

SIXTH FRAMEWORK PROGRAMME  
PRIORITY 7: "CITIZENS AND GOVERNANCE IN A  
KNOWLEDGE-BASED SOCIETY"



**Contract for:**

INTEGRATED PROJECT

***Annex I – "Description of Work"***

**Project acronym:** WORKS

**Project full title:** Work organisation and restructuring in the Knowledge Society

**Proposal/Contract no.:** 006193

**Related to other Contract no.:**

**Date of preparation of Annex I:** 2/2/2005

**Start date of contract:**

# Table of Contents

<b>1. Project summary</b>	<b>3</b>
<b>2. Scientific and technological objectives of the project</b>	<b>4</b>
2.1 The main objective of WORKS	4
2.2 Detailed description of project goals, means to achieve them and measures of progress	5
<b>3. Participant list</b>	<b>11</b>
<b>4. Relevance to the objectives of Priority 7 – Changes in work in the Knowledge Society</b>	<b>12</b>
<b>5. Potential impact</b>	<b>24</b>
<b>6. Outline implementation plan for the full duration of the project</b>	<b>27</b>
6.1 Activities	27
6.1.1 Introduction	27
6.1.2 Research, technological development and innovation activities	31
6.1.3 Training activities	40
6.1.4 Management activities	43
6.2 Plans	46
6.2.1 Plan for using and disseminating knowledge	46
6.2.2 Gender Action Plan	48
6.2.3 Raising public participation and awareness	49
6.3 Milestones	50
6.3.1 Major Milestones over full project duration	50
<b>7. Project management</b>	<b>53</b>
<b>8. Detailed implementation plan – first 18 months</b>	<b>59</b>
8.1 Introduction - general description and milestones	59
8.2 Planning and timetable	78
8.3 Graphical presentation of work packages	81
8.4 Work package list	82
8.5 Deliverables list	83
8.6 Work package description (18 months period, month 1 – 18)	84
<b>9. Project resources and budget overview</b>	<b>98</b>
9.1 Efforts for full duration of the project	98
9.2 Efforts for the first 18 months	99
9.3 Overall budget for the full duration of the project	102
9.4 Budget for the first 18 months	102
9.5 Management level description of resources and budget	102
<b>10. Ethical issues</b>	<b>106</b>
<b>11. Other issues (optional)</b>	<b>107</b>
<b>Appendix - Subcontracting</b>	<b>104</b>
<b>Appendix A – Consortium description</b>	<b>108</b>

# 1. Project summary

WORKS is an IP with 17 EU and Accession State partners to carry out research on how employment, learning and labour practices adapt to change and with what effect. Taking account of the global context and of regional diversity within Europe, the project will: integrate knowledge on changes in work in the KBS; analyse existing quantitative data, identify best practices and develop a roadmap for convergence; carry out organisational case studies to provide windows into the restructuring of value chains at strategic points to illuminate changes in the organisation of work within and between organisations; carry out qualitative research at the individual level in order to analyse the quality of work, time use, learning and occupational identities; carry out a comparative regional mapping of the institutional, policy and social dialogue aspects of workplace changes and their impact on organisations and individuals; establish a Global Reference Group to compare European developments with those elsewhere and to identify the niches of European regions in the new global division of labour in the knowledge economy; develop methodologies for carrying out qualitative research into work organisation which are sufficiently rigorous to allow for comparability whilst retaining sensitivity to cultural and institutional differences; contribute to the development of an integrated ERA by involving researchers from outside the project and by contributing to the training of researchers; actively involve the social partners and other policy stakeholders in the project; include the future perspective grounded in robust empirical research, take account of regional diversity and the differing interests of social actors and avoid crude extrapolation; take account of gender, ethnic and other social variables within as well as between sectors, regions, organisations, workplaces and households and, finally, disseminate the results to the policy and research communities.

## 2. Scientific and technological objectives of the project

### 2.1 The main objective of WORKS

One of the underlying assumptions of the WORKS proposal is that the reorganisation of work can only be understood fully in the context of a global restructuring of value chains, entailing a simultaneous decomposition and recomposition of sectors, organisations, labour processes and skills. However, the considerable heterogeneity within Europe of skill supply, levels of employment, welfare systems, and economic sectors make it especially difficult to disentangle the causes and effects of such processes and to isolate the primary drivers of change. Yet it is particularly important for Europe both to understand the factors underlying economic restructuring (and hence the competitiveness of European firms) and to examine their quantitative and qualitative impact on working conditions and social welfare. Further, Europe not only faces the future from a highly fragmented base but its research in this area is similarly fragmented. This research project is designed to overcome this, and to produce knowledge and recommendations specifically geared to the problem of organisational development in a period of rapid change. At the heart of this is a single issue: how are employment practices adapting to change and with what effect? If we can answer this more effectively on a Europe-wide basis we will be able to propose practical solutions to real problems.

**The main objective of the WORKS project is to improve the understanding of changes in work in the knowledge-based society (KBS), their driving forces and their implications for the use of knowledge and skills and for the quality of life. In particular, new forms of work organisations will be analysed taking account of global value chains and regional institutional contexts.**

Fundamental to the achievement of this objective is the need to root the programme of research in a framework informed and supported by users and stakeholders, to link the research to training, and to establish a comprehensive programme of dissemination. These are essential parts of the proposal. The research objective will be achieved through a comprehensive and coherent programme of research involving several disciplines (sociology, economics, organisation analysis, labour studies, psychology, gender studies, political science and compute science) and in 13 European countries.

Why do we propose such a multi-faceted approach? Our argument is that the research base needs to innovate in a more comprehensive inter-linking of different issues, different research approaches, and different disciplines if it is to contribute something of value. The real world is now so complex that research on the factors driving change, and assessment of the effects of change, can no longer be compartmentalised. The project is rooted in the following assumptions:

1. the *workplace* forms a crucial locus where the individual citizen encounters global economic forces. However, the interactions between the individual and the global which take place in the workplace are neither inevitable nor uni-directional. Work organisation is shaped interactively both by structural forces and by the agency of individuals at a local level. It is therefore necessary to combine the study of *institutions* with that of *individuals*;
2. the '*knowledge society*' is rooted in the 'knowledge-based economy', but there are both continuities and discontinuities with the 'old economy'. The processes which accompany technological change bring about structural changes in the economy, a complex restructuring of traditional manufacturing and service sectors, and new patterns of cross-sectoral trade in services. Thus research should not be restricted too narrowly defined 'knowledge sectors'. A key concept here is that of the *elaboration of value chains, both spatially and contractually*;
3. these developments are accompanied by (and in some cases enabled by) the *codification of skills and knowledge* leading simultaneously to new forms of flexible and autonomous 'knowledge work' but also to new forms of Taylorism;
4. the accompanying changes in technology and work organisation are leading to new patterns of learning, both formal and informal, resulting in a dual process of *decomposition and recomposition of skills and occupational identities*;

5. as well as transforming production and business processes and generating new products and services, these developments also transform *consumption processes*, creating new types of unpaid activity and thus impacting on domestic as well as working life. These impacts interact with the impacts of changing household structures and changing gender patterns of labour market participation;
6. the 'knowledge society' cannot be seen as a single undifferentiated global entity, regional and national institutions continue to contribute to distinctive trajectories, thus rendering it necessary to carry out *comparative research* and develop explanatory models for differing regional development paths and to consider what this means for the European context;
7. the *social impacts* of changes in work affect groups differentially according to their specific social positions, gender, ethnicity, age, educational background and other social variables;
8. a complex array of *drivers of change* in work organisation in the knowledge society result from a number of different factors which, on the *labour market demand side* include the globalisation of markets, the liberalisation of trade, the development and spread of new information and communications technologies, the deregulation of labour markets, the marketisation of the public sector and policy initiatives such as the development of eGovernment. On the *supply side* they include changing household structures, the emergence of a tele-literate generation of workers and consumers and the appearance on the labour market of new groups;
9. workplace innovation should be seen as the product of a complex process of learning grounded in, for example, vertical and horizontal interaction within firms, networking between firms (industry associations, supply chain relationships, etc.), public policy, vocational training, industrial relations and the financial system. It is therefore important to discover and to strengthen the characteristics of effective and dynamic innovation systems at regional, national and European levels, and to reinforce the bridges between academic research, social partners, business support organisations and the individual firm.

## 2.2 Detailed description of project goals, means to achieve them and measures of progress

### 2.2.1 **Goal 1: Integrating the existing knowledge on changes in work in the knowledge-based society. To review the state-of-the-art in respect of concepts, theories and empirical research on changes in work in the KBS in Europe**

This will involve:

- a comprehensive overview of research traditions and a synthesis of research findings;
- a systematic interaction with the new scientific developments in each of the countries involved and at the European level during the project's lifetime.

Measures of progress:

- nine state-of-the-art papers synthesising the theoretical, conceptual, empirical and policy debate on the issues relating to changes in work, covering the European diversity and including the future perspective: December 2005;
- the systematic monitoring of relevant national and European research activities as an ongoing process in the global dissemination activities (conferences, etc.): ongoing.

### 2.2.2 **Goal 2: Mapping and assessing the exploitation of existing quantitative data sources of the National and European Statistical System, including the development of a roadmap for more convergence of instruments to measure changes in work in the KBS at the European level**

This will involve:

- a feasibility and benchmarking study of the national and European statistical systems regarding the quantitative analysis of changes in work in organisation and in individual and household surveys;
- the identification of problems of comparability of the different data bases and the strengths and weaknesses of the national and European data bases;
- the identification of best practice indicators for European comparative research that form the basis for quantitative analyses developed in the project;
- the establishment of a European working group on organisation surveys;

- the development of a roadmap for co-operation and a convergence process on organisational surveys in Europe, including a frame for a basic module with indicators and related questions to measure organisational change in organisation surveys.

Measures of progress:

- a 'map' of European organisations and individual/household surveys that are relevant to measure changes in work: May 2006;
- an updated digital questionnaire data base on organisation surveys: December 2005;
- a European working group with representatives from organisation surveys: November 2005;
- the use of previous national and European research projects already undertaken, such as in data harmonisation (PASO and CHER), and in projects such as STILE and NESIS: ongoing;
- a list of best practice key indicators for measuring changes in work in organisations identified in organisational surveys in Europe, including full specification of key variables, their location, the degree of comparability, and their suitability for purpose of analysis: May 2006;
- a list of best practice key indicators for measuring the impact of changes in work on individuals, and their households, including full specification of key variables, their location, the degree of comparability, and their suitability for purpose of analysis: May 2006;
- a questionnaire module with key indicators and questions for organisation surveys that allow to collect data in a comparative way on changes in work in the future, developed in a workshop: February 2006;
- plans to use the agreed organisation survey module into the next survey waves by the different institutes of the working group (within their regular funding or with additional national funding): end of the project.

### **2.2.3 Goal 3: Innovating the knowledge on changes in work and the quality of life by carrying out qualitative research on work organisation, use of knowledge and skills and quality of working life in selected business functions or activities at organisational and networks level**

This will involve:

- the development of an appropriate internationally comparative qualitative research methodology on organisations;
- the investigation in case study research of 58 organisations in 13 participating countries;
- innovating the knowledge on changes in work based on the analysis of the case study material collected in the frame of the project.

Measures of progress: see below.

### **2.2.4 Goal 4: Innovating the knowledge on the implications of changes in work in the knowledge-based society by conducting qualitative empirical research at the individual and household levels, analysing aspects of quality of work, time use, learning and occupational identities**

This will involve:

- the development of an appropriate internationally comparative qualitative research methodology on occupations and biographical career trajectories;
- the investigation in case study research of occupations and career trajectories in all participating countries including retrospective questions;
- innovating the knowledge on changes in work based on the analysis of the case study material collected in the frame of the project.

Measures of progress: see below.

### **2.2.5 Goal 5: Innovating the knowledge on the shaping by institutional arrangements and policies of work organisation and their outcomes in terms of quality of life**

This will involve:

- the development of an appropriate internationally comparative qualitative research methodology on the role of institutional regulations and the social dialogue for shaping work and the quality of life;
- the mapping of the institutional, policy and social dialogue contexts which have an impact on work organisations and individual quality of life;

- to develop analytical schemes to better understand similarities and differences in European institutional settings and to map institutional change and adaptation in view of changing forms of work organisation;
- research on the institutional frameworks which influence HRM policies and occupational change such as labour market regulation and social dialogue by investigating institutions or regulations 'at work', i.e. in their practical application and contestation at the level of the workplace;
- a specific stream on policy and institutional shaping in the last project conference.

Measure of progress for goals 3, 4 and 5:

- case study research guidelines (on selection, interviewing, analysing and reporting) for organisations, individuals and households and representatives of social partners and policy, relevant to the organisations: March 2006;
- methodology has to include also a process perspective as well as both an objective and subjective perspective on the development of work organisation and quality of life: March 2006;
- 58 case study reports on organisations, on individuals and their households and on the role of social dialogue and policy: May 2007;
- reports on business functions integrating empirical data collected with organisations, individuals and social partners: May 2007.

**2.2.6 Goal 6: To describe and explain the extent of organisational change in Europe on the comparison of secondary analysis of existing data bases with the focus on the research issues of the project, based on the identification of best practice indicators on changes in work**

- To describe and explain the impact of organisational change in European employment as this affects individuals and households through comparative quantitative analysis of a number of large-scale data sets of individuals.
- To describe and explain the extent of organisational change in European organisations through the comparison of quantitative analysis of a number of data sets resulting from organisation surveys in Europe.
- To explain the causes of this change and national variation in order to assess the significance of variation.

This will involve:

- training to researchers in quantitative analysis of existing organisation survey data bases;
- analysis of data sets at the descriptive level, mapping the necessary parameters such as national variation in key indicators, regional distributions, and trends over time;
- analysis of data using a variety of statistical techniques to model change in the key indicators in order to isolate causes of change and the effects on European competitiveness and social welfare;
- to examine the distribution of new forms of work organisation throughout Europe as identified in the different organisation surveys and to compare both the antecedents and the impact on organisational strategies and HRM-related issues;
- to examine the welfare implications in respect of occupational mobility, the distribution of earnings, and gender equality;
- to integrate the findings of the secondary analysis of both the organisational data and the individual and household data;
- interaction with the subgroup 'Theories and concepts' in order to confront the results with the qualitative empirical phases and horizontal thematical analysis.

Measures of progress:

- access to required data sets of organisation surveys or to tables resulting from analyses to integrate knowledge on organisational change: October 2006;
- a training workshop (summer school) for researchers on comparative analysis on data bases from organisational surveys: December 2006;
- a series of tables based on the analysis of best practice indicators to measure changes in work in surveys: March 2007;
- a report with a descriptive account of organisational change in Europe: May 2007;

- a report with analyses which seeks to explain the changes which are occurring and attempt to make projections of change based on these: March 2008;
- the integration of these results with the findings from the qualitative case studies of the project: May 2008.

**2.2.7 Goal 7: Integrating the new knowledge on changes in work organisation and their outcomes in terms of quality of life. The aim is to synthesise the material collected in different countries and across the different economic activities and occupational groups to reach insights at an aggregate and comparative level and, in particular:**

- to provide descriptions and explanations on the evolution of work organisation, the drivers of change and the impacts on the work force;
- to separately deal with topics of high scientific and political relevance;
- to present the research findings in concise form for separate expert communities and audiences.

This will involve:

The production of 11 comparative thematic reports on the key issues of changes in work, based on an integration of findings from the quantitative and qualitative work in the previous project phase. The themes of these papers are:

- the networked organisation and global value chain restructuring;
- strategies to reach flexibility in the organisation;
- NFWO and the quality of working life, health and safety, autonomy;
- changes in work in transitional economies;
- change processes and future perspectives;
- learning and skills, occupational identities;
- flexibility, time use and work life balance;
- forms of employment and biographical aspects;
- changing gender and ethnic relations at work in the KBS;
- changes at work, social dialogue and institutional shaping in the KBS;
- internal and external labour markets and intermediation.

Measure of progress:

- 11 reports: May 2008.

**2.2.8 Goal 8: Innovating the knowledge on changes in work in the knowledge-based society by developing a global perspective taking full account of the implications for work organisation of global economic restructuring and the recomposition of value chains**

This will involve:

- to provide a forum for consolidation of the learning so far derived from the project's work and for discussing the best way to take it forward;
- to ensure that the project's theoretical and empirical work is grounded in a full understanding of the global context, enabling the specific place of European industries and regions in the global value chains to be identified. In particular, it will make it possible to explore the origins and destinations of the value chains under study when these lie outside Europe;
- to give an opportunity to draw international comparisons, thus strengthening the project's analysis of regional institutional shaping;
- to establish a form of peer review for the project's work;
- to set up a forum for dialogue with policy stakeholders and, as the work progresses, for dissemination of its results;
- to make a contribution to innovative training and demonstration activities.

Measures of progress:

- the establishment of a Global Reference Group that will be consulted two times during the project lifetime in two conferences organised at milestone moments: March 2006;
- the involvement of stakeholders through extensive dissemination of methods and findings to the European scientific community, to policymakers, to other interest groups, and to those engaged with

non-European experts on changes in work in the knowledge-based society: September 2006, February 2009.

**2.2.9 Goal 9: To contribute to the further development of the European Research Area by improving knowledge on qualitative case study work in internationally comparative research in particular in the area of research on work and employment. To contribute to the dissemination of the WORKS findings by developing specific training initiatives to the scientific community and to practitioners. This includes providing training to researchers in comparative research methods on work organisation and quality of life, quantitative analysis of existing organisation survey data bases and training organisation practitioners on tools related to organisational design**

This will involve:

- development of training material;
- to present up-to-date methods covering all phases of the research: problem-formulation, research design, research sample, research instruments and analysis of case study material;
- to summarise experiences from case study work within the WORKS project;
- to integrate methodological knowledge and research experiences.

Measures of progress:

- a manual for qualitative case study work in internationally comparative research; adapted to different national research traditions by way of involving researchers from different national scientific communities: May 2008;
- a summary of available methodological knowledge on qualitative case study work in internationally comparative research: December 2007;
- up-to-date methods covering all phases of the research: problem-formulation, research design, research sample, research instruments and analysis of case study material: December 2007;
- useable case study reports based on the qualitative phases of the WORKS project: May 2007;
- to adapt the manual to different national research traditions by way of involving researchers from different national scientific communities: March 2008.

**2.2.10 Goal 10: Contributing to extending insight into the future of work by including the future perspective as a main stream in the different stages of the project by including a process perspective in the analysis of changes in work organisation; a detailed description of the relevant drivers of change; and an analysis of the institutional frameworks of work organisation and their dynamics**

This will involve:

- a state-of-the-art phase in which research findings using a process perspective and scenarios of changes in work will be compiled;
- a specific thematic paper presenting visions and scenarios of work organisation in the knowledge-based society;
- a specific stream in the last project conference presenting the project results and confronting them with external expert knowledge.

Measures of progress:

- the development of findings on the present state of work organisation and quality of life derived from both the qualitative and quantitative research (thematic paper): May 2008;
- carrying out an expert evaluation and discussion within the project and beyond during the second conference as a forum for validation of the scenarios: May 2009.

**2.2.11 Goal 11: Building in the gender perspective as a main stream into the project by:**

- assessing and improving the research methods used in the project from the gender perspective during the whole project lifetime;
- taking the 'gender contract' as the major tool to innovate the knowledge on segregation in different levels and dimensions.

This will involve:

- building in the gender perspective in the design of the research methodologies of the project and data analysis;
- including the gender composition of the work force in the selection of the case studies;
- attention for the gender balance in project-related events s.a. training events;
- including the gender perspective into the project's reports, such as the insights from the so-called gender contract.

Measures of progress:

- including gender specific issues and questions in the interview and reporting schemes: May 2006;
- including gender in the tables resulting from the quantitative analysis: May 2007;
- a gender-balanced participation in project-related events such as training: February 2006, October 2008, December 2008;
- explicit gender issues reported in the project's reports: May 2009.

### 3. Participant list

Part. role*	Part. number	Part. name	Part. short name	Country	Date enter project	Date exit project
CO	1	Katholieke Universiteit Leuven (Catholic University of Leuven), Hoger Instituut voor de Arbeid (Higher Institute for Labour Studies)	K.U.LEUVEN	Belgium	01/06/05	31/05/09
CR	2	Forschungs- und Beratungsstelle Arbeitswelt (Working Life Research Centre)	FORBA	Austria	01/06/05	31/05/09
CR	3	London Metropolitan University, Working Lives Research Institute	LONDONMET	UK	01/06/05	31/05/09
CR	4	Fondation Travail-Université, Work & Technology Research Centre	FTU	Belgium	01/06/05	31/05/09
CR	5	Panteion University of Political and Social Sciences, Department of Social Policy & Social Anthropology of Panteion	UPSPS	Greece	01/06/05	31/05/09
CR	6	University of Twente, School of Business, Public Administration & Technology	UT	Netherlands	01/06/05	31/05/09
CR	7	University of Essex, Institute for Social and Economic Research	UESSEX	UK	01/06/05	31/05/09
CR	8	MTA Szociológiai Kutatóintézet, Institute of Sociology of the Hungarian Academy of Sciences	ISB	Hungary	01/06/05	31/05/09
CR	9	Institut für Sozialwissenschaftliche Forschung e.V.	ISF MUENCHEN	Germany	01/06/05	31/05/09
CR	10	Forschungszentrum Karlsruhe GmbH, Institute for Technology Assessment and Systems Analysis	FZK	Germany	01/06/05	31/05/09
CR	11	Fundação da Faculdade de Ciências e Tecnologia-UNL	FFCT-UNL	Portugal	01/06/05	31/05/09
CR	12	National Institute for Working Life, Department for Research on Development Processes	NIWL	Sweden	01/06/05	31/05/09
CR	13	Istituto di Ricerche Economiche e Sociali	IRES	Italy	01/06/05	31/05/09
CR	14	Stiftelsen for industriell og teknisk forskning ved Norges tekniske høyskole, Industrial Management	SINTEF	Norway	01/06/05	31/05/09
CR	15	Arbetslagarkonsultation AB, Arbetsliv	ATK	Sweden	01/06/05	31/05/09
CR	17	Centre d'études et de l'emploi	CEE	France	01/06/05	31/05/09
CR	19	Bulgarian Academy of Sciences, Institute of Sociology,	IS	Bulgaria	01/06/05	31/05/09

## 4. Relevance to the objectives of Priority 7 – Changes in work in the knowledge society

### 4.1 Contribution to the programme objectives

The primary aim of the WORKS project is to cover topic '2.1.3 Changes in work in the knowledge society' fully and exclusively. Thus the project will contribute to:

- *'understand the major changes in work'* by investigating the dynamics of work organisation and employment;
- *'in a future perspective'* by applying a process view and including the future perspective as a main stream in the project activities;
- *'the relationships of these changes to the use of knowledge and skills'* by analysing the development and the application of knowledge and skills in the work organisation as influenced by the institutional context;
- *'and their implications for quality of life'* by investigating, in particular, working conditions and the work/life balance from an organisational, individual and household point of view.

To reach this aim this proposal suggests a *comparative analysis of changes in work organisation* as shaped by *major driving forces* including the dynamics of global value chains and other forms of restructuring, taking into account the variety of institutional and policy contexts in the EU member and Accession Countries. The project will analyse *different ways of achieving flexibility* and, partly related to this, *changes in the use of knowledge and communication* considering explicit and tacit forms of knowledge, spatially distributed work and the dynamics of the use of ICT. The *examination of new forms of work organisation*, including *network organisations and employees' self-organisation*, is at the core of the project.

One major aim in this is to analyse, by way of focusing both on organisations and occupational groups on the one hand, and individuals and households on the other, the impact of new forms of work organisation *on the quality of life, both within the work environment and outside*, by investigating core aspects of working and living conditions. These include the *use of time* and work/life balance as well as the *learning opportunities, occupational identities* and aspects of income and biographical security. *Social dialogue aspects* are included by analysing the dynamics of organisational change and the shaping of work organisation and quality of life in an institutional context. A *well-grounded future perspective* will be reached based on the acquired knowledge on drivers of change, including the strategies of relevant actors, on the dynamics of organisational development, and on the impacts on the quality of life.

The objectives of the WORKS project clearly relate also to the overall objective of Priority 7, research area 2, in that they are meant to contribute to 'an integrated understanding of how a knowledge-based society can promote the societal objectives of the EU'. In investigating the development of work organisation, its driving forces and consequences, the project in particular addresses the goals of 'social and territorial cohesion and improved quality of life'. The project's comparative approach, which takes full account of the institutional shaping of work organisation and its outcomes in terms of quality of life, guarantees 'due consideration to the variety of social models in Europe'. Finally, a deeper understanding of work organisation and human resource management in the knowledge-based society with special focus on the quality of working life will provide an enhanced understanding of problems stemming from the ageing of the population.

The WORKS project will also contribute to the creation of the **European Research Area**.

- The project will map different *European research traditions* in the research on work organisation and quality of life. It will bring together various 'schools' of research in an attempt to further develop existing approaches.
- The project will contribute to the *improvement of comparative research* by further developing methods for international case study research on work organisation and by improving the comparative power of national and European statistics regarding the quantitative analysis of changes in work. On organisational survey research, the project will take decisive steps forward for more convergence in

measuring organisational change by participatory design of modules. Comparative research will also be supported through mapping the institutional and policy landscape relating to work organisation.

- The objectives of the project will be achieved through *co-operation between various disciplines* including sociology, economics, psychology, gender studies, political science and technology studies. The co-operation is required both for the integration of existing theoretical and empirical knowledge and for the empirical tasks of the project.
- The project will develop *common research methodologies* for the analysis of work organisation and quality of life at organisational, individual and household levels, and it will identify useful *indicators* for the statistical representation of change in work.
- The *state-of-the-art reviews* produced within the WORKS project will make it possible for researchers, students, policymakers and more general audiences to gain insights into the various European research traditions on work organisation and quality of work and on the recent research findings in *the European Union and in New Member States*.
- It is a central aim of the project to strengthen the *knowledge bases for policies* in the field of employment, work organisation and education at national and European levels. This relates in particular to the complex processes of restructuring of new and traditional sectors, the development of value chains, the shaping of work organisation, the recomposition of skills and occupational identities, and the consequences of new forms of work for the quality of life.
- The contributions of the 17 partners representing 13 European countries, including New Member States and Candidate Countries, will allow the mapping of research competencies in Europe. This mapping will be extended beyond Europe through the co-operation with experts from North America, South America, Africa, Asia and Australia.
- The WORKS partners are well established both in *European and national level research*. Through being embedded in national research activities the partners will develop links between the European project and major national research programmes or activities in the area of changes in work.
- Special emphasis will be on the *involvement of users and stakeholders and in targeted dissemination* throughout the project, e.g. with the establishment of a Global Reference Group. This will in particular be achieved by organising conferences and by publishing reviews of the state-of-the-art and research findings.
- The project will remain open and outward looking and in particular invite additional researchers from Candidate Countries to join the review of the state-of-the-art, research and training activities and conferences. It is a particular strength of the project to engage in co-operative activities beyond Europe.
- In the course of the project *training* will be provided to young researchers and practitioners in particular regarding research methodologies for comparative research on work organisation.

## 4.2 State-of-the-art of research in relevant fields

This state-of-the-art review is organised round ten distinct but inter-related themes which reflect the literature. All of the work packages proposed in WORKS will build on several of these themes, and all themes will be covered somewhere in WORKS. These themes are: the knowledge society; globalisation and the elaboration of value chains; public policy and social dialogue; new forms of work organisation in the knowledge-based society; new career trajectories; the use of knowledge and communication; occupational change and the demand for skills; the gender dimension; quality of life; and future trends.

## 4.3 The knowledge society

The concept of a 'knowledge society' is a contested one which has evolved from other related concepts, notably that of the 'post-industrial' and the 'information society' (Bell, 1973; Touraine, 1969). Initially several key differences between 'industrial society' and post-industrial society were identified, the most important of which were an economy that has changed from producing goods to producing information and services; an occupational distribution dominated by professionals and technical classes; and the centrality of theoretical knowledge as the source of innovation and policymaking. Such ideas were popularised by a number of futurologists such as Toffler (1981). A number of critics of the model (Gershuny, 1978; Miles, 1988; Lyon, 1988; Braverman, 1974) raised a variety of questions, for example that the development of a 'self-service economy' was actually leading to a replacement of services by goods, or that societal paths were not

converging in the way posited by post-industrial scenarios. However, the dominant concept during the rest of the 1980s and early 1990s (usefully summarised in the mid-1990s by Webster, 1995; Mattelart, 2001) continued to assume an '*information society*' or 'information age', increasingly oriented to its 'global' dimension and culminating in Castells' 'network society' (1997).

During the 1990s a large discourse arose from a variety of different disciplines attempting to characterise and explain the range of *economic, social and geographic developments* being observed; phrases coined in this regard include: the 'Death of Distance' (Cairncross, 1997), 'Weightless World' (Coyle, 1997), the 'Connected Economy' (Meyer & Davis, 1998), the 'Digital Economy' (Tapscott, 1995), the 'Knowledge-Based Economy' (Neef, 1998), the 'Virtual Organization' (Norton & Smith, 1998). With the rise of the Internet and the US-led Dotcom boom, the term 'information economy' was increasingly replaced in the 1990s by that of the 'new economy', used in several distinct senses.

One of the most important of these was as a descriptive term to define the new industries which had developed using new digital technologies, a loosely defined group of overlapping sectors which include software development, Website development and management, broadcasting, publishing, multimedia and other content provider industries, together with hardware and telecommunications companies. The most serious empirical attempts to date to delineate these sectors, sometimes known as the '*digital economy*', were made by the US government's Department of Commerce (2000), Industry Canada (Howitt, 1998), and by the OECD (Pattinson, 2000). In a more abstract and theoretical rendering of the term, economists, such as Quah (1997; 1998) argued that we are entering an era in which increasing proportions of added value are created by inputs of 'knowledge' which, because it is inappropriable, does not obey the same economic laws as consumable items, such as raw materials (see also Coyle, 1997; and Leadbetter, 2000). Another body of theoretical work, coming mainly from within the discipline of systems theory (Luhmann, 1997), deals with the convergence between 'knowledge' and technology to produce what have been termed '*cognitive-technical complexes*' (Bechmann & Frederichs, 1998). Here it is argued that the computer's ability to contribute to the development of a 'knowledge society' is only realised once it has progressed from being a calculating machine to a 'knowledge-based system' enabling all the functional systems in a society to be interconnected and bound to a single knowledge base and mode of operation.

Although the knowledge-based society and its links to the networked economy and technological innovation have engendered an enormous literature in almost all disciplines, the concept and its concrete effects on changes in work and the larger transformation of the social division of labour are not very well understood (Gadrey, 2001). What role knowledge creation has as a driver or as a consequence in light of the appearance of new industries and overlapping sectors needs to be examined in more detail at the micro as well as the macro level.

**WORKS will map the range of theoretical perspectives and provide a forum for debate and refinement of concepts to contribute to a better understanding of concept of the knowledge society as a driver of change.**

**The research question addressed in this perspective is: "To what extent do theories on the knowledge-based society help explain changes in work organisation?"**

#### 4.4 Globalisation and the elaboration of value chains"

In the literature on globalisation there seems to be a general consensus that it is becoming easier to relocate work around the globe, with some commentators arguing that this may well lead to increasing *differentiation between regions* (Gourevitch, 1996) and others arguing that there will be an increasing homogenisation between different national styles of economic management and institutional forms (Reich, 1991; Sorge, 1991; Castells, 1996). There is also general agreement about the growing dominance of transnational corporations (Hirsch-Kreinsen, 1998; Meil et al., 2003), which not only play a critical role in determining what employment gets located where, but also play an increasingly important part in shaping work culture, regardless of where it is located (Kotthoff, 1997 & 2001; Dörrenbächer, 2003).

Processes of internal and external restructuring have led to decentralisation, outsourcing and networking. Key to this development is the disaggregation of organisations into smaller functional units which may then be relocated spatially or outsourced. Spatial relocation may take the form of concentration of functions in large centres, often organised on Tayloristic principles, or of decentralisation to smaller units, which may exhibit more flexible forms of organisation (Flecker & Kirschenhofer, 2002). Outsourcing, too, may be to

large multinational companies specialising in the provision of a range of back office functions, or to micro-businesses supplying a single business service (Huws, 2003).

As a consequence, new forms of work organisation in many industries are strongly marked by new developments in *corporate governance and interrelations between companies*. This is reflected in different bodies of research ranging from analyses of globalisation and multinational companies (e.g. Ruigrok & van Tulder, 1995; Hirsch-Kreinsen, 1998; Bartlett & Ghosal, 1998; Narula & Dunning, 2000), the work on increasingly global commodity or value-added chains (Gereffi & Korzeniewicz, 1994; Altvater & Mahnkopf, 2002; UNCTAD, 2002) and in debates on decentralisation of companies and changing managerial strategies (Kotthoff, 1997; Sauer & Döhl, 1997; Faust et al., 2000).

It is often assumed that outsourcing takes place from a large and powerful organisation to a smaller and less powerful one. In fact, this is not always the case: recent years have witnessed the growth of very large companies offering a range of back-office functions to clients in both the private and public sectors, for instance in payroll administration, Human Resource Management, recruitment, software development, data base management, logistics management, design, publishing, customer services and marketing. The disaggregation and geographical decentralisation of some organisations is therefore accompanied by aggregation and spatial concentration in others.

Various aspects of work organisation are strongly influenced by new developments such as benchmarking and the establishment of market-like relationships within the company that are used to ensure the contributions of individual units to overall profitability (Meil et al., 2003). Competitive pressures have also accelerated external restructuring with levels of profitability in a volatile market environment being increased through a reduction of the levels of employment and fixed assets by way of outsourcing. In highly-skilled work, in particular in knowledge intensive service industries, the work roles and the delineation of tasks seem to have become more fluid. A high degree of self-organisation is being combined with high levels of responsibility within the framework of tight financial controls (Kratzer, 2003). In fact, new forms of financial controls ultimately reflect the decisive role that financial markets have gained through the process of globalisation. Work itself is undergoing a change away from job to project and firm to network (Powell, 2001).

