module on access to services*

The non-availability of services for 15% of those with care needs in their household is a substantial issue and indicates a basic access problem. It could also be a proxy for an affordability barrier: a service might be available through a private provider but is perceived as unavailable because it is unaffordable or hard to reach.

The 4% who find the quality of services unsatisfactory and the 8% who report that the person in need of care is unwilling to accept the professional home-care services on offer demonstrate that the acceptability and adequacy of services must be addressed when designing and delivering them.

The fact that the reason behind an unmet care need was not identified for one in four people and therefore designated 'other' shows the potential diversity of people's needs and preferences. These 'other' reasons could relate to the conditions for receiving benefits and the flexibility of informal carers' employment situations, or they may link to issues around perceived fairness and equal treatment. What it does underscore is that designing services is a significant challenge when the obstacles are not transparent.

Improving access through respite care

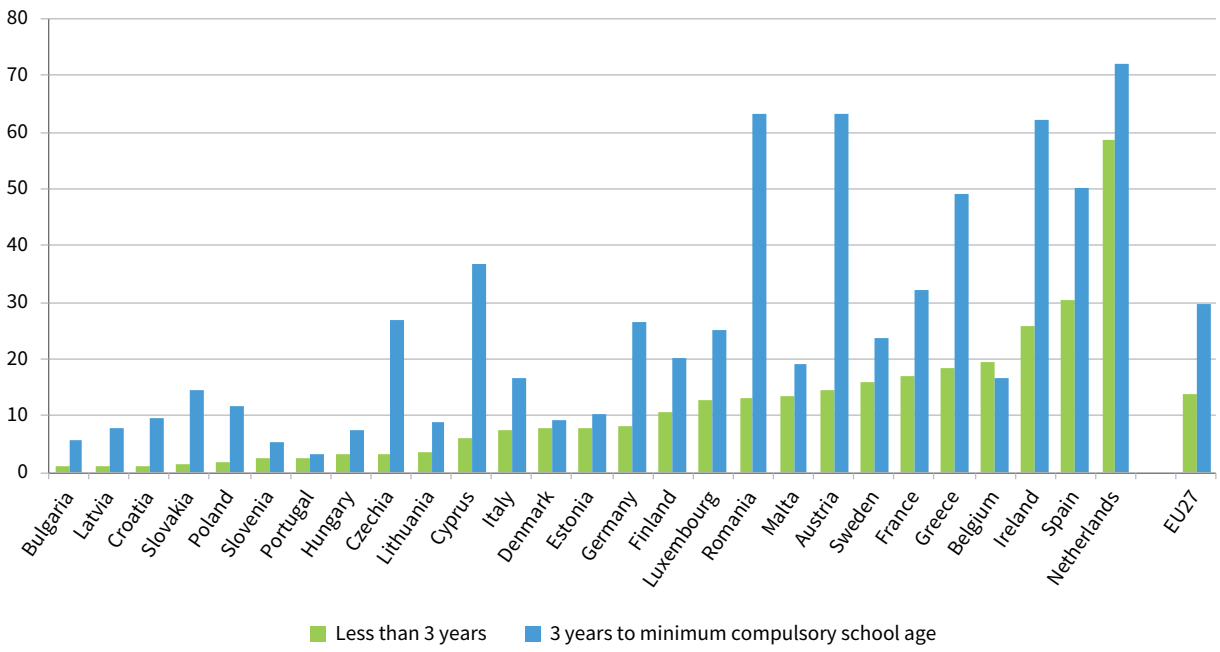
Formal long-term care could reach more people if respite care services were more widely available to informal carers. Given that some countries are substantially dependent on informal care provided by relatives and friends, it is important to ensure that carers are able to maintain their own mental and physical well-being while doing so. Furthermore, respite services can help to initiate formal care contact early on with people who have care needs, at a stage when they can still benefit from targeted support. Furthermore, take-up could be encouraged by diversifying the types of respite care services, especially by providing alternatives to placing people with care needs in hospitals or residential facilities. In this way, it can respond to the reluctance of some care recipients and their carers to opt for formal residential care.

Early childhood education and care: Mixed take-up

Early childhood education and care (ECEC) is any regulated arrangement that provides education and care for children from birth to compulsory primary school age. High-quality ECEC lays the foundation for children's development and is particularly important for vulnerable children.

In the EU27 in 2019, 14% of children under three years of age attended ECEC, while the proportion was 30% for children aged three to the minimum compulsory school age. The take-up of ECEC, especially for children aged under three years, is very low in several central and eastern European Member States as well as in Portugal (Figure 34).

Figure 34: Children cared for by formal arrangements (%), by age group, EU27 and Member States, 2019

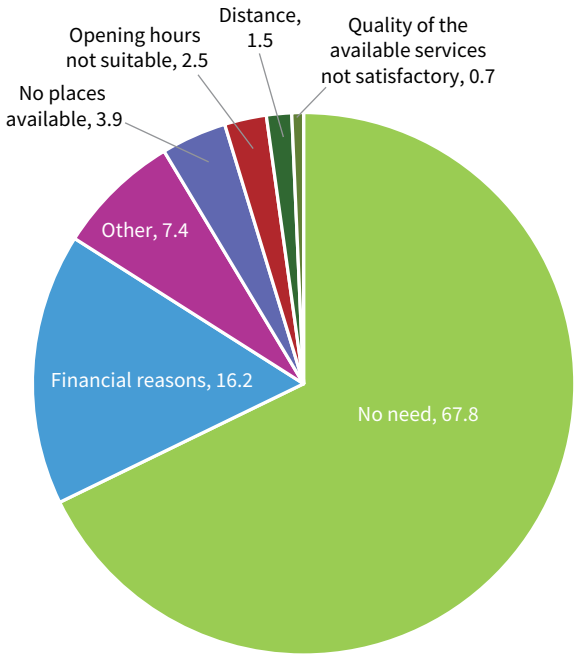


Notes: *Duration of care is 1–29 hours a week. Less than 3 years min: Bulgaria, Croatia, Latvia – 1%; max: Netherlands – 59%. 3 years to minimum compulsory school age min: Portugal – 3%; max: Netherlands – 72%.*
Source: *EU-SILC*

The main reason, by a large margin, that people do not take up ECEC is that they have no need for it (Figure 35). In other words, parents themselves are providing care and using sources of informal childcare when they need it. It may be the case, though, that parents are unaware of how ECEC could benefit their children and therefore do not perceive a need for it. It may also be the case that parents choose to do all the care work themselves because formal care is inaccessible for other reasons.