The development of an understanding of these processes requires the integration of a large and fragmented body of literature currently spread across a number of different disciplines and adopting a wide range of different theories and concepts. In economic geography, the concept of 'spatio-temporal fixes' has been developed by Harvey (2003) as an explanation of the tendency of companies in advanced economies to redistribute employment globally. Patterns of globalisation are not based on simple economic grounds alone, however, but are also shaped by *policy decisions* made at national and supra-national levels, such as that of the World Trade Organisation (Moore, 2002). In a field first comprehensively mapped out by Dunning (1993) theoretical analyses have been carried out of the factors driving globalisation at an organisational level (e.g. Narula, 2001 & 2003) supplemented at a more practical level by empirical research at the level of particular sectors or regions (e.g. Boone, 2002; Sahay, 2000; Mirchandani, 1999; Kiser, 2003). Attempts have been made to measure the extent of globalisation (e.g. OECD, 2001) and to survey its impact on labour (e.g. Radice, 2001; Singer, 2000) and on gender relations (e.g. Kelly, Bayes & Young, 2001). It is clear, however that neither macro level analyses, whether by geographers, economists or political scientists, nor quantitative studies give a full insight into the elaboration of value chains and the dynamics of employment relocation and new forms of distributed work. It is also necessary to take account of qualitative studies of such factors as local organisational cultures (Trompenaars & Turner, 1998; Hofstede, 1997) and specific features of the local institutional environment (Soskice & Hall, 2001).

**The research question addressed in this component of the work is: "To what extent can the reorganisation of work be explained by the global restructuring of value chains, entailing a simultaneous decomposition and recomposition of sectors, organisations, labour processes and skills?"**

#### 4.5 Public policy and social dialogue

The European Employment Strategy and the employment policies of most individual EU member states have stressed issues relating to work organisation since the early 1990s, when political consensus developed around the structural nature of Europe's employment problem and on the need to increase the employment intensity of growth (Delors' White Paper on Growth, 1993). While confirming national

competence for employment policy, employment was declared (Art. 126) a matter of common concern and member states were called on to develop a co-ordinated employment strategy on the basis of shared European priorities and interests, linking the intensity of growth in employment to a more flexible form of work organisation satisfying both the wishes of employees and the requirements of competition.

In the Lisbon Strategy (2000), the European Council called for changes in work which improve employment and competitiveness through a better organisation of work based on high skill, high trust and high quality (EC, 1997a: 5; Gill & Krieger, 2000; Sisson, 1999). *Quality* is at the heart of the European social model and covers a number of dimensions, as established by the European Council in Laeken at the end of 2001. In the transition from Tayloristic working arrangements to the environment of the knowledge-based economy, in which 'old' problems of Taylorism still exist, but such trends as international company networks and project-based work are leading to clear shifts in work organisation, *new conceptual frameworks and developmental models* are needed. This poses a major challenge for public policies aiming to improve work. Due to this change of context and focus, it becomes increasingly difficult to find ready-made expert solutions, standards or 'best practices' to the new problems and development needs facing companies and their employees in the knowledge-based economy. Acquiring sufficient expertise to successfully deal with these ever more complex issues in programme design and implementation calls for a combination of different kinds of expertise.

A significant element of this strategic perspective of '*renewal*' is the belief that the social partners (employers' organisations and trade unions) have a leading role to play, including active participation of the social actors in the policymaking process. However, the regulation processes of the industrial relations system are complex because they take place at multiple levels (organisational, local level, sectors, national and European level) (Huiskamp, 1995: 29; Hyman, 2001). Moreover, social dialogue has *formal and non-formal institutional and participatory elements* ranging from bipartite collective bargaining to tripartite co-management or policy consultation (Pinaud, 1996; Müller-Jentsch, 1997), indirect participation at company level or co-determination, and direct participation at company level (EPOC, 1997). Increasingly social dialogue aspects of changes in work also have to take greater consideration of non-institutionalised practices of direct participation at company level (Kelly, 1998; Lallement, 1999).

The industrial relations systems of the EU differ substantially in their main characteristics such as legal frameworks, centralisation and co-ordination methods, state intervention to balance conflicts, policy-concertation in the socio-economic field, organisational structures of the social partners, etc. (Sisson, 1999b; Aust, Leitner & Lessenich, 2000). While contemporary studies that connect the production regime to the interaction of the social welfare and employment regimes are now tending to emphasise a *mix of continuities with discontinuities* (Boyer, 1998; Heidling et al., 2003; Meil, 2000), the combined impact of two decades of high unemployment and capital consolidation has had a marked effect on the processes of social dialogue (Carpenter & Jefferys, 2000). The majority of recent comparative studies of industrial relations have tended to conclude that few signs of general convergence are apparent in European industrial relations (see for instance Ebbinghaus & Visser, 1997). The *convergence/divergence problem* within European industrial relations is important when examining the diversified nature of the role that the social dialogue plays in changes in work and organisational innovation (Lansbury & Pickersgill, 2000; Green et al., 2001). Research needs to consider to a larger extent than before not only the interrelations between companies in a network or value-added chain but the implications for the development of employment relations.

**Research questions addressed in this context include: "What is the interaction between the changing division of labour and restructuring of work roles of global pressures on the one hand and different national regulatory contexts or practices on the other?" and**

**"How do public policies and industrial relation systems influence changes in work organisation in particular regional contexts and, conversely, how do the dynamics of restructuring impact on social dialogue and policymaking?"**

## 4.6 New forms of work organisation in the knowledge-based society

### 4.6.1 Division of labour and work roles

One of the most important changes in work organisation in the last two decades is the increased flexibility in the assignment of task or deployment of personnel usually referred to as *functional flexibility*. A wide range

of measures was implemented to achieve this, ranging from job enlargement and multi-tasking to teamworking. According to the European Foundation for the Improvement of Living and Working Conditions, 60% of all employees in the EU work in some form of team (Paoli & Merllié, 2001). There are, however, widely differing estimates of the extent of diffusion of new principles of division of labour such as 'teamworking', depending on the precise definition of the practices under investigation. More generally, there is 'no unambiguous way of defining a high performance work system and knowing whether or not the establishment is following the path' (Osterman, 1999; Kumar, 2000). Additionally, recent evidence (Schumann & Springer, 1999; Gallie & Paugam, 2002) has questioned the positive picture of new forms of work organisation. There seems to be a trend towards *polarisation* between a rise in broadly defined and autonomous forms of work and work with low levels of autonomy, co-operation and participation (Bosch, 2000; Vendramin & Valenduc, 2002).

There are thus contradictory tendencies at play. On the one hand, a rise in the demand for 'soft skills', such as language, communication skills and *self-management* have encouraged a blurring of the boundaries between occupations and the emergence of new work roles. The dispersal of employees to clients' premises, as teleworkers or in projects, has also encouraged multi-tasking and self-servicing by workers. This has been accompanied by the flattening of decision-making structures, a fusion of conceptual and operative roles (e.g. production and quality control, or assembly and maintenance), and the broadening of roles and requisite skills of the individual worker (e.g. multi-tasking, teamworking). This latter form of work organisation is associated with the high-trust/commitment, high-performance firm (Milgrom & Roberts, 1995; Appelbaum et al., 2000). Its orientation toward quality competition and innovation, toward continuous upgrading and broadening of the skill endowment of its work force, and its elective affinity toward collaborative, high-trust labour relations has earned it the special attention of the European Commission (Andreasen et al., 1995; OECD, 1996; European Commission, 1997 & 1998). The results of the EPOC survey (EPOC, 1997 & 1999), are also supportive of the positive impact of employee participation in decision-making and job-enrichment on business performance (Sisson, 1999; see also Coriat, 2002). It is often argued that high performance practices are complementary and their impact on performance is maximised when adopted as a group rather than piecemeal (Ichniowski et al., 1997; Lawler et al., 1998), though there is not always a clear statement of which practices must be in the group or the nature of the bundles. Case studies and cluster analyses of survey data have generally failed to find strong patterns of practices adopted in combination (Osterman, 1994). Given the highly diverse findings in different sectors or occupations there is a need for an adaptation of research tools and analytical instruments.

In contrast to trends in high performance work, the increasing *formalisation and codification of skills* and a new emphasis on standardisation have encouraged new forms of control, for instance in call centres. Numerical or external flexibility in work organisation represents a further 'distancing' of workers from the final product and their contractual relationship to their employers is also divided into progressively shorter periods (fixed-term, temporary, on-call, subcontracting). There is some evidence that the worker-friendly aspects of functional flexibility have also been exaggerated. Functional flexibility can be a method of work organisation that serves to mask the increase in the scope of managerial prerogatives and often the intensification of work (Elger, 1991).

The two forms of flexibility ('internal-functional' and 'external-numerical') are sometimes viewed as being alternative company strategies, and when used in the same company, represent a new division of labour between a core and a peripheral work force (Atkinson, 1984; Kandell, 2001). A range of new evidence, however, indicates that *degrees of precariousness* or job security are not directly related to the existence of 'periphery' workers (Capelli & Neumark, 2001; Felstead & Gallie, 2002; Littler & Innes, 2003).

**Research questions addressed in this context are: "What are the directions of a changing division of labour and forms of co-operation for different occupational groups?" and "How are the simultaneous trends of flexibilisation and standardisation played out?"**

#### 4.6.2 Work space and location

Both globalisation and technical potentials have induced changes in the way work is organised, monitored and regulated. In global production and service networks, work is often organised into projects, which has major consequences for the competence profile, work pressure, and responsibility of the individual employee. Advances in technology potentially enable employees to work at home or in distributed work

environments which greatly increases autonomy, but which often means a change in company control measures.

*Distributed work forms* also demand that employees constantly reorient themselves to new situations, colleagues and problems. Often this reorientation process takes place outside of familiar national contexts, in different 'experience spaces'. Educational and training systems as they exist now do little to prepare employees for this new situation (Heidling et al., 2004). Another challenge is that non-hierarchical virtual project teams, where each member shares responsibility, are still anchored in hierarchical organisations. The employee has decision-making autonomy but is simultaneously a subordinate. This tends to leave the worker without leadership whilst still holding responsibility for their work (Sennett, 2000).

Parts of these challenges are captured by the literature on '*virtual enterprises*', based on a notion that organisations can no longer be defined in terms of the physical premises that they occupy, or indeed their formal contractual relationships with each other or with their employees (Ettighoffer, 1993; Cooper & Rousseau, 1999). Early publications on virtual organisations are linked with the literature on *eWorking* (Huws, 1996) and on forms of organisational restructuring such as 'Business Process Re-engineering'. More recently, attention has shifted outwards from the individual 'virtual' organisation towards its relationship with its supply chain (Norton & Smith, 1998). At the same time, new forms of distributed work mean that work is carried out *across company boundaries*, often over large distances (Hinds & Kiesler, 2002). Apart from the literature on delocalisation, there is a related body of work on the growing mobility of workers and the use of ICTs to support peripatetic work, encapsulated by Makimoto's phrase '*Digital Nomad*' (1997). There is a general agreement in this literature that mobile working is as important as, if not more important than other forms of *eWork* such as home-based *eWorking*. However, in contrast with the literature on home-based telework, little research exists on the prevalence or characteristics of mobile *eWorking* or to investigate its *social implications*, for instance its implications for family and community life, for worker representation and participation or for equality of opportunity.

In parts of the literature, emphasis is placed on the limits to delocalised work. *Spatial proximity* is seen as crucial for specific work and innovation processes which is due to the need for tacit, social knowledge and to learning processes requiring co-presence. Knowledge is often socially embedded but also geographically located, which is why cities and regions attract workplaces in specific knowledge-intensive industries (Sassen, 1991; Krugman, 1998). Thus a major contradiction is brewing between *theories of knowledge generation* and the use of *local resources* on the one hand (Bélanger et al., 1999), and the growing *spatial dispersion of work* on the other.

**Research questions addressed in this component include: "How do the restructuring of global value chains change the spatial distribution of work?" "How transitional is this new spatial distribution?" and**

**"What are the implications for job security, knowledge generation and learning opportunities, time use and collective identities?"**

#### 4.7 New career trajectories

In the growing literature on post-industrial society, one of the central arguments is that patterns of careering become increasingly *destandardised* (e.g. Trommel, 1995; Beck, 2000) and as such the life course becomes less uniform and less 'preshaped' by an orderly, linear succession of stages. Whereas the paradigmatic 'industrial man' passed through a fixed sequence of education, work and retirement (cf. Kohli, 1978), in the post-industrial era this 'tripartised' life course becomes subject to disintegration and desynchronisation. The emergence of this trend is assumed to be propelled by economic, socio-cultural and political factors (Castells, 1996). At the same time, the preferences of people with respect to their work and private lifestyle have become much more diverse, due to the rising culture of *individualisation and emancipation*. More people strive for a 'parallelisation' of activities, seeking good opportunities to combine labour participation with other activities, such as study, housework, child care or cultural participation (Schmid, 1998). In some countries political efforts have been made to strengthen the personal responsibility for employability and income security resulting from growing uncertainties from the post-industrial economy and the trend toward individualisation (Trommel & De Vroom, 2002).

Recently, the concept of *transitional labour markets* (TLM) has been developed in an effort to come to grips with the new social risks emerging from the destabilisation of employment structures and personal

biographies. It is assumed that new arrangements will arise that (a) help the individual to create a stable life course, (b) facilitate transitions between the different spheres of life and (c) realise a new form of social security that better fit the logic of post-industrial risks. Compared to industrial welfare, TLM arrangements have an enabling and activating character, put emphasis on problems of time-structuring and aim to integrate institutional sectors that used to be separated, such as social security, labour policy and educational policy.

However, in its current state one may doubt the usefulness of the concept, both for empirical and theoretical reasons. Not only do explanatory and normative claims seem to be mixed up; also the concept tends to neglect sectoral and national differences with respect to production regimes and social policies. One question is how TLM's relate to *internal labour markets* (ILM's). In contrast to the popular hypotheses of increasing job insecurity, empirical data (at least in European welfare states) show that the idea of lifetime employment is still vital. Therefore, we need to better understand what is happening at the level of internal labour markets. In particular, the role of modern information and communication technologies (ICT) needs to be reconsidered critically. Is it true that ICT reshapes the world of careering? Is this a homogenous effect or is it possible to distinguish between different patterns? It could also be that different socio-political logics lie behind the suggested singularity of the TLM concept. TLM stands for a major reorganisation of work and welfare, but it would be naïve to assume that this process destroys the institutional differences between countries. In order to clarify the patterns of interaction between Internal Labour Markets and Transitional Labour Markets, it is necessary to focus on the changes in the linkages between production regimes, personnel policies, collective bargaining and national social policies.

**The research question here is: "How do company strategies and labour market regulation impact on career trajectories, time use and occupational identities?"**

#### 4.8 The use of knowledge and communication

It is widely acknowledged that the development and mobilisation of knowledge is one of the main challenges for both companies aiming at competitiveness and workers attempting to enhance their employability in the knowledge-based society. The main aspects covered by the literature are: the opportunities for the creation, acquisition and development of knowledge; the utilisation and mobilisation of knowledge; and the changing importance of, and the interrelationships between, different types of knowledge. There is a large body of theory on *knowledge creation and learning*, especially with regard to technological innovation (Freeman & Soete, 1997) which is in turn linked with a series of studies on different forms of knowledge and learning. Soete (1996), for instance, distinguishes three forms in which knowledge contributes to growth': 'easily transferable codifiable knowledge', 'non-codifiable knowledge', also known as 'tacit knowledge', and 'codified knowledge'. Dodgson (1993) discusses 'organisational learning' and points to the importance of non-routinised or 'exploratory' learning (see also Erpenbeck, 1997; Foray, 2002).

In recent years a growing body of research has emerged from studies in computer science and organisational studies focused on *knowledge management systems* within organisations and beyond. Some approaches to knowledge management prioritise structural models and IT systems whereas others focus on processes, communities of practice and dialogue (Heisig, 2001; Nonaka & Takeuchi, 1997; Willke, 1998; Romhardt, 2002). The main problems knowledge management aims to solve, i.e. the generation, representation, storage, distribution and application of knowledge, are of particular importance in network organisations and with distributed work. While advanced data bases greatly support co-operation over distance, recent trends in the debate on knowledge management put more emphasis on *implicit knowledge* and the role of communities of practice (Katenkamp, 2003). Research on various forms of work indicates that neither higher levels of *codification of knowledge*, increased planning, nor a more intensive use of technology can replace tacit forms of knowledge in the light of increasing complexity and critical situation (Böhle & Meil, 2003; Meil & Heidling, 2003). Likewise, the more information is codified and stored in ICT, and retrievable from it, the more important *tacit knowledge* becomes in selecting, combining and applying knowledge.

One major issue in this regard is the *transfer of implicit knowledge*, the question of its reliability or the establishment of favourable learning conditions (Büssing & Herbig, 2003). While the distinction between explicit and implicit forms of knowledge has been well established in research for many years (Polanyi, 1983;

Wood, 1982), more recent work on the subject emphasises the social and relational dimension of knowledge and the role of communities of practice within organisations and beyond (Barley & Orr, 1997).

Accelerated *innovation activities* in many sectors and enhanced competition lead to the ever-faster creation of new knowledge and obsolescence of old knowledge. Companies may opt to acquire knowledge by recruiting people with particular knowledge and competencies on the external and professional labour market. They may also rely on the internal labour market making use of company specific knowledge and supporting the further development of competencies. One of the crucial questions is how the *flexibility strategies* of organisations conform to the need for the creation and development of knowledge. There is considerable agreement that knowledge-intensive work requiring high levels of commitment and organisational trust is usually incompatible with external or numerical flexibility (Seifert & Pawlowski, 1998).

The *characteristics of the work organisation* are crucial for the distribution of responsibility of knowledge and competence development (Lutz, Meil & Wiener, 2000). This relates to the opportunities for learning through both off the job and on the job training. It also relates to the human resources and flexibility strategies of companies. Thus new forms of work organisation need to be judged with regard to how well they mobilise knowledge and competencies. For instance, while in the case of high degrees of employment stability the company and the worker share the responsibility for knowledge development, in case of external flexibility the individual is entrusted with responsibility to gain new knowledge (Meil, 2000). In addition to these basic strategies the impact on knowledge development of the different dimensions of work organisation referred to above need to be analysed in detail. The *temporal, the spatial, the contractual and the gender dimension* all have consequences for the actual learning opportunities. What is more, the organisational aspects need to be analysed in the context of *institutional settings* and, in particular, the characteristics of the education and vocational training system, the *social dialogue*, the relationship between companies and universities and scientific research or the legal aspects.

**Here, the research question is: “How do new forms of work organisation impact on the opportunities for the acquisition, mobilisation and utilisation not only of explicit, but also of implicit knowledge?”**

#### 4.9 Occupational change and the demand for skills

The advance of technology is believed to require a more highly-skilled work force, and the evidence for a general upgrading of skills has been strongly asserted for some time (e.g. OECD, 1996). There has also been an increase in *earnings polarisation* between the low and highly-skilled (Nickell & Bell, 1995). However, there has been a long-standing concern that the relationship between educational outputs and labour inputs, especially during a period of rapid technological change, is more complex than this. What counts is the use to which skills are put. Hence the importance of the debate about job flexibilisation which might have managerial rather than technological goals. Demand for more qualified people might be linked to *reduced* returns to education on average (Sørensen, 2000) if more highly-skilled people replace more numerous middle-order skills. While the pay gap between the high and low skilled is rising, wage dispersion has occurred within as well as across occupational groups (Makepeace & Johnson, 1997). At the same time, it is possible that the social demand for education has outstripped the economic demand for skills. Such findings and concerns have led to debates on skills mismatches using innovative concepts such as *overqualification* and excess skill competition (Brynin, 2002). A growing literature specifically argues that a large proportion of employees are overqualified for the jobs they do (Borghans & de Grip, 2000; Hartog, 2000).

Excess skill competition has a number of correlates in earlier concepts such as skill polarisation (Gallie, 1994). It has been suggested by Hartog (2000) that in some countries the demand for skills has become more dispersed than the supply. This implies a bunching of educational qualifications in the face of a proliferation in demand in which skill clustering might be associated with reduced returns to education. However, there are fundamental differences between European countries in the way that the labour market rewards skills (Shavit & Müller, 1998; Lichtenberger, 1999; Harmon, Walker & Westergaard-Nielsen, 2001). We must look to national differences in the processes governing the relationship between education and the labour market if we are to understand the competitive and welfare implications of this relationship and see in which ways it is possible to maximise social and economic returns to human-capital investment.

Here, the research question is: “What is the interplay between skills demand and qualification levels taking account of national differences in the processes governing the relationship between education and the labour market?”

#### 4.10 The gender dimension

There is a vast body of literature, both theoretical and empirical, stretching back over more than two decades, on gender and work and the ways in which patterns of segregation are reinforced or challenged. This includes studies which focus specifically on *labour market restructuring* (e.g. Rubery & Fagan, 1994; Crompton & Sanderson, 1990). Here, comparative research has analysed segregation of the labour markets, *working-time segregation* and its relation to inequality across a range of EU and Accession States (e.g. Bettio et al., 1998; Rubery et al., 1999; Anxo & O'Reilly, 2000). A special focus has been on non-standard forms of employment supporting in many countries the integration of women in the labour market while failing to challenge segregation and limitations to economic independence (Instituto de la Mujer, 1998) and the gender impacts of *flexibilisation strategies* (e.g. Gunnarsson, 1994 & 1998; Huws et al., 1996). Other studies have focused on gender and *technological change* in the workplace (e.g. Vendramin & Valenduc, 2003; Cockburn, 1988; Webster, 1996; Game & Pringle, 1983) including gender and teleworking (Gunnarsson & Huws, 1997). There have also been comparative studies illustrating the different ways in which gender patterns are institutionally shaped across Europe (e.g. Gottschall & Bird, 2003; Lewis, 2002; Sainsbury, 1996; Lessernich & Ostner, 1998; Wallace, 2003).

Whilst there are large differences in the theoretical explanations for these gender patterns, there is substantial agreement that gender is an important issue at all levels, that work organisation patterns are strongly gendered and that gender is a multifaceted issue which interacts in complex ways with all other variables. This suggests that a multiple tool analysis model is necessary to capture the complexities of flexibility/mobility and stability as well as the asymmetry of change in modern organisations, labour markets and welfare states. The model should allow on the one hand for a traditional structural analysis, making vertical, horizontal and time sex-segregation visible both inside and outside the organisation and on the other for other forms of analysis to capture the processes by which *masculinities and femininities* are adapted and reproduced.

The concept of the gender contract has been developed by Nordic researchers (Gunnarsson & Friberg, 1995; Gunnarsson, 1998) as a tool for understanding the sex-segregated division of labour, both paid and unpaid in a way which makes it possible both to carry out a comparative analysis and to model the dynamics of change. Aspects of power and negotiation are important elements within this concept. *Gender contracts* are expressed on different levels, a *structural level* (local-regional-national and within organisations), at a *work-place level* and within *the family*. The gender contract concept has been used successfully in the analysis both of *quantitative and qualitative* data to illuminate gender and ethnic relations (see for instance, Swedish Ministry of Labour, SOU 1997/87) horizontally, vertically and in terms of work-time, revealing patterns of segregation in relation both to different *occupations* and different *sectors* in society as well as for workers occupying different positions and with different time contracts (Gunnarsson, 1998). Using indicators of sex-segregation on the labour market as well as the degree of the extent to which *care* for children and elderly is solved within the enlarged family, Forsberg (1998) makes visible the *regional variations* in gender contract in Sweden. These two dimensions of inequality and care in combination distinguish several distinct types of gender contract. She also shows that regions ranked as expansive, with high economic growth and rapid restructuring are not necessarily those with the most equal gender contracts. Interesting research has also been done on the link between the gender contract in the *work place and the household level* (Bekkengen, 2002; Eriksson, 2003; Gottschall, 1999; Crompton & Birkelund, 2000). The concept of the gender contract can also be used to develop typologies of differing forms of household division of labour.

It was made explicit for the first time in the Luxembourg Jobs Summit that policies relating to work organisation cannot be divorced from other aspects of public policy, including *equal opportunities policy*. With the growing participation of women in the labour force and the restructuring of labour markets there has been a reduction in many traditional forms of sex typing. The current dynamics of women's employment are tightly connected with the nature and the quality of the new job demand, offering new opportunities but also new risks. This creates new challenges for European welfare systems and labour representation organisations.

A central issue here is flexibility. In order to analyse organisational flexibility from a gender as well as an ethnicity perspective it is important to make the distinction between flexibility meaning *individual freedom* and flexibility meaning *availability* in relation to the employer (see for example, Gunnarsson, 1994 & 1998; Huws et al., 1996; Gunnarsson & Huws, 1997). New organisational structures may be characterised by a 'continuously changing balance between organisational flexibility and stability'. Not only are new flexible work patterns often strongly gendered but so also is stability in flexible organisations, being maintained by female dominated positions and occupations, for instance, by assistants and secretaries in organisations with multilocal and mobile e-working professionals.

**Here, the research question is "How do changes in work organisations impact on patterns of gender segregation and how gender contracts influence changes in work organisations?"**

#### 4.11 Quality of life

In the literature usually multidimensional concepts for quality of life are used that include security needs and social needs both in an *objective* and a *subjective* perspective (Noll, 1999; Zapf, 1987). The restructuring of business activities and organisations and the spread of new forms of work organisation have a far-reaching impact on the quality of life. This relates to different aspects of '*sustainable work*' which are covered by different research fields: health and safety focussing in particular on workloads, stress levels and coping capacities; flexible labour, precarious work and insecurity in a biographical perspective; 'work/life balance' in particular focussing on time aspects and the blurring boundaries between employment and private life.

The mainstream of quality of working life research, that was developed on the basis of the human relations approach, the *sociotechnical systems theory* and concepts of humanisation of work, especially in the Nordic and Rhineland countries, has emphasised the importance of craftsmanship, participation, team work and the subjective meaning of work (cf. Peters & Waterman, 1982; Kern & Schumann, 1984; Piore & Sabel, 1984; Senge, 1990; Pfeffer, 1994; Hamel & Prahalad, 1994; Hague, 2001). An example of organisational concepts that takes account of both quality of work and demands for flexibility and quality of production is the *modern sociotechnics* (Van Eijnatten, 1993; Sitter, 1995; Sitter et al., 1997). It is aimed at flow production and team based work, in which workers have obtained a high level of responsible autonomy (cf. Oeij & Wiezer, 2002).

While the traditional human relations approach focused on *physical strains* in assembly work and on other production-related jobs, including e.g. cycle times, organisational change and the application of new technology has led to a rise of a new set of threats with regard to employees' health and safety. The 2000 European Survey on Working Conditions has revealed a significant increase in strains related to growing *stress at work*, finding an "intensification of work over the last decade" and "a very strong link between the degree of intensity on the one hand and reported health problems on the other" (Paoli & Merllié, 2001). The same survey, however, also shows that workers' autonomy in the workplace increased markedly over the last decade.

While *individual autonomy* might reduce stress and enhance learning opportunities in work (see Karaçek, 1979), this is questioned in the current debate on decentralisation, new forms of work organisation, knowledge work and the role of subjectivity (Moldaschl & Voß, 2002). Management by objectives and centralised control of results may often confront employees directly with market pressures and customer requirements and tends to leave them without leadership they can hold responsible for the feasibility of the work (Sennett, 2000). As a consequence, *network organisations* and employee self-organisation in the knowledge-based society need a new understanding of autonomy, control and coping strategies. While there is a strong theoretical debate on this, comprehensive and comparative empirical research is still missing.

The integration and improvement of theoretical approaches and the in-depth empirical analysis of new forms of work organisation from the organisational and individual point of view in the project will make an important contribution to comparative empirical research on the networked organisation, self-organisation, and autonomy.

Although the mode and extent varies between member states according to national labour market regulations, there is a general trend towards *non-standard forms of employment* within the EU (De Grip et al., 1997; European Foundation, 2001). Non-standard forms of work include employment on fixed-term contract, part-time, temporary and agency work, marginal employment as well as self-employment. Non-standard forms of employment reflect the corporations' need for greater flexibility in an increasingly

competitive business environment, as well as an individualised and diverse society with diverse working careers that in many cases do no longer match the standard full-time life-long employment relationship (Bosch, 2002). Perhaps the most significant development in this regard is the massive growth of female labour market participation and the subsequent demise of the 'male breadwinner model'. Of course non-standard employment is not always precarious, but the *precariousness* is strongly related to the *national systems of social protection and welfare* (Esping-Andersen, 1990 & 1996; Lind et al., 1999). Where the social security system is based on an uninterrupted life-long model of dependent employment, or payments are restricted to the extent of previous contributions (according to the principle of equivalence), non-standard forms of employment can pose severe risks with regard to workers' social security, because payments may not be sufficient to allow for a decent independent existence. The result can be a profound *social segmentation in worker and families* which enjoy full social protection and those with insufficient or no protection, or in 'insiders' and 'outsiders' (Supiot & Casas, 2001). On the other hand, even in those countries with a universal approach to social protection (e.g. the Scandinavian countries), risks have increased in recent years due to repeated cutbacks on welfare expenditures because of budget constraints. In other words, flexible labour demands for a new understanding of social security and a reorganisation of traditional welfare systems (Vielle & Walthery, 2003; Esping-Anderson et al., 2002). Hence research on the relationship between *work organisation and quality of life* needs a broader conceptual scope in order to cover the important aspects income security and social security and the biographical dimension.

**The WORKS project will result in important improvements in relation to the state-of-the-art in combining the analysis of restructuring and changes of work organisation with investigations in individual biographies and household dynamics and their institutional contexts of welfare systems.**

The *demands of work* have increased in recent years (Guest, 2002: 257), particularly in parts of the 'new economy', and especially amongst managers, professionals, technicians and self-employed workers (Wagner, 2000; Green, 2001; Basso, 2003). This change has blurred the boundaries between work and non-work (Taylor, 2001; Perrons, 2003). While ICT advancements and flexible forms of employment might contribute to autonomy and commitment to work they have also significantly increased the pressure at work, and because of the blurring of work and non-work, at home too (Hyman et al., 2003). Although ICTs extend the temporal and spatial boundaries of work, potentially allowing workers to combine caring responsibilities with paid employment, mothers with dependent children are often excluded from such working careers because they are unable to work long hours, thus perpetuating the traditional gendered division of labour (Krings, 2003), though some companies are aware of growing difficulties to balance work and private and support their employees with an explicitly family-friendly culture (Hyman et al., 2003).

Changes in the quality of working life cannot be separated from *changes in the quality of life outside the workplace* - they are mutually interactive. Hence organisational changes in the workplace must be combined with new strategies and mechanisms to allow for a *reconciliation* of paid and non-paid work as well as leisure that support gender equality, partnership and family life (Lewis & Lewis, 1996; Gonäs, 2002; Fagan, 2003). In the words of a French campaign launched at the International Women's Day 2002: What is needed is '*Du temps pour vivre*' ('Time for Life'). Moreover, organisational change and increasing flexibility also demand for public support outside the workplace. This includes the availability of child care facilities as well as other social services at times when flexible workers need them and are able to access them such as in the '*tempo de la città*' initiatives in Italy (Mückenberger, 1998).

Through analysing the implications of new forms of work organisation from the organisational, the individual and the household perspective the WORKS project will be able to enhance the understanding of tensions in the use of time and in options for improvements at organisational and institutional levels.

**Research questions addressed here include: "In what specific ways are changes in work organisations introducing health and safety problems and which social groups and occupations are particularly affected by it?"**

**"In what ways do changes in working time structures impact on the quality of life?" and**

**"How do new working patterns of different occupational groups affect the quality of life in the short and the long term taking into account national institutional contexts?"**

## 5. Potential impact

In view of recent policy debates on work and employment in the knowledge-based society a strong strategic impact of the project in terms of reinforcing competitiveness and solving societal problems can be expected. In particular, the project refers to the relationship between new forms of work organisation, productivity, innovation and employment and quality of life - issues that have become of key importance in the context of the European Employment Strategy as confirmed and refined in the subsequent European Councils since Essen (1994). In various green papers and communications the European Commission and the member states expressed the view that developing the *productivity and competitiveness* of enterprises and at the same time improving the quality of work is one of the fundamental aims of the European Employment Strategy (EES).<sup>1,2,3,4</sup> The way in which work is organised is an important aspect of this. Therefore, work organisation and, more generally, the *adaptability of both enterprises and employees*, has been a key part of the EES from its inception.

It is widely acknowledged that new forms of work organisation significantly help to improve the performance of companies. It is also generally accepted that such new systems, often called the 'high road to competitiveness', provide employees with greater job security and enhanced job satisfaction while incorporating extensive levels of employee involvement in decision-making.

However, some critical analyses shows that still several problems remain (Totterdill, 2002).

- The main policy developments in the area of adaptability over the past five years were related to more flexible types of employment relationships and more flexible working time arrangements. Beyond these, the broader scope of work organisation has not yet received sufficient attention. A wider approach to modernising work organisation is still lacking, although some progress, notably in the field of lifelong learning, has been achieved.<sup>5</sup> Yet, no effective guidance to close the gap between leading-edge practice and common practice in European workplaces is available.
- The integration of the quality dimension in the European Employment Strategy was one of the main priorities during the Belgian EU-presidency during the second half of the 2001. At the Laeken-Summit ten indicators were selected to monitor and evaluate this quality dimension. However the indicators refer mainly to 'quality in the way the labour market operates' while only scant attention is given to the intrinsic quality of work although stress and insufficient learning opportunities are major threats to individual employment.
- Europe lacks a system of knowledge management on work organisation. The diversity of European experience offers a potentially powerful learning resource for actors at all levels yet there is no effective mechanism for the sharing of knowledge and experience on a systematic basis. Practitioners in each member state are continually forced to reinvent the wheel.

One crucial aspect in this is a 'narrow' approach to new forms of work organisations which assumes that changes take place only within organisations. It is however increasingly questionable whether in an increasingly networked knowledge economy the organisation as such is still the appropriate level to instigate changes in work organisation. **One of the main innovative aspects of the WORKS proposal is the fact that it locates work organisation and its analysis within (global) 'value chains' and networked organisations. Hence the project has the capacity to reorient the debate and lay the ground for an adaptation of policies to developments such as the recomposition of global value chains, involving tendencies of geographical concentration and decentralisation of business functions at the same time.**

<sup>1</sup> European Commission Green Paper 'Partnership for a new organisation of work', 1997.

<sup>2</sup> European Commission Communication 'Modernising the organisation of work', 1998.

<sup>3</sup> European Commission Communication 'COM (2000) 894 Brussels 12.01.2001'.

<sup>4</sup> European Commission, The Green Paper on the Information Society (COM 96, 389).

<sup>5</sup> A framework for actions for the lifelong development of competencies and qualifications was adopted by the European social partners in February 2002, as a follow up of the joint declaration of social partners on Lifelong learning presented to the Laeken European Council. Also the recent agreement on telework is relevant in this context.

At the outset the focus of work organisation development programmes was typically on problems arising from Taylorist working arrangements such as the ergonomic and psychological problems of repetitive and monotonous work and the lack of autonomy and influence at work. Even though these and many of the other 'old' problems of Taylorism are still a relevant object of development in many European workplaces, in the environment of the knowledge-based economy the starting points for work organisation development programmes have become more complex (Totterdill, 2000).

- Apart from the fact that networks of companies have become the crucial level for analysis and intervention, **employee self-organisation** involving high levels of autonomy combined with direct customer contact and responsibilities for economic results lead to new problems for the quality of work and quality of life. This mainly relates to the work/life balance and to skills development.
- Due to this change of context and focus, it becomes increasingly difficult to find ready-made expert solutions, standards or '**best practices**' to the new problems and development needs facing companies and their employees in the knowledge-based economy.
- It is rather necessary to develop a model of workplace innovation which creates **hybrids**, drawing on external experience but customising and improving it through local knowledge, resources, cultures and institutions. Public policy and business support organisations have a critical role to play.

**The second innovative aspect is the fact that the project will address the national and the regional institutional context and analyse the institutional setting including 'social dialogue' aspects: What framework conditions are conducive to high levels of quality of work and quality of life under conditions of new forms of work organisation in the knowledge-based society? This sensitivity to institutional settings not only means a European added value and that European diversity is brought in, but also makes it possible that research results can be used more easily in different institutional contexts.**

## 5.1 Exploitation and dissemination

In addition to enhancing scientific knowledge the WORKS project aims to provide novel and highly relevant knowledge to policymakers and social partners both at national and European Union level. These will be involved in the course of the project and form target groups for the dissemination of the project results. In particular, they will be invited to participate in two major international conferences and to subscribe to the project's Newsletters and other publications.

The dissemination activities built in systematically in the project structure:

1. will ensure that the project's theoretical and empirical work is grounded in a full understanding of the global context, enabling the specific place of European industries and regions in these global value chains to be identified. In particular, it will make it possible to explore the origins and destinations of the value chains under study when these lie outside Europe;
2. will provide an opportunity to draw international comparisons, thus strengthening the project's analysis of regional institutional shaping. In order to facilitate such comparison, both within and outside Europe, conferences will be structured in such a way as to highlight the similarities and contrasts between specific regional groupings, both within and outside the EU;
3. will provide a peer review and external assessment for the project's work by drawing in participants from the ERA from a range of different disciplinary backgrounds thus contributing to a general strengthening of the ERA and enabling methodological benchmarking against current best research practice in the EU;
4. will provide a forum for dialogue with policy stakeholders and, as the work progresses, for dissemination of its results;
5. will make a contribution to innovative training and demonstration activities.

Among the means of exploitation and dissemination are the following:

- Website and Newsletter;
- two conferences with Global Reference Group as milestones;
- training initiatives for young researchers on comparative methodologies;
- working group on organisational survey research;
- roadmap for more convergence in organisational survey research, construction of a international agreed survey module on measuring changes in work from the organisational perspective;
- course material and integration of findings in university teaching activities;

- building instruments and tools for training researchers and for practitioners, s.a. local employee representatives.

**The third innovative aspect relates to the systematic involvement of a 'Global Reference Group' that exceeds the consortium in a substantial way.**

**The fourth innovative aspect relates to the innovation and European convergence of existing statistical instruments that provide quantitative microdata on organisational change.**

**The fifth innovative aspect is the furthering of qualitative research methods allowing international comparative analysis on issues related to changes in work.**

**Subject to the availability of resources and outside the formal scope of the project, it is also hoped to launch an international peer-reviewed journal on *Work Organisation, Labour and Globalisation*, linked to the project, to provide a forum for theoretical debate, the sharing of empirical results and dialogue between policymakers and the academic research community.**

## **5.2 European added value**

There is a clear added value in carrying out the project at a European level.

The approach to the analysis of work organisation and quality of life, first, takes as a starting point the recomposition of economic activities at international (European or global) level and, second, is comparative in investigating different institutional contexts. This approach of necessity requires European level, in contrast to national level, research.

The research has a strong policy orientation and will result in recommendations for policies at national and European levels. This again requires that the research covers the variety of European national economies, labour markets and welfare systems.

## **5.3 Taking account of other national and international research activities**

The project is based on a number of previous or ongoing national and international research projects co-ordinated by members of the WORKS consortium such as EMERGENCE on the relocation of work in the global information economy, STILE on statistics and indicators on the labour market in the eEconomy, SIREN on individual perceptions of changes in work and political reactions, WWW-ICT on widening women's work in ICT, eLiving and others (see section 5 on how the WORKS project will be based directly on the experiences and findings from these and other European projects).

The project will take into account other recent and ongoing research on changes in work and quality of life at European and national levels. This includes a number of relevant projects carried out under the 5th Framework Programme but also nationally funded research. Large parts of the first project period are devoted to elaborating an authoritative state-of-the-art of European research in this area. The consortium encompasses leading research institutes from many EU member, new member and candidate countries that are key players also in national research on changes in work and, therefore, are in a good position to build bridges between the European Integrated Project and relevant national research activities.

WORKS will also use research that is carried out in non-European countries for the purpose of comparison and in order to follow value chains outside Europe. The consortium has a range of international contacts outside the EU, as a result of EMERGENCE and other past work. Specifically we have partners or research associates in the USA, Canada, Australia, Japan, Russia, Hong Kong, China, India, Philippines, Vietnam, Sri Lanka, Thailand, Malaysia, South Africa, Morocco, Mexico, Uruguay, Ecuador, Brazil, Colombia, Argentina and Chile. Close relationships have been established also with similar projects outside the EU such as 'Restructuring Work and Labour in the New Economy', a multi-partner research project led by York University, Toronto, Canada.

## 6. Outline implementation plan for the full duration of the project

### 6.1 Activities

#### 6.1.1 Introduction

The main research components of the project are research and innovation activities focused on broadening, integrating and innovating knowledge in Europe and beyond on changes in work in the knowledge-based society. This will at the formal level be achieved through a comprehensive, multi-faceted and yet closely controlled set of research activities:

- writing state-of-the-art papers about theory, concepts, research and policies in the different countries and regions involved, and at the European level. This is mostly based on document study and desk research (subgroup 'Theory and concepts', subgroup 'Policy, institutions and social dialogue');
- undertaking comparative quantitative analysis of data based on existing data bases (subgroup 'Quantitative analysis');
- doing case studies in organisations and networks, mainly by interviewing stakeholders from management and employees (subgroup 'Qualitative research');
- doing case studies with individuals and their households through interviewing employees at their homes (subgroup 'Qualitative research');
- writing thematical papers and reports on the basis of (the integration of) different empirical phases.

The critical and distinctive aspects of this, however, are the goals of introducing analysis around fluid concepts such as occupations in change and business functions. These substantive points mean that, on the secure foundation just described, the research can move freely through its content matter by not getting fixed on rigid or potentially obsolete aspects of current work organisation. This flexibility, combined with both horizontal and vertical approaches to aspects of organisational change, is a major step forward.

Our central organisational innovation comes through the cross-disciplinary nature of this research project, involving a range of social science expertise and techniques in order to get a grip on the complexity of the research subject. The team is drawn from many countries and many research traditions, each explicitly focused on one part of the jigsaw, and yet working closely together and linked through a well worked out management structure.

Second, the innovative approach relates to the assumption that changes in work are related to global developments. This is visible in the following:

- the changes in the global value chain of goods and services as principal point of departure for the theoretical and empirical research activities, thus including an international perspective;
- several initiatives are undertaken to look beyond the project and the consortium; the discussions at the level of the consortium, are mainly organised through regular meetings at the level of the work packages and the subgroups;
- in addition, the knowledge creation is organised through focused workshops, mostly with external experts and stakeholders;
- thirdly, this knowledge innovation is enhanced through the organisation of the two project conferences.

Another innovative aspect of the project relates to a roadmap for European convergence of existing organisational surveys:

- a Digital Toolkit and Questionnaire and Survey Data base for organisational surveys will be updated and fine-tuned to the needs of the WORKS project. It provides an important and innovative tool for peer review and convergence within the community of organisation survey organisers;
- finally, this roadmap for European convergence of existing organisation surveys is a powerful tool for concerted innovating and fine-tuning the survey instruments that can provide comparative microdata on organisational change in the future.

The following table summarises the composition of the consortium and distribution of roles (a main role and responsibility is indicated in bold):

Participant ID	Acronym	Country	Role	Subgroups/horizontal theme
1	K.U.LEUVEN (CO)	Belgium	<b>Co-ordinator</b> , Partner, Scientific Board, WP Leader, Second	<b>Quantitative analysis (org+ind)</b> , Qualitative research, Theory, Training
2	FORBA	Austria	Partner, <b>Scientific Board</b> , WP Leader, Second	<b>Qualitative research (org+ind)</b> , Gender, Theory, Training
3	LONDONMET	UK	Partner, <b>Scientific Board</b> , WP Leader	<b>Theory, Global dissemination</b> , Gender, Qualitative research, Training
4	FTU	Belgium	Partner, <b>Scientific Board</b> , WP Leader, Second	<b>Qualitative research (ind)</b> , Gender, Theory, Training
5	UPSPS	Greece	Partner, Second	Gender, Theory, Qualitative research, Policy, <b>Global dissemination</b>
6	UT	Netherlands	Partner, Second	Theory, <b>Policy</b> , Qualitative research
7	UESSEX	UK	Partner, WP Leader, Second	<b>Quantitative analysis (ind+org)</b>
8	ISB	Hungary	Partner	Theory, Policy, Quantitative analysis (org), Qualitative research, Training
9	ISF MUENCHEN	Germany	Partner, <b>Scientific Board</b> , WP Leader, Second	<b>Policy</b> , Theory, Qualitative research, Training
10	FZK	Germany	Partner, Second	<b>Qualitative research (org+ind)</b> , Gender, Theory, Training
11	FFCT-UNL	Portugal	Partner, Second	<b>Theory</b> , Policy, Quantitative analysis (org), Qualitative research
12	NIWL	Sweden	Partner	<b>Gender</b> , Theory, Policy, Qualitative research, Training
13	IRES	Italy	Partner, WP Leader, Second	<b>Theory</b> , Quantitative analysis (org+ind), Qualitative research, Training, <b>Global dissemination</b>
14	SINTEF	Norway	Partner	Theory, Gender, Qualitative research, Quantitative analysis (org), Training
15	ATK	Sweden	Partner, WP Leader, Second	Theory, Qualitative research, Quantitative analysis (org), <b>Training</b>
17	CEE	France	Partner, Second	<b>Quantitative analysis (org+ind)</b> , Theory
19	IS	Bulgaria	Partner	Theory, Qualitative research, Training

Several partners act as WP Leader or second or have a specific expertise on the horizontal theme gender. Obviously, most partners are involved in more than one subgroup. Further the cohesion in the consortium is supported by the four-level management structure (General Assembly, WP Teams, Subgroups, Scientific Board) that is described in section 7, as well as with proper communication and information structures and facilities that will be set up at the project start. All this contributes not only to the commitment of every partner involved, but also to the confirmation of the strong cohesion within the consortium.

The table below summarises the major themes of the project and the partners that can contribute to enhancing the knowledge on this project on the basis of their personal and institutional experience.

## Themes and expertises

Topic in the project	Partner qualification and expertise
1. Future perspective	FFCT-UNL, FZK, FORBA
2. Use, change and development of knowledge and skills and the development of occupational identities	LONDONMET, FTU, UPSPS, UESSEX, ISB, ISF MUENCHEN, IRES, K.U.LEUVEN, SINTEF, NIWL
3. Different ways of achieving flexibility	FTU, FORBA, IS, CEE
4. New forms of work organisation	FTU, UPSPS, FZK, FFCT-UNL, IRES, ATK, K.U.LEUVEN, FORBA, SINTEF, NIWL, CEE
5. Quality of life (outside and within work)	LONDONMET, FTU, ISB, FZK, K.U.LEUVEN, SINTEF, IS, NIWL
6 Use of time	FTU, UT, FZK, UESSEX
7. Social dialogue aspects	LONDONMET, FTU, ISF MUENCHEN, IRES, ATK, K.U.LEUVEN, FORBA
8. Implications of the knowledge society for work and related policies	LONDONMET, FTU, UESSEX, UT, ISB, FZK, FFCT-UNL, IRES, K.U.LEUVEN, FORBA
9. Gender issues	LONDONMET, FTU, UPSPS, FZK, FORBA, IS, NIWL, SINTEF

The partners have complementary expertise in the five subgroups that form the main pillars of the project, and they are allocated in leading roles in the subgroup in which they have most knowledge and experience, based on their European and/or national research practices and tradition. On the other hand, there is also a need for 'integration', synergies, spin-offs and systematic interaction between different perspectives in order to have critical assessment build in and in order to enhance a creative process of knowledge innovation and mutual learning. This is stimulated systematically by sharing roles in the different subgroups and work packages. This way, a healthy, effective and synergetic mix of expertises is structurally embedded in the project.

The project will build substantially on the outcome of previous European research projects, where several of the partners acted as co-ordinator while others were involved as WP Leaders. Details of these expertises are described under section 5.

## Involvement of the partners in the subgroups

Partner/subgroup	Subgroup 'Theory and concepts'	Subgroup 'Quantitative analysis'	Subgroup 'Qualitative research'	Subgroup 'Policy and institutions'	Subgroup 'Global dissemination'
K.U.LEUVEN (B)	x	<b>X</b>	x		x
FORBA (AU)	x		<b>X</b>		<b>X</b>
LONDONMET (UK)	<b>X</b>		x		<b>X</b>
FTU (B)	x		<b>X</b>		x
UPSPS (G)	x		x	x	<b>X</b>
UT (NL)	x		<b>X</b>	<b>X</b>	x
UESSEX (UK)		<b>X</b>			x
ISB (HU)	x	x	x	x	x
ISF MUENCHEN (D)	x		<b>X</b>	<b>X</b>	x
FZK (D)	x		<b>X</b>		x
FFCT-UNL (P)	x	x	x	x	<b>X</b>
NIWL (S)	x		x	x	x
IRES (I)	<b>X</b>	x	x		<b>X</b>
SINTEF (N)	x	x	x		x
ATK (S)	x	x	<b>X</b>		<b>X</b>
CEE (F)	x	<b>X</b>			x
IS (BU)	x		x		x

(**X** = leading role as Subgroup Leader, WP Leader or Second; x = participating as partner)

The science and technology approach of the proposal can be divided in three major parts:

- 1. integrating the knowledge and preparing the ground for a European Research Area on changes in work in the knowledge-based society;**
- 2. improving and innovating the knowledge on changes in work and the quality of life;**
- 3. going beyond the project towards a European Research Area and towards a global perspective.**

The development of the different pillars or subgroups and their systematic interaction during the project's lifetime allows for an integrative and innovative approach. These pillars or subgroups are:

1. the integration and innovation of *concepts, theories and empirical findings* of qualitative research on changes of work organisation in the knowledge-based society. Partners involved here form the project's subgroup 'Theories and concepts'. Lead: LONDONMET, seconds: IRES - FFCT-UNL;
2. the *assessment and exploitation of the existing quantitative data sources* of the National and European Statistical System, including the development of a roadmap for more convergence of instruments to measure changes in work in the KBS at the European level, including training for researchers in analysis of existing organisation survey data bases. Partners involved here form the subgroup 'Quantitative analysis'. Lead: K.U.LEUVEN, second: UESSEX;
3. the *mapping and involvement of the institutional, policy and social dialogue landscape* that impacts on changes in work, including the development of training instruments towards practitioners. Partners involved here form the subgroup 'Policy, institutions and social dialogue'. Lead: ISF MUENCHEN, second: UT;
4. the *development and application of the appropriate methodologies* for European comparative qualitative research including training initiatives for researchers. The investigation will be of changes in work through *case studies* in organisations and networks and with individuals and their households. Partners involved here form the subgroup 'Qualitative research'. Because of the importance of this research, which lies at the heart of the project, this group will be subdivided into two, dealing respectively with research at the organisational level and research at the individual/biographical level. Lead organisation part: FORBA, second: ISF MUENCHEN – UT; Lead biographical and occupational part: FTU, second: FZK;

5. to organise in a systematic way *dissemination, feedback and peer review* in a global perspective, including the involvement of a Global Reference Group. This subgroup 'Global dissemination' is a collective responsibility of the Scientific Board of the project, but because of the close link with the theoretical development and peer review activities included in this pillar LONDONMET will be the main partner to co-ordinate these activities.

These activities will be the pillars around which the project and all its components are built during its four years' lifetime. This is supported by a project management structure that provides systematic discussion, interaction and synergies between the 'subgroups' as well as systematic monitoring and ongoing assessment, in particular in the project's Scientific Board. The systematic integration of the gender perspective in these pillars, led by Ewa Gunnarson (NIWL), is conceived as a mainstream and horizontal activity, as explained in the Gender Action Plan and as is visible in the overview of expertise within the consortium. The development of the future perspective is also conceived as a mainstream and horizontal activity included in the three major project phases.

In each of the three project periods (integrating knowledge, innovating knowledge and 'going beyond'), activities include in the first place research but also training. In the following paragraph 6.1.2, the RTD activities developed during the three project periods will be described. In the next paragraph 6.1.3, the training activities of each of the project periods will be detailed.

### 6.1.2 Research, technological development and innovation activities

#### 6.1.2.1 Integrating knowledge and preparing the ground for a European Research Area on changes in work in the KBS

In the first project phase, five activities, the first four of which run in parallel, will be developed with the following objectives:

1. to review the state-of-the-art in respect of concepts, theories and empirical research on changes in work in the KBS in Europe;
2. to assess and improve existing quantitative data sources:
  - a. through a feasibility and benchmarking study of the national and European statistical systems regarding the quantitative analysis of changes in work in organisation and in individual and household surveys;
  - b. through the identification of best practice indicators for European comparative research, that form the basis for comparative secondary analysis developed in the next phase of the project;
  - c. through developing a roadmap for co-operation and a convergence process on organisational surveys in Europe;
3. to map the institutional and policy landscape in order to assess how new forms of work organisation and the quality of life are shaped by policy and institutions and how institutions and policies are adapted to the emergence of new forms of work organisation in the knowledge-based society;
4. to develop the appropriate research methods for European comparative qualitative research in organisations and with individuals, based on the inventarisation and evaluation of the different approaches to undertake case studies in a comparative research design.

The period will conclude with a process of review in order to fine-tune plans for subsequent project work, in particular for the empirical phase. This will take into account assessments by the project's 'Global Reference Group' which will be consulted through a first conference organised at the start of the second project period.

The research questions that form the starting point of the first project period are based on the issues identified in the state-of-the-art review and will be addressed with the aim of integrating the existing knowledge to date. The research questions include:

- the better understanding of the concept of the knowledge society as a driver of change;
- changes in work and new forms of work organisation related to the global restructuring of value chains;
- the impact of these changes on the spatial distribution of work, the division of labour, flexibility and standardisation strategies;

- the better understanding of the interaction between global pressures changing the division of labour and restructuring work roles on the one hand and different industrial relations systems, social dialogue aspects, national regulatory contexts and practices on the other hand;
- the changing division of labour and forms of co-operation for different occupational groups;
- changes in the development of knowledge generation, learning opportunities and the use of knowledge, skills and communication related to changing work organisation;
- the implications for changes in the use of time;
- the implications for career trajectories and occupational identities;
- the implications for quality of life, both within the work environment and outside;
- the mutual interaction between changes in work organisations and gender contracts on patterns of gender segregation.

The different activities to be undertaken in the first phase of the project are now described more fully.

### **Subgroup 'Theories and concepts'**

**WP3:** State-of-the-art on concepts, theories and research on changes in work (co-ordination: LONDONMET - IRES)

In order to bring together the huge variety of research traditions and the most recent empirical, conceptual and theoretical knowledge throughout Europe, the partners, fully reflecting European diversity will prepare papers on the state-of-the-art, representing the different regions and/or language groups in Europe. This state-of-the-art also includes a European level state-of-the-art, aiming at taking account of relevant European projects. Further, a special state-of-the-art paper on the future perspective will be prepared.

This work includes theoretical approaches; conceptual frameworks and comparative models; and the collection, analysis and benchmarking of empirical results of qualitative and quantitative research such as organisational research on changes of work in different economic sectors and research on individual behaviour and outcomes (e.g. time use, skill development, quality of working life, work/life balance, and occupational identities). Attention will be paid to crosscutting issues such as patterns of gender and ethnic segregation as well as the regional dimension.

This component of the project's work will be outward looking, inviting debate and peer review with the broader research community. This will be achieved by drawing on the expertise of the Global Reference Group, both as reviewers and as contributors to the first WORKS conference, as well as more general open invitations to submit papers to the conference. Subject to the availability of resources, the journal *Work Organisation, Labour and Globalisation*, will also be used as a forum for theoretical debate and the sharing of empirical results.

In this respect a systematic interaction with the new scientific developments in each of the countries involved and at the European level will be achieved during the project's lifetime.

### **Subgroup 'Quantitative analysis'**

**WP4:** Feasibility study and benchmarking of the national and European statistical system with respect to the quantitative analysis of changes in work, including the development of a roadmap and related initiatives for more convergence of instruments to measure changes in work in the KBS at the European level (co-ordination: K.U.LEUVEN - UESSEX)

The aim of this work is to organise a state-of-the-art overview of the existing statistical sources in the different European countries and at the European level. The analysis will focus on the extent to which these sources and data bases make it possible to monitor changes of work quantitatively. Objectives of this research phase are the systematic mapping of European organisations and individual/household surveys that are relevant to measure changes in work; identification of indicators for further use in the project, investigation of the accessibility and feasibility of using existing data bases, assessment of problems of comparability across different data bases, and examination of the strengths and weaknesses of the national and European statistical systems with regard to the issues addressed in the project.

Although organisation surveys and individual/household surveys are different in nature, it is important to provide clear links between them. These will be established by the subgroup structure that ensures co-operation between the two quantitative parts of the project. This is necessary for instance to ensure equivalent occupational and sectoral definitions, and that information on organisational change elicited in

one are of work is tested in the other. Such a link is necessary to understand the relationship between changes on the labour market and the pressures on organisations emanating from globalisation, technological changes and policies to develop 'human capital' within organisations. Moreover, some means are needed to disseminate key findings from both survey studies. This will ensure that the quantitative work meets the needs of the project, that the organisational and individual research outputs are linked in order to maximise synergies, and that the results are then fed into other parts of the project's research. While overall control of the organisational and individual analyses are combined, these two survey types do also need different strategic approaches to meet the objectives.

*a) A roadmap for more convergence of organisation/establishment surveys (co-ordination: K.U.LEUVEN)*

In Europe, there is an established practice of organisation (panel) surveys in different countries on several issues relevant for the project. The most important surveys have been mapped and benchmarked within the STILE project (see [www.stile.be](http://www.stile.be)), co-ordinated by K.U.LEUVEN.

The outcome of the STILE project will be taken as point of departure to aim for further collaboration between the institutes that organise these surveys. This will be done by updating the questionnaire data base, by organising a peer review workshop on how concepts on changes in work organisations are translated into indicators and questions, by a 'bottom up' organised construction of a module with key indicators and questions, by the development of a 'roadmap' for more convergence involving the organising institutes, and by seeking to negotiate the inclusion of the agreed module into the next survey waves. Finally, these steps will also feed into the next project periods by selecting the most appropriate data to do secondary analysis on the data of the existing surveys in view of comparative analysis. This way, the project aims to enhance the convergence of the existing surveys and the possibilities of collecting data on changes of work in a quantitative and international comparable way.

*b) Surveys on households and individuals (co-ordination: UESSEX)*

With regards to Labour Force Surveys and other surveys designed to elicit standard information for national governments more harmonised data exist at the European level than in the case of organisational surveys, and supra-national statistical bodies such as Eurostat and the European Foundation for the Improvement of the Living and Working Conditions exist to enhance this. There are also cross-national surveys such as Eurobarometer. There is less harmonisation in respect of other household surveys, especially household panel surveys, although the academic institutions which run these have regular contact and meetings, and retrospectively harmonised variables have been produced where possible. Far less harmonisation exists in the area of time budget surveys, where there are in fact only limited comparative data.

In this first project phase, the identification of key variables will be a central aim, in particular on issues such as skills and time use (see section 8 for more detail). Further, the available national and international surveys will be assessed and benchmarked as best practice for their use and function for the different themes and issues that are central for the project. Intensive use will be made of previous national and European research projects already undertaken, such as in data harmonisation (PACO and CHER), and in projects such as STILE and NESIS, where assessment has been made of the existence of some relevant variables and the level to which they can be operationalised. Finally, an assessment will be made of the need for and value of imputation of data across data sets. This would effectively allow the 'marriage' of data sets which have distinct but complementary coverage. This has some statistical costs and is time-consuming, but could greatly enhance the value of particular data sets.

**Subgroup 'Policy, institutions and social dialogue'**

**WP5:** Mapping the institutional and policy landscape regarding changes in work and development of comparative research design (co-ordination: ISF MUENCHEN - UT)

The first objective here is on the mapping of national and European employment policies and the institutional and social dialogue landscapes that can influence changes in work and its effects on quality of life. It is crucial that the partners involved in this work will assess, benchmark and identify best practices in respect of the institutional landscape and the wide variety of policy traditions in the different national settings. In this phase the aim is to identify innovative practices and to develop analytical schemes to better understand

similarities and differences in European institutional settings and to map institutional change and adaptation in view of changing forms of work organisation.

The situation in the Candidate and Accessing Countries will receive particular attention in this respect in view of the enlargement of the European Union. Further, the assessment will include the gender contract that exists at different institutional and policy levels in the countries involved. Finally in the first project period, the aim is to develop comparative research methodology that will be used in the case study research of the second project phase.

### **Subgroup 'Qualitative research'**

**WP6:** Case study research. Research traditions and development of comparative research design – including training (co-ordination: FORBA - FTU)

The first activity for this subgroup is the fine-tuning of an appropriate internationally comparative qualitative research methodology on organisations and occupations. Indeed, next to the assessment of quantitative indicators and the availability of data systems to analyse the dissemination of new working patterns in a quantitative way, it is important to develop further appropriate qualitative research methods that allow in-depth analysis in a European comparative perspective. In view of the empirical phase in project period 2, and in order to tailor the methodology to the specific research requirements, this phase is divided in two parts. The empirical phase of the second project period focuses in the first place on organisation case studies to address the research questions from an organisational perspective. In the next step the organisational case studies will be enhanced by occupational case studies, focusing on specific occupational groups within the organisations included. Both approaches require specific research tools, but it is of course important to provide clear links between the two approaches. This will be established by the subgroup structure that ensures co-operation between the two qualitative parts during the project's lifetime.

As the main activity of this subgroup in the first project year is a training initiative for researchers, this activity will be described in section 6.1.3.

#### 6.1.2.2 Improving and innovating the knowledge on changes in work and the quality of life

The second phase is the core of the project: the investigation of the changes in work and their impact on organisations and individuals in a European comparative perspective. It is crucial that the outcome of the first project year is used to the full extent, including the development of the methodologies for comparative research. In order to do so, a specific peer review and synthesising activity is scheduled in the first project conference. This second project phase has further two main objectives:

1. innovating the knowledge on changes in work and the quality of life by carrying out qualitative research on changes in work at organisations and individual and household levels and including the analysis of the shaping of regional institutions and the social dialogue;
2. to describe and explain the extent of organisational change in Europe based on secondary analysis of existing data bases from individual/household surveys and organisation surveys, with the focus on the research issues of the project, based on the identified best practice indicators of the first project phase.

### **Subgroup 'Global dissemination'**

**WP7:** Bringing together the knowledge to build on further in a European perspective (co-ordination: LONDONMET - UPSPS)

Producing the state-of-the-art reviews in the first project year is a necessary step in integrating the rich knowledge, expertise, research and policy traditions that exist in the different European member states and at the European level with regards to the issue of changes in work and work organisation. Taking into account this variety regarding research and policy is necessary in order to understand national practices and research results, to identify best practices and existing gaps, and to initiate a mutual learning process and to strengthen knowledge and policy at the European level. The first project period closes with a first conference, scheduled in September 2006, of the two conferences envisaged within the project, not only to bring together the four parallel streams, but also with the aim to better specify how to build on knowledge beyond this state-of-the-art in an innovative way. This will allow the consortium to develop an effective research strategy for the next project period. Further, the establishment of a Global Reference Group is

envisaged that will provide the systematic peer review and external assessment of the project's outcome, more precisely during the two conferences. These will serve several purposes. They will:

1. provide a forum for consolidation of the learning so far derived from the project's work and for discussing the best way to take it forward;
2. ensure that the project's theoretical and empirical work is grounded in a full understanding of the global context, enabling the specific place of European industries and regions in the global value chains to be identified. In particular, it will make it possible to explore the origins and destinations of the value chains under study when these lie outside Europe;
3. give an opportunity to draw international comparisons, thus strengthening the project's analysis of regional institutional shaping;
4. establish a form of peer review for the project's work;
5. set up a forum for dialogue with policy stakeholders and, as the work progresses, for dissemination of its results;
6. make a contribution to innovative training and demonstration activities.

The first conference will integrate the theoretical, empirical and methodological knowledge obtained so far. A special theme of the first conference will be the global context, with a particular emphasis on the development of indicators and theoretical and conceptual models of globalisation and, more specifically, of the knowledge economy. Topics under discussion will include the evolution of new industrial geographies, the codification of tacit knowledge, the separation of 'knowledge work' from manual work and the development of increasingly elaborate value chains, in both their spatial and legal dimensions. This conference will therefore act as an appropriate concluding point for the first phase of work.

### **Subgroup 'Quantitative analysis'**

**WP 8+9:** Analysis of existing data bases of organisation surveys and individual/household data sets (co-ordination: K.U.LEUVEN - UESSEX)

The objectives of the quantitative analysis of this second project phase are the following:

- based on the outcome of the feasibility study of the first project period, the aim is to exploit the identified quantitative data sources of the national and European statistical system to measure changes in work in the KBS at the European level in organisation and individual/household surveys;
- to describe and explain the extent of organisational change in European employment as this affects individuals and households through quantitative analysis of a number of large-scale data sets of individuals;
- to describe and explain the extent of organisational change in European organisations through comparative quantitative analysis of a number of data sets resulting from organisation surveys in Europe;
- to describe and explain the extent of organisational change in European employment as this affects individuals and households through quantitative analysis of a number of large-scale data sets of individuals;
- to explain the causes of this change and national variation in order to assess the significance of variation.

This second activity of the subgroup 'Quantitative analysis – organisations' involves the organisation of a summer school to train researchers to do comparative analysis on data sets from different organisation surveys in order to allow for international comparative research. This activity is described under 6.2 'Training activities'.

With respect to the secondary analysis of individual data sets, the aim is to examine the welfare implications in respect of occupational mobility, the distribution of earnings, and gender equality of changes in work in Europe. For the analysis of the individual and household data sets, the research programme will begin by accessing the required data sets and reconstructing these for the purpose of comparative analysis. This will be based on the outputs of the feasibility study of the first project period. After extensive internal discussion of the best way to make maximum use of these data, analysis will be undertaken first at the descriptive level, mapping the necessary parameters such as national variation in key indicators, regional distributions, and trends over time. The second phase of analysis will use a variety of statistical techniques

to model change in the key indicators in order to isolate causes of change and the effects on European competitiveness and social welfare. The results will be disseminated through reports and a workshop.

The main aim of the workshop will not be to summarise the results but to assess their value and to move forward through estimating what they mean for the future of organisation efficacy in Europe over the next 10-20 years.

The chief milestones of this work will be the achievement of a series of critical internal thresholds for data management, data analysis, and essential liaison with contributors to other work packages - in particular the work done on data sets from organisation surveys, but also those working on qualitative research.

### **Subgroup 'Qualitative research'**

**WP10+11:** Case studies on changes in work (co-ordination: FORBA – FTU)

The objectives are:

- innovating the knowledge on changes in work and the quality of life by carrying out qualitative research on work organisation, use of knowledge and skills and quality of working life in selected business functions or activities at organisational and networks level through case studies on 58 organisations (networks) in 13 participating countries including retrospective questions (subgroup 'Qualitative research - organisations'). Lead: FORBA, second: ISF MUENCHEN;
- innovating the knowledge on the implications of changes in work in the knowledge-based society by conducting qualitative empirical research at the individual and household levels through the investigation in case study research of occupations in all participating countries, including retrospective questions analysing aspects of quality of work, time use, learning and occupational identities (subgroup 'Qualitative research - individuals'). Lead: FTU, second: FZK;
- innovating the knowledge on the shaping by institutional arrangements and policies of work organisation and its outcomes in terms of quality of life by way of conducting research on the national/regional institutional contexts, on occupational groups, on labour market regulation and on social dialogue. The actual empirical work for the policy pillar will be integrated in the organisational and individual case studies. This should provide the opportunity to investigate institutions or regulations 'at work', i.e. in their practical application and contestation at the level of the workplace. This gives indications for causal explanations within the case studies and in particular, for the policy pillar, a dynamic view on institutions and regulations that can inform conclusions on regulation (subgroup 'Policy, institutions and social dialogue'). Lead: ISF MUENCHEN, second: UT.

The implementation of these activities is described in the detailed project outline (section 8). In this section, we mainly want to explain how the innovative approach of the project will be realised in the qualitative case study work. It is based on three basic principles.

1. The recomposition of global value chains and the evolution towards globalisation of economic activities in a given sector is a basic assumption for the project, involving at the same time tendencies of geographical concentration and decentralisation of business functions. The re-composition of the value chains implies that different business functions, such as R&D and design, production/manufacturing, transport and logistics, sales and customer-related activities are more interwoven than ever, in particular because of the use of information and communication technologies. Therefore 'functions' and 'activities' of specific economic sectors will be selected for the organisation case study research, for instance the logistics function in the automotive sector or the research and development function in the food industry. The output of the activities in project period one (state-of-the-art on qualitative and quantitative research) contributes to a general picture of the recomposition of global value chains, of organisations and of skills and labour markets. Based on these insights, the organisation case studies serve as qualitative 'windows' into these processes at points which are strategically chosen. Since other 'drivers of changes' will also be taken into consideration when examining changes in work, in particular economic drivers of change such as privatisation and rationalisation, and changes in the welfare states, some additional functions of a different nature are relevant for inclusion, in particular care work and personal services.
2. In order to have an integrated and deep insight into the changes in work and their impact on the individual, organisation case studies and research on individuals and their 'households' will be linked closely together. The units of analysis here are the occupational groups that are connected to the activities included in the organisational case study research. This means it will be possible to go beyond the level of the organisations included in the case studies and to draw conclusions at the level of the

occupational group and also its societal dimensions. The occupational groups will be restricted because of the focus on the business function or activity and in order to have a certain level of homogeneity. However, one of the important characteristics of the quickly evolving economic restructuring is precisely the blurring of boundaries between what traditionally were 'occupations'. This means that the research will also focus on what can be called 'occupations under construction'. These might lack an institutionalised corporate identity, institutionalised skill and competence trajectories, and collectively negotiated working conditions. Moreover, the focus on business functions in the organisational case study phase makes it easier to approach such 'occupations under construction'. This in-depth qualitative phase will enable insights into issues such as work/life balance, occupational identities, occupational trajectories and biographies.