Many who use ECEC have difficulty affording it, and cost is the second most common reason for not using formal services. Access problems due to affordability stem from an interplay of factors, including household income and expenditure (on housing costs, for instance), and various costs related to the use of the service. To understand the cost barrier, other data would need to be examined, such as data on ECEC fees. Fees for children under the age of three are higher in the countries where fees are not regulated and where ECEC providers have autonomy in establishing their prices (Ireland and the Netherlands, for instance).

Figure 35: Main reasons for not using professional ECEC (%), EU27 and the UK, 2016



Source: *EU-SILC 2016 ad hoc module on access to services*

Improving access through more inclusive ECEC

Enhancing the inclusiveness of ECEC to cater for children with special educational needs could widen the coverage of these services. These children, who may or may not come from homes in poverty, face many barriers other than cost. Even when they attend ECEC services, it might be in special schools or special classes within mainstream settings. It may be the case that they do not fully take part, are discriminated against, or have worse outcomes in mainstream classes.

Continuing professional development (CPD) could improve the quality and inclusiveness of ECEC, equipping carers with the ability to support and accommodate children with special educational needs. Lack of specialists has been found to be one of the main difficulties in establishing an inclusive educational framework. In-service training has been shown to improve the quality of ECEC services and the outcomes of children. At present, only three EU Member States (Luxembourg, Romania and Slovenia) make CPD courses mandatory for all ECEC staff and specify the minimum amount of time to be spent on such training. Ten other countries refer to CPD in their regulations or make it compulsory, but without specifying the amount of time to be spent on it.

- Although costs and waiting lists are the main reasons that people give for not receiving the medical care they need, in reality barriers to access result from a complex interaction of factors. This implies that policymakers need to look deeper and to pay attention to various outcomes across the spectrum of access problems, not just unmet needs, to resolve access problems in healthcare.
- Formal long-term care provision needs to be expanded substantially in most EU countries, especially in Member States where income is low, and more options made available to meet people's different needs. Perceived absence of need should not be taken at face value. Societal norms and expectations play a significant part in people's perception of their need for formal home care.
- Many people with young children report that they have no need for formal childcare because they care for their children themselves, and many who use ECEC have difficulty affording it. Continuing professional development could help improve the inclusiveness of ECEC by equipping childcare professionals with the skills for caring for children with special needs.

Read more

Topic: *Living conditions and quality of life* eurofound.link/qualityoflife

Topic: *Care* eurofound.link/care

Report: *Access to care services: Early childhood education and care, healthcare and long-term care* eurofound.link/ef20015

Report: *Impact of digitalisation on social services* eurofound.link/ef19043

Policy brief: *Education, healthcare and housing: How access changed for children and families in 2020* eurofound.link/ef21012

Blog post: *Protecting access to healthcare during COVID-19 and beyond* eurofound.link/ef21014

9 COVID-19: The toll on well-being and social cohesion

Scientists had for years warned that a future pandemic was certain; the question was when, and how bad. Regardless, no one was prepared for the bleak events of 2020: a virus rampant, hospitals overwhelmed, death rates soaring, businesses shut down, populations confined, health workers traumatised, education disrupted, jobs lost, rule-breakers shamed – and much more could be added.

The blow to people's well-being was swift, though the rebound (which proved to be short-lived) was also quick as restrictions were lifted and normality edged back before a second wave hit. But the collective experience should not cloud the fact that some had to deal with much more adversity than others, and only by restoring the fortunes of those who lost out most can we avoid the mistakes made the last time crisis gripped the European Union.

Collective breakdown

Well-being across Europe plummeted during the lockdowns of spring 2020. We know this from Eurofound's *Living, working and COVID-19* e-survey, which captured, among other things, people's psychological responses to the situation. Over a range of indicators, Europeans' well-being at that point was much lower than recorded previously by the periodic EQLS. While the findings of the two surveys are not directly comparable because of the different methodologies used, the EQLS nevertheless provides a context in which to gauge how much the virus containment measures affected people's state of mind.