3. Several issues related to changes in work, in particular issues related to flexibility and learning, are generally studied from either an institutional or an organisational perspective, and are rarely connected. The first has a strong socio-political and regional dimension of labour regulation, while the second concentrates on technological and organisational drivers of changes. An important innovative aspect of this project is that it aims at combining both traditions in one single conceptual frame. On the one hand it rejects strong institutionalism by assuming that traditional (or industrial) forms of social security and employment policy, as distinguished in typologies of welfare capitalism, are no longer decisive with respect to the explanation of change because of globalisation. On the other hand, it repudiates the idea that economic, organisational and technological constraints determine the future of work and welfare in Europe. Rather, the project seeks to find out if new institutional arrangements and policy mixes occur (based on both organisational and institutional dynamics) that support the emergence of work patterns which better fit the conditions of a knowledge-based society.

These innovative approaches have a considerable impact on the organisation of the empirical case study work since this has to combine three different perspectives: first, the perspective of the organisation - in order to investigate organisational change, second the perspective of the individual and his/her household - to assess the impact of change, and third, the policy and social dialogue perspective. With the latter the perspective of the region will be brought in to assess the regional and/or national and especially the institutional context of the changes in work and its impact. To address this complexity, the empirical work is divided into three phases:

1. case studies on strategically selected business functions/activities at the organisational or network level;
2. case studies at the individual and household level, focusing on occupational groups;
3. extension of the data collection for the case studies to include the regional/national institutional and the policy context of the occupational groups and economic activities involved, including the social dialogue aspects.

To realise these objectives, it is vital that all nations involved in the project, and representatives for the broad European labour market, economic and institutional variety, are included in the case study research, that is at the core of the project and its aim of innovating knowledge. At the same time, in order to keep the research in manageable proportions, four different business functions, their related occupational groups and the regional institutional contexts will be investigated. Furthermore, two organisations for each business function will be investigated. The details of the selection process for these organisations are explained in section 8. This will result in 58 case studies in total. The table below indicates how this qualitative case study research is organised in order to realise the project's objectives by including the European regional variety of labour markets, economies and institutional contexts.

Country/business function	Business function 1	Business function 2	Business function 3	Business function 4	<i>Institutional context and social dialogue</i>	Total
Austria (FORBA)		x	x		x	2
Belgium (K.U.LEUVEN and FTU)	x	x		x	x	3
Germany (ISF MUENCHEN and FZK)	x		x	x	x	3
UK (LONDONMET)	x	x			x	2
France (FTU)	x			x	x	2
Netherlands (UT)		x	x		x	2
Portugal (FFCT-UNL)	x		x		x	2
Italy (IRES)		x	x		x	2
Greece (UPSPS)	x			x	x	2
Sweden (ATK)		x	x	x	x	3
Norway (SINTEF)		x		x	x	2
Hungary (ISB)	x		x		x	2
Bulgaria (IS)		x		x	x	2
<b>Total</b>	<b>7</b>	<b>8</b>	<b>7</b>	<b>7</b>	<b>13</b>	<b>29</b>

#### 6.1.2.3 Going beyond the project towards a European Research Area and towards a global perspective: integrating knowledge on the changes in work in an international comparative perspective and including the future, policy and dissemination

After the qualitative and quantitative empirical phases, integration of findings, revisiting the original research questions and also building bridges beyond the project, will be possible. The results of both the quantitative secondary analysis of organisation survey data bases and individual/household data sets will be integrated. The findings and experiences of the empirical phase also allow a further establishment of training activities. A first objective will however focus on the reporting on the findings of the empirical phase in order to integrate these from the different perspectives: the organisation, the individual and the institutional/regional context, and to initiate a comparative analysis.

#### **Subgroup 'Theories and concepts'**

**WP12:** Innovating the knowledge on changes in work in the knowledge-based: thematic analysis (co-ordination: LONDONMET - IRES)

To do so, horizontal analysis of the case study material will be organised on the key themes of the research project, thus addressing the objective of innovating knowledge on changes in work in the knowledge society. The empirical phase will not only focus on the specific developments in each economic activity/business function or occupational group, but will also include analysis at 'the horizontal level'. This means that reports will be produced on the material collected in the different countries and across the different economic activities and occupations. This will allow integration of the insights gained at an aggregate and comparative level on the basis of the sectoral and national variety and also insights into the specificities of the evolution of work organisation, the drivers of change, and the impacts on the work force. The following 11 thematic reports will be produced, each co-ordinated by one expert partner but with input from at least 2 other partners involved in the project:

- the networked organisation and global value chain restructuring;
- changes at work, social dialogue and institutional shaping in the KBS;
- strategies to reach flexibility in the organisation;
- NFWO and the quality of working life, health and safety, autonomy;
- learning and skills, occupational identities;
- flexibility, time use and work/life balance;
- forms of employment and biographical aspects;

- internal and external labour markets and intermediation;
- changing gender and ethnic relations at work in the KBS;
- changes in work in transitional economies;
- change processes and future perspectives.

### **Subgroup 'Policies and institutions'**

**WP13:** Policy institutions and social dialogue - conclusions (co-ordination: ISF MUENCHEN - UT)

A next important activity to go beyond the project is to aim for policy conclusions and dissemination of the project findings to different targeted policy audiences. The objective is here:

- to achieve a better understanding of the (national and regional) institutional frameworks that are relevant to the regulation of labour in the cases under study, both on the level of industrial relations, labour market policy and welfare policies;
- to shed light on new developments in the field of social dialogue in Europe, especially regarding the various aspects of the interrelationship between new forms of work organisation and quality of working life.

These objectives will be aimed for by constructing an explanatory framework of 'regulatory logics' drawing on current theoretical insights in the field of labour market and welfare regulation. In a next step this framework will be applied to the findings of our case studies, in order (a) to enrich the explanation of the variety of observed trends and (b) to discuss the opportunities to 'govern' social developments in a European context.

This work will result first into a final report including an analysis of the cases using the institutional explanatory framework and an analysis of the potentials for social governance in Europe, given the observed institutional constraints and opportunities, second into a series of policy papers to different target audiences, such as: HR Managers, labour market intermediaries, trade unions, European institutions, regional governments, equal opportunities policies.

### **Subgroup 'Quantitative analysis'**

**WP15+16:** Quantitative analysis: organisation surveys – conclusions & individual and household surveys – conclusions (co-ordination: HIVA - UESSEX)

The main aim of the quantitative analysis in this third project phase is to integrate the findings of the secondary analysis of both the organisational data and the individual and household data, as analysed the previous project phase. This way, the project outcome aims at explaining the causes of this change and national variation in order to assess the significance of variation for European social policies and competitiveness. Active liaison mechanisms will be put in place to provide interaction with the subgroup 'Theories and concepts' in order to confront the results with the qualitative empirical phases and horizontal thematic analysis. This will be done in view of the reporting of the results of the quantitative analyses.

Subject to the availability and comparability of the best practice indicators (as identified in the first and second project period), the output of the secondary analysis of organisation survey data will allow to examine the distribution of new forms of work organisation throughout Europe as identified in the different organisation surveys and to compare both the antecedents and the impact on organisational strategies and HRM-related issues. In this respect, this outcome will envisage to complement the findings of the qualitative data collection (case study research) and provide a quantitative input into the thematic papers developed in the frame of the theoretical subgroup.

The outcome of this project phase will be reports on the results which will make a major contribution to understanding of organisational change. One report will contain a descriptive account of organisational change in Europe. Another will contain analyses which seek to explain the changes which are occurring and attempt to make projections of change based on these. The result will be a body of innovative and comprehensive research which can be used by stakeholders for a variety of purposes covering employment, education and training, and social welfare. This will be made available in easy to use formats to provide the basis for dissemination.

### Training activities

With the aim both to disseminate the knowledge on changes in work as concluded in the research and to contribute to the innovation of research methods and of organisational practices, this phase will mainly focus on the development of training material and on the setting up of targeted training initiatives. The target groups of the training activities cover both researchers and practitioners such as trade unionists. This activity is described under section 6.1.3.

#### Subgroup 'Global dissemination'

**WP19:** Final conference 'The future of work in the knowledge society' (co-ordination: LONDONMET - IRES)

The objective here is innovating the knowledge on changes in work in the knowledge-based society by developing a global perspective taking full account of the implications for work organisation of global economic restructuring and the recomposition of value chains. This will be done by organising a second project conference.

The second project conference will draw together the results of the empirical work of the project at both the organisational and individual level, together with comparative information from outside the project. It will assess scenarios for the future based on an analysis of this work, taking account both of the major global shaping trends and of the varying regional trajectories, as well as the differing goals of the social actors whose decisions will also shape future patterns.

Like the first conference, this final conference will have a clear global dimension, aiming to present the work of the project in a manner which facilitates the location of restructuring of work in the EU within the context of a global knowledge-based economy.

In a mix of plenary and parallel sessions, the thematic reports and other outcomes arising from the WORKS project will be presented alongside papers addressing the same themes by external experts, drawn from the Global Reference Group, from relevant policy stakeholders and from other EU research projects. Linked to the conference, a separate one-day workshop will be held, involving policymakers and key experts, to discuss future trends, explore scenarios for the future and highlight the key trends of relevance to European policymakers. This session will include inputs from the social partners and from international organisations (such as the ILO, OECD etc.) as well as academic experts, representatives of the European Commission and other policy stakeholders. As in the first conference, to ensure that regional diversity is kept in focus throughout the discussion of general issues attention will be paid to selecting participants whose work makes visible the variety of institutional models which exist both within the EU and outside it.

#### 6.1.3 Training activities

Four focused training activities are organised during the three phases projects' lifetime ('integrating', 'innovating', 'going beyond'), all with the aim of an effective uptake by a wider target audience of the project's outcomes and of the expertise of the consortium gained and enhanced throughout the project. Three of these training activities are focused on research methodology. A first will train the researchers in view of the qualitative research phase of project period 2 (first project period). A second focuses also on researchers and is about internationally comparative qualitative research methodology that will be developed and applied during the project (third project phase). The third is related to the quantitative secondary analysis of data about changes in work organisation (and related issues) collected in organisation survey data bases (WP8, summer school) (second project period). The fourth training focuses on practitioners and social partners at the organisational level and is about tools for innovative organisational design (third project period). Training will be carried out at three stages of the project. The first will help to develop the methodology or tools internally within the consortium (organised as subgroup meetings). The other two are targeted at specific audiences outside the project. The training on methodology for qualitative research will be organised in the second period (after the first empirical phase of the project).

In addition to these specific activities, the universities involved in the project (London Metropolitan University, Leuven, University Nova Lisbon, Namur, Essex, Athens, Twente, Budapest, Sofia) can make an active contribution to the development of course materials for courses on research methods, organisational theory, labour sociology, management and trade union studies etc. which include MBA courses. Wherever possible these partners will also try to spread these course materials beyond the consortium, especially in

Accession States and Developing Countries (using the extensive existing contacts and teaching exchange schemes within the consortium).

Furthermore, the consortium will explore the possibility of using the Marie Curie scheme to further develop training opportunities by creating fellowships and workshops within the consortium partnership.

Finally, the active participation of students and young researchers to participate in the project conferences will be stimulated through targeted dissemination of the conference announcements and providing reduced participation fees. The detailed description of the training initiatives is included below:

#### 6.1.3.1 Integrating knowledge and preparing the ground for a European Research Area on changes in work in the KBS

##### **WP6: Organisation case study research. Research traditions and development of comparative research design, including training** (co-ordination: FORBA - ISF MUENCHEN)

The main aim of this work in the first project period is to bring together first hand research experience with qualitative methods in the field of work and employment. Appropriate exchange and transfer activities will be initiated that take into account the partly 'tacit' character of methodological knowledge. Special emphasis will be on appropriate ways of making visible the gender and ethnic dimension in case study work.

The methodology has to include also a process perspective and both an objective and subjective perspective on the development of work organisation and quality of life.

The activities of the project will include focused training activities, in the first place of the partners involved in the empirical phase, in procedures and methods for the project's own case study research. This training will be based on both the state-of-the-art in methodology and on the extensive experience of the WORKS consortium in carrying out empirical comparative research. In the last phase of this project, similar training activities will be organised for target groups beyond the project (see below).

##### **WP6: Occupational case study research. Research traditions and development of comparative research design, including training** (co-ordination: FTU - FZK)

The main aim at this stage is to develop a method that can provide us with data collection exercises that can be carried out and compared cross-nationally. The focus on the individual needs to be broadened to encompass relations within the household, including the domestic division of labour.

The development of this methodology will pay special attention at the gender perspective by identifying the issues that have to be included in the individual case studies.

#### 6.1.3.2 Improving and innovating the knowledge on changes in work and the quality of life

##### **WP8: Comparative secondary analysis of organisation surveys in Europe** (co-ordination: K.U.LEUVEN - CEE)

Objectives:

- to organise a training initiative for researchers of the institutes involved in the working group on analysis of data from organisational surveys;
- to describe and explain the extent of organisational change in Europe based on comparative secondary analysis of existing data bases with the focus on the research issues of the project, based on the identification of best practice indicators on changes in work;
- to explain the causes of this change and national variation in order to assess the significance of variation for European competitiveness.

Based on the work of the first project year, the feasibility study on quantitative sources, the identification of best practice indicators and the joint construction of a focused module for organisation surveys of key indicators, the WP Team will access the required data sets of organisation surveys to use these data

collection initiatives to integrate knowledge on organisational change. This will be done on the basis of secondary analysis of identified best practice indicators on changes in work. To do so the partners involved in this work package will liaise with the national institutions that organise organisational surveys.

To support this aim, the WP Leader will organise a training initiative for researchers of the institutes involved in the European working group on comparative analysis of data from organisational surveys, that is established in the first project period.

The output of the comparative analysis, developed in the frame of the summer school training initiative, will allow to complement the analysis of the individual data sets; liaison will be established with contributors to other subgroups, in particular the work done on data sets from individual surveys, but also those working on qualitative research.

#### 6.1.3.3 Going beyond the project towards a European Research Area and towards a global perspective: integrating knowledge on the changes in work in an international comparative perspective and including the future, policy and dissemination

With the aim of disseminating the knowledge on changes in work as concluded in the research and to contribute to the innovation of research methods and of organisational practices, this phase will mainly focus on the development of training material and on the setting up of targeted training initiatives. The main objectives are:

- to contribute to the further development of the European Research Area by improving knowledge on qualitative case study work in internationally comparative research, in particular in the area of research on work and employment;
- to contribute to the dissemination of the WORKS findings by developing specific training initiatives to the scientific community and to practitioners.

#### **WP14: Development of training material** (co-ordination: FORBA - ATK)

The objective here is to develop training material which combines academic methodological knowledge with experience-based knowledge gained in international research co-operation. The training material will be developed based on the combination of:

1. up-to-date methods covering all phases of the research (problem-formulation, research design, research sample, research instruments and analysis of case study material);
2. the available methodological knowledge on qualitative case study work in internationally comparative research; and
3. the experiences from case study work within the WORKS project.

#### **WP17: Training researchers** (subgroup 'Global dissemination') (co-ordination: FORBA)

In this stage the knowledge brought together, created and documented in the previous project periods will be systematically transferred to the scientific community, to young researchers from the member states and the Accession Countries in an open training seminar on research traditions, reflexivity and cultural diversity, research design and instruments, and comparative analysis methods. The training seminar should attract (young) researchers interested in international research co-operation. The participants will not only receive novel training material but also have the opportunity of intensive interaction with experienced researchers from WORKS partner institutes. This is very important because much of the methodological know-how consists of tacit knowledge.

The training will be based on the state-of-the-art in methodology, previous research experiences of the partners, and on the experience of the WORKS consortium in carrying out empirical comparative research in project period 2. The aim of the training activities is to raise awareness for the advantages and limitations of different approaches to case study research and to present procedures and methods of internationally comparative qualitative research. The participation in the training seminar will not be restricted to the project partners but will be open to members of other research institutes and to university teachers. The partners will use their contacts and various networks including the European and national scientific societies to attract

participants to the training seminar. Special emphasis will be on the participation of researchers from the Accession and Candidate Countries.

Another contribution to training and to the development of a European Research Area will be the exchange of researchers between the participating institutes and beyond. This exchange, having as a main objective the support of culturally sensitive comparative research - both data collection and interpretation - will at the same time be an important learning opportunity for researchers interested in European level and comparative research.

#### **WP18: Training trade unions and other stakeholders** (subgroup 'Global dissemination') (co-ordination: ATK)

In order to disseminate the results of the project to the broader public, a specific training activity will be organised with the purpose of condensing the most important results into tool(s) for analysing and developing work organisation in the knowledge society and carrying out training based on these tools. The basic idea is that practitioners, in particular trade unions as social partners at the organisational level, need support in business and work organisation development. WORKS will develop knowledge on the most important aspects of this development from an individual/occupational, an organisational/industrial and societal/regional perspectives. Training will be set up and fully supported for:

- professionals in business and organisational development;
- social partners (in particular union and work council representatives) that take an active role in developing processes.

The *contents* of the training will focus on design processes - organisational design, work design, management systems design, the design and use of ICT, design of competence and occupation development, and design of systems for OHS. The design processes will be based on the main issues and themes of the WORKS project:

- networked organisations and other forms of NFWO;
- flexibility - for the organisation and the individual, work/life balance;
- the use and development of knowledge;
- learning, skills and occupational development;
- individualisation and employment security;
- health, safety and quality of work;
- social dialogue, participation and change processes.

The training methods will be built on tools for analysis, design, development and benchmarking as well as case studies integrating gender and ethnic perspectives. The first step in the work package will be identifying the core design processes from the case studies and the thematic analysis, together with the needs of the core target groups. The second step will be constructing the tools and the training methods and setting up the training events: two European pilot training programmes and three national pilot programmes.

#### **6.1.4 Management activities**

The management activities include the main tasks of the Project Co-ordinator (K.U.LEUVEN) and the tasks and responsibilities that result from the management structure as described under section 7.

##### 6.1.4.1 Project co-ordination

###### Operational co-ordination:

Setting-up the infrastructure for co-ordinating the project, including operational aspects of dissemination

- assign personnel responsible for organising the work processes;
- implement communication channels such as email, telephone, fax, Intranet, project Newsletter; develop and maintain a project logo;
- standardising the procedures and forms for internal project co-ordination;
- standardising the procedures and forms for publications and dissemination (templates);
- organisation/planning of the project activities, logistic support and practical organisation;
- management of the Intranet;
- management, design and distribution of the project Newsletters;

- management of the public Website (composition, follow-up, collect information, update, links).

Overall financial and administrative management of the project consortium:

- implementation of procedures and forms for reporting to the EU, taking into account administrative rules and regulations related to European research projects;
- co-ordinating technical and financial reporting;
- informing, communicating and supporting the partners, checking cost statements;
- keeping overview on all exchanges and personnel movements involved in the project;
- assign dates and places for future meetings; preparing the agenda, taking meeting minutes; making an inventory of agreed engagements and follow-up;
- design clear timetables for the project execution (overview of deadlines for deliverables);
- reporting towards the Commission, e.g. review reports (technical, financial, etc.);
- obtaining and maintaining audit certificates by each of the partners;
- setting-up a transparent accounting system, provide overviews of the financial status of the project, and assign funds in view of the actual planned work in line with the initial projections and the decisions of the Scientific Board;
- facilitation is provided to all the partners for attracting additional external funding to support the project and thus strengthening it.

Managing overall consortium-level scientific and knowledge-related issues:

- co-ordination and maintenance of the Consortium Agreement;
- monitoring and controlling the research activities of the project;
- co-ordinating at consortium-level knowledge management activities (dissemination) and other innovation-related activities;
- co-ordinating all other dissemination/valorisation/exploitation efforts;
- fulfil additional efforts to disseminate the scientific research results;
- co-ordination of promotional activities and events;
- an overview is kept on project-related presentations and publications. The latter are screened first by the Scientific Board before released for publication.

Implement and explain the project governance structure:

- implement the Scientific Board; assign the Subgroup Leaders;
- assign the WP Leaders and the participating representatives to each work package;
- define a calendar, plan and assist in organising the meetings of the Scientific Board and the General Assembly. The WP Leaders and Subgroup Leaders define their own calendar as required and ensure sufficient communication between the partners and to the co-ordinator and the Scientific Board.

#### 6.1.4.2 Implementation of the management structure: meetings (a schematic overview of all meetings, workshops, etc. is included in the Gantt diagram)

1. The Scientific Board consisting of the Subgroup Leaders, chaired by the co-ordinator: meetings three times a year, i.e. 11 times in 4 years.
2. The Subgroups including the WP Leaders, chaired by the Subgroup Leader: meetings at least every year and at the occasion of events (s.a. workshops) but more meetings can be scheduled if needed.
3. The WP Teams consisting of individual partners, chaired by the WP Leaders: meetings at least every year and in the occasion of events (s.a. workshops) but more meetings can be scheduled if needed.
4. The General Assembly, consisting of all partners, chaired by the co-ordinator: kickoff meeting and further yearly, i.e. after every project period, i.e. 4 meetings in total.

Whenever possible, meetings will be scheduled to coincide with each other to minimise the cost and effort of travelling for the partners.

## 6.2 Plans

### 6.2.1 Plan for using and disseminating knowledge

#### 6.2.1.1 Use of knowledge

The management of knowledge and intellectual property is described in detail in the project's Consortium Agreement. The main principles and provisions are as follows:

##### *Principles of copyright*

The copyright of each partner in copyright-protected work remains with the author himself or herself. The same holds for co-workers of the individual partner. If several authors are involved in the work, then in case of doubt each holds an equal share of the copyright. Authors always have the right to be fully acknowledged for their authorship.

##### *Works external to the project*

In the case that the partners utilise copyright-protected works for the aims of the project and these works have not been drawn up within the project, but the rights thereto have accrued independently of the project, then all rights belong exclusively to the respective partner. The use of such works by other partners requires the express agreement of the entitled.

In the case that such copyright-protected works are introduced into the project and made available for use it will be assumed that the partner in question is granting the unrestricted use of the work. This also holds expressly for data bases. Otherwise the entitled partner shall be obliged expressly to restrict particular rights of use with regard to the partner and to disclose any existing third-partner rights.

Each partner is also obliged to disclose any existing third-partner rights to works.

##### *Works internal to the project*

Works commissioned within the project may be used by all partners during the period of the project. The copyright of the author shall not be affected hereby. All copyright-protected works that are drawn up within the project shall be used by the partners exclusively for the objectives of the execution of the project. This shall also apply to data bases.

The partners vest in the consortium, represented by the co-ordinator and the Scientific Board, the exclusive rights to reproduction and distribution of the respective works drawn up within the project. The said rights are geographically unrestricted for the legal term of copyright in the respective country.

Further, the partners grant the consortium for the term of the main copyright the following exclusive subsidiary rights:

- the right to – also partial – pre-prints and reprints in newspapers and journals;
- the right to permit translations into other languages;
- the right to the inclusion of the work in collections of all kinds;
- the right to other reproduction, in particular through photomechanical or other similar processes (e.g. photocopying);
- the right to transfer onto carrier material for digital reproduction (diskettes, CD-ROMs and similar) and their duplication;
- the right to editing or other re-arrangement of the work;
- the right to incorporate the work in data bases, documentation systems or in similar kinds of storage systems (e.g. the Internet);
- the right to transmit the contributed work electronically or in similar fashion;
- the right to give public lectures of the work by audio or visual means.

The consortium shall not transfer the above vested subsidiary rights to third parties. Each partner is obliged to ensure that the rights to commercial use may be vested in the consortium also in the case that commissioned works are carried out by third parties not engaged in the project. The copyright of the author shall not be affected hereby.

### *Publication*

All partners agree to the publication of the project results and all works drawn up in the framework of the project. The consortium's right to publication also expressly includes the right to publish in digital media.

Each individual partner is entitled to publish the results of his or her own research. In the case that copyright-protected works of partners are to be used for this purpose, the express agreement of this partner is required.

In the case that the research results concern not only the partners' own research results but statements that concern the results of the whole project, the express agreement of the Scientific Board is to be obtained before publication.

Further, the RESPECT code of conduct for socio-economic research, as developed in the RESPECT project (see section 7) is a full annex of the Consortium Agreement.

#### 6.2.1.2 Dissemination of knowledge

The main objective of the plan of disseminating knowledge is to develop a dissemination strategy to ensure that the WORKS project and its outcomes are clearly disseminated in a manner which is:

- timely;
- accessible;
- appropriate;
- of high scientific quality;
- to a range of audiences including:
  - EU, national and regional policymakers;
  - other relevant policy stakeholders (e.g. NGOs, public and private agencies involved in education and training, regional development, international trade and aid, equal opportunities, information technology and other policy fields);
  - the social partners;
  - the scientific community within the ERA;
  - the global scientific community;
  - the specialist and general media.

As dissemination is a horizontal activity of the project, all partners will be involved. The co-ordinator manages and co-ordinates the project-related dissemination tools in close collaboration with the members of the Scientific Board. The national dissemination of the project results by all partners of the consortium is actively stimulated: all partners are assigned a budget for national dissemination activities.

As befits a large, multi-partner project, WORKS will employ a variety of different means of general dissemination in addition to those specific activities (including training workshops and conferences) which are the subject of separate work packages. These project dissemination will include:

- a well-linked project Website which will be used for publication of Newsletters, links, announcements, posting of more substantial reports and documents, conference and workshop registration and organisation and other external activities, in addition to acting as a means of exchange of information between partners through a password-protected private space;
- regular project Newsletters, posted on the Website and delivered by email;
- publication of all reports both on the Website and in hard copy;
- general dissemination activities both nationally and internationally by all partners through participation in conferences and workshops, integration of results into teaching activities and publication in academic and other journals;
- press releases of key results to targeted national and international media, supported by availability of partners to give press interviews etc.;
- participation of partners for policy briefings and expert consultancy at EU, national and regional level, subject to availability of time and resources;
- participation in EU conferences, concertation activities etc. subject to availability of time and resources;
- publication of conference proceedings;
- in addition to these 'normal' activities, WORKS will also use another more innovative means of dissemination. Because of lack of resources, this will not take place within the scope of the project itself but will be carried out in parallel in close collaboration with it. This will take the form of a new academic

journal to be published twice a year on the theme of reorganisation of work and labour in a global knowledge economy, as is further described in section 6.2.3.

### 6.2.2 Gender Action Plan

The project addresses gender issues at a number of levels:

1. **in terms of the composition of the team:** here the aim is to ensure that both men and women are represented in the project management team, as WP Leaders, as research assistants, as administrators and as authors and conference presenters. Approximately half the lead partners in the project are women. Furthermore, the Project Co-ordinator is a woman as are three of the five members of the Scientific Board. It is intended to ensure a similar balance throughout the project's work;
2. **in terms of research content:** gender is a cross-cutting horizontal theme throughout the project's work, and will be integrated into the analysis at all levels. However in order to ensure its separate visibility it will also be the subject of a separate thematic analysis (see below for further details);
3. **in terms of research methodology:** attention will be paid to gender sensitivity in the design of all research instruments and in interviewing methods, data analysis and other aspects of research methodology. Gender issues will also be highlighted in the research training activities organised by the project. For this aim, a specific international expert is included in the consortium and is assigned a budget to allow the assessment from a gender perspective of all work in progress;
4. **in terms of the selection of case study sites:** one of the criteria for case study selection will be that the organisations and occupations to be studied exhibit a gender composition which will allow for interesting analysis which will shed light on the ways in which changing work organisation interacts with changing gender relations or reinforces existing patterns;
5. **in terms of the selection of participants for training and dissemination activities:** attention will be paid to ensuring a gender balance amongst participants, both within the group as a whole and within national groupings. The content of training activities will also be designed to encourage gender sensitivity in research methodology;
6. **in terms of decision-making processes and the organisation of conferences and workshops:** efforts will also be made to ensure that discussions are carried out in a way which is unthreatening and 'woman friendly' so that all participants are encouraged to contribute.

Each of these items will be reported on in all progress reports to the Commission of the project's work and in the final report.

#### *Gender issues in the WORKS project*

Gender issues form an integral component of the WORKS project. For this aim, a specific international expert, Ewa Gunnarson (NIWL) is included as a full partner in the consortium and she is assigned a budget to allow the assessment from a gender perspective of all work in progress. This allows not only 'ex post' evaluation of the gender aspects developed in the project, but on the contrary an ongoing attention and effort to have an explicit strategy to include gender as a main stream issue in all the aspects of the project development. Gender issues will form a crosscutting theme throughout all its research activities as well as forming the subject of a separate report.

Gender is recognised as complex variable which interacts with other social differentiators including ethnicity, age and class. Although the secondary data analysis carried out by the project will include an investigation of gender differences across all variables and research instruments will be designed to ensure that men and women are separately identifiable, it is recognised that these are not simple unchanging categories.

For the purposes of carrying out qualitative research on organisational change, many existing structural theories on gender and organisation are overly simplistic, with the risk of creating a one-side focus on structures and the reproduction of different forms of sex segregation, thus downplaying the importance of individual agency and making it difficult to observe change processes and analyse the differences between gender relations in differing contexts. To avoid this over-simplified approach, WORKS will follow some features of the 'doing gender' approach in the design of its research methodologies, including drawing on the work of West and Zimmerman (1987), Acker (1990, 1992), Gherardi (1994) and Connell (1987, 1995). This approach is also helpful in making it possible to render visible the ways in which gender relations are shaped

by (and shape) ethnicity and other variables, such as those created by educational, age, class or occupational differences. Particular attention will be paid to making visible underlying gender patterns which are taken for granted in particular organisational, household or regional contexts, and to study forms of masculinity as well as femininity.

In carrying out comparative analysis, special attention will be paid to specific regional models of 'gender contract' and the ways in which these vary across different social groups and institutional settings.

### 6.2.3 Raising public participation and awareness

Dialogue with policy stakeholders and the broader research community form a key component of the WORKS project. The strategy has been specifically designed to ensure that these groups are not perceived as passive recipients of 'dissemination' of the project's findings but on the contrary are given a role in making inputs to the project's work.

This will take several different forms, and operate at different levels:

- a *Global Reference Group* will be established to provide ongoing peer review of the project's work as well as to provide specific inputs to particular activities such as the state-of-the-art reviews and the project's conferences. This group will include leading researchers from within the European Research Area but also from outside it, to provide a global perspective on the project's work. In addition, it will include representatives from key policy institutions and from civil society;
- the project's two *international conferences* will act as forums to bring together research from inside and outside the project together with policy actors;
- the project's *training activities* will ensure the dissemination of methodological innovations to the wider research community, as well as to policy stakeholders (for instance to trade union researchers);
- the project's *Website* and *Newsletters* will be designed to reach a broader audience, acting both as introductions to the project and as access points for more in-depth analyses;
- at strategic points in the project, and where research findings warrant it, *press releases* will be issued to draw key results to the attention of the media so that they can find a wider audience.

The project will also publish its findings both in book and report form and over the Internet, as well as taking part in normal dissemination practices such as writing articles for academic journals, participating in conferences, seminars and workshops and contributing to EU concertation activities.

In addition to these 'normal' activities, subject to the availability of resources and outside the formal scope of the project, WORKS will also use another more innovative means of dissemination. This will take the form of a new academic journal to be published twice a year on the theme of reorganisation of work and labour in a global knowledge economy. Because of lack of resources, this will not take place within the scope of the project itself but will be carried out in parallel in close collaboration with it.

The journal is provisionally entitled *Work Organisation, Labour and Globalisation* and it is envisaged that it will be published either by an existing academic journal publisher or independently by a not-for-profit company. It will be edited by Ursula Huws, from LONDONMET, under the guidance of an editorial management board whose membership will consist of the five members of the WORKS Scientific Board (Monique Ramioul from K.U.LEUVEN, Jörg Flecker from FORBA, Gerard Valenduc from FTU and Pamela Meil from ISF MUENCHEN plus the editor). It will also have an editorial advisory group whose membership will be drawn from the WORKS Global Reference Group. All articles which appear in the journal will be peer-reviewed according to normal academic criteria. It is envisaged that seven issues will appear during the life of the WORKS project and if during this period a sufficiently large subscriber base is built up to sustain it financially it will continue beyond the life of the project.

Two of these issues would feature papers from the two WORKS conferences. Each issue of the journal will be available separately as a book as well as a journal issue and will be awarded an ISBN as well as an ISSN to facilitate distribution through bookshops as well as by subscription.

The journal will aim:

- to be interdisciplinary;
- to be global in scope, with a particular emphasis on attracting contributions from developing countries as well as from the EU and other developed countries;
- to provide a locus for articles presenting empirical research findings as well as theoretical contributions with priority being given to those which combine the two;

- to become a forum for serious theoretical debate, especially to engage with conceptual work taking place beyond the scope of the project;
- to publish in a style which is accessible to policymakers as well as academics, with the aim of contributing towards an exchange of information between scholarly and policy-related research. Provided that they meet the peer review criteria, articles will be welcomed, for instance, from researchers working in international development agencies, trade unions, companies or public bodies;
- related to the above, to offer a place to publish to researchers specifically wishing to disseminate their results to a policy audience whilst retaining the scientific status of a refereed journal;
- not to compete with existing journals (e.g. *Work, Employment and Society* or *International Labour Review*) but to complement them by providing a more focused home for articles which specifically address issues relating to the changing international division of labour and the restructuring of work in a global knowledge-based economy, articles which can currently only be found with great difficulty scattered across journals in fields as diverse as economic geography, organisational theory, technology policy, sociology of labour, comparative social policy, development studies, political economy etc.

## 6.3 Milestones

### 6.3.1 Major milestones over full project duration

#### 6.3.1.1 Period 1

##### *Theories and concepts*

The main milestone for this subgroup is to collect at the regional levels - as identified in the work package description - the material on the research issues of the WORKS project in view of synthesising these into a state-of-the-art paper. This material includes theoretical approaches, conceptual frameworks and comparative models, empirical evidence from surveys and other quantitative sources, a systematic collection, analysis and benchmarking of qualitative research results, the identification of the key researchers in the fields of our interest (December 2005). This will then result in 9 synthesis papers (May 2006).

##### *Quantitative analysis*

The main milestones are a feasibility and benchmarking study and overview of the existing statistical sources in the different European countries and at the European level re. organisation and in individual and household surveys (March 2006) and to establish a European working group on organisation surveys (November 2005). This milestones are important for the objective of this work package which includes an update of the Digital Toolkit and Questionnaire and Survey data base on organisational surveys (December 2005) and a state-of-the-art review of existing statistical resources, including full documentation of key indicators for measuring organisational change in organisational and individual data bases (May 2006).

##### *Policy, institutions and social dialogue*

The main milestones are, first, to reach a summary of existing materials relating to the relevance of institutions for changes in work and, second, to develop an analytical mapping scheme of the institutional landscape and to accomplish a comparative report. The mapping scheme and the comparative report describing the institutional landscapes in different countries will be delivered at the end of period 1 (May 2006).

##### *Qualitative research*

The main milestone in period 1 is to lay the foundations for the empirical work by way of reaching a further development of case study methodology in comparative research which is tailor-made for the needs of the project.

The development of qualitative methodologies will result in a report on comparative case study methodologies to be delivered at the end of period 1 (May 2006).

*Global dissemination*

A major milestone here is identifying and establishing a 'Global Reference Group' for the WORKS project (March 2006) which will reconvene at later stages in the project's life and provide a source of peer review on the project's outcome. Next, a conference will have to be organised on the basis of the inputs of the work of the first project year in the four subgroups. The conference will act as a forum for sharing and synthesising the first results of the project's work amongst the partners and beyond and providing an opportunity for discussing and agreeing the final choice of case study organisations and fine-tuning the research methodology in consultation with the Global Reference Group.

## 6.3.1.2 Period 2

*Qualitative research*

The main milestone for the qualitative research in period 2 is the accomplishment of the case study research and the description of forms of work organisation in selected business functions/activities as shaped by the recomposition of value chains and by different regional and institutional settings. This will include the effects of changing work patterns on the individuals and their quality of life at work and outside work. The findings are to be presented in case study reports on business functions/activities including comparative evaluation at the end of period 2 (May 2007).

*Quantitative analysis*

The major milestone on the quantitative analysis on organisation survey data bases is access to required data sets of organisation surveys to use these data collection initiatives to integrate knowledge on organisational change. The second is the successful organisation of a summer school training (December 2006) where joint analysis on these data bases will result into a report on secondary analysis of survey material for measuring organisational change as defined in this project (May 2007).

The major milestone on individual/household data sets is accessing the required data sets and reconstructing these for the purpose of comparative analysis and the achievement of a series of critical internal thresholds for data management, data analysis (October 2006). This will result into sets of tables to form the basis for the last project period.

## 6.3.1.3 Period 3

*Policy, institutions and social dialogue*

The main milestone is to produce a final report including an analysis of the cases using the institutional explanatory framework and an analysis of the potentials for social governance in Europe, given the observed institutional constraints and opportunities. The report is to be delivered towards the end of period 3 (March 2008).

*Theories and concepts*

The main milestone in period 3 is to accomplish a synthesis of the results of the fieldwork in the light of the results of earlier theoretical analyses and reviews of the evidence. This will include addressing the specific research questions raised by WORKS in relation to 11 themes, selected for their policy relevance and relevance to the call, and will result in 11 thematic reports that will be delivered towards the end of period 3 (April 2008).

*Quantitative analysis*

The major milestone will be outcome of the secondary analysis of project period 2, this will next result into an integration of findings of the secondary analysis of both the organisational data and the individual and household data. This will result in a report containing a descriptive account of organisational change in Europe. Another will contain analyses which seek to explain the changes which are occurring and attempt to make projections of change based on these.

*Global dissemination*

The major milestones for this work package are the different reports that result from the previous project phases and that have as well be the basis for developing training material and to organise training workshops for researchers and practitioners, as to organise the last project's conference.

## 7. Project management

Based on the involvement in several European Research projects of all of the participants, of which some have been Project Co-ordinators (Gerard Valenduc, Monique Ramioul, Ursula Huws, Jörg Flecker, Antonio Moniz, Per Tengblad, Steve Jefferys, Giovanna Altieri, Csaba Makó, Malcolm Brynin), the partners in the consortium have built up extensive experiences and practices related to European Research and are indeed part of an established European Research Area on the topics addressed in the call, due to their involvement in several consecutive and interrelated projects. This experience relate both to the management structure to organise European Research in an effective and efficient way, and to the management of knowledge creation, of Intellectual Property Rights, management issues and dissemination activities. In the frame of these research activities, fair and workable management structures and Consortium Agreements have already been established and proved to be effective ways of managing these issues. The management structure for WORKS is however adapted in order to meet the requirements of an Integrated Project that includes as well a large consortium of 17 European partners with a wide variety of expertises, as a broad range of activities, including research, training and global dissemination.

The establishment of a Consortium Agreement was one of the first tasks to be undertaken as part of the management of the project before the contract signature because clarifying the Consortium Agreement is a corner stone in the establishment of trust, confidence and good working relationships amongst all involved.

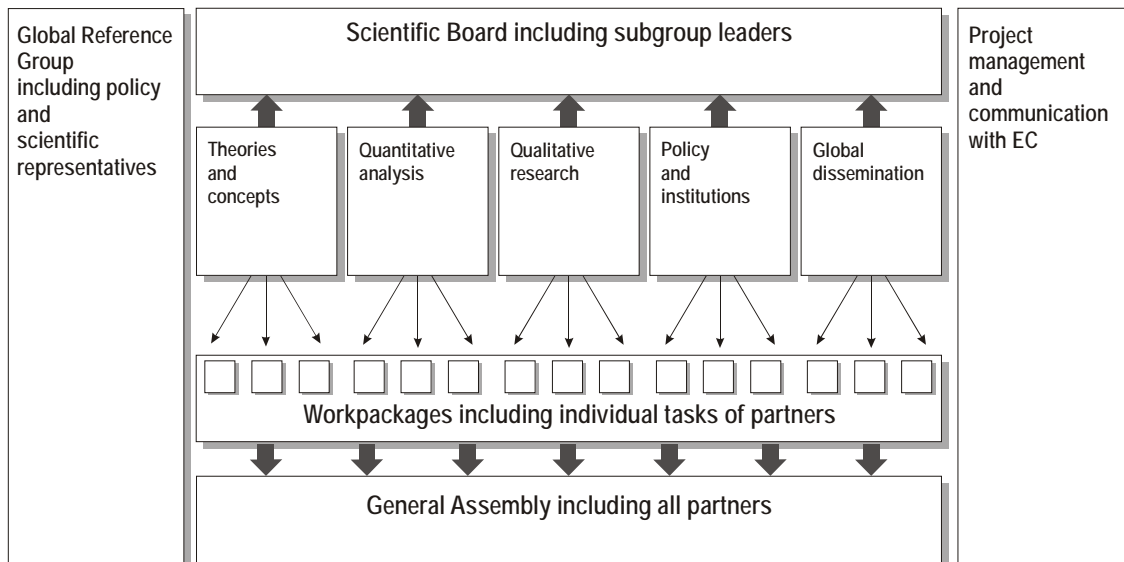
### 7.1 Project management

Specific attention will be focused on all integration activities. In order to handle the complexity of management tasks arising with this Integrated Project, both the organisational and administrative structure of the Project need to be carefully implemented. The management structure consists of five different levels:

- the Scientific Board consisting of the Subgroup Leaders, chaired by the co-ordinator;
- the subgroups including the WP Leaders, chaired by the Subgroup Leader;
- the WP Teams consisting of individual partners, chaired by the WP Leaders;
- the General Assembly, consisting of all partners, chaired by the co-ordinator;
- the Global Reference Group including policy and scientific representatives beyond the project.

The general project is organised based on the five main pillars or subgroups of the project, each consisting of different work packages. The five project pillars/subgroups are:

1. the integration and innovation of theories and concepts (subgroup 'Theory and concepts');
2. the quantitative analysis, including convergence strategies at the European level (subgroup 'Quantitative analysis');
3. the qualitative research including the development of comparative methodologies (subgroup 'Qualitative research');
4. the institutional, policy and social dialogue aspects (subgroup 'Policy, institutions and social dialogue');
5. the global dissemination activities beyond the project and the consortium as a main responsibility at the level of the Scientific Board (subgroup 'Global dissemination').



### 7.1.1 Project co-ordination

The project will be co-ordinated by K.U.LEUVEN, a research institute based at the Catholic University of Leuven - Belgium, with a staff of more than 70 people and considerable experience of managing as well as co-ordinating large and complex national and international research projects. As member of European networks and as partner in other European projects, it has well-established relations with most of the other research partners. The remaining partners have all an established relationship with at least one other partner. The *co-ordinator* will be Monique Ramioul - K.U.LEUVEN, who has a.o. experience with co-ordinating the STILE project, a 5FP IST project with 9 partners. She will be assisted by a local secretariat for the day-to-day follow-up.

The **Project Co-ordinator** will be the co-ordinating agent and the essential contact with the outside world. The co-ordinator will be responsible for (see also section 6):

- the organisation of project management meetings; administration, preparation of minutes;
- follow-up and adaptation of the project planning;
- organising, steering, checking and assuring of the reporting in time towards the CE;
- the overall monitoring of progress on all work packages and setting in place procedures for ensuring more detailed progress monitoring in consultation with the subgroups (see below);
- monitoring of the expenses and allocation of the budget; assistance towards the participants concerning administrative aspects of the project;
- the co-ordinator is responsible for all communications with the Commission;
- prepare and communicate the yearly project progress reporting to the General Assembly and Scientific Board;
- co-ordinate the payments to the partners;
- provide assistance towards the participants concerning: the rules of the project, the outline of a Consortium Agreement, the project planning and individual partner planning, give advice on all kind of matters, e.g. how to fill in cost statements, full cost system, rights, ...

### 7.1.2 Scientific Board

A Scientific Board as steering and management committee will be set up consisting of the Project Co-ordinator and the Subgroup Leaders. One main aim of this Board is to ensure the integration and spill over of the knowledge created in each of the subgroups, and thus to monitor and assess the scientific progress of the project in line with the objectives and even beyond. Further, the Scientific Board will be an effective and efficient management level. This board will be responsible for all decisions of general nature within the frame of the EC contract and the Consortium Agreement. Especially the detailed budget allocation, any re-definition of the overall work plan, the co-ordination of the activities and communication between the subgroups, and the progress assessment will be performed by this committee, meeting at least twice a year, as the principal decision making forum within the project. The General Assembly will take the decision of the

yearly updated project plan (including overall budget allocation, changes in partnership and responsibilities (if necessary)) based on a proposal of the Scientific Board.

The Scientific Board is responsible for all decisions affecting more than one partner, such as contractual matters, planning, financial matters, major technical decisions, preparation of reporting. The detailed responsibilities and tasks are described in the projects' Consortium Agreement. The Scientific Board is chaired by the Project Co-ordinator. The members are:

1. subgroup 'Theories and concepts': Ursula HUWS (LONDONMET – UK);
2. subgroup 'Quantitative analysis': Project Co-ordinator Monique Ramioul (K.U.LEUVEN – Belgium);
3. subgroup 'Qualitative research': Jörg Flecker (FORBA – Austria) and Gerard Valenduc (FTU – Belgium);
4. subgroup 'Policy, institutions and social dialogue': Pamela Meil (ISF MUENCHEN - Germany);
5. subgroup 'Global dissemination': all members, but in particular to be monitored by the leader of the subgroup 'Theories and concepts'.

The meetings will be called by the Co-ordinator. The meetings will take place regularly, in principal 3 times a year and whenever needed. A tentative meeting agenda will be prepared in advance of all meetings and will be distributed to all attendees by email or fax well before the meeting. The meetings will take place in the locations of the different core partners in rotation. The meetings will be supported by approved minutes. They will include a list of actions and due dates for each of the partners. Decisions will be taken by consensus or in case by majority vote. The project plan will be updated at the meetings.

### 7.1.3 The 5 subgroups

The subgroups will be led by the Subgroup Leaders. They have regularly consultation meetings with the WP Leaders of their subgroup to monitor the developments within each work package, to safeguard the scientific consistency within the subgroup, and to build synergies between the different work packages of their subgroup. The Subgroup Leader chairs the subgroup meetings. The subgroup will meet every year at least, and on the occasion of project-related events, to discuss the project's progress, ongoing and new activities and to prepare the yearly working plan with respect to the definition and sharing of tasks within the subgroup. Additional meetings may be called by the Subgroup Leader whenever needed. All meetings will be supported by approved minutes, taken by one of the members of the subgroup. A copy of the minutes will be sent to the Scientific Board. In cases where the members of the subgroup are of different opinions, the Subgroup Leader may propose compromising solutions. Should no agreement be reached, the Scientific Board is responsible for making a decision.

### 7.1.4 The WP Teams

Each subgroup is divided into work packages. The WP Team is responsible for the execution of the technical tasks as stated in the work package description. Each work package will be in direct responsibility of the partners involved, who will report progress and deviations from the work plan to the WP Leader.

The work packages within each subgroup will be lead by the WP Leader. The WP Leader is responsible for co-ordinating all activities necessary to bring the objectives, milestones and deliverables of the work package to a good end. Each leader will in principle be supported specifically by a second partner from another institute that acts as a sounding board, in order to have a primary feedback for preparing and monitoring all work package-related work. The WP Leaders and the seconds are specified in section 8. This allows setting up more efficient and effective work practices that are required by the extent of the project and the consortium and it will to a large degree facilitate efficiency without however hampering active participation and commitment of the partners involved in the WP Team. This distribution of responsibilities is also supported by assigning WP Lead partnership and support amongst almost all of the partners involved, in line with their specific expertise. The WP Lead partner chairs the work package meetings. The WP Team will meet at least yearly and on the occasion of project-related events to discuss the work package's progress, ongoing and new activities and to prepare the working plan with respect to the definition and sharing of tasks within the work package. Additional meetings may be called by the WP Leader whenever needed. All WP Team meetings will be supported by approved minutes, taken by one of the members of the WP Team. A copy of the minutes will be sent to the Subgroup Leader. In cases where the members of the

WP Team are of different opinions, the WP Leader may propose compromising solutions. Should no agreement be reached, the Subgroup Leader is responsible for making a decision.

### **7.1.5 The General Assembly**

The General Assembly includes all project partners. The General Assembly is chaired by the co-ordinator. The meetings will be called by the co-ordinator. The meetings will take place once a year and will take place in the locations of different partners in rotation. The General Assembly meetings will be supported by approved minutes. Decisions are achieved by consensus or simple majority in the consortium (except for decisions affecting material interests of any partner; they can only be made with his/her agreement).

Each partner will assign a key contact who will normally be the main researcher involved in the project. This key contact is to be contacted for all matters relating to that partner, and who will in practice be the same person as the WP Leader, in case this partner has the responsibility to lead a work package. Each partner supervises all project activities within their organisation and will ensure that all relevant administrative information is supplied to the co-ordinator. The partners have the following general responsibilities in addition to specific ones related to the content of their work packages: review project progress according to the project timetable; ensure the project maintains its technical objectives; quality assurance of all work contributing to the deliverables and working documents produced in the work package including the organisation of specific work package meetings; co-ordination of effort, resource utilisation and communication within the work package; implementation of the information dissemination and exploitation programme. Each partner has to prepare in time, and according to the time schedule included in this document, his or her temporary and final technical and financial documents and send those to the co-ordinator. Each partner is entitled to inform the co-ordinator immediately of any event that may have an important impact on the project.

### **7.1.6 The Global Reference Group**

Finally, the project will involve the wider - European and global - scientific and policy community in its two conferences, organised at milestone moments in the project's lifetime: after the period one, scheduled in September 2006 (the integration of European knowledge on changes in work) and at the end of the project – February 2009 (to look at changes in work in a future perspective). The chair of this group is the lead partner of the subgroup 'Theories and concepts'. The Global Reference Group will also be a crucial actor to provide peer review on the project's output as described in the quality control procedures in the Consortium Agreement.

## **7.2 Information and communication structures**

An Intranet solution will be installed as a basic information platform with specific password-oriented access rules. An overall summary bulletin board, documenting status of the project (results, deliverables), status of milestones, project's calendar (meetings, events, etc.) will be open for all participants in the project. Monitoring boards, including status of tasks and reports as well as workspace and communication tools offered for task-specific exchange of information, are restricted to members of subprojects (or - where appropriate - work packages).

An electronic library will be offered, containing all documents relevant for the project (administrative, technical, and scientific). Finally, the Intranet will offer an expert data base for exchange of information and advice including a discussion forum for open questions, new ideas etc.

The Project Co-ordinator is responsible for the operational aspects of the Information and Communication structures. The tasks related to these responsibilities are described in detail in section 6.3.

## **7.3 Dissemination of knowledge within and beyond the partnership**

Within the project dissemination of the knowledge will be assured through:

- the establishment of an Intranet system (see information and communication structure above);
- the General Assembly to which all partners participate.

Within subprojects and work packages researchers will regularly meet in order to exchange information about their work and results.

Outside the partnership,

- an open project Website will be installed with description of the results during the project, including summaries and press releases of key results;
- scientific and technical publications generated by the partners and published in leading peer-review papers;
- announcements, programmes and proceedings of workshops and conferences organised by the partners;
- partners will be open for training towards guest-researchers e.g. Marie Curie type activities as announced via Website.

#### **7.4 Consortium Agreement: management of knowledge, of IPR and innovation-related activities**

All issues related to the management of knowledge and IPR are described in detail in the Consortium Agreement. As an annex to this Consortium Agreement is included a code of conduct, developed within the RESPECT project - Professional and Ethical codes for Technology-related Socio-economic Research - funded by the Commission under the 5<sup>th</sup> Framework programme to draw up ethical and professional guidelines for socio-economic research ([www.respectproject.org](http://www.respectproject.org)). This project, involving several of the WORKS partners, has created a high awareness of ethical issues concerning Intellectually Property Rights and scientific quality standards within the research team.

## 8. Detailed implementation plan – first 18 months

### 8.1 Introduction - general description and milestones

The first 18 months include the first two steps of the project plan:

1. **integrating** the knowledge and preparing the ground for a European Research Area on changes in work in the KBS;
2. **improving and innovating** the knowledge on changes in work and the quality of life.

The very first step is however the implementation of the appropriate management structures, as described under the sections 6 and 7 to guarantee the successful execution of the project. This is detailed in the first work package.

#### 8.1.1 WP1: Project co-ordination and management (co-ordination: K.U.LEUVEN)

Objectives:

- to implement successfully the operational aspects of the co-ordination in every institute;
- to implement successfully the project's proposed co-ordination, management and governance structure;
- to ensure the efficient financial and administrative management of the project.

The Project Co-ordinator is responsible to set up an effective and efficient management structure which includes the implementation of the project's proposed co-ordination, management and governance structure as described under sections 6.1.3 and 7. The co-ordinator organises the meetings of the General Assembly at the kickoff of the project (September 2005), and each fourth month of the following project years. Subgroup and WP Team meetings will be under the responsibility of the respective leaders, but the co-ordinator will monitor that those, as well as other intermediate follow-up meetings, closing meetings and specific workshops or seminars will coincide with each other whenever possible to minimise the cost and effort of travelling for the partners. The detailed schedule of all meetings is included in the Gantt diagram. The subgroup proceedings will be reported at the Scientific Board and the General Assembly, thus ensuring to fine-tune where necessary the elaboration of the work, to provide input to the consortium as a whole and to discuss eventual changes to plan.

Since the co-ordinator manages all administrative and financial aspects of the project, including maintenance of audit reports and the development of transparent accountants, he will in the first months implement procedures and forms, taking into account administrative rules and regulations related to European research projects. As well, since the co-ordinator manages the overall consortium-level scientific and knowledge-related issues, the Consortium Agreement as well as the contract and its annexes will be presented in detail to the partners at the first meeting of the General Assembly. Further all other management activities relating to the operational, administrative, financial and other aspects, as described under section 6.3 will be set up.

A project Intranet and library will be developed to act as a means to enforce the partners involvement and to set up an effective and efficient communication structure within the consortium; this has proved to be a useful tool for distribution and sharing of interim reports, methodological notes and guidelines, preliminary outcomes, discussions, etc.

For the whole project period (48 months) the co-ordinator is assigned 25.5 months in total for all co-ordination and management tasks, including 18 months in total for secretarial staff to take care of the operational management tasks as described under section 6.3. All other partners are assigned 0.5 months for kickoff.

#### 8.1.2 WP2: Ongoing monitoring and assessment (co-ordination: K.U.LEUVEN)

In the project, considerable attention is given to the ongoing monitoring and assessment of the project's activities, as well internally as with the help of external assessment. The Scientific Board, including the Subgroup Leaders, is the major instrument to organise this ongoing monitoring and assessment. In addition,

the Global Reference Group will be actively involved in the assessment of the deliverables in a peer review procedure. Finally the organisation of the first project conference is set up explicitly as an intermediary assessment and feedback mechanism of the project's target audiences to allow for fine-tuning of the project's major empirical phases. This way, the project combines internal ongoing monitoring with external assessment of the project's output.

The first objective of the ongoing monitoring and assessment is to enable the Scientific Board, representing the five project subgroups, to assess the project progress with a view to ensuring the efficient project implementation and the continued relevance of the planned activities. This way a continuously optimal project development is possible. The second objective is to give information on results and output, to explain and demonstrate to what extent the project objectives are met towards the global consortium, the EC, the Global Reference Group and all other target audiences of the project.

The global project structure (with five subgroups) and the related management structure (with representatives of the five subgroups in the Scientific Board) are conceived to be adequate to bring the project objectives to a good end and to ensure this by ensuring the continuous monitoring. These structures allow to focus on process evaluation, i.e. the steps within the project, and its progress, rather than to focus exclusively on the outcome. The Scientific Board meets regularly, on average three times a year, and is the key body of the project: the Subgroup Leaders act as the co-ordinators of the work performed in the different work packages related to the subgroup; on the other hand they are the central co-ordination body for the project as a whole. The combination of the Subgroup Leaders as 'bottom up' suppliers of information of the ongoing activities undertaken in the frame of each subgroup, and their role of 'top down' communicators and 'guardians' of the global project aims and goals, provides a major tool to link the specific work package objectives to the global project aims and vice versa.

The organisation of the Scientific Board is described in section 7 as well as in the project's Consortium Agreement.

Next to the ongoing monitoring of the project's progress, the consortium includes a systematic quality control procedure of all projects' outcome during the projects' lifetime. This quality control procedure is described fully in the Consortium Agreement and can be summarised as follows:

The partners will supply all milestones and deliverables in draft form to the co-ordinator, the WP Leader and the Subgroup Leader in due time to allow for feedback. As a second step, all deliverables will be subject to peer review by a member of the Scientific Board supported by a member of the Global Reference Group. This way, the project outcome is also actively assessed by relevant peer reviewers outside the consortium before being disseminated as a project's outcome. The Consortium Agreement includes rules for dealing with unsatisfactory deliverables and how to solve these. In addition, regulations for persisting inadequate performance, as well as for conflict resolution are included in the Consortium Agreement.

Finally, the first projects' conference will serve as an important intermediate feedback instrument before the major empirical project phase will start.

The co-ordinator will co-ordinate the monitoring and assessment activities. The co-ordinator convenes the meetings of the Scientific Board. The Subgroup Leaders (members of the Scientific Board) will prepare regular assessment report in May of each project year, summarising and assessing the main outcome of the work packages involved.

The co-ordinator and the members of the Scientific Board are assigned one person month in the first three years and one half month in the last project year, for preparing and attending the meetings, for co-ordination and follow-up activities towards their subgroup, for the quality control and for writing two assessment reports, one after each project period (3.5 PM in total for each member of the Scientific Board).

### 8.1.3 Period 1: Integrating knowledge and preparing the ground for an European research Area on changes of work: June 2005-May 2006

The distribution of work amongst the partners of this first project period is as follows:

Partner	Theory WP3 State-of-the-art	Quantitative WP4 Feasibility	Policy WP5 Policy inst. and social dialogue	Qualitative WP6 Comp. meth. (org. and ind.)	Total
<b>1. K.U.LEUVEN</b>	1	<b>4</b>			<b>5</b>
<b>2. FORBA</b>	3			<b>4</b>	<b>7</b>
<b>3. LONDONMET</b>	<b>5</b>			1	<b>6</b>
<b>4. FTU</b>	3			<b>4</b>	<b>7</b>
<b>5. UPSPS</b>	1.5		2		<b>3.5</b>
<b>6. UT</b>	3		<b>1</b>		<b>4</b>
<b>7. UESSEX</b>		<b>5</b>			<b>5</b>
<b>8. ISB</b>	3		1.5		<b>4.5</b>
<b>9. ISF MUENCHEN</b>	3		<b>4</b>	1	<b>8</b>
<b>10. FZK</b>	1			1	<b>2</b>
<b>11. FFCT-UNL</b>	3		2		<b>5</b>
<b>12. NIWL</b>			1	1	<b>2</b>
<b>13. IRES</b>	<b>3</b>				<b>3</b>
<b>14. SINTEF</b>	3				<b>3</b>
<b>15. ATK</b>	1				<b>1</b>
<b>17. CEE</b>	1	2			<b>3</b>
<b>19. IS</b>	1			1	<b>2</b>
<b>TOTAL</b>	<b>35.5</b>	<b>11</b>	<b>11.5</b>	<b>13</b>	<b>71</b>

Lead partner and second are in bold. NIWL is assigned a specific budget for including gender aspects at this stage related to the development of comparative methodologies (WP6) and the gender contract mapping in WP5. Further, additional time has been allocated for both subgroup level concertation and meetings, as described in the work package sheets.

In this project period, the first work of the key project pillars/subgroups is set up taking fully into account the European diversity. This work will allow:

1. to review the state-of-the-art in respect of concepts, theories and empirical research on changes in work in the KBS in Europe;
2. to assess the exploitation of existing quantitative data sources of the national and European statistical system, including the development of a roadmap and related initiatives for more convergence of instruments to measure changes in work in the KBS at the European level:
  - a. through feasibility and benchmarking study of the national and European statistical systems regarding the quantitative analysis of changes in work in organisation and in individual and household surveys;
  - b. through the identification of best practice indicators for European comparative research, that form the basis for secondary analysis developed in the next phase of the project;
  - c. through developing a roadmap for co-operation and a convergence process on organisational surveys in Europe;
3. to map the institutional, policy and social dialogue contexts, impacting on the work organisations and the quality of life, of the European nations and regions; to develop an appropriate internationally comparative qualitative research methodology on the role of institutional regulations and the social dialogue for shaping work and the quality of life;
4. to develop further the appropriate research methods for European comparative qualitative research in organisations and with individuals;
5. to conclude and fine-tune the plans for the future project work in particular on the empirical phase taking into account assessment from a broader group by the establishment of a Global Reference Group that will be consulted a first time in a conference organised at the end of this period.

The four steps to be undertaken in the first project period are focused on the issues to be addressed in the project, as elaborated in the state-of-the-art.

The research questions formulated in the first project period focus on issues identified in the state-of-the-art review (see section 4.2), including:

- the better understanding of the concept of the knowledge society as a driver of change;
- changes in work and new forms of work organisation related to the global restructuring of value chains;
- the impact of these changes on the spatial distribution of work, the division of labour, flexibility and standardisation strategies;
- the better understanding of the interaction between the changing division of labour and restructuring of work roles of global pressures on the one hand and different industrial relation systems, social dialogue aspects, national regulatory contexts and practices on the other hand;
- the changing division of labour and forms of co-operation for different occupational groups;
- changes in the development of knowledge generation, learning opportunities and the use of knowledge, skills and communication related to changing work organisation;
- the implications for changes in the use of time;
- the implications for career trajectories and occupational identities;
- the implications for quality of life, both within the work environment and outside;
- the mutual interaction between changes in work organisations and gender contracts on patterns of gender segregation.

#### 8.1.3.1 Subgroup 'Theories and concepts'

**WP3:** State-of-the-art on concepts, theories and research on changes in work (co-ordination: LONDONMET - IRES)

Objectives:

- to make a state-of-the-art of research traditions and recent empirical conceptual and theoretical knowledge on changes in work in the knowledge-based society in Europe.

In order to bring together the huge variety of research traditions and the most recent empirical, conceptual and theoretical knowledge throughout Europe, the different partners representing the European diversity will prepare in total 9 state-of-the-art reports. This work will have several components. It will include:

- a critical overview of the *theoretical approaches, conceptual frameworks and comparative models* which have been developed to explain the current transformation of work including analyses of drivers of change such as globalisation, informatisation and economic liberalisation. It will take a broad economy-wide approach, addressing issues specific to the knowledge society in relation to their general context. This review will also address the related theoretical literature on skill formation and the codification of knowledge;
- a review of *the empirical evidence from surveys and other quantitative sources* with the aim of establishing a comparative picture of the extent to which the changes identified in the literature are actually taking place and their specific regional and national characteristics. The focus of this review will not simply be on change *per se*. Evidence will also be sought for the stability and durability of specific regional, sectoral or occupational employment models in order to establish a broad picture of the diversity of work practices across Europe. This part of the work will be carried out in close collaboration with WP4;
- a *systematic collection, analysis and benchmarking of qualitative research results*. This will include case study research at the sectoral and organisational levels and research studies of specific local labour markets as well as qualitative research with individuals on relevant issues, such as time use, skill development, and quality of working life, work/life balance, and occupational identities. Attention will be paid to transversal issues such as patterns of gender and ethnic segregation as well as the regional dimension.

The division of tasks across the consortium will be based on dividing Europe up into a series of regions, based on a combination of language group, geographical proximity and socio-economic type (loosely conforming to the Esping-Andersson typology of European Welfare States). These are as follows:

- Dutch-speaking countries (on which the lead will be taken by UT with support from K.U.LEUVEN);
- French-speaking countries (on which the lead will be taken by FTU with the support of CEE);
- German-speaking countries (on which the lead will be taken by FORBA with the support of FZK);

- English-speaking countries (on which the lead will be taken by LONDONMET with the support of ISF MUENCHEN);
- Nordic countries (on which the lead will be taken by SINTEF with the support of ATK);
- NAS/NMS (on which the lead will be taken by ISB with the support of IS);
- Southern Europe (on which the lead will be taken by IRES with the support of UPSPS and FFCT-UNL);
- in addition, ISF MUENCHEN will support the lead partner in reviewing Europe-wide literature and policies, and FFCT-UNL will take the lead on reviewing trend forecasts.

#### 8.1.3.2 Subgroup 'Quantitative analysis'

**WP4:** Feasibility study and benchmarking of the national and European statistical system with respect to the quantitative analysis of changes in work including the development of a roadmap and related initiatives for more convergence of instruments to measure changes in work in the KBS at the European level (co-ordination: K.U.LEUVEN – UESSEX)

##### Objectives:

- to organise a feasibility and benchmarking study and overview of the existing statistical sources in the different European countries and at the European level re. organisation and in individual and household surveys;
- to identify problems of comparability of the different data bases and the strengths and weaknesses of the national and European data bases;
- to investigate the feasibility of using existing data bases to identify best practice key indicators. For European comparative research on the issues related to changes in work;
- to establish a European working group on organisation surveys;
- to initiate a roadmap for convergence of organisation surveys, including a frame for a basic module with indicators and related questions to measure organisational change in organisation surveys.

This work package is to organise a state-of-the-art overview of the *existing statistical sources in the different European countries and at the European level*. The analysis will have to focus on the question of to which extent these sources and data bases make it possible to monitor changes of work quantitatively. Typical examples are the systematic collection of statistical indicators on:

- work organisation, such as outsourcing, networking, organisational innovation, etc.;
- workplace design and use of teamwork, job rotation, functional flexibility, telework, etc.;
- indicators on HRM and training practices;
- different forms of temporal flexibility, work/life balance arrangements, shift and night work;
- skills levels of the work force;
- quality of work indicators, including health and safety, stress risks;
- data on time use of individuals and households;
- gender and ethnicity (horizontal, vertical and time segregation; household structures; ...).

A central aim of this work is to address the *fragmentation and incompatibility* of European data sources. This is one of the greatest impediments to effective use of data and the implementation of analysis for the purpose of policy recommendations. On the one hand there are European institutions such as Eurostat, many data collection and dissemination exercises are standardised for international organisations such as the OECD, and some national surveys such as Labour Force Surveys use a range of agreed definitions. On the other hand, there is an established practice of *organisation (panel) surveys* in different countries in Europe on several issues relevant for the project, although the landscape here is much more dispersed and hardly harmonised at a European level in comparison to individual and household surveys. In reality, however the unity of data for both statistical sources in Europe has not kept pace with developments on the ground. This is especially so if we take a broad area of *change* as the theme, which cuts across many areas of organisation and individual behaviour and many sources of data. This part of the project is designed primarily to deal with this problem. The objectives of this work package are:

- the identification of *indicators* as examples of best practices re. the quantitative data collection on changes in work and the other issues, and useful for further use in the project. It is important to use both one-off examples and periodical data collection initiatives, both official statistical system (e.g. Eurostat and the European Foundation, OECD) and the academic quantitative research practices;

- the investigation of the *accessibility and feasibility* of using existing data bases, the identification of *problems of comparability* of the different data bases, the identification of *strengths and weaknesses* of the national and European statistical systems with regards to the issues addressed in the project;
- developing a *roadmap* for co-operation and a convergence process on organisational surveys in Europe.

Particular attention will be paid to the assessment of the quantitative sources in the Accessing and Candidate Countries, in order to contribute to the awareness and promotion of systematic data collection for European comparative purposes.

The results of this assessment will feed directly into the project's own qualitative data collection and secondary quantitative analyses, more precisely for the sectors and occupational groups selected in the second project period.