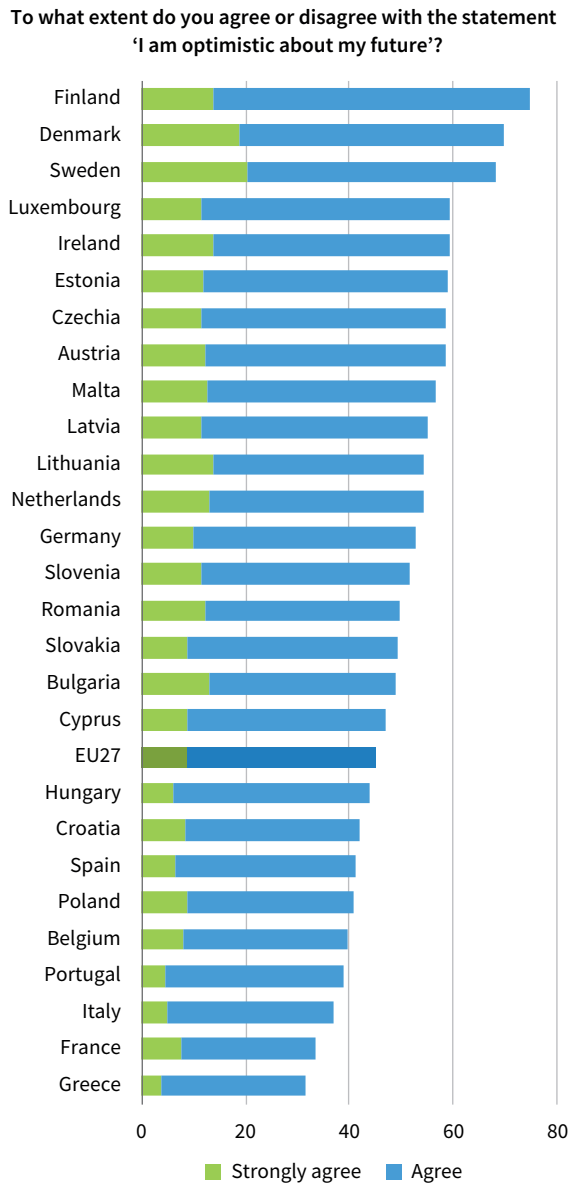
- In April 2020, Europeans rated their life satisfaction at 6.3 and happiness at 6.4, on average, on a scale of 1 to 10. Even at the depths of the last recession, in 2011, the EQLS recorded ratings of 7.1 for life satisfaction and 7.4 for happiness.
- Less than half the population (45%) was optimistic about the future – compared to 64% in the 2016 EQLS. Respondents in the EU countries hit hardest by the pandemic at that point – Belgium, France, Italy and Spain – were among those least optimistic about their future, with lower percentages of people expressing optimism than the EU average (Figure 36).
- People's mental well-being suffered: on the WHO Mental Well-being Index, which measures well-being on a scale of 1–100, the average score across the EU was 59; in the 2016 EQLS, it was 64 (Figure 37).
- Loneliness and anxiety escalated: 16% of respondents said that they were lonely all or most of the time in the two weeks prior to the survey, while 18% said they felt particularly tense most of the time. The percentages in the 2016 EQLS were 6% and 11%, respectively.

Meanwhile, when asked to rate their trust in their national governments – the institutions responsible for managing the response to the crisis – Europeans were cool, giving an average rating of 4.8 on a scale of 1–10. Trust in the European Union was even lower: 4.6 on average across all Member States.

Contributing to the gloomy collective mood across the continent was the financial hit many took when businesses closed their doors and laid off staff or reduced their hours. The e-survey captured some of this too. For instance, close to half of all respondents (47%) said that their household had some level of difficulty making ends meet. One in 10 reported this to be great difficulty, a level of financial hardship that varied across the EU: while 5% or less of the populations of Austria, Denmark, Estonia and the Netherlands had great difficulty making ends meet, the percentages were 17–24% in Croatia, Bulgaria, Greece and Slovakia. One in 10 respondents reported being in arrears on rent or mortgage payments or household bills.

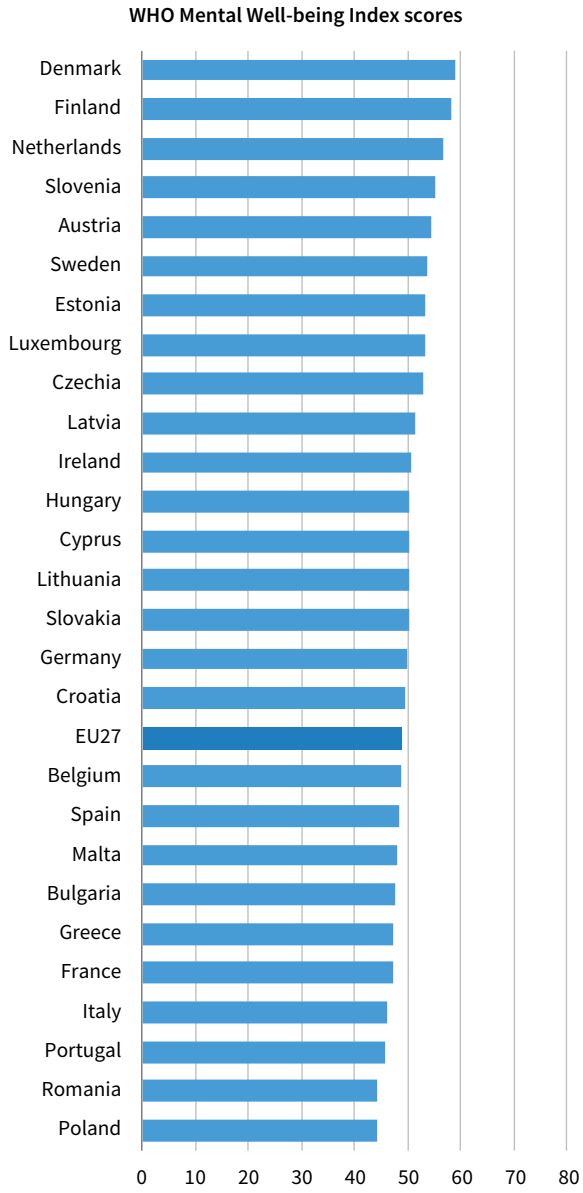
The febrile economic climate caused some to doubt their job security, with 16% of workers believing that they were likely to lose their jobs in the near future, a figure that rose to 20% among workers without a permanent contract.

Figure 36: Optimism about the future, EU Member States (%), April 2020



Note: *Min: Greece – 31%; max: Finland – 75%.*
Source: *Living, working and COVID-19 e-survey, 1st round*

Figure 37: Mental well-being, EU Member States, April 2020



Note: *Min: Poland – 44; max: Denmark – 59.*
Source: *Living, working and COVID-19 e-survey, 1st round*

Citizens rally

When Europeans were surveyed again in July 2020, at a point when restrictions were being eased across the EU and it seemed the worst of the pandemic had passed, some recovery was evident in these indicators. More people expressed optimism about the future (49%); the average mental well-being score rose to 53; and the percentage unable to make ends meet fell to 44%. However, no indicator had improved to reach levels recorded in the 2016 EQLS.

As we know now, countries and regions were to go through a rollercoaster of rising infection and death rates, followed quickly by reimpositions, to varying degrees, of virus containment measures. Well-being, in all likelihood, fluctuated in kind; in fact, given the dismal outlook as the year drew to a close, with the virus rampant once more and further deferral of a return to normal life, with exhaustion pervading many populations, well-being could well have dipped below April levels as the old year gave way to the new. We must await the results of the third round of the e-survey, conducted in March 2021, for evidence on this.

Event: EU Presidency Conference: Our social Europe – Strong together

16 September 2020

Eurofound contributed to the German EU Presidency online conference *Our social Europe – Strong together*, a high-level event focused on improving living and working conditions in Europe and efforts to recover from the COVID-19 crisis.

The conference brought together EU and national-level policymakers and representatives of social partners, civil society and the academic community across the EU. The gathering looked at issues in social justice facing Member States and the EU, including: putting solidarity within the EU into practice and boosting social justice; preventing in-work poverty; enabling vulnerable people to participate in society; and fostering inclusive growth in Europe.

Eurofound's Deputy Director Maria Jepsen shared insights, based on Eurofound's recent findings, into the challenges for Europe's youth in the wake of the pandemic, while Massimiliano Mascherini, Head of Social Policies, provided a contribution to the conference on upward convergence in the EU.

Uneven impact

One fault line in the post-pandemic world might be the gulf that opened up between those for whom the lockdown measures had little material impact and those who saw their economic bedrock crumble.

The first group consist of urban-based, white-collar, well-educated office employees who were able to work from home with little disruption to their working lives. While some had to cope with stresses such as trying to home-school children during the working day, they kept their livelihoods and salaries. Of those teleworking, for instance, 24% had difficulty making ends meet (compared to 44% of the population in general). They were also more likely to have financial buffers if they had lost their income: only 10% of those who worked all the time at home and 15% of those who worked part of the time from home had no savings at all, compared to an average of 26% across the EU. In fact, these workers were able to accumulate savings because so many outlets for spending were shuttered.

On the other side are those who underwent an employment upheaval – workers in 'non-essential' sectors who could not work from home. Some lost their jobs with the shutdowns and saw their incomes evaporate while having little prospect of finding work in an unsettled labour market. Furlough consigned others to a living dormancy, many uncertain whether their job would survive the pandemic. Still others were in and out of work as restrictions were tightened and eased. On top of a diminished income, they had to cope with idleness and limited social contact for weeks on end – a perfect storm for a mental health crisis. In July 2020, the average mental health scores of these workers was less than 50 on the WHO index, a marker for risk of depression: unemployed people and those with low job security returned scores of 43 on average, while those who recently lost their jobs had an average score of 42.

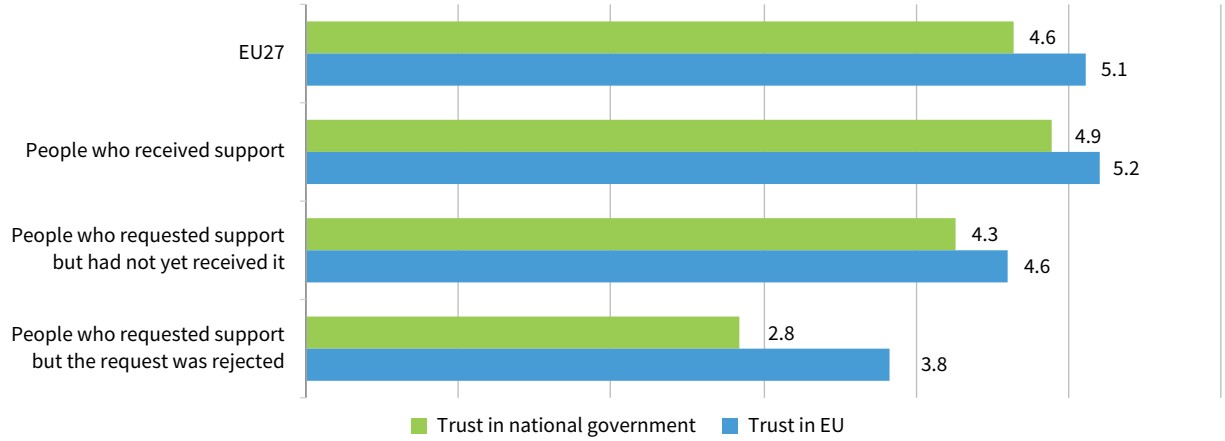
Unemployed people struggled financially more than any other group: in July, 69% indicated that their financial situation had worsened since April; 79% reported that their household had difficulty making ends meet, more than twice the rate of households in employment (36%); and the rates of arrears in their households was much higher than those in work – for instance, 20% of unemployed people were in arrears on their rent or mortgage payments compared to 8% of the population as a whole.

Keeping faith

The efforts of policymakers to set society to rights once the fog of pandemic has lifted will have better hope of success if their actions take account of the pandemic's uneven impact on the lives of citizens. To avoid an unravelling of social cohesion, there is a strong case for maintaining the ambitious approach to policymaking that gave a lifeline to those whose livelihoods fell apart during the crisis. One in five people in the EU received some form of financial support during the COVID-19 pandemic, and that may prove to have been a social glue, binding societies together.

Findings from the *Living, working and COVID-19* e-survey suggest that there could be a trust dividend. People who received state supports were significantly more trusting of both the national government and the EU than those who requested support but had their request rejected. Among the latter, the verdict was particularly harsh towards the national government, with an average trust score of just 2.8 (Figure 38).

Figure 38: Average scores on trust in government and trust in the EU, by whether state support was received, requested or rejected, EU27, July 2020



Source: *Living, working and COVID-19 e-survey, 2nd round*

The lasting impact of COVID-19 on the collective psyche, if any, will be measured in the years to come. Meanwhile, against a background of massive national debt, governments face the daunting prospect of devising an economic and social policy approach that rescues the national economy while simultaneously protecting employment and providing a robust social safety net to catch those for whom job loss is inevitable. At the forefront of planning should be the recollection of the consequences of decisions made during the last economic crisis in Europe, when in the context of large-scale unemployment and underdeveloped social security systems, swingeing cutbacks to social benefits and public services left large swathes of people unsupported in their struggle with falling living standards and diminishing quality of life. The ensuing loss of confidence in established political institutions fuelled the growth of populist politics, which offered simple explanations to complex problems and proffered solutions that would benefit few, at the cost of many.