### Organisation surveys (co-ordination: K.U.LEUVEN)

By means of surveys of employees and household panels there is a good view on the result of changes in work for employees in terms of job creation and unemployment, types of contract, wages, training, etc. What is lacking, however, is the possibility to link these changes to what is happening within organisations. Yet, such a link is necessary to understand the relationship between changes on the labour market and the pressures on organisations emanating from globalisation, technological changes and the policy to develop 'human capital' within organisations. But research on the incidence of 'new forms of work organisation' is at the international level very limited (see e.g. Marsden, 1995: 6; Vickery & Wurtzburg, 1998: 4). Case studies are the original and still most widely practised type of organisation research. Although such research is very effective to make hypotheses, by means of questionnaires, information in a broad field of organisations can be collected faster and cheaper. The most important national and international surveys have been mapped and benchmarked within the STILE project ([www.stile.be](http://www.stile.be)), co-ordinated by K.U.LEUVEN. The study of the STILE project included a benchmarking of 30 surveys with respect to survey design (methodology, sample frame, periodicity, etc.) and with respect to the way indicators and questions related to the use and impact of ICT on work organisation and employment are included. This work resulted a.o. in the construction of a interactive survey and questionnaire data base and digital toolkit that allow survey organisers to construct a tailor-made questionnaire on organisational change and the implications for work and employment. Next to this, the STILE project mapped the stakeholders' needs (policymakers and social partners) for establishment surveys on organisation and employment issues, and formulated a strategic action plan for more convergence in view of collecting international comparable data at the level of establishments. It became very clear from this research that international organisations have repeatedly called to the need for greater comparability in the existing organisation surveys. This *benchmarking study* will be taken as point of departure for further work. The main conclusions can be summarised as follows:

- drawing an *European-wide picture* with regard to work organisation on the basis of organisation surveys, either cross-sectional or panels, is hard, because of: complexity of organisational innovation and change theories, that is reflected in the empirical data; the lack of common definitions and indicators of organisational innovation or changed work organisations, the context-dependency of best practice examples in organisational innovation;
- next to this conceptual problems, the *survey methodology and design* of the organisation surveys varies widely, for instance with regard to: researched population (e.g. economy-wide or only manufacturing, including SME or not); research units (e.g. workplaces, establishments or companies); sample frame; method of questioning, periodicity. The conclusion of this benchmark study show that economy-wide and large-scale organisational panels covering aspects of work organisation are scarce in Europe.<sup>6</sup>

---

<sup>6</sup> Among others, most prominent are:

- the *OSA-Panel* from the Netherlands (Organisatie voor Strategisch Arbeidsmarktonderzoek, Tilburg); URL: <http://www.uvt.nl/osa/>;
- the *IAB-Betriebspanel* from Germany (Institut für Arbeits- und Berufsforschung, Nürnberg); URL: <http://betriebspanel.iab.de/>;
- the PASO-panel in Flanders (PAnel Survey of Organisations, HIVA-K.U.Leuven); URL: <http://www.paso.be/>;
- also the British WERS has, apart from its cross-sectional part, also partly a panel-feature (Workplace Employee Relations Survey); URL: <http://www.dti.gov.uk/er/emar/1998wers.htm>.

Some very cautious attempts have been made to integrate the results of these different organisation surveys in Europe and beyond (see e.g. Cappelli et al., 1997; Marsden, 1995; Vickery & Wurzburg, 1998; European Commission, 1999; Kling, 1995.). However, such comparisons do not go further than concluding that some elements of new forms of work organisation do occur, but that they are rarely introduced as a coherent set of measures in which changes in the division of labour within the organisation are fitted to changes in personnel policy as well as to the organisation's environmental pressures. There is still important work to do in order to fine-tune the methodology of organisation surveys as well as their operationalisations and thereby retaining the most reliable and valid instruments. International organisations have repeatedly called to the need for greater comparability in organisation surveys.

A strategy towards a European-wide view on work organisation, as developed in the STILE project can be focused at different ways. The options of aiming at more comparative outcome of organisation surveys should be assessed against criteria of *validity of results* (theory-based questions, ensuring common definitions, appropriateness of target groups, etc.); *comprehensiveness of results*; *stakeholder acceptance* (by firms addressed, industry as a whole and the various industrial associations, trade unions, researchers, etc. with respect to respondent burdens, accordance with the respective interests, etc.) and *cost-effectiveness*. Three options can be considered:

1. *extension of existing international organisation surveys with questions on new forms of work organisation*. However, cost-effective, the limits of innovation-related surveys to include labour-related themes are pointed out in the STILE project, such as the difficulties with regards to stakeholder acceptance of this approach;
2. *development and implementation of an independent survey on new forms of work organisation*. The most demanding approach would be to establish a full questionnaire survey of organisational innovation on the European level, across sectors and to already existing national surveys. Experience indicates that the actual Europe-wide realisation would be very difficult, time consuming and costly. Some attempts have also been realised in this approach. The most prominent has probably been the EPOC survey by the European Foundation (URL: <http://www.eurofound.ie/industrial/epoc.htm>). This was however a one-off initiative;
3. *harmonisation of existing regular surveys in European countries*; one could build on existing surveys and reach a consensus on core indicators. Given a certain stability of the conducting institutions and their commitment to a viable sample practice, one major task would then be to ensure the availability of the results to the different stakeholders. This approach offers an opportunity for comprehensive mapping of organisational innovation combined with stakeholder acceptance. Compromises are however necessary regarding validity. The cost of such an approach seems manageable.<sup>7</sup> The STILE project included a *convergence strategy* that concluded that this last approach is the most feasible and effective at the short term. This conclusion is also based on the *stakeholder study*, undertaken in this project that identified common interests and shared needs for European establishment surveys amongst social partners and policymakers at different levels. The conclusions of the STILE project about the *convergence* of these surveys (Promberger et al., 2003), will therefore be taken as point of departure.

Given the objectives of this first work package under the subgroup of quantitative research this study is designed to build further on the outcome of the STILE project in the following way:

- to update the *Digital Toolkit and Questionnaire Data base on organisation surveys* (see [www.stile.be](http://www.stile.be)) that is the practical outcome of the STILE benchmark study and includes the most important European organisation surveys, the questions and indicators they use for investigating changes in work organisations and their impact. This would provide a basis for effective peer review and for a roadmap for more convergence;
- to establish a *European working group on organisation surveys* with representatives of organising institutes and to organise a first workshop to: discuss in-depth the indicators used to measure organisational change and their validity;

---

<sup>7</sup> A prominent attempt in this respect has been the 'Nordflex'-project in Nordic countries (NUTEK, 1999). The study involves organisation surveys of four Nordic countries around the concept of 'the flexible organisation'. Although the design of these surveys differs, a common analysis has been attempted by concentrating on common features (e.g. limiting analysis to the same sectors and sizes, looking for the common questionnaires).

- to establish in a *participatory process* a first consensus on key indicators that are necessary for this measurement and how those should be translated into questions within the context of the surveys; to identify missing indicators and to propose collectively a *basic module* with indicators and related questions; preparing a step to a 'self-obligation' of participants to use them in their surveys;
- Based on this, the different institutes presented can be stimulated to add these questions into the next wave of their surveys within their regular funding or with additional national funding.

The participation at this process of all survey organising institutes is not given, there are however strong indications of the interest in such a European level-working group. The co-ordinator of this work package, K.U.LEUVEN is one of the co-ordinators of the Flemish establishment panel survey ([www.paso.be](http://www.paso.be)) and has strong established relationships with the most important institutions that organise for several years such panels, OSA (The Netherlands) and IAB (Germany) (both participated in the STILE project). Further, OSA has established institutional relationships with one of the core organisations of the EPOC survey (TNO-Arbeid). The NORDIC experiment of collaboration within the Scandinavian panels, finally, support the idea that institutes are indeed prepared to liaise more systematically in view of European comparative results.

Finally, this work will guide the *secondary analysis* on the existing data bases of the organisation surveys in view of European comparison, to be carried out in project period 2.

### **Surveys on households and individuals** (co-ordination: UESSEX)

With regards to Labour Force Surveys, household surveys, working conditions surveys, time budget surveys, etc. much more harmonised data exist at the European level, more precisely by Eurostat and the European Foundation for the Improvement of the Living and Working Conditions. However, isolation and extraction of a full range of suitable and comparable variables will be a complex task, which will also need to be fully documented. This will include two elements: (1) an inventory of relevant national surveys at the individual level will be made including a benchmark on their use for the project objectives; (2) a unified description of the purposes of existing variables, documentation of differences, and an assessment of significant gaps.

This will function directly to help a number of stakeholders: statistical services, data analysts, and policymakers. It will also provide the basis for the development of methods of secondary data analysis of themes of the project which will be carried out in project period 2.

The surveys that will be used will have specific functions. For instance, Labour Force Surveys will be used to measure forms of flexibilisation at the individual level, and which therefore include such things as flexible time input and pay (where available). Panel surveys such as the GSOEP and BHPS will be used to produce information on changes in these and in the relationship between changing work descriptions. Unified time-budget data will be used to provide trend information on change in time use. Other sources, which tend to be far more fragmented, include skills surveys.

Two further levels of work are required in relation to the above. First, imputation of data will be needed across data sets (using a variety of statistical techniques) in order to maximise comparability. Second, data which discriminate between different social and geographical categories will be needed to cut across the above information. Central here will be gender and regional distributions.

This work package will also build on the results of another outcome of the STILE project (more precisely WP6, see [www.stile.be](http://www.stile.be)) on measuring labour market mobility with the Community Labour Force Survey. In this study the sectoral mobility of specific occupations (in the STILE case ICT occupations) is traced and key determinants of this mobility have been revealed. This included the investigation of the effect of gender, age and educational back ground on labour market mobility. In the STILE project considerable experiences have been gained with the opportunities and limits of the CLFS, compared to administrative data bases, to get insights into this labour market mobility. The WORKS proposal will enlarge this analysis to other sectors and occupations relevant to the project.

#### 8.1.3.3 Subgroup 'Policy, institutions and social dialogue'

**WP5:** Mapping the institutional and policy landscape regarding changes in work and development of comparative research design (co-ordination: ISF MUENCHEN - UT)

This work will focus on the *mapping of existing practices in national and European employment policies* and the *institutional landscape* that can influence and impact on changes in work and the effects on the work force. Special attention will be paid to the European variety of *industrial relation systems* including labour

law, social dialogue arrangements, education and training as well as health and safety and equal opportunity regulation. Further, the assessment will include *the gender contract* that exists at different institutional and policy levels in the countries involved. It is crucial that the partners involved in this work will *assess benchmark and identify best practices* regarding the institutional landscape and the wide variety of policy traditions in the different national settings while at the same time focus on new forms of work organisation, on the development and use of knowledge and skills and on quality of life.

It is important to understand, for example, how institutions and policies shape the way in which companies *generate and acquire new knowledge*, further develop knowledge and competencies and reconcile the needs for *flexibility with knowledge and skills needs*. It is of equal importance to enhance our understanding of how the various institutional contexts impact on strategies of *time use* and their consequences for the *quality of life*. A special focus of the work will be on the adaptation of *institutional frameworks and policies* to the emergence of new forms of work organisation in the knowledge-based society. This relates, for example, to support structures for employees' self-directed learning, regulation of working hours for highly flexible knowledge work or arrangements aiming at improvements of the work/life balance. Of course, the European policy and social dialogue initiatives relevant to the issues of changes in work will be included. Special attention can be given to *secondary analysis of the different National Action Plans* in order to identify best practices in the changes in work. The work will include the situation in Accession or New Member States by especially looking at emerging institutional arrangements and the interplay between the transfer of work organisation, e.g. with Foreign Direct Investment, and national legislation and regulation.

The aims of this part of the project will be reached by way of *evaluating literature and documents* and by organising and documenting a *workshop*. The results will be synthesised and written up in a report. Further, this will result in an analytical scheme in view of the further stages of the project and to equip partners with novel comparative information for dissemination towards national governments.

#### 8.1.3.4 Subgroup 'Qualitative research'

**WP6:** Case study research. Research traditions and development of comparative research design – including training (co-ordination: FORBA – FTU)

#### **WP10: Comparative organisation case study research** (co-ordination: FORBA – ISF MUENCHEN/UT)

Next to the assessment of quantitative indicators and the availability of data systems to analyse the dissemination of new working patterns in a quantitative way, it is important to develop appropriate *qualitative research methods* that allow in-depth analysis in a European comparative perspective. It is well-known that the issues of changing work organisation and their impact on the work force are mostly investigated in case study research, which allows a comprehensive analysis of the organisational context, configuration of the organisation, determinants and effects of changes in work, but which in turn hampers generalisations and in particular comparisons at the European level. In order to contribute to the integration of the European Research Area on these issues, the development of a comparative methodology for organisational case study results needs special attention. For transnational and internationally comparative research on the basis of case studies the variety of national research traditions constitutes both a rich potential for mutual learning and a limitation to efficient and successful European level research. It is therefore a major challenge in building the European research area to benefit from the plentiful and diverse research experiences and at the same time to develop further the methods and procedures of comparative research.

Starting from a *variety of approaches* to comparative case study research and from the impression that partly problems of comparative research so far have been resolved in a rather *ad hoc* manner within the individual research projects, *different research approaches* need to be discussed and *methods developed further*.

This will be done by bringing together first hand research experience with qualitative methods in the field of work and employment. *Appropriate exchange and transfer activities* will be initiated that take into account the partly 'tacit' character of methodological knowledge. Special emphasis will be on appropriate ways of making visible the *gender and ethnic dimension* in case study work. Experiences from a large number of European socio-economic research projects can be used to establish the needs for methods development

which, in turn, will be supported by confronting actual research practices with state-of-the-art methodological scholarship. The work will not be confined to the comparative analysis of case studies but encompass all stages of empirical research such as research design, sampling, development of research instruments and collection of data and information.

The development of this methodology will pay special attention at the gender perspective by identifying the issues that have to be included in the organisational case studies in order to address gender issues.

- This work package will start with an *intensive discussion - collection and comparison* - of the various research approaches to - organisational and occupational - case study research.
- A *training workshop* will be held for the partners involved in the case study research in project period 2 with the aim of taking an overview of the various concepts and developing a mutual understanding of the different approaches as the basis for further work in the project. Partners will have an input with papers on presentation of methodological foundations (e.g. classic sociological approaches, and psychological approaches, the ethnographic 'grounded theory' approach), the conceptualisation of gender differences as well as concrete procedures and techniques of case study research, the applied methods, design of the research sample, selection of cases and the analysis of the case study material. Further discussion points are tactics for dealing with the generalisation of case study findings (*external validity*) as well as tactics for dealing with *internal validity and reliability*. The discussion covers *all stages of the research cycle* as development of comparative research design (problem-formulation), research design, research sample, research instruments and analysis of case study material.
- In addition experiences from European research projects from the TSER, IHP and IST programmes (EMERGENCE, TOSCA and SIREN are just three examples of such studies where members of this work package were involved in) will be integrated.
- Based on the inventarisation and evaluation of the different approaches to case studies a comparative research design for the project will be developed.

**WP6: Impact on the individual and the household – case studies** (co-ordination: FTU - FZK)

In the empirical phase of the project (period 2) the organisational case studies will be enhanced by occupational case studies, focused on specific *occupational groups* within the organisations included. Case studies of occupational groups allow for tackling the individual dimension of changes in work, as far as they consider individual profiles and trajectories within a group of reference of workers *sharing a common set of tasks, opportunities and challenges*. Such case studies may include several dimensions:

- work biographies, career construction and choices;
- occupational identities;
- work/life balance including household dynamics;
- gender and occupations.

The development of methodological tools has to deal with two main questions. How to carry out in-depth and occupational case studies? How to build up methods allowing for comparative studies at the European level?

An important step at this stage will be to work towards the development of a method that can provide us with similar data collection that can be carried out and compared *cross-nationally*.

- *In-depth case study methods*: biographical interviews can be used as a key method. Biographical interviews are based on narratives (method already used in the WWW-ICT project). They highlight individual coping strategies, household situations, domestic division of labour, choices and detours and their consequences, transitions, personal development phases, individual perception of collective issues, etc. Other methods can complement biographies, for instance focus groups watching longitudinal evolution of the occupations across several years, or semi-directive group interviews.
- *Comparative criteria and methods*: biographies may be used in comparative studies when a pattern of criteria and variables is defined at the beginning of the process, and specific comparative information is collected in the biographical interviews. Coding of keywords and key patterns allows for cluster analysis of professional trajectories. Contextual information, related to national and sectoral specificities, is however necessary in order to build relevant clusters.

The development of methodological tools for occupational case studies has to encompass not only the individual and occupational level, but also to foster specific insights on work organisation and labour market. Qualitative case studies of occupational groups must further be related to quantitative analysis of existing occupational surveys, as will be developed in the subgroup 'Quantitative analysis'.

The development of this methodology will pay special attention at the *gender perspective* by identifying the issues that have to be included in the individual case studies in order to address gender issues.

### 8.1.4 Period 2: Improving the knowledge on changes in work and the quality of life: June 2006-May 2007

The second project period focuses on the core of the project: *the investigation of the changes in work and their impact on the individual in a European comparative perspective*. In this period the data collection phase is organised. As this empirical phase will cover in total 12 months, it is more consistent to describe the full activities of the phase, covering the whole second project year.

The distribution of work of the whole second project year is as follows:

Partner	Dissemination WP7 Conference	Quantitative WP8 Organisations	Quantitative WP9 Individuals	Qualitative WP10 Organisations	Qualitative WP11 Occupations	Policy*	Total
1. K.U.LEUVEN		4	6	6	4.5		20.5
2. FORBA				10	4.5		14.5
3. LONDONMET	3			6	4.5		13.5
4. FTU				11	10.5		21.5
5. UPSPS	1.5			6	4.5		12
6. UT				6	4.5		10.5
7. UESSEX		1	8.5				9.5
8. ISB		1		6	4.5		11.5
9. ISF MUENCHEN				8	4.5		12.5
10. FZK				6	5.5		11.5
11. FFCT-UNL		1		6	4.5		11.5
12. NIWL				3	2		5
13. IRES		1	5	6	4.5		16.5
14. SINTEF		1		6	4.5		11.5
15. ATK		1		6	4.5		11.5
17. CEE		2	6				8
19. IS				6	4.5		10.5
<b>Total</b>	<b>4.5</b>	<b>12</b>	<b>25.5</b>	<b>98</b>	<b>72</b>	<b>0</b>	<b>212</b>

\* The issues related to institutional and social dialogue regulations are included in the organisational and occupational case study phases.

The detailed distribution of resources for the first six months (in order to distinguish the first 18 months in the detailed implementation plan and budget) is as follows:

Partner	Dissemination WP7 Conference	Quantitative WP8 organisations	Quantitative WP9 individuals	Qualitative WP10 organisations	Qualitative WP11 occupations	Policy*	Total
1. K.U.LEUVEN		3	4	4	3		14
2. FORBA				6	3		9
3. LONDONMET	3			4	3		10
4. FTU				8	8		16
5. UPSPS	1.5			4	3		8.5
6. UT				4	3		7
7. UESSEX			6				6
8. ISB				4	3		7
9. ISF MUENCHEN				5	3		8
10. FZK				4	3.5		7.5
11. FFCT-UNL				4	3		7
12. NIWL				2	1		3
13. IRES			3	4	3		10
14. SINTEF				4	3		7
15. ATK				4	3		7
17. CEE			4				4
19. IS				4	3		7
<b>Total</b>	<b>4.5</b>	<b>3</b>	<b>17</b>	<b>65</b>	<b>48.5</b>	<b>0</b>	<b>138</b>

\* The issues related to institutional and social dialogue regulations are included in the organisational and occupational case study phases.

Lead partner and second are in bold. Further, additional time has been allocated for both subgroup level concertation and meetings, as described in the work package sheets. It has to be noted that one of the lead partners of the subgroup 'Qualitative research' is currently 'hosting' the efforts for carrying out the French case studies, because of a unpredictable change of the French partner since the proposal of this project. The systematic and longstanding relationships of FTU with the French-speaking scientific community and its acknowledged expertise for doing qualitative case study work make of FTU the best partner to take the responsibility to organise the French case studies. FTU will in due time take the necessary organisational measures for the organisation of the French case studies. The French partner CEE will provide where possible support for contacting the respondents for the different phases of the case study research.

The specific project approach combines three different perspectives: the perspective of the *organisation* to investigate organisational change and the perspective of the *individual and his/her household* to assess the impact. At the same time the perspective of the *region* has to be brought in to assess the regional/national and especially the institutional context of the changes in work and its impact. To address this complexity the empirical work is divided in five phases, as another 'batch' of work packages of the projects subgroups:

1. *subgroup 'Quantitative analysis'*: quantitative secondary analysis of organisation surveys;
2. *subgroup 'Qualitative research'*: case studies at the organisational level, data collection at the organisational and at the individual and household level;
3. *subgroup 'Policy, institutions and social dialogue'*: data collection on the regional institutional context of the occupational groups of the economic activities involved, including social dialogue aspects; the organisation of this phase is included in the organisation and individual case studies for practical reasons;
4. *subgroup 'Quantitative analysis'*: quantitative analysis of secondary data of work force and household surveys;
5. *subgroup 'Theory and concepts'*: horizontal thematically analysis, conclusions and reports (will be executed in the third project phase, not detailed in this section).

However, the first activity will be to organise a first project conference, on the one hand in view of making the bridge between the first project period, making state-of-the-arts and feasibility studies and bringing together the four parallel streams, on the other hand in order to prepare the methodological approaches of the second project period. This will be done with an explicit peer review strategy with audiences beyond the project.

#### 8.1.4.1 Subgroup 'Global dissemination'

**WP7**: Bringing together the knowledge to build on further in a European perspective (co-ordination: LONDONMET - UPSPS)

The first conference is set up with the aim to develop collaboratively a strategy to build on knowledge beyond the state-of-the-arts produced in the first phase in an innovative way which combines policy relevance with methodological rigour. This will allow the consortium to develop an *effective research strategy* for the second project period. On the basis of the state-of-the-art review, experts from the EU and Accession States as well as selected regions from outside Europe will be invited to attend the conference as the first step in establishing a *Global Reference Group* for the project. In addition, representatives from the social partners and other policy stakeholders will be invited to participate. Above the general aims of dissemination, the first conference will have the specific aims of:

- identifying and bringing together a 'Global Reference Group' for the WORKS project which will reconvene at later stages in the project's life and provide a source of peer review;
- initiating a dialogue with policy stakeholders which will on the one hand (as a WORKS output) inform them about changes currently taking place in work organisation and on the other (as a WORKS input) help to shape the direction and priorities of the future work of the project;
- providing an opportunity for launching the draft reports from the first work packages of the project and obtain critical feedback on them;
- acting as a forum for sharing and synthesising the first results of the project's work amongst the partners and providing an opportunity for discussing and agreeing the final choice of case study organisations and fine-tuning the research methodology.

The focus of the project will be on *Researching Changes in Work Organisation in Europe in a Global context*. The conference will bring together several strands:

- theories and concepts about the drivers of change in a global knowledge economy;
- indicators and empirical evidence on the relevant technological, economic, geographical, political and social trends;
- methodologies for carrying out research on changes in work organisation at both the organisational and individual level, including methodologies for ensuring the visibility of issues relating to gender, ethnicity and other social variables.

To ensure that regional diversity is kept in focus throughout the discussion of these general issues attention will be paid to selecting participants whose work makes visible the variety of institutional models which exist both within the EU and outside it. A working typology for establishing this framework of regional representativeness has been developed by the consortium. This would entail ensuring that there is representation from the 'Nordic', 'corporatist', 'liberal' and 'southern European' EU states, from a range of Accession States, and from outside Europe.

Invited participants will include:

- representatives of the European Commission;
- representatives of the social partners;
- representatives of other national or international bodies with an interest in the aims of the project;
- researchers from the ERA who are not participants in WORKS. After taking account of ensuring regional representativeness, priority here will be given to inviting experts in three categories:
  - those who can make a theoretical contribution to an understanding of the global drivers of change;
  - those who are engaging in comparable studies who can provide opportunities for comparison and benchmarking;
  - those who can act as 'critical friends' offering peer review of the project's work to date and offer constructive comments on the proposed methodology;
- researchers from outside the ERA who can present comparable research, or assist the project in developing a comprehensive understanding the global drivers of change;

Junior researchers and students for whom participation will provide a training opportunity will be encouraged to participate by providing reduced participants fees.

The full proceedings of the conference will be made available on the project Website. A collection of edited papers will also be published in book form and distributed as a special issue of a journal as well as a stand-alone volume.

#### 8.1.4.2 Subgroup 'Quantitative analysis'

**WP8:** Comparative secondary analysis of organisation surveys in Europe (co-ordination: K.U.LEUVEN – CEE)

Objectives:

- to describe and explain the extent of organisational change in European based on secondary analysis of existing data bases with the focus on the research issues of the project, based on the identification of best practice indicators on changes in work;
- to describe and explain the extent of organisational change in European organisations through quantitative analysis of a number of data sets resulting from organisation surveys in Europe;
- to explain the causes of this change and national variation in order to assess the significance of variation.

Based on the work of WP4 on quantitative sources, the identification of best practice indicators and the joint construction of a focused module of key indicators, the WP Team will access the required data sets of organisation surveys to use these data collection initiatives to integrate knowledge on organisational change. To do so the partners involved in this work package will liaise with the national institutions that organise organisational surveys:

1. this will be done by secondary analysis of existing data bases with the focus on the research issues of the project, based on the identification of best practice indicators on changes in work;
2. to support this aim, the WP Leader will organise a training initiative for researchers (summer school) of the institutes involved in the working group on analysis of data from organisational surveys, that is

established in WP4. This summer school will be organised in the second part of the second project period (December 2006).

In the frame of this WP one specific task will be subcontracted by K.U.Leuven: the delivery of specific analyses and tables from data bases of organisation surveys of two Member States, Germany and The Netherlands. Details of this task are described in Appendix A2.

The output of the secondary analysis will allow complementing the research issues of the first qualitative data collection. This will involve the analysis of data sets at the descriptive level, mapping the necessary parameters such as national variation in key indicators, regional distributions, and trends over time. Further the data will be analysed using a variety of statistical techniques to model change in the key indicators in order to isolate causes of change and the effects on European competitiveness and social welfare. The outcome is to examine the distribution of new forms of work organisation throughout Europe as identified in the different organisation surveys and to compare both the antecedents and the impact on organisational strategies and HRM-related issues. As a result a series of tables based on the analysis of best practice indicators to measure changes in work in surveys will be the basis for the reports produced in the frame of this work package, more precisely:

- a report with a descriptive account of organisational change in Europe;
- a report with analyses which seek to explain the changes which are occurring and attempt to make projections of change based on these.

#### 8.1.4.3 Subgroup 'Quantitative analysis'

**WP9:** Comparative secondary analysis of individual and household surveys in Europe (co-ordination: UESSEX)

Objectives:

- to describe and explain the extent of organisational change in European based on secondary analysis of existing data bases with the focus on the research issues of the project, based on the identification of best practice indicators on changes in work;
- to describe and explain the impact of organisational change in European employment as this affects individuals and households through quantitative analysis of a number of large-scale data sets of individuals;
- to explain the causes of this change and national variation in order to assess the significance of variation.

Our focus is on description of shifts in organisational change where this is measured by: change in occupational distributions, aggregate movements into and out of occupational groups, change in skill allocation to jobs, access to technology in work processes, trends in individual time inputs into work, the association between these factors and earnings, the underlying cause of change in these distributions and associations, and analysis of their distribution by different social categories such as gender and region.

The first aim of this analysis is to quantify change on several dimensions, but especially on a European wide basis - which would alone be a major step forward given the paucity of knowledge in this area. Detailed accounts of trend change in Europe, benchmarked against what we know from other parts of the world, will be a major outcome. The second main aim is to understand these changes causally. An example is increased demand for skills. Is this the result of the demand for more sophisticated goods, which requires more sophisticated production methods? Failure to adapt leads to a loss of competitiveness but also to welfare losses for those who do not have the right skills (Nickell & Bell, 1995). Alternatively, skills might be used to eliminate levels of hierarchy, in which case the outcome is redistribution between skills levels. The implications for both productivity and welfare are quite different here. Finally, it may be that the supply of skills is exceeding demand, which is possible if the social demand for education has its own drivers which only partly relate to job market signals. In this case the productivity effect might be neutral but the welfare effect negative, as the value of education will go down (Borghans & de Grip, 2000). Research here needs to firstly be cross-national and secondly to take simultaneous account of both supply and demand factors, which is a complex issue (see for instance Teulings & van Rens, 2002). This will be achieved here in part through liaison at the level of the quantitative subgroup on organisation change where demand factors will be taken into account. WP9 will be able to look both the supply side and the effects of the interaction of supply and demand through analysis of occupational mobility and returns to skills.

This example can be extended to other areas - for instance, the impact of change on the gender distribution of welfare, including job segregation by gender. A lot is known about the importance of the growth of the service sector for female employment (Esping-Andersen, Assimakopoulou & Kersbergen, 1993) but much of this is out of date. We need to know whether the growth in the services sector remains beneficial for women across a long period of time, and why there might be changes (such as difference in job availability, national welfare provisions, or family care).

The following indicates those areas of research which will be undertaken in order to achieve the general aim described above:

1. description of distributions of occupations and changes in occupational distributions (where data over time exist). Description of these distributions and changes in these by country, industry and region. This would mostly use Labour Force Survey types of data;
2. analysis of the relation of these to changes in access to specific work technologies and to distributions of achieved qualifications, plus skills, where measurable (using specialised data sets such as the British Skills Survey);
3. analysis of the variation across Europe and over time in job tenure and labour turnover with a view to testing differing empirical models of change (Gregg & Wadsworth, 1995);
4. examination of the relationship between these to productivity (measured by pay);
5. assessment of welfare implication through looking at job segregation by gender, and the distribution of pay across social class, ethnic group (where feasible), and gender;
6. calculation of measures of eWork, especially for comparative purposes;
7. analysis of comparative differences in time use using established internal comparative time-use data, and of changes in time use, for instance through the historical archive of time-use data held by UESSEX at the University of Essex, and of factors related to change in time use;
8. simulation of data across data sets (e.g. to provide some measure of the distribution of skills in data sets which lack this information) where feasible and worthwhile.

Analytical procedures will include a range of descriptive techniques but also be heavily reliant on various forms of regression. Typical examples will be where the dependent variable is pay (hourly or annual, or gross or net, depending on data availability) and the use of various explanatory variables such as gender, job segregation, and skill or educational levels but in combination with regional indicators of industrial and occupational distributions. Here, interaction terms could be used to see how job segregation affects pay by country and region, or multi-level modelling techniques can be used to measure the relative impact on the outcome of the individual, the region and (where the data are pooled across countries) the country. The aim will not only be to understand the causes but the likely effects and future paths of change.

Three specific examples of potential types of analysis are now given. The first is in respect of occupational mobility. The STILE analysis mentioned above (van der Hallen, Stimpson & Tielens, 2003) splits this into two: changes over the year, which can for instance be derived from retrospective responses to labour force surveys, and longer term changes which can only be assessed using panels. The major European panel data sets will allow detailed examination of factors associated with social mobility within people's careers. For instance, does labour market uncertainty force people to take jobs below their educational level at the start of their career? On the other hand, Labour Force Surveys are needed to measure longer-term aggregate mobility into and out of specific types of jobs. Thus short-term movement can be related to longer-term shifts in occupational distributions. The second example is of telework patterns. This is derived from the longitudinal aspect of the Framework 5 IST Programme *eLiving* survey. Telework is not yet a widespread phenomenon, but we do not know whether its *potential* growth would derive from social demand for more flexible employment or from managerial or technological imperatives. The project includes analysis (in six countries) of change in modes of telework and homework. However, there is considerable movement by individuals in and out of these categories over a short period of time, and these can be related to social rather than technological-managerialist causation. The larger-scale surveys available in Europe that now carry telework questions will allow a more detailed comparative and occupational analysis. Time-use data can in some cases be used to get a more detailed break-down of the incidence of non-standard employment. The third example relates to the changing value of education. This varies over time and across Europe. Explanation lies partly in variation in job opportunities, training programmes (Booth & Snower) and variation in the links between education systems and labour markets (Shavit & Müller, 1998). This relationship is now subject to great pressure with the rapidity of change in the

market for skills. The value of education is changing over time. An analysis of the impact on the graduate pay in Britain of competition from other graduates shows that men earn lower wages as a result, while women have gained. This has major implications for the understanding of the expansion of education and also of its distributional effects (Brynin, 2002). Far more work on this is needed, especially analysis by occupation, by region, and by country.

The precise timing for carrying out this phase will depend on the feasibility study carried out in period 1 therefore be fine-tuned after completion of WP4. The selection of countries and occupations to be studied will also depend on the feasibility study.

Deliverables from WP9 will be two reports on the results which will make a major contribution to understanding of organisational change and will be widely disseminated. One report will contain a descriptive account of organisational change in Europe. The second will contain analyses which seek to explain the changes which are occurring and attempt to make projections of change based on these. A fourth milestone will be a workshop to be held at the end of the second year (March 2007) which will draw together all the results and disseminate these to stakeholders from different policy fields and to researchers. In particular, the material from WP9 will feed into WP10 and to the formulation of the case studies.

#### 8.1.4.4 Subgroup 'Qualitative research'

**WP10:** The organisational level – case study research (co-ordination: FORBA – ISF MUENCHEN)

The evolution towards globalisation of economic activities in one sector, the *recomposition of the global value chains*, is a basic assumption for the project as explained in the state-of-the-art and in section 6. This assumption implies that rather 'functions' and 'activities' of specific economic sectors will be selected for the organisation case study research, for instance the logistics function in the automotive sector or the research and development function in the food industry. The output of the activities in project period one contributes to a general picture of the recomposition of global value chains, of organisations and of skills and labour markets. Based on these insights, the organisation case studies serve as *qualitative 'windows'* into these processes at points which are strategically chosen. Since other 'drivers of changes' will as well taken into consideration when examining changes in work, in particular economic drivers of change such as privatisation and rationalisation, and changes in the welfare states, some additional functions of a different nature are relevant to include, in particular care work, personal services. The organisation research will cover important business functions representing different steps in value chain, such as:

- research and development;
- manufacturing/production functions;
- business service provision including creative functions;
- provision of personal services.

For each of the four selected business functions, *two different organisations/networks* will be investigated. In carrying out this empirical phase in 13 different countries, this will lead to a total of 58 different organisation case studies. The distribution over the different countries, *representing the European national diversity*, is clarified under section 6. Based on the outcome of these case studies, the organisation of the business functions of an economic sector can be compared in different regional and institutional settings. This is important because the re- and decomposition of the value chain has a strong impact on the *regional economic dynamics*, which implies that the effects of a globalised value chain are different within the different regions of Europe. A crucial phase in the development of the organisation case study research is the well-thought *selection* of business functions and the specific sectors where those will be investigated. Based on the theoretical approach developed in the frame of this proposal, the following set of criteria should be taken into consideration and guide the case study research in order to provide a broad insight into changes in work in Europe:

- the extent of *globalisation* of the economic activities in the sector. The changes in the 'value chains' are the starting point of the identification of changes in work and work organisation. Crucial is the evolution towards a new social division of labour and the recomposition and decomposition of labour processes;
- the use of *ICT* as a second important driver of changes;
- the impact of *societal trends* such as ageing, the 24 hours economy, privatisation and liberalisation, deregulation on the organisations' strategies;

- rapid changes of use of *different forms of knowledge*: traditional, tacit, codified, organisational knowledge, re- and decomposition of knowledge;
- relevance in terms of *employment figures* and hence social impact of changes;
- *characteristics of the work force involved*, in particular lower vs. higher skilled; men versus women, ethnical groups;
- the *regional dimension*, taking into consideration the European variety of economic systems, institutional aspects of labour market regulation and the different regional dynamics with regards to concentration and decentralisation of activities as a result of the global re-division of work.

The final decision on the selection of business functions will be based on the material collected in the first project period.