The Member States must act in concert to maintain living standards across the Union. Some divergence across the Member States appears inevitable, given the scale of the economic shock and the differences in the extent to which countries depend on the sectors hardest hit. But should EU upward convergence, the collective raising of living standards and quality of life, stall as it did a decade ago, the blow to the European project could be severe.

Was the pandemic worse for younger people?

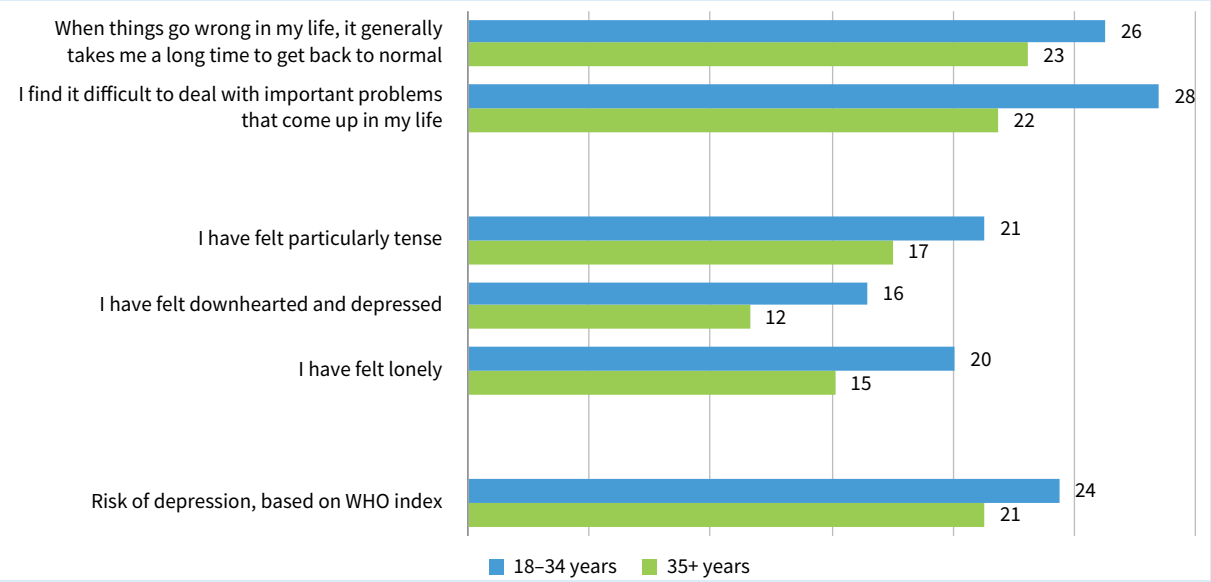
Memory of the catastrophic consequences for young people of the previous crisis quickly raised concerns that the pandemic would result in a similar outcome. During the economic turmoil of 2008–2013, youth unemployment skyrocketed to more than 40% in some Member States, while the lack of prospects elevated the perception of social exclusion among young people.

And, indeed, this time round it is again young people, along with female workers, who have borne the brunt of the employment contraction, because the sectors that have been most affected by COVID-19 lockdowns – hospitality, retail and leisure – are sectors that employ higher numbers of younger people. Employment levels declined by 7–8% for the 15–25 age group between Q2 2019 and Q2 2020.

There were signs that younger people struggled psychologically more than other age groups during the lockdowns. Eurofound's EQLS generally finds that the well-being of younger people tends to be higher than other age groups, but at the height of the pandemic in April 2020, younger people (aged 18–34) rated their life satisfaction no higher than the 35–49 age group (6.2 on a scale of 1–10), and slightly lower than that of people over 50 (6.4).

People in this younger age group were also less likely to perceive themselves as resilient in the crisis (Figure 39): 28% agreed with the statement 'I find it difficult to deal with important problems that come up in my life', and 26% agreed that 'When things go wrong in my life, it generally takes me a long time to get back to normal'. The comparative figures for the over-35s were 21% and 23%, respectively.

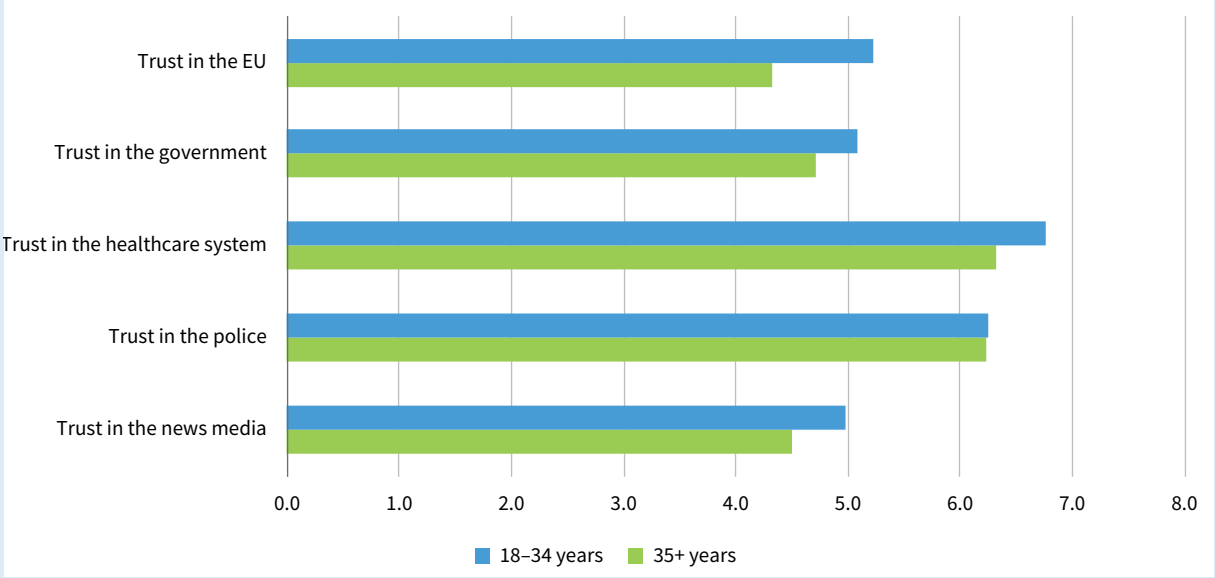
Figure 39: Comparing well-being of younger and older age groups (%), EU27, April 2020



Source: *Living, working and COVID-19 e-survey, 1st round*

At the same time, the younger age group seems better at tapping into hope; this group was slightly more optimistic than their older counterparts, with 53% reporting feeling optimistic about their future, compared to 41% of respondents aged 35 and over. This optimism may have driven the extra trust in institutions that they expressed in comparison to other age groups (Figure 40).