Most of the WORKS partners have a long experience of carrying out qualitative case studies of work organisation. Where other criteria are met, priority will be given to case study organisations which have been studied in the past in order to lengthen the period of change which can be observed.

The organisation of the case studies is conceived to have different combinations of:

- *countries* representing different 'types' of welfare states in order to take into consideration the regional context that impacts on the shaping of the organisations and the working conditions of the work force involved;
- *business functions* including both manufacturing and service functions and activities;
- related *occupational groups*;
- *institutional settings and social dialogue* to be investigated in the same countries (as the functions/activities they relate to).

The *main themes* to be investigated in the case studies at organisation or network level are:

- the networked organisation, the global division of work within the value chain, inter-organisational division of work;
- drivers of change and shaping factors, including technological innovation, economic factors such as liberalisation and rationalisations related to cuts in public spending;
- (new) forms of work organisation, division of work and workplace design at the establishment level;
- co-operation, control, autonomy, time use, learning and working conditions in new forms of work organisation;
- impact of organisational changes on internal labour market structure, personnel policies (in-, through- and outflow policies, learning and skill policies);
- use of organisational temporal and contractual flexibility;
- social dialogue and participation issues.

#### 8.1.4.5 Subgroup 'Qualitative research'

**WP11:** Impact on the individual and the household (co-ordination: FTU – FZK)

Within the same empirical phase, the teams involved will next track the *employees* working in these organisations and include their *households* into the analysis in order to assess the impact of the organisational changes and policies on the individuals and their family. The issues to be investigated at the individual level are mainly focusing on the impact of organisational change on:

- *time use; flexibility, work/life balance* from the perspective of the individual and his/her family;
- *labour market and mobility perspective* of the individual and the household, impact on perceived *employability* (e.g. expected retirement), impact of employment insecurity;
- *learning and skills development*; the codification of skills;
- *occupational identity*;
- *autonomy at work*;
- *working conditions, health and safety issues including stress*.

The unit of analysis is here on the *occupational groups* that are connected to the activities, included in the organisational case study research, e.g. transporters for logistics activities, elderly care workers for mobile health care; ICT professionals of IT service firms, blue-collar workers in food industry or automotive, back office clerks/call centre workers in administrative back office organisations, etc. This allows to exceed the level of the organisations included in the case studies and to draw conclusions at the level of the

occupational group and its societal dimensions. The occupational groups will be *restricted* because of the focus on the business function or activity and in order to have a certain level of homogeneity. However, one of the important characteristics of the quickly evolving economic restructuring is precisely the blurring of boundaries between what traditionally were 'occupations'. This means that the research might also focus on what can be called 'occupations under construction', that still lack a institutionalised corporate identity, institutionalised skill and competence trajectories, collectively negotiated working conditions, etc. but identify themselves on specific criteria, for instance as occupations according to their mastering of the technology they use. Moreover, the focus on business functions in the organisational case study phase allows easier to approach such 'occupations under construction'. This phase includes interviews (with employees belonging to these occupational groups, but from additional organisations than those in-depth interviews with the individuals included in the organisation case studies.

#### 8.1.4.6 Subgroup 'Policy and institutions'

Institutional frameworks and social dialogue (co-ordination: ISF MUENCHEN - UT)

It is widely acknowledged that work organisation and the quality of working life are shaped both by global forces, including the transfer of management methods within transnational companies, and by national, regional and local institutional contexts and policies. What is more, the emergence of the knowledge-based society and the growing internationalisation of economic activities reshape the institutions regulating work and employment such as education and training systems, industrial relations, welfare systems and labour market policy. It is therefore crucial to enlarge the analysis and to focus also on the regional institutional context where the individuals/occupational groups of the organisations belong to. The main goal of this phase is to analyse the institutional setting including 'social dialogue' aspects in order, first, to understand how institutions and policies shape work organisation and influence quality of life and, second, to analyse how institutional arrangements and policies are adapted to emerging new forms of work organisation.

Consequently the *main research question is*: what framework conditions are conducive to high levels of quality of work and quality of life under conditions of new forms of work organisation? The impact of institutions and policies will be analysed on the one hand with a focus on the shaping and facilitators and barriers to the spreading of new forms of work organisation and, on the other, relating to the way institutions and policies influence the consequences of work organisation on the quality of life. A research model will be developed in which the relevant dimensions of institutional regulation are specified along three lines: (a) the structure and regulatory impact of social partnerships (industrial relations), (b) national welfare policies and labour legislation relevant to the employment practices of firms, and (c) the emergence of new patterns of social dialogue and governance regarding the various aspects of quality of work (s.a. working hours, gender, child care, lifelong learning, etc.).

As the members involved will all use the same research model, comparable reports on the regulation of labour will become available. The work will draw on policy documents and literature studies into the interrelation between institutional regulation and changing forms of work organisation. Next to that, and extending the case study work, experts and stakeholders' involved will be interviewed, e.g. sectoral and vocational training institutes, occupational associations, trade unions, etc.

Some of the key issues to analyse on the basis of the extended case study material are:

- the role of welfare state and labour market regulations on flexibility, time use, contractual relationships, employability issues in particular regarding network organisations and employees' self-organisation;
- social dialogue and new forms of social governance regarding work organisation and quality of working life;
- occupational groups: new forms of interest representation and collective action, collective bargaining structures at different levels;
- social dialogue on working hours, time use and other working conditions issues, with special focus on new forms of work organisation;
- learning environments; certification of skills and training trajectories, etc.;
- particularities and development of national/regional 'gender contract'.

The analysis will be used as the raw material for a more comprehensive study of 'regulatory logics' of new forms of work organisations in Europe. This step will be taken for two distinct reasons. First, the framework of regulatory logics will be used to enrich the explanation of the trends (regarding the quality of work) that

were observed in the case studies. Second, we aim at clarifying the institutional opportunities to improve the quality of work and the quality of life by means of sectoral, national and European policymaking. In this respect, special attention will be paid to the question whether the variety of social dialogue forms and industrial partnerships in Europe can be linked to the recent introduction of a new type of social policymaking at the European level, namely the 'open method of co-ordination'. This new form of social governance includes such instruments as benchmarking and 'peer review'. In the final report on this work package it will be discussed to what extent the existing system of regulatory logics in Europe fits to the open method of co-ordination, in order to shed light on the regulatory opportunities in the area of work organisation and the quality of work.

#### 8.1.4.7 Subgroup 'Global dissemination'

##### **WP20:** Project dissemination

As dissemination is a horizontal activity of the project, all partners will be involved. The co-ordinator manages and co-ordinates the project-related dissemination tools in close collaboration with the members of the Scientific Board. All partners receive dedicated resources to stimulate national dissemination activities during the whole project period, although most of the efforts will be concentrated towards the later stages. The global dissemination plan is described in detail under section 6. The main activities will be concentrated in the last project period. But of course, the aim is also to provide mechanisms to disseminate the project's activities throughout the whole project duration. Therefore a variety of different means of general dissemination in addition to those specific activities (including training workshops and conferences) which are the subject of separate work packages are planned. In the frame of the detailed work plan for the first 18 months the following dissemination activities are planned:

- a well-linked project Website which will be used for publication of Newsletters, links, announcements, posting of more substantial reports and documents, conference and workshop registration and organisation and other external activities, in addition to acting as a means of exchange of information between partners through a password-protected private space;
- a first issue of the project's Newsletter that will serve for presentation of the project, its consortium and its activities to the outside world. This Project Presentation will be widely distributed;
- a second issue of the project Newsletter to be delivered at the first project period, posted on the Website and delivered by email;
- participation in EU conferences, concertation activities, etc.

A project Website, to serve the external constituencies, and a first Newsletter presenting the project, will be the first dissemination related deliverables of this work package. Both products will be the main promotion and dissemination tools for the project's activities and deliverables during the lifetime of the project. The dissemination of the Newsletter, of which 5 editions in total are planned, will not only be guaranteed by the Project Co-ordinator but also by each of the individual partners. A specific project budget is allocated to the co-ordinator to develop both products.

In the last project period, this work package will also include three key deliverables in the project that are described in detail under section 6.2:

1. a final dissemination report;
2. a Gender Action Plan report;
3. a report on public participation and awareness.

## **8.2 Planning and timetable**

Below is the detail of the different activities, milestones and deliverables as developed in the first 18 project months: a grey cell indicates a meeting or other project-related event, involving travel.

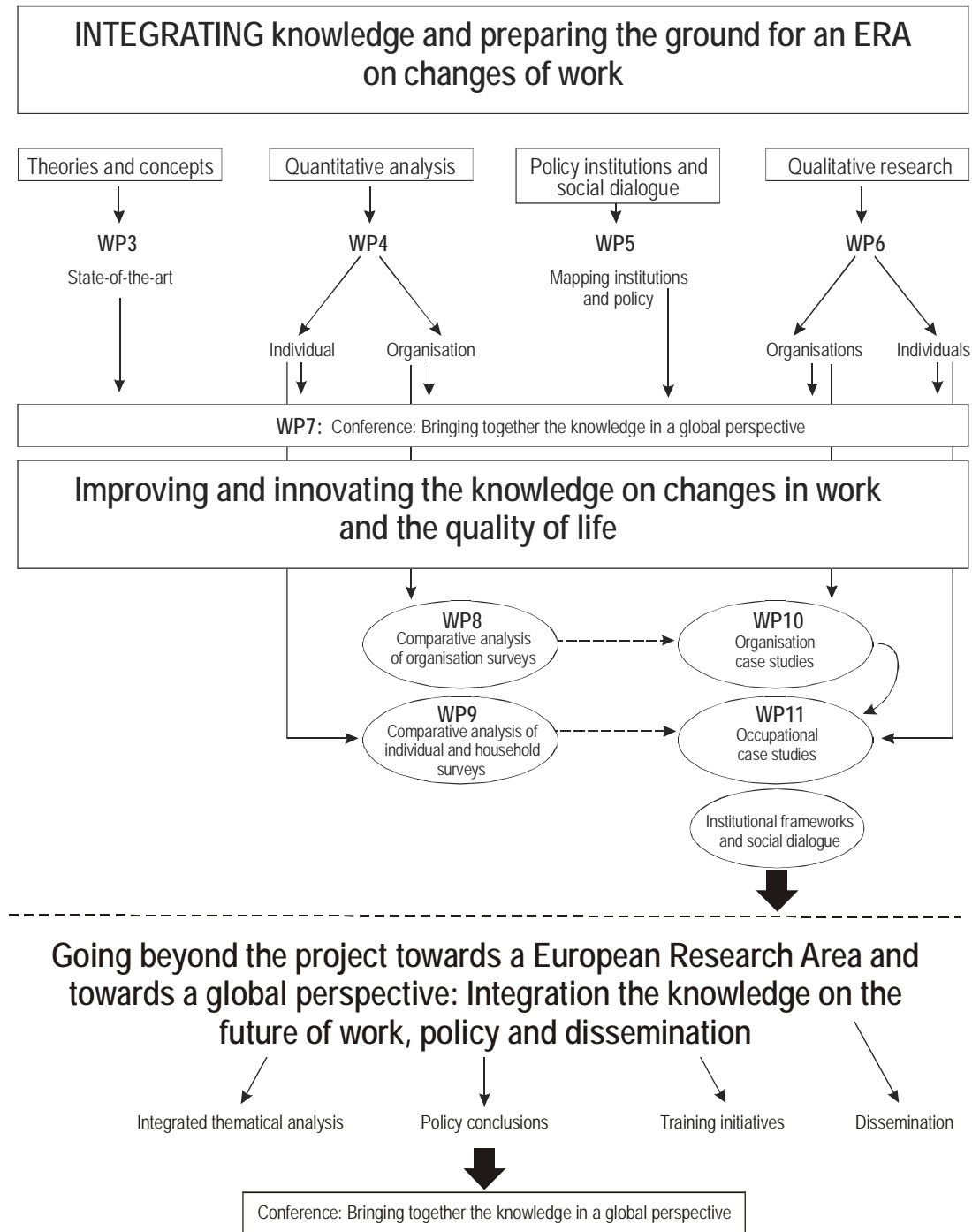
## Period 1

Month	2005							2006				
	1	2	3	4	5	6	7	8	9	10	11	12
	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Febr.	Mar.	April	May
<b>WP1 Project co-ordination and management</b>												
Infrastructure for overall management		M1.1										
Internal communication structure				D1.1								
Work processes and procedures					M1.3							
General Assembly				M1.2								
<b>WP2 Ongoing monitoring and assessment</b>												
Scientific Board	M2.2									M2.2		
Assessment reports from each subgroup												M2.1
Summary of EC management report												D2.1
<b>WP3 THEORY: state-of-the-art</b>												
Subgroup procedures				M3.1								
6 EU regional reports							M3.2					
Report on European research							M3.3					
Report on trends and forecast							M3.4					
Draft synthesis report									M3.5			
Synthesis report												D3.1
<b>WP4 QUANTITATIVE: feasibility</b>												
Subgroup procedures				M4.1								
European working group						M4.2						
Workshop									M4.3			
Digital toolkit							D4.1					
Draft workshop report										M4.4		
Workshop report												D4.2
<b>WP5 POLICY: mapping</b>												
Subgroup procedures				M5.1								
Workshop						M5.2						
Summary report							D5.1					
Draft comparative report								M5.3				
Methodology on policy and social dialogue										M5.4		
Analytical mapping and comparative report												D5.2
<b>WP6 QUALITATIVE: research design</b>												
Subgroup procedures				M6.1								
Approaches for case study research				M6.2								
Foundations and development						M6.3						
Development of research methodology								M6.4				
Individual working papers								D6.1				
Training workshop									D6.2			
Draft report on comparative methodologies										M6.5		
Report on comparative methodologies												D6.3
<b>WP20 Project dissemination</b>												
External communication structure and Website				D20.1								
Project Newsletter (paper)				D20.2								
Project Newsletter												D20.2

## Period 2

Month	2006					
	13	14	15	16	17	18
	June	July	Aug.	Sept.	Oct.	Nov.
<b>WP1 Project co-ordination and management</b>						
General Assembly				M1.4		
<b>WP2 Ongoing monitoring and assessment</b>						
Scientific Board		M2.2				
Assessment reports from each subgroup						
Summary of EC management report						
<b>WP7 DISSEMINATION: conference</b>						
Preparatory meeting	M7.1					
Final programme on Website		M7.2				
Conference				D7.1		
Publication of proceedings on Website						D7.2
Publication of book						
<b>WP8 QUANTITATIVE: organisation surveys</b>						
Subgroup meeting				M8.1		
Secondary analysis					M8.2	
Summer school						
Draft report secondary analysis						
Report secondary analysis						
<b>WP9 QUANTITATIVE: individual and household surveys</b>						
Subgroup meeting				M9.1		
Formats of expected results				M9.2		
Internal thresholds					M9.3	
Descriptive analysis						D9.1
Causal analysis						
Workshop						
Draft workshop report						
Report secondary analysis						
<b>WP10 QUALITATIVE: organisations</b>						
Subgroup meeting				M10.1		
Detailed case descriptions						
Work organisation descriptions						
Draft case study report						
Case study report						
<b>WP11 QUALITATIVE: individuals</b>						
Subgroup meeting				M11.1		
Detailed case descriptions						
Descriptions individual trajectories						
Draft case study report						
Case study report						
<b>WP20 Project dissemination</b>						
Newsletter						
Dissemination Plan						
Gender Action Plan						
Public Participation and awareness						

### 8.3 Graphical presentation of work packages



## 8.4 Work package list

## Work package list (18 months period June 2005-November 2006)

Work-package No	Work package title	Lead contractor No	Person-months	Start month	End month	Deliverable No
WP1	Project co-ordination and management	1	17	01/06/05	31/05/09	D1.1
WP2	Ongoing monitoring and assessment	1	7.5	01/06/05	31/05/09	D2.1
WP3	State-of-the-art on concepts, theories and research on changes in work	3	35.5	01/06/05	31/05/06	D3.1
WP4	Feasibility study and benchmarking of the national and European statistical system with respect to the quantitative analysis of changes in work	1	11	01/06/05	31/05/06	D4.1, D4.2
WP5	Mapping the institutional and policy landscape regarding changes in work and development of comparative research design	9	11.5	01/06/05	31/05/06	D5.1, D5.2
WP6	Case study research - Research traditions and development of comparative research design – including training	2	13	01/06/05	31/05/06	D6.1, D6.2, D6.3
WP7	Bringing together the knowledge to build on further in a European perspective: first conference	3	4.5	01/06/06	31/05/07	D7.1, D7.2
WP8	Comparative secondary analysis of organisation surveys in Europe	1	3	01/06/06	31/05/07	
WP9	Comparative secondary analysis of individual and household surveys in Europe	7	17	01/06/06	31/05/07	D9.1
WP10	Comparative organisation case study research	2	65	01/06/06	31/05/07	
WP11	Impact on the individual and the household – case studies	4	48.5	01/06/06	31/05/07	
WP20	Project dissemination	1	0	01/06/05	31/05/09	D20.1, D20.2
	Total		233.5.5			

## 8.5 Deliverables list

## Deliverables list (18 months period June 2005-November 2006)

Deliverable No	Deliverable name	WP no.	Lead participant	Estimated indicative person-months	Nature	Dissemination level	Delivery date (project month)
D1.1	Internal communication infrastructure	1	1	10	O	PU	Sept. 2005
D2.1	Summary of management reports to the EC	2	1	7.5	R	PU	May 2006
D3.1	Synthesis report	3	3	35.5	R	PU	May 2006
D4.1	An update of the Digital Toolkit and Questionnaire and Survey data base on organisational surveys	4	1	2	O	PU	Dec. 2005
D4.2	A state-of-the-art review of existing statistical resources, including full documentation of key indicators for measuring organisational change in organisational and individual data bases	4	1	9	R	PU	May 2006
D5.1	Summary of existing materials relating to the relevance of institutions for changes in work and presentation of workshop results relating to innovative practices in European institutions	5	9	9	R	PU	Dec. 2005
D5.2	Analytical mapping scheme of the institutional landscape and comparative report	5	9	2.5	R	PU	May 2006
D6.1	Individual working papers	6	2	7	R	CO	Jan. 2006
D6.2	Workshop	6	2	5	O	CO	Febr. 2006
D6.3	Report on comparative methodologies	6	2	1	R	PU	May 2006
D7.1	Conference	7	3	3.5	O	PU	Sept. 2006
D7.2	Publication of conference proceedings on Website	7	3	1	R	PU	Nov. 2006
D9.1	A report containing descriptive analyses	9	7	20	R	PU	Nov. 2006
D20.1	External communication structure and Website	20	1	6	O	PU	Sept. 2005
D20.2	Project Newsletters	20	1	1.5	O	PU	Sept. 2005, April 2006
TOTAL				120.5			

## 8.6 Work package description (18 months period, June 2005-November 2006)

### First project year

### Project co-ordination and management

<b>Work package number:</b>	1	<b>Start date or starting event:</b>					June 2005-November 2006
<b>Participant id:</b>		K.U. LEUVEN	UPSPS	UT	UESSEX	ISB	FZK
<b>Person-months per participant:</b>		11	0.5	0.5	0.5	0.5	0.5
<b>Participant id:</b>		FFCT-UNL	NIWL	IRES	SINTEF	ATK	CEE
<b>Person-months per participant:</b>		0.5	0.5	0.5	0.5	0.5	0.5
<b>Participant id:</b>		IS					
<b>Person-months per participant:</b>		0.5					

#### Objectives

- To kickoff the project.
- To implement successfully the operational aspects of the co-ordination in every institute, as described under 6.3.
- To implement successfully the project's proposed co-ordination, management and governance structure as described under section 7.
- To ensure the efficient financial and administrative management of the project, as described under 6.3.

#### Description of work

##### *Project co-ordination*

All aspects of project co-ordination are under the responsibility of K.U.LEUVEN, the Project Co-ordinator. The co-ordinator sets up efficient management infrastructures, including work procedures and templates, communication channels such as Intranet, as a means of exchange of information between partners through a password-protected private space on the project's Website.

The co-ordinator manages all administrative and financial aspects of the project, including maintenance of audit reports, transparent accountants; the implementation of procedures and forms for reporting to the EU, taking into account administrative rules and regulations related to European research projects; financial and administrative reporting; support of the partners in all this. The co-ordinator develops tools for the yearly monitoring and assessment activities, such as reporting and evaluation formats.

The co-ordinator will organise yearly meetings with the General Assembly.

All partners implement these in their own organisations.

The co-ordinator organises a first kickoff meeting with the General Assembly and four further meetings of the General Assembly.

#### Deliverables

- D1.1: Internal communication infrastructure: September 2005

#### Milestones and expected result

- M1.1: Infrastructure for overall management of an IP: July 2005
- M1.2: Kickoff meeting with the General Assembly: September 2005
- M1.3: Work processes and procedures (RTD reporting, financial reporting, publication, intellectual property): October 2005
- M1.4: Meetings of the General Assembly: September 2006 (conference), September 2007, September 2008, February 2009 (conference)

## Ongoing monitoring and assessment

<b>Work package number:</b>	2	<b>Start date or starting event:</b>				June 2005-November 2006
<b>Participant id:</b>		K.U. LEUVEN	FORBA	LONDON MET	FTU	ISF
<b>Person-months per participant:</b>		1.5	1.5	1.5	1.5	1.5

### Objectives

- To co-ordinate the ongoing monitoring and assessment activities of the project.
- To ensure that all deliverables are delivered according to schedule and to a high quality standard.
- To organise the Scientific Board meetings three times a year.
- To co-ordinate the overall consortium-level scientific- and knowledge-related issues.

### Description of work

#### *Ongoing monitoring and assessment*

The Project Co-ordinator organises meetings with the Scientific Board three times a year. He co-ordinates the reporting on these meetings. The co-ordinator will co-ordinate the ongoing monitoring and assessment activities that are undertaken in co-operation with the Scientific Board as described under section 7 and in the Consortium Agreement. The co-ordinator manages the overall consortium-level scientific- and knowledge-related issues, such as the co-ordinating and maintenance of the Consortium Agreement and the overview of project-related publications and presentations. The co-ordinator will co-ordinate the assessment activities that are organised in the subgroups. The Subgroup Leader will prepare an assessment report after each project period, summarising and assessing the main outcome of the work packages involved in view of the yearly reporting to the Commission, to the Scientific Board and to the General Assembly.

### Deliverables

- D2.1: Summary of management reports to the EC: June 2006, June 2007, June 2008, June 2009

### Milestones and expected result

- M2.1: 4 yearly assessment reports to the Scientific Board and the General Assembly: May 2006, May 2007, May 2008, May 2009
- M2.2: Meetings of the Scientific Board: June 2005, March 2006, July 2006, December 2006, April 2007, July 2007, January 2008, May 2008, July 2008, December 2008, May 2009

## Theories and concepts

### State-of-the-art on concepts, theories and research on changes in work

<b>Work package number:</b>	3	<b>Start date or starting event:</b> June 2005-May 2006					
<b>Participant id:</b>		K.U. LEUVEN	FORBA	LONDON MET	FTU	UPSPS	UT
<b>Person-months per participant:</b>		1	3	5	3	1.5	3
<b>Participant id:</b>		ISB	ISF	FZK	FFCT-UNL	IRES	SINTEF
<b>Person-months per participant:</b>		3	3	1	3	3	3
<b>Participant id:</b>		ATK	CEE	IS			
<b>Person-months per participant:</b>		1	1	1			

#### Objectives

To make a state-of-the-art of research traditions and recent empirical conceptual and theoretical knowledge on changes in work in the knowledge-based society in Europe.

#### Description of work

This work package is under the lead of LONDONMET. IRES will act as the second. The aim of this work package is:

- to make a critical overview of the theoretical approaches, conceptual frameworks and comparative models which have been developed to explain the current transformation of work in the knowledge society including analyses of drivers of change and forecasts of future changes;
- in close consultation with the partners of WP4, to make a review of the empirical evidence from surveys and other quantitative sources with the aim of establishing a comparative picture of the extent to which the changes identified in the literature are actually taking place and their specific regional and national characteristics;
- to make a systematic collection, analysis and benchmarking of qualitative research results. This will include case study research at the sectoral and organisational levels and research studies of specific local labour markets as well as qualitative research with individuals on relevant issues;
- to identify the key researchers in this field both within the EU and in Accession States and external countries, in order to establish a dialogue and enable them to participate in WORKS conferences and dissemination activities;
- to produce a synthesis report on European research on changes in work organisation in the knowledge society;
- this work will then be synthesised by two partners of this work package, LONDONMET and IRES to make a comprehensive overview on the state-of-the-art on changes in work in Europe;
- internal liaison procedures will be followed to ensure proper synergy within the theory subgroup, and their full utilisation within the project.

The division of tasks across the consortium will be based on dividing Europe up into a series of regions, based on a combination of language group, geographical proximity and socio-economic type (loosely conforming to the Esping-Andersson typology of European Welfare States). These are as follows:

- Dutch-speaking countries (on which the lead will be taken by UT with support from K.U.LEUVEN);
- French-speaking countries (on which the lead will be taken by FTU with the support of CEE);
- German-speaking countries (on which the lead will be taken by FORBA with the support of FZK);
- English-speaking countries (on which the lead will be taken by LONDONMET with the support of ISF MUENCHEN);
- Nordic countries (on which the lead will be taken by SINTEF with the support of ATK);
- NAS/NMS (on which the lead will be taken by ISB with the support of IS);
- Southern Europe (on which the lead will be taken by IRES with the support of UPSPS and FFCT-UNL);
- in addition, ISF MUENCHEN will support the lead partner in reviewing Europe-wide literature and policies, and FFCT-UNL will take the lead on reviewing trend forecasts.

#### Deliverables

- D3.1: 1 synthesis report: May 2006

**Milestones and expected result**

- M3.1: The construction of internal procedures for ensuring synergy within the theory subgroup and between these and other parts of the project at the level of the subgroup: September 2005
- M3.2: 7 EU regional reports: December 2005
- M3.3: 1 report on European research: December 2005
- M3.4: 1 report on trend forecasts: December 2005
- M3.5: Draft synthesis report: February 2006

## Quantitative analysis

### Feasibility study and benchmarking of the national and European statistical system with respect to the quantitative analysis of changes in work

<b>Work package number:</b>	4	<b>Start date or starting event:</b>	June 2005-May 2006		
<b>Participant id:</b>		K.U. LEUVEN	UESSEX	CEE	
<b>Person-months per participant:</b>		4	5	2	

#### Objectives

- To organise a feasibility and benchmarking study and overview of the existing statistical sources in the different European countries and at the European level re. organisation and in individual and household surveys.
- To identify problems of comparability of the different data bases and the strengths and weaknesses of the national and European data bases.
- To investigate the feasibility of using existing data bases to identify best practice key indicators for European comparative research on the issues related to changes in work.
- To establish a European working group on organisation surveys.
- To initiate a roadmap for convergence of organisation surveys.
- To construct a basic module with best practice questions for organisation surveys on the issues related to changes in work as defined in WORKS.

#### Description of work

This work package is under the lead of K.U.LEUVEN. UESSEX will act as the second.

- The first task is to set up a review of existing surveys, building on information which already exists and updating an existing organisation survey Website.
- A group of representatives from relevant organisation survey institutions will be established and a first workshop will be organised to discuss criteria for comparability and validity; to aim for consensus on key indicators necessary for measurement of organisational change in the new economy; to identify missing indicators; and to propose a frame for a basic module with indicators and related questions or other means of survey convergence.
- For data bases on individuals and households, full specification of key variables, their location, the degree of comparability, and their suitability for purpose will be generated.
- This will be supported by full on-line documentation.
- Internal liaison procedures at the level of the subgroup will be followed to ensure proper synergy within the quantitative subgroup, and their full utilisation within the project.

#### Deliverables

- D4.1: An update of the Digital Toolkit and Questionnaire and Survey data base on organisational surveys: December 2005
- D4.2: A state-of-the-art review of existing statistical resources, including full documentation of key indicators for measuring organisational change in organisational and individual data bases: May 2006

#### Milestones and expected results

- M4.1: The construction of internal procedures for ensuring synergy within the quantitative subgroup and between these and other parts of the project at the level of the subgroup, subgroup meeting: September 2005
- M4.2: Establishment of a European working group on organisation surveys: November 2005
- M4.3: A workshop to set out a roadmap for more convergence and to discuss concepts, indicators and questions for the measurement of organisational change in Europe: February 2006
- M4.4: A report of the outcomes of the first workshop: March 2006

## Policy, institutions and social dialogue

### Mapping the institutional and policy landscape regarding changes in work and development of comparative research design

<b>Work package number:</b>	5	<b>Start date or starting event:</b>			June 2005-May 2006		
<b>Participant id:</b>		UPSPS	UT	ISB	ISF	FFCT-UNL	NIWL
<b>Person-months per participant:</b>		2	1	1.5	4	2	1

#### Objectives

To map the institutional and policy landscape in order to assess, first, how new forms of work organisation and the quality of life are shaped by policy and institutions and, second, how institutions and policies are adapted to the emergence of new forms of work organisation in the knowledge-based society. In doing so the work will also aim at reaching a common understanding of existing practices in national and European level policy and at identifying innovative practices.

#### Description of work

This work package is under the lead of ISF MUENCHEN. UT will act as the second.

- Collect information on institutions and policies shaping changes in work in the knowledge-based society with special focus on areas such as the development and use of skills, regulation of working hours, equal opportunities, etc. (e.g. from European Union observatories, comparative research, national level research).
- Collecting information on changes of institutions and policies aimed at adapting to the emergence of new forms of work organisation.
- Prepare and carry out one workshop with partners to discuss and evaluate interim results and to collect state-of-the-art information on institutional change.
- Develop analytical scheme in view of the further stages of the project and map institutions in a comparative report on the institutional shaping of changes in work in the knowledge-based society.
- Equip partners with novel comparative information for dissemination towards national governments.

#### Deliverables

- D5.1: Summary of existing materials relating to the relevance of institutions for changes in work and presentation of workshop results relating to innovative practices in European institutions: December 2005
- D5.2: Analytical mapping scheme of the institutional landscape and comparative report: May 2006

#### Milestones and expected result

- M5.1: The construction of internal procedures for ensuring synergy within the policy subgroup and between these and other parts of the project, subgroup meeting: September 2005
- M5.2: Workshop: November 2005
- M5.3: Draft comparative report: January 2006
- M5.4: Development of comparative research methodology for this project aimed at policy and social dialogue representatives: March 2006

## Qualitative research Case study research - Research traditions and development of comparative research design - including training

<b>Work package number:</b>	6	<b>Start date or starting event:</b>			June 2005-May 2006		
<b>Participant id:</b>		FORBA	LONDON MET	FTU	ISF	FZK	NIWL
<b>Person-months per participant:</b>		4	1	4	1	1	1
<b>Participant id:</b>		IS					
<b>Person-months per participant:</b>		1					

### Objectives

- To set up an intensive discussion - collection and comparison - of the various research approaches to - organisational and occupational - case study research.
- To organise a workshop with the aim of taking an overview of the various concepts and developing a mutual understanding of the different approaches as the basis for further work in the project.
- Based on the inventarisation and evaluation of the different approaches to case studies a comparative research design for the project will be developed.

### Description of work

FORBA is the lead partner of this work package. FTU will act as second.

Each partner will prepare papers for the workshop – which will be organised over four days – presenting their approach on methodological foundations, the conceptualisation of gender differences as well as concrete procedures and techniques of case study research (both organisational and occupational case studies), the applied methods (problem centred or narrative interviews, group discussions, observation, etc.), design of the research sample, selection of cases the analysis of the case study material (problem centred, structural or comparative casuistic, etc.). Further discussion points are external validity, internal validity and reliability.

The discussion covers all stages of the research cycle as development of comparative research design (problem-formulation, research design, research sample, research instruments and analysis of case study material).

In addition experiences from European research projects from the TSER, IHP and IST programmes (such as EMERGENCE, TOSCA, SIREN, WWW-ICT, others) will be integrated in presentations and the discussion. This includes the description and analysis of achievements and difficulties encountered in all stages of the research process (e.g. difficulties in the stage of designing research projects as national meanings of terms, abstract categories cover different phenomena, etc.).

### Deliverables

- D6.1: Individual working papers: January 2006
- D6.2: Workshop: February 2006
- D6.3: Report on comparative methodologies: May 2006

### Milestones and expected result

- M6.1: The construction of internal procedures for ensuring synergy within the 'Qualitative research' subgroup and between these and other parts of the project at the level of the subgroups: September 2005
- M6.2: Presentation of different approaches to - organisational and occupational - case studies: September 2005
- M6.3: Foundations for the further development of case study methodology in comparative research: November 2005
- M6.4: Development of comparative research methodology for this project: January 2006
- M6.5: Draft report on comparative methodologies: March 2006

## Second project year

## Dissemination – Conference

## Bringing together the knowledge to build on further in a European perspective

<b>Work package number:</b>	7	<b>Start date or starting event:</b>	June-November 2006
<b>Participant id:</b>	LONDON MET	UPSPS	
<b>Person-months per participant:</b>	3	1,5	

**Objectives**

WP7 represents the first of two conferences planned to take place during the projects' life. Above the general aims of dissemination, the first conference will have the specific aims of:

- identifying and bringing together a 'Global Reference Group' for the WORKS project which will reconvene at later stages in the project's life and provide a source of peer review;
- initiating a dialogue with policy stakeholders which will on the one hand (as a WORKS output) inform them about changes currently taking place in work organisation and on the other (as a WORKS input) help to shape the direction and priorities of the future work of the project;
- providing an opportunity for launching the draft reports from the first work packages of the project and obtain critical feedback on them;
- acting as a forum for sharing and synthesising the first results of the project's work amongst the partners and providing an opportunity for discussing and agreeing the final choice of case study organisations and fine-tuning the research methodology.

**Description of work**

This work package is under the lead of LONDONMET. UPSPS will act as the second.

The first conference, will bring together the four parallel streams, and better specify how to build on knowledge beyond this state-of-the-art in an innovative way. In order to facilitate such comparison, both within and outside Europe, conferences will be structured in such a way as to highlight the similarities and contrasts between specific regional groupings, both within and outside the EU. A preliminary regional typology has been developed but this will be critically examined and if necessary adapted during the project's first phase.

The focus of the project will be on *Researching Changes in Work Organisation in Europe in a Global Context*.

The conference will bring together several strands:

- theories and concepts about the drivers of change in a global knowledge economy;
- indicators and empirical evidence on the relevant technological, economic, geographical, political and social trends;
- methodologies for carrying out research on changes in work organisation at both the organisational and individual level, including methodologies for ensuring the visibility of issues relating to gender, ethnicity and other social variables.