Figure 40: Comparing scores on trust in institutions between younger and older age groups, April 2020, EU27



Source: *Living, working and COVID-19 e-survey, 1st round*

- The lockdown measures implemented across the EU to control the spread of the COVID-19 virus took a heavy toll on the well-being of Europeans, with ratings for life satisfaction, mental well-being, and trust in the national government and the EU dropping well below ratings typically given in population surveys. These indicators rebounded to some extent in July as restrictions were eased.
- Those who were able to telework were relatively well protected from the material impact of lockdowns – these were principally urban-based, white-collar, well-educated office employees. By contrast, workers in 'non-teleworkable' and 'non-essential' jobs experienced considerable upheaval of their livelihoods and much greater falls in psychological and material well-being.
- This division could become a fault line in the post-pandemic world. To avoid an unravelling of social cohesion, there is a strong case for maintaining the ambitious approach to policymaking that gave a lifeline to those who suffered material hardship during the crisis.

Read more

Topic: *Promoting social cohesion and convergence* eurofound.link/socialcohesionconvergence

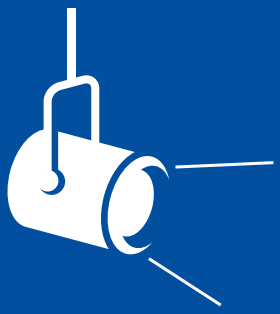
Topic: *COVID-19* http://eurofound.link/covid19

Topic: *European Pillar of Social Rights* eurofound.link/socialpillar

Report: *Living, working and COVID-19* eurofound.link/ef20059

First findings: *Living, working and COVID-19: First findings – April 2020 (PDF)* eurofound.link/ef20058

5



Living and working post-COVID

10 What future for Europe?

COVID-19 struck just as Europe was facing into the twin transition to a climate-neutral and digital society, a process that was already going to change how Europeans live and work. The pandemic has put a brake on developments in some respects and amplified the challenges, but the changeover is inexorable. The crisis exposed the fault lines in our societies and played out along them. Eurofound's work calls attention to many of those fault lines – those that run through life and work in Europe. They present many questions about the path ahead and the choices for decision-makers.

A jobless future?

The pandemic has already eliminated millions of jobs, and a tide of restructuring may sweep across Europe as unviable businesses shut down with the withdrawal of government supports. However, much of this is the acceleration of structural changes already taking place in the economy. The crisis boosted the use of online services, for instance, but technology has been replacing human input in sectors such as retail and banking for many years.

It does not mean that a jobless future lies in store. Automation and the increasing ability of machines to replace humans in performing repetitive, standardised tasks will indeed eliminate jobs. But Eurofound's work has highlighted that while routine jobs are in decline, most jobs comprise bundles of tasks, only a portion of which can be automated. Jobs also include social tasks – such as serving, teaching and managing – which cannot be automated, and jobs that are predominantly social are on the rise. These are the types of jobs that the pandemic gave prominence to, such as nursing and social care. They are also the types of jobs that are increasingly in demand to meet the health and care needs of an ageing population, for instance, or to meet the commitments of governments across Europe to the provision of affordable childcare services. And let's not forget that technology creates new jobs – think of the jobs that the internet has created, such as search engine optimiser and virtual assistant. The critical issue for employment is that workers have the skills to do the jobs of the future and the qualifications to prove it. One estimate is that 100 million workers in Europe will need to be reskilled in the coming decade, yet the current level of investment in training and development of the existing workforce suggest that countries and companies are ill-prepared for the changes ahead.

A divided labour market?

Perhaps the real risk for the world of work will not be the lack of work, but the lack of decent work for a portion of workers. With the easing of the use of temporary contracts over several decades, many labour markets in the EU appear to have settled into an equilibrium where most workers enjoy secure, well-paid jobs, but the demands of competitiveness mean that a substantial minority of workers have insecure contracts of employment in fixed-term, casual, on-call or zero-hours jobs. Not only are the jobs insecure, though, they are typically low paid and offer limited future prospects. Moreover, workers in this employment status – who are more likely to be young, have low educational attainment, work part time or have a migration background – tend to get trapped, moving from temporary job to temporary job, unable to secure a permanent contract.

Eurofound's research has found that since the start of the millennium, in the most economically dynamic centres in Europe, its capital city regions, most employment has been created in well-paid, high-skilled, knowledge-intensive jobs – precisely the 'more and better jobs' that policy aims to grow. It is an undeniable success story. But these centres in parallel have tended to expand their share of low-paid, less-skilled and often precarious employment in sectors such as retail, accommodation and food services, and personal care – employment that in many cases is dependent on the spending of their higher earning co-citizens.

The digital divide exposed by the pandemic lockdowns is another layer of this occupational gulf. High-end, urban-based jobs were protected in the COVID-19 crisis, as they were in the crisis of 2008–2013, this time thanks to their teleworkability. Meanwhile, workers in the contact-intensive sectors, where non-standard contracts are common, lost their jobs in millions. This cleavage is likely to become a permanent feature of the occupational landscape, given the extent to which employees have embraced telework and employers have conceded its feasibility.

The digital revolution for all its trailblazing is reproducing, perhaps even exacerbating, existing labour market divisions. On the one hand, it is generating high-skilled jobs in telecommunications, computer programming and information services. On the other, it is spawning businesses dependent on cheap labour. Online platforms have constructed a business model that saves them the costs and responsibilities of hiring employees. Online retailers are driving the growth of jobs in warehouses and distribution centres, where the work is physically intense, the shifts long and the workers often employed on fixed-term contracts.

An equal Europe?

The pandemic replayed the familiar tale of what happens to those with insecure employment in an economic crisis. As a result of the lay-offs and furloughing, financial distress, household debt and unpaid bills escalated. It has highlighted that the struggle to make ends meet is a fact of life for many Europeans. Even as GDP was rising and employment expanding in pre-COVID times, 1 in 10 workers was at risk of poverty. In 2018, in-work poverty, income inequality and risk of poverty were no lower than in 2007 – in fact, they were marginally higher – and Member States converged on these indicators, meaning they were becoming more similar in respect of these inglorious statistics.

Measures to shield households from hardship are critical, even after the dust of the crisis has settled, to safeguarding a social Europe. So, too, are the public services that improve the quality of life of all – healthcare, care services for children and dependent adults, education, transport and so on. Not only are quality, accessible public services fundamental to sustaining living standards and redressing social inequalities, they play a major role in shaping people's trust in national government and EU institutions, and they will be crucial in getting through the current and future challenges. The need for more extensive provision of home-care and residential care services for older people is clearly on the horizon as Europe's demography shifts and recourse to the informal care of families diminishes. Provision is not enough when it comes to public services – they must be of good quality and accessible to all.

A gender-equal future?

The EU has made great strides in establishing equal opportunities and equal access to resources for women and men. The journey to gender equality in work and society is proving to be long and laborious, however, and progress, it seems, has been interrupted by the pandemic. Women's labour market participation has been dealt a particularly severe blow because of their numerical dominance in the sectors shut down by pandemic measures. And while the ability to telework has generally helped women to improve their work–life balance, working from home in the context of a generalised lockdown was highly stressful for many working mothers. The burden of childcare and home-schooling resulting from the simultaneous closures of workplaces, schools and childcare facilities fell to a greater extent on the shoulders of women, exposing the tenaciousness of stereotypes about the roles of women and men in the household and the workplace. The renewed Gender Equality Strategy could not have come at a better time.

Policy to drive change

The transition is inescapable – climate change must be combated to avert devastation of the planet, and technological advance is the lifeblood of progress. But the trends in employment, social inequality and gender inequality are not – they are the outcomes of economic, social and cultural constructs. Policies and contexts can significantly alter their effect. A trend is never the full picture. Not all EU countries are dependent to the same extent on temporary contracts, for instance, and more determined legislative action and active labour market policy measures could encourage the conversion of temporary contracts into permanent contracts.

The implication is that policy can make a difference, and a number of policy initiatives launched in 2021 provide fresh momentum to achieving a more equal and inclusive Europe. The NextGenerationEU instrument, backed up by €750 billion in funding, will drive recovery from the COVID-19 pandemic, helping EU countries to emerge stronger from the crisis. The European Pillar of Social Rights Action Plan, launched in March 2021, continues the process of turning the 20 principles of the Pillar into concrete measures and actions to ensure that the Pillar becomes a reality for citizens in their daily lives. The Pillar, the blueprint for Europe's social dimension, is central to securing the social rights of citizens as Europe recovers and adapts in the transition to a digital and climate-neutral future. The Porto Social Summit on 7 May provides a forum for EU leaders, institutions and stakeholders to renew their commitment to the implementation of the Pillar and Action Plan.

This is followed by the Future of Europe conference, which kicks off on 9 May. This is a major initiative to engage with citizens and to inject greater democracy into decision-making on the shape of the EU in the years to come. It is an opportunity for Europeans to voice their thoughts and ideas on what the EU's priorities should be, and those thoughts and ideas will be incorporated into the reform recommendations that emerge from the conference.

As we emerge from the darkness of COVID-19, there is good reason for hope that in the transformations ahead, Europe will become the quintessence of all our aspirations.

11 Eurofound in 2021

2020 marked the final year of Eurofound's four-year programming period for 2017–2020. The first three years saw many positive economic and social developments across the EU, with consistent economic growth, new employment highs, rising living standards, and convergence of Member States towards better living and working conditions. The COVID-19 pandemic brought an abrupt halt to this trajectory, and the main task ahead is to put the EU on a path towards a sustainable, climate-neutral economy and a more equal society. In 2021, the Agency began its 2021–2024 programming period, aptly titled *Towards recovery and resilience*.

The programme is operationalised through six strategic areas:

1. **Working conditions and sustainable work**: providing comparative data and analysis that can be used to improve job quality and promote sustainability of work over the life course.
2. **Industrial relations and social dialogue**: functioning as a centre of expertise for monitoring and analysing developments in industrial relations and social dialogue, and promoting dialogue between management and labour.
3. **Employment and labour markets**: providing knowledge to identify changes in the labour market and inform employment policies to improve its functioning and inclusiveness.
4. **Living conditions and quality of life**: mapping and analysing key elements for the improvement of living conditions of people, including information on their perception of quality of life and society.
5. **Anticipating and managing the impact of change**: providing evidence on structural changes, driven largely by digitalisation and climate change but also by the COVID-19 crisis, which can be of use in ensuring a just transition to a climate-neutral economy.
6. **Promoting social cohesion and convergence**: contributing to the policy debate on fairness and informing policies aimed at improving social cohesion and promoting convergence towards better living and working standards in the EU.

The main outputs from each of these activities in 2021 are described briefly below.

Working conditions and sustainable work

Under this activity, Eurofound will release the results of an investigation into how companies have adapted their workplace practices to ensure business continuity in response to the disruption of the COVID-19 crisis, while also protecting the health and safety of workers and supporting their physical and mental well-being. The involvement of employee representatives in decisions about these measures, including the presence of collective bargaining and social dialogue, will also be covered.

Connecting with the advent of mass telework, further research findings on the right to disconnect, based on case studies exploring modalities of disconnection introduced at company level, will be published. This will also examine whether the implementation of such policies affects work–life balance and workers' well-being. A separate study on telework will begin examining telework arrangements during the pandemic, the 'teleworkability' of jobs and the new regulatory measures implemented to address this new way of working.

Secondary analyses of the European Company Survey (ECS) 2019 undertaken jointly by Eurofound and Cedefop will be finalised, including projects exploring workplace practices relating to innovation and distinctions between European establishments with a strong export orientation and other establishments.

Work will also begin on drafting the overview report of the European Working Conditions Survey (EWCS) special edition 2021, for publication in 2022. Fieldwork on the survey was halted as a consequence of the COVID-19 crisis, but data collection resumed in 2021, using computer assisted telephone interviewing (CATI) instead of face-to-face interviews.

Industrial relations and social dialogue

Eurofound's work on industrial relations and social dialogue will report on trends and developments in national industrial relations systems, including social dialogue and working life regulations and outcomes. Where relevant, the results of monitoring these developments will be analysed in other activities. The Network of Eurofound Correspondents has already contributed working papers on working life in Member States during the pandemic and will continue to provide updates to the COVID-19 EU PolicyWatch database, maintaining it as a resource for further research on

measures to cushion the economic and social fallout from the pandemic. The national working life profiles, which provide information on the structures, institutions and regulations that shape working life, will be updated.

Regular monitoring of industrial relations systems will be maintained, and comparative reports will be published on developments affecting working time and minimum wages, with analysis of the levels and systems for setting them, in the context of the European policy debate. Specific topics will be selected for comparative reporting, including analysis of the impact of COVID-19 on the dynamics of collective bargaining.

In addition, Eurofound will update its knowledge base on capacity building for social dialogue, drawing on its own research data, including the recommendations from the seminars in 2019 and on social partners' work.

Employment and labour markets

Eurofound's study exploring the immediate employment impact of the COVID-19 crisis was published in spring 2021. This includes an examination of the effectiveness of emergency support measures initiated by governments and social partners to mediate the negative consequences of the pandemic on businesses, workers and citizens. By the end of the year, another report will analyse the European labour market situation one year after the onset of the COVID-19 pandemic. As far as data allow, the report will explore the short-term resilience of countries and sectors. It will also take a regional perspective (building upon previous European Jobs Monitor (EJM) research), for example by analysing selected regions most affected by the crisis, such as traditional tourist regions.

Research on labour market shifts related to gender and age (in the framework of the EJM and jointly conducted with the European Commission's Joint Research Centre) will be finalised and published. The analysis of gender will reassess the findings of the EJM's 'jobs approach' to analysis using more gender-disaggregated job-ranking data based on both wage and educational information. The age analysis looks at how the age profile of employment has evolved and the extent to which net employment creation is related to the age profile of job-holders.

In the research strand on labour shortages, Eurofound will publish the results of an ECS 2019 analysis on workplace practices in relation to skills shortages and mismatches, conducted jointly with Cedefop.

Living conditions and quality of life

Under this activity, Eurofound will complete a study on the well-being and employment prospects of young people, especially those not in employment, education or training (NEET) and will look at the early impact of the COVID-19 crisis on the younger generation. Building on Eurofound's previous research on youth, the project will investigate how the size and composition of the NEET population has changed and will review evaluations of selected measures for social inclusion of young people.

Another output from this area this year is a report entitled *Fairness and the future*. This aims to shed light on how growing inequalities affect perceptions of fairness, potential sources of discontent and the overall sense of disillusionment in some parts of society in Europe, in comparison with objective realities. The analysis also looks at the extent to which individuals and society as a whole are optimistic about the future.

Anticipating and managing the impact of change

One research strand in this area focuses on the digital age, and as part of this strand, Eurofound will publish research on the impact of the digitisation of technologies on work organisation and working conditions. This investigates company approaches to the introduction and use of digital devices in the workplace and explores their impact on different dimensions of job quality, work organisation and industrial relations (including, for example, whether job descriptions in collective agreements have been changed to accommodate the effects of digitisation). The online flagship resource on digitalisation, bringing together research conducted in the 2017–2020 programming period, will also be published.

A second research strand in this activity deals with the impact of the transition to a climate-neutral economy. Research on the distributional impact of climate policies explores which population groups are at risk of being adversely affected and presents evidence on how this is being tackled at Member State level. Built on these findings, the results of a project exploring the socioeconomic impact of the transition to a climate-neutral economy, conducted in cooperation with the European Environment Agency, will be published.

Promoting social cohesion and convergence

Research outputs under this activity include the results of a project on regional convergence and inequalities, an area that continues to attract much attention in the policy debate. Recent emphasis has been placed on the underlying spatial dimensions of inequalities and whether poor regions are catching up with wealthier ones. Given that income convergence alone provides limited insights, the project investigates the evolution of social imbalances, such as unemployment, social exclusion and poverty.

Informed by developments arising from the European Pillar of Social Rights, Eurofound will publish findings on convergence in different dimensions of living conditions. This comprises an in-depth analysis of convergence trends among European countries, as well as a discussion of policy options to restore convergence among Member States.

The flagship report on Eurofound's work on convergence in the 2017–2020 programming period will be published. This report provides an overarching and comprehensive discussion on EU convergence in employment, working conditions, living conditions and socioeconomic factors.

Getting in touch with the EU

In person

All over the European Union there are hundreds of Europe Direct information centres. You can find the address of the centre nearest you at: https://europa.eu/european-union/contact

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EU law and related documents

For access to legal information from the EU, including all EU law since 1952 in all the official language versions, go to EUR-Lex at: http://eur-lex.europa.eu

Open data from the EU

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Eurofound's brief

What does Eurofound do for you?

- We benchmark good practice in industrial relations, living and working conditions, employment and competitiveness
- We make key actors aware of challenges and solutions
- We support policymaking by monitoring the latest developments in living and working conditions

Eurofound, a tripartite European Union Agency, provides knowledge to assist in the development of social, employment and work-related policies.

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