To ensure that regional diversity is kept in focus throughout the discussion of these general issues attention will be paid to selecting participants whose work makes visible the variety of institutional models which exist both within the EU and outside it. A working typology for establishing this framework of regional representativeness has been developed by the consortium. This would entail ensuring that there is representation from the 'Nordic', 'corporatist', 'liberal' and 'Southern European' EU states, from a range of Accession States, and from outside Europe.

Invited participants will include:

- representatives of the European Commission;
- representatives of the social partners;
- representatives of other national or international bodies with an interest in the aims of the project;
- researchers from the ERA who are not participants in WORKS. After taking account of ensuring regional representativeness, priority here will be given to inviting experts in three categories:
  - those who can make a theoretical contribution to an understanding of the global drivers of change;
  - those who are engaging in comparable studies who can provide opportunities for comparison and benchmarking;
  - those who can act as 'critical friends' offering peer review of the project's work to date and offer constructive comments on the proposed methodology;
- researchers from outside the ERA who can present comparable research, or assist the project in developing a comprehensive understanding the global drivers of change.

The full proceedings of the conference will be made available on the project Website. A collection of edited papers will also be published in book form and distributed as a special issue of a journal as well as as a stand-alone volume (subject to the availability of resources).

**Deliverables**

- D7.1: Conference: September 2006
- D7.2: Publication of conference proceedings on Website: November 2006

**Milestones and expected result**

- M7.1: Preparatory meeting: June 2006
- M7.2: Final programme on Website: July 2006
- M7.3: Publication of book: May 2007

## Quantitative analysis

### Comparative secondary analysis of organisation surveys in Europe

<b>Work package number:</b>	8	<b>Start date or starting event:</b>	June-November 2006
<b>Participant id:</b>		K.U. LEUVEN	
<b>Person-months per participant:</b>		3	

#### Objectives

- To describe and explain the extent of organisational change in Europe based on secondary analysis of existing data bases with the focus on the research issues of the project, based on the identification of best practice indicators on changes in work.
- To explain the causes of this change and national variation in order to assess the significance of variation for European competitiveness.
- To organise a training initiative for researchers of the institutes involved in the working group on analysis of data from organisational surveys.

#### Description of work

This work package is co-ordinated by K.U.LEUVEN, CEE will act as second.

Based on the work of WP4 on quantitative sources, the identification of best practice indicators and the joint construction of a focused module for organisation surveys of key indicators, the WP Team will access the required data sets of organisation surveys to use these data collection initiatives to integrate knowledge on organisational change. This will be done by secondary analysis and based on the identification of best practice indicators on changes in work. To do so the partners involved in this work package will liaise with the national institutions that organise organisational surveys.

To support this aim, the WP Leader will further organise a training initiative for researchers of the institutes involved in the working group on analysis of data from organisational surveys, that is established in WP4.

The output of the secondary analysis will allow to complement the research issues of the qualitative data collection (case study research) and provide a quantitative input into the thematical papers developed in the frame of WP12.

#### Deliverables

- D8.1: Training workshop: December 2006
- D8.2: Report on secondary analysis: May 2007

#### Milestones and expected result

- M8.1: Subgroup meeting: September 2006
- M8.2: Secondary analysis: October 2006
- M8.2: Draft report secondary analysis: March 2007

## Quantitative analysis Comparative secondary analysis of individual and household surveys in Europe

<b>Work package number:</b>	9	<b>Start date or starting event:</b>			June-November 2006
<b>Participant id:</b>		K.U. LEUVEN	UESSEX	IRES	GEE
<b>Person-months per participant:</b>		4	6	3	4

### Objectives

- To describe and explain the extent of organisational change in European employment as this affects individuals and households through quantitative analysis of a number of large-scale data sets of individuals.
- To explain the causes of this change and national variation in order to assess the significance of variation for European competitiveness.
- To examine the welfare implications in respect of occupational mobility, the distribution of earnings, and gender equality.

### Description of work

UESSEX will co-ordinate this work package. K.U.LEUVEN will act as second.

Using the outputs of WP4, the research programme will begin by accessing the required data sets and reconstructing these for the purpose of comparative analysis. After extensive internal discussion of the best way to make maximum use of these data, analysis will be undertaken first at the descriptive level, mapping the necessary parameters such as national variation in key indicators, regional distributions, and trends over time. The second phase of analysis will use a variety of statistical techniques to model change in the key indicators in order to isolate causes of change and the effects on European competitiveness and social welfare. The results will be disseminated through reports and a workshop. The main aim of the workshop will not be to summarise the results but to assess their value and to move forward through estimating what they mean for the future of organisation efficacy in Europe over the next 10-20 years.

### Deliverables

- D9.1: A report containing descriptive analyses: November 2006
- D9.2: A report which will bring together key results, assessment by stakeholders of their significance, and of implications for the future of European competitiveness and the distribution of welfare: May 2007

### Milestones and expected results

- M9.1: Subgroup meeting: September 2006
- M9.2: Formats to provide the basis for an extensive dissemination programme: September 2006
- M9.3: The chief milestones will be achievement of a series of critical internal thresholds for data management, data analysis: October 2006
- M9.4: Workshop: March 2007
- M9.5: Draft workshop report: April 2007

## Qualitative research

### Comparative organisation case study research

<b>Work package number:</b>	10	<b>Start date or starting event:</b>					June-November 2006
<b>Participant id:</b>		K.U. LEUVEN	FORBA	LONDON MET	FTU	UPSPS	UT
<b>Person-months per participant:</b>		4	6	4	8	4	4
<b>Participant id:</b>		ISB	ISF	FZK	FFCT-UNL	NIWL	IRES
<b>Person-months per participant:</b>		4	5	4	4	2	4
<b>Participant id:</b>		SINTEF	ATK	IS			
<b>Person-months per participant:</b>		4	4	4			

#### Objectives

- Definition of business functions/activities within organisations or networks of organisation as objects of study for the case study research.
- Concluding agreements with companies on co-operation in case study research.
- Preparing and carrying out organisational case studies.
- Analysing:
  - the networked organisation, the global division of work within the value chain, the inter-organisational division of work;
  - drivers of change and shaping factors, e.g. technological innovation, economic factors, liberalisation and rationalisation due to cuts in public spending;
  - (new) forms of work organisation, division of work, and workplace design at the establishment level;
  - co-operation, control, autonomy, time use, learning and working conditions in new forms of work organisation;
  - the impact of organisational changes on internal labour market structure, personal policies (in-, through- and outflow policies, learning and skill policies);
  - the use of organisational temporal and contractual flexibility;
  - social dialogue and participation issues;
  - how, in the cases under investigation, the (national and regional) institutional frameworks shape work organisation and the quality of work.

#### Description of work

This work package is under the lead of FORBA. ISF MUENCHEN and UT (for the policy issues) will act as a second.

- Selection of business functions/activities and two different organisations for each business function in 13 countries representing the European national diversity.
- In order to provide a broad insight into changes in work in Europe the selection of cases has to take into consideration a set of criteria as for instance the extent of globalisation of the economic activities in the sector, the use of ICT as a second important driver of changes, the rapid changes of use of different forms of knowledge and the characteristics of the work force involved (in particular lower vs. higher skilled; men versus women, ethnical groups).
- Negotiating access and reaching a commitment on the part of the organisations to take part in case study investigations.
- Finalising and adaptation of interview guidelines and research plans.
- Conducting the guided interviews in the organisations with the aim to fully cover different categories of workers in the selected activities/business functions.
- Transcription of interviews.
- Development of common procedures and schemes for the analysis of the case study interviews.
- Interpretation and analyses of the cases (the analyses are carried out by interdisciplinary teams).
- Writing of detailed case study reports on the basis of a common structure.

#### Deliverables

- D10.1: Case study reports on business functions/activities including comparative evaluation: May 2007

**Milestones and expected result**

- M10.1: Subgroup level meeting: September 2006
- M10.2: Detailed case descriptions on the basis of common structures that can be used for thematic and comparative analysis and interpretations: December 2006
- M10.3: Description of forms of work organisation in selected business functions/activities as shaped by the recomposition of value chains and by different regional and institutional settings: January 2007
- M10.4: Draft case study report: March 2007

## Qualitative research

### Impact on the individual and the household – case studies

<b>Work package number:</b>	11	<b>Start date or starting event:</b>					June-November 2006
<b>Participant id:</b>		K.U. LEUVEN	FORBA	LONDON MET	FTU	UPSPS	UT
<b>Person-months per participant:</b>		3	3	3	8	3	3
<b>Participant id:</b>		ISB	ISF	FZK	FFCT-UNL	NIWL	IRES
<b>Person-months per participant:</b>		3	3	3.5	3	1	3
<b>Participant id:</b>		SINTEF	ATK	IS			
<b>Person-months per participant:</b>		3	3	3			

#### Objectives

- Characterisation of occupational groups as relevant units of analysis for the individual dimension and work/life balance issues of changes in work.
- Preparation and implementation of the methodological tools: in-depth case study methods and comparative criteria and methods.
- Analysis of:
  - occupational trajectories: career construction and choices, transitions into work, continuous learning and training, self-training, mobility;
  - occupational identities: common skills and values, recognition and rewarding patterns, personal investment in the job, formal and informal social relations;
  - work/life balance: specific arrangements of occupational groups, management of working time and rhythms, job sustainability, household situation, domestic division of labour, lifelong learning;
  - gender and occupations: imbalances in professions and careers, gendered work culture, gender bias in work/life arrangements, gendered comparison of individual trajectories.

#### Description of work

FTU will act as lead partner, FZK will act as second.

Using the outcomes of WP6 on methodologies for occupational case studies, key occupational groups will be selected in the business functions considered in WP9, in 13 countries representing European diversity as regards occupational models and social background. Selected case studies will cover both 'stabilised' occupational groups and 'emerging' occupational groups. Stabilised occupational groups can be characterised by professional status, common values, career paths, social habitus, although new trends in organisation and technology make these characteristics increasingly blurred. Emerging occupational groups can be characterised by competences and tasks, but their status, trajectories, careers and social behaviours are still in construction, in rapidly changing environments.

The main tasks to be carried out are:

- selecting and reaching commitment of individuals to be involved in biographical interviews and focus groups, finalising interview guidelines, testing common schemes for gathering and coding comparative material;
- conducting the biographies and the focus groups and checking the cumulativeness and representativeness;
- transcription, synthesis and coded summaries of the collected material. Utilisation of common procedures and schemes for the analysis of interviews;
- preparation, circulation and discussion of case study reports;
- consolidation of the work carried out by the research teams involved in the work package.

#### Deliverables

- D11.1: Case study reports on individual and work/life issues in occupational groups, including transnational comparative evaluation according to the methodological criteria and tools defined in WP5: May 2007

#### Milestones and expected results

- M11.1: Subgroup level meeting: September 2006
- M11.2: Detailed case descriptions: December 2006
- M11.3: Description of individual trajectories: January 2007
- M11.4: Draft case study report: expected final results of the work package consist of a detailed and contrasted common picture of the effects of changing work patterns on the individuals and their quality of life at work and outside work, in order to feed the thematic reports of period 3: March 2007

## 9. Project resources and budget overview

### 9.1 Efforts for full duration of the project

*IP Effort Form – Indicative efforts for full duration of project*

Project number (acronym): WORKS

<i>IP Activity Type</i>	RTD / Innovation activities	Demonstration activities	Training activities	Consortium management activities	TOTAL per PARTICIPANT
K.U.LEUVEN	55.5		5	3.5	64
FORBA	24		12	3.5	39.5
LONDONMET	29.5		3	3.5	36
FTU	30.5		5	3.5	39
UPSPS	23		0		23
UT	21		0		21
UESSEX	16.5		1		17.5
ISB	23		3		26
ISF MUENCHEN	29.5		2	3.5	35
FZK	21		3		24
FFCT-UNL	27		1		28
NIWL	12.5		3		15.5
IRES	32		4		36
SINTEF	20		2		22
ATK	18		7		25
CEE	16.5		2		18.5
IS	17		3		20
TOTAL per ACTIVITY Type	415.5		56	17.5	
Overall TOTAL efforts					490

**9.2 Efforts for the first 18 months**

*IP Effort Form - indicative efforts for 18 months period covering detailed implementation plan (project month 1 to 18 – June 2005 to November 2006)*

Project number (acronym): WORKS

IP ac	K.U.LEUVEN	FORBA	LONDONMET	FTU	UPSPS	UT	UESSEX
RTD/Innovation activities							
WP1	11				0.5	0.5	0.5
WP3	1	3	5	3	1.5	3	
WP4	4						5
WP5					2	1	
WP7			3		1.5		
WP9	4						6
WP10	4	6	4	8	4	4	
WP11	3	3	3	8	3	3	
Total research	27	12	15	19	12.5	11.5	11.5
Demonstration activities							
Total demonstration							
Training activities							
WP6		4	1	4			
WP8	3						
Total training	3	4	1	4			
Management activities							
WP2	1.5	1.5	1.5	1.5			
Total management	1.5	1.5	1.5	1.5			
<b>TOTAL ACTIVITIES</b>	<b>31.5</b>	<b>17.5</b>	<b>17.5</b>	<b>24.5</b>	<b>12.5</b>	<b>11.5</b>	<b>11.5</b>

## WORKS

Proposal no. 006193

Date: 02/02/2005

	ISB	ISF MUENCHEN	FZK	FFCT-UNL	NIWL	IRES	SINTEF
RTD/Innovation activities							
WP1	0.5		0.5	0.5	0.5	0.5	0.5
WP3	3	3	1	3		3	3
WP4							
WP5	1.5	4		2	1		
WP7							
WP9						3	
WP10	4	5	4	4	2	4	4
WP11	3	3	3.5	3	1	3	3
Total research	12	15	9	12.5	4.5	13.5	10.5
Demonstration activities							
Total demonstration							
Training activities							
WP6		1	1		1		
WP8							
Total training		1	1		1		
Management activities							
WP2		1.5					
Total management		1.5					
<b>TOTAL ACTIVITIES</b>	<b>12</b>	<b>17.5</b>	<b>10</b>	<b>12.5</b>	<b>5.5</b>	<b>13.5</b>	<b>10.5</b>

## WORKS

Proposal no. 006193

Date: 02/02/2005

	ATK	CEE	IS			TOTAL PARTNERS
RTD/Innovation activities						
WP1	0.5	0.5	0.5			17
WP3	1	1	1			35.5
WP4		2				11
WP5						11.5
WP7						4.5
WP9		4				17
WP10	4		4			65
WP11	3		3			48.5
Total research	8.5	7.5	8.5			210
Demonstration activities						
Total demonstration						
Training activities						
WP6			1			13
WP8						3
Total training			1			16
Management activities						
WP2						7.5
Total management						7.5
<b>TOTAL ACTIVITIES</b>	<b>8.5</b>	<b>7.5</b>	<b>9.5</b>			<b>233.5</b>

### 9.3 Overall budget for the full duration of the project

See CPF forms.

### 9.4 Budget for the first 18 months

See CPF forms.

## 9.5 Management level description of resources and budget

### 9.5.1 Research and innovation activities

The most important activities of the project are research and innovation activities, more precisely focused at broadening, integrating and innovating the knowledge in Europe - and beyond - on changes in work. Integrating and innovating knowledge through research activities is reached at mainly by:

- writing state-of-the-art papers about theory, concepts, research and policies in the different countries and regions involved, and at the European level. This is mostly based on document study and desk research;
- undertaking quantitative analysis on data sets constructed in the frame of the project based on acquired existing data bases;
- undertaking case studies in organisations, mainly by interviewing stakeholders from management and employees;
- interviewing employees at their homes;
- interviewing policy stakeholders and social partners;
- reporting.

This implies that most of the budget will be allocated to the salary of scientific personnel of the institutes involved in the different phases and research activities of the project. It is important to refer to section 8, where synthetical overviews are included on the distribution of the partners per work package. This gives a good insights of the budget distribution within the consortium with regards to the person months, and thus the salary costs. With regards to the most labour intensive phase of the project, it can be clarified that for the case study research, following budgets are assigned to the partners:

All partners involved in the empirical qualitative work package will receive 1 extra month in period 2 to organise the case studies, including the reporting.

Assigned budget for the case study research:

- interviews at organisation level, including preparation and reporting: 1 month;
- interview of individuals and their household including preparation and reporting: 1 month;
- interviews with stakeholders re. institutional context, policy and social dialogue, including preparations and reporting: 1.5 month.

Per business function (see sections 6 and 8) two organisations and their employees will be interviewed. In total, 58 case studies will be organised in this project activity.

The main other costs related to the research activity are the purchase of data for the quantitative analysis (WP4, WP8 and WP9).

For K.U.LEUVEN, a budget of 6,000 euro for the purchase of data is provided. The other partners involved in the quantitative work receive 1,000 euro for working on the data of other surveys.

Further, all partners of the consortium are assigned a lump-sum budget of 200 euro per person month for the additional costs of undertaking the research activities as described above (s.a. consumables).

However, integration of knowledge requires exchange, discussion and synergies that can not only be reached through electronic communication infrastructures and paperwork. Further, since it is one of the basic assumptions and innovative approaches of the project that changes in work are related to global developments, several initiatives aim at looking beyond the consortium. The first aspect, discussions at the level of the consortium, is mainly organised through regular meetings at the level of the work packages and the subgroups. This is reflected in the budget, more precisely in the budget for travel and subsistence. However, as the Gantt diagram shows (see section 8), work package and subgroup meetings will be

organised to coincide as much as possible with other meeting initiatives in the frame of the project, such as workshops with external experts, conferences etc. This in view of a rational use of the partners' budget and time.

The partners of the consortium are assigned a budget of 900,- euro per travel, since travels will normally only be inside Europe. Further, it is important to note that meeting locations will be rotated through the partners involved, in order to allow partners to confirm their project commitment through their hospitality of hosting the meeting. The same sum of 900,- euro will in that case be assigned for the hosting of the meeting.

Participant ID	Acronym	General Assembly	Scientific Board	Work package meetings (incl. workshops, trainings, conferences, ...)	Total # travels	Total budget
1	K.U.LEUVEN	8*	22*	11**	41	36,900
2	FORBA	4	11	5	20	18,000
3	LONDONMET	4	11	5	20	18,000
4	FTU	4	11	3	18	16,200
5	UPSPS	4	0	4	8	7,200
6	UT	4	0	3	7	6,300
7	UESSEX	4	0	2	6	5,400
8	ISB	4	0	5	9	8,100
9	ISF MUENCHEN	4	11	4	19	17,100
10	FZK	4	0	3	7	6,300
11	FFCT-UNL	4	0	4	8	7,200
12	NIWL	4	0	4	8	7,200
13	IRES	4	0	7	10	9,000
14	SINTEF	4	0	3	7	6,300
15	ATK	4	0	3	7	6,300
17	CEE	4	0	3	7	6,300
19	IS	4	0	3	7	6,300

\* Co-ordinator + secretarial staff.

\*\* For conference: co-ordinator + secretarial staff, including travels for subcontractors.

The second aspect of knowledge creation, innovating and integrating knowledge beyond the project and the consortium, is organised through focused workshops, mostly with external experts and stakeholders, and in the two project conferences, organised at milestone moments of the project, with the active involvement of the Global Reference Group. The same rates for travel and subsistence are provided for travels for participants from outside the consortium, that are attending such a project event, more precisely the training events for participants beyond the project. The travel budget for speakers at both global conferences however are higher, since these participants may also come from outside Europe.

Also these activities have explicitly been budgeted in the project resources, as follows:

1. **Conference budget** (two conferences during the project's lifetime; estimated at 100 participants and 20 external speakers, two-day conference): 33,500.00 euro/conference.

Since these conferences include in particular guests from all over the world, a higher budget (1000 euro per travel instead of 900 euro) is assigned. The conference budget is assigned to the leader of the subgroup 'Global dissemination', who will organise these conferences. In addition, the publication of a book based on the conference contributions is planned. For editing this, an additional budget of 3000,- euro/book is assigned to the partner, that will be responsible for this.

2. **Workshops with external experts** (estimated at 20 participants, and 10 external speakers, two-day workshop): 14,000.00 euro

These costs are an estimation for a two-day workshop with 20 participants and 10 external speakers. This estimation is based on the workshops as they are described for WP4 (quantitative analysis -

meeting with institutes that organise organisation surveys), WP5 (meeting with policy stakeholders) and WP9.

Finally, in the frame of the project two dissemination tools will be developed: a public Website and a project Newsletter, that will be issued twice a year with the most important project outcome and with announcements of activities etc. In addition, an existing Digital Toolkit and Questionnaire and Survey data base for organisational surveys, that is developed by the WP Lead partner in a predecessor project STILE, and who is the co-ordinator of both WORKS and STILE (ended in 2004) will be updated and fine-tuned to the needs of WORKS. The costs for this are included in the costs for the project Website, as this task will be executed similarly.

#### **Project's Website**, including Digital Toolkit updating

Website development (+ update Digital Toolkit)	45,000.00 euro
Web registration	250.00 euro
<b>Total</b>	<b>45,250.00 euro</b>

In the budget of the Newsletter, the design of a project's logo and publication templates is included. In the budget of the Website, the Website registration is included.

#### **Project Newsletters**

Printing	5,000.00 euro
Design	6,000.00 euro
Mailing	2,250.00 euro
<b>Total budget for 5 Newsletters</b>	<b>13,250.00 euro</b>

### **9.5.2 Training activities**

Four training activities are organised during the project, all with the aim of an effective uptake by a wider target audience of the project's outcome and of the expertise of the consortium, gained and enhanced throughout the project. Two of these training are focused on research methodology. A first training initiative focuses at researchers and is about the internationally comparative qualitative research methodology that will be developed and applied during the project (WP6). The second training is related to the quantitative secondary analysis on the data about changes in work organisation (and related issues) collected in organisation survey data bases (WP8). The third training focuses at practitioners and social partners at organisational level and is about tools for innovative organisational design. The fourth methodology training for researchers will be organised after the empirical phase of the project.

The budget breakdown for these activities is as follows:

1. **Practitioner workshop** (estimated at 5 external speakers, 20 participants and two-day workshop): 8,8750.00 euro
2. **Methodology and analysis training** (estimated at 5 external speakers, 20 participants and four-days workshop): 10,625.00 euro

### **9.5.3 Management activities**

The management activities as described under section 6.1.3, include mainly costs for the operational aspects of the project and to support the management and decision-making structures. In total 18 months for clerical staff are allocated to the Project Co-ordinator to carry out these operational tasks. The co-ordinator herself, responsible for the scientific co-ordination as well as being the main contact point for the outside world and in particular for the EC is allocated 3 months for the first three years and two for the last year. The meetings of as well the General Assembly as the Scientific Board are included. The Scientific Board has been allocated in addition a budget of one person month a year during the first three years and 0.5 person month during the last project year for carrying out its specific task, as described in WP2.

The co-ordinators' travel and subsistence budget does not only include the participation of researchers to the meetings, but it does include the participation of project assisting clerical staff at the General Assembly, the Scientific Board and the conferences.

## 10. Ethical issues

The proposed research does not raise any unusual ethical issues. Like most research in the social sciences, however, it will be important that all team members are full aware of ethical issues, including:

- obtaining informed consent from respondents;
- respect for confidentiality of informants;
- respect for intellectual property rights and data protection issues;
- ensuring that the results are disseminated widely and responsibly to all relevant stakeholders.

Four of the partners in WORKS (K.U.LEUVEN, FORBA, ISB and LONDONMET, via the past involvement of Ursula Huws as project director) have also been partners in the RESPECT project, funded by the Commission under the 5<sup>th</sup> Framework programme to draw up ethical and professional guidelines for socio-economic research. This has created a high awareness of ethical issues within the research team which will not only inform the research work of WORKS but also feed into the training activities, thus contributing to the development of good ethical practice in the social sciences in the ERA.

## 11. Other issues (optional)

## Appendix – Subcontracting

### 1. Subcontracting the construction of specific tables – HIVA-K.U.Leuven

#### 1.1 Introduction

In the frame of the WORKS project one specific task will be subcontracted by HIVA-K.U.Leuven: the delivery of specific analyses and tables from data bases of organisation surveys of two Member States, Germany and The Netherlands. This task relates to the subgroup 'quantitative analysis – organisation surveys', led by HIVA-K.U.Leuven.

The main task to be subcontracted is the secondary analysis on data of existing data bases of organisation surveys. These analyses will be based on a detailed description and list of the indicators, variables and questions that will be provided by the WORKS partners in the frame of **Work package 4**, 'Feasibility study and benchmarking of the national and European statistical system re. the quantitative analysis of changes in work including the development of a roadmap and related initiatives for more convergence of instruments to measure changes in work in the KBS at the European level.' In the frame of WP4, best practice key indicators for European comparative research on the issues related to changes in work will be identified. The secondary analysis of the data related to the indicators is a next step. Seven WORKS partners (Belgium, France, Hungary, Portugal, Italy, Norway, Sweden) will be involved in collecting the relevant survey data from organisation surveys in their countries, of which at least two (Belgium and France) are organising such surveys themselves. However, the data from additional national organisation surveys should be included in view of a broader comparative basis and project outcome. The most appropriate institutes to be involved additionally are Germany and The Netherlands, who have a long tradition of organisation surveys, including several waves, and with whom strong relationships with the project co-ordinator have been established in previous relevant research. The outcome of the secondary analysis will feed into the summer school for young researchers, that will be set up in the second half of the second project year.

#### 1.2 The subcontracting can be justified as follows:

The construction of tables as such, the main task for the subcontract, is not a core project task. In the frame of the quantitative analysis subgroup, the core activity of the workpackage is to compare tables with data on similar variables and indicators collected in the frame of regular organisation survey activities of different institutes, organising such surveys. The construction of the basic tables with secondary analysis as such, however necessary for the comparison exercise that is provided in the project, cannot be regarded as a core activity of the WORKS project itself.

The secondary analysis on data bases of institutes that are not a partner in the consortium, cannot be done by one of the partners of the WORKS consortium. The construction of these tables can only be done by the institutions organising such surveys, since they are the legal owners of the related data bases. There are different reasons for this:

- reasons of confidentiality of the data bases, which contain data of several survey waves of establishments and organisations. Since these data are very sensitive for identification of respondents, these survey data bases are mostly not at the disposal of external parties. It is not possible that the data bases concerned can 'leave' the owners' premises.
- reasons of methodology: the owners of the data bases have to take into account the specific methodological requirements of working with the data.
- reasons of efficiency: the owners of the data bases are most familiar with the specific characteristics of the data bases, such as is mostly described in internal codebooks.

A sum of 10.000,- euro is available for each of both subcontractors, performing the same work.

### 1.3 Description of tasks to be subcontracted:

The main task is the construction of tables with selected data from the existing data bases of the organisation surveys in view of European comparison. The tasks have to be carried out in project year 2. Based on the identification of best practice indicators within the first project year, the subcontractors will:

- identify the variables in their data bases that refer to the WORKS list of best practice indicators on organisational change
- analyse these variables in relation to relevant and identified independent variables
- analyse where possible these variables in the data sets of different waves of their organisation surveys, in view of including a longitudinal perspective,
- construct the tables
- include the required methodological explanations in view of a correct use of the tables
- interpret the tables and describe the analysis in order to allow a correct interpretation in view of a comparison in the frame of the project
- deliverable: report with tables, description and methodological explanations.

For each of both subcontracts a lumpsum of 10.000,- euro is provided. The deliverables should be finalised at the end of project year 2.

### 1.4 Procedures of subcontracting

The subcontracting will be made in compliance with the national legislation of the subcontracting partner, which is Belgian (KULeuven - Belgium). This implies:

- The sum of 10.000,- euro for each of both subcontractors is too small to require a public tender.
- The law of 24 december 1993, art. 17 §1, §2, 1°, f) states:  
 Art. 17 § 1. Le marché public est dit ' procédure négociée ' lorsque le pouvoir adjudicateur consulte plusieurs entrepreneurs, fournisseurs ou prestataires de services de son choix et négocie les conditions du marché avec un ou plusieurs d'entre eux.  
 § 2. Il peut être traité par procédure négociée sans respecter de règle de publicité lors du lancement de la procédure, mais si possible après consultation de plusieurs entrepreneurs, fournisseurs ou prestataires de services lorsque:  
*f) les travaux, fournitures ou services ne peuvent, en raison de leur spécificité technique, artistique ou tenant à la protection des droits d'exclusivité, être confiés qu'à un entrepreneur, fournisseur ou prestataire de services déterminé.*

Since the tasks as described can only be performed by IAB for Germany and by OSA for The Netherlands – as the sole institutes organising the organisation surveys concerned and holding the exclusive ownership of the related data bases, both subcontracts should be assigned to these institutes.

- 8 JANVIER 1996. - Arrêté royal relatif aux marchés publics de travaux, de fournitures et de services et aux concessions de travaux publics. Art. 120 En application de l'article 17, § 2, 1°, a, de la loi, il peut être traité par procédure négociée sans publicité lors du lancement de la procédure lorsque la dépense à approuver ne dépasse pas, hors taxe sur la valeur ajoutée, le montant de (67.000 EUR). <AR 2000-07-20/50, art. 2, 006; **En vigueur** : 01-01-2002> Pour les marchés publics de services au sens des catégories 6, 8 et 21 de l'annexe 2 de la loi, (la dépense à approuver ne peut atteindre (hors taxe sur la valeur ajoutée, le montant prévu à l'article 53)) <AR 1999-03-25/39, art. 46, 003; **En vigueur** : 01-06-1999> <Erratum, voir M.B. 25-08-1999, p. 31471> Le montant de ces marchés est à apprécier, selon le cas, en fonction des règles fixées par les articles 2, 28 ou 54 du présent arrêté. (Lorsque des lots sont prévus dans un marché public de travaux ou de services dont le montant estimé, hors taxe sur la valeur ajoutée, est inférieur, pour les travaux, à (550.000 EUR) et, pour les services, au montant prévu à l'article 53, il peut également être traité par procédure négociée sans publicité lors du lancement de la procédure pour ceux des lots dont la dépense individuelle à approuver ne dépasse pas (13.500 EUR), hors taxe sur la valeur ajoutée, mais pour autant que leur montant cumulé n'excède pas vingt p.c. du montant cumulé de tous les lots.) <AR 1999-03-25/39, art. 46, 003; **En vigueur** : 01-06-1999> <AR 2000-07-20/50, art. 2, 006; **En vigueur** : 01-01-2002> Aucun marché ne peut être scindé en vue de permettre l'application du présent article.

## **2. Subcontracting the development and maintenance of website, logo, templates, Newsletter design – HIVA-K.U.Leuven**

### **2.1 Introduction**

These tasks are part of the management activities of the project co-ordinator as described under section 6.1.4.1.

As these are not core tasks of the project and require specific expertise not available within the research and management team of the project co-ordinator, the tasks will be subcontracted.

### **2.2. Description of tasks to be subcontracted:**

#### **2.2.1 Project website and templates**

The project Website will be used for publication of Newsletters, links, announcements, posting of more substantial reports and documents, conference and workshop registration and organisation and other external activities, in addition to acting as a means of exchange of information between partners through a password-protected private space. In the frame of this task, a project logo, publication templates, PowerPoint template and cover template will also be developed in accordance to the website design.

The development of the website will be scheduled at the start of the project. It has to be implemented at the end of September 2005. According to the progress of work, the publication of deliverables, the organisation of project related events etc. a regular maintenance and updating is necessary. In view of the two project conferences, additional webpages allowing on-line registration, have to be developed. Further, the digital toolkit as developed in the frame of WP4 'Feasibility study and benchmarking of the national and European statistical system re. the quantitative analysis of changes in work including the development of a roadmap and related initiatives for more convergence of instruments to measure changes in work in the KBS at the European level' will have to be included.

A budget of 45.000,- euro for the whole project period is provided.

#### **2.2.2 Project Newsletters**

During the project's lifetime 5 project Newsletters will be developed. The first and the last issue will be printed on paper and distributed by landpost as well as electronically. The three other Newsletters will be distributed by email. All will be posted on the project's website. Typically, the Newsletters will be 8 pages and contain short articles on the project's work, graphs and photographs.

For the design of the Newsletter, a budget of 1,200,- euro is provided, in total 6,000,- euro for 5 Newsletters.

The dates of the distribution of the project Newsletters are: September 2005 (paper), April 2006, March 2007, March 2008, March 2009 (paper).

### **2.3 Procedures of subcontracting**

The subcontracting will be made in compliance with the national legislation of the subcontracting partner, which is Belgian (K.U.Leuven – Belgium) as described.

## **3. Subcontracting for translations**

### **3.1 ISB**

ISB is going to employ subcontracting to carry out all translations of working documents and papers written in Hungarian in the course of the project. At ISB there are no translators employed, thus this job must be done by external translators. This will be done in line with Annex II of the General Conditions. In the process the institute will also apply the rules to be followed as laid down in Hungarian law relating to subcontracting. If the sum of subcontracting in the project exceeds HUF 2 million a year, a public procurement procedure

must be effected, and the task is to be assigned to the best bid. The translation costs to be subcontracted are estimated to be 4,900 euros for the whole project period.

### **3.2 IRES**

IRES is going to employ subcontracting to carry out all translations of working documents and papers written in Italian in the course of the project. At IRES there are no translators employed, thus this job must be done by external translators. This will be done in line with Annex II of the General Conditions. The translation costs to be subcontracted are estimated to be 3,000 euros for the whole project period.

### **3.3 CEE**

CEE is going to employ subcontracting to carry out all translations of working documents and papers written in French in the course of the project. At CEE there are no translators employed, thus this job must be done by external translators. This will be done in line with Annex II of the General Conditions. The translation costs to be subcontracted are estimated to be 5,850 euros for the whole project period.

## Appendix A – Consortium description

### General description of the consortium, their roles and the structures that aim for integrating and innovating knowledge

The project will be managed by the Hoger Instituut voor de Arbeid (HIVA-K.U.LEUVEN; Higher Institute for Labour Studies), based at the Catholic University of Leuven (Belgium), which will act as a research partner as well as the Project Co-ordinator. The consortium is composed based on the following criteria:

1. their relevant and synergetic knowledge expertise in the research fields of the project (see below);
2. to have a broad coverage of the European diversity in order to fully take into account the specific situation, perspectives and needs of the various European labour markets, economies, industrial relation systems, and employment and welfare policies; this implies a fair and balanced representation of different European regions: Northern Europe (Sweden, Norway), Southern Europe (Italy, Portugal, Greece). The Centre (The Netherlands, France, Germany, Austria, Belgium and the UK), as well as the participation of an Accessing (Hungary) and a Candidate Country (Bulgaria). This representation is also consistently reflected in the different scientific aspects of the project, such as the composition of subgroups and WP Teams, the distribution of work with regards to: the state-of-the-arts investigations, the organisational case studies, occupational case studies, institutional and social dialogue analysis and thematical reports;
3. the experience in participation and/or co-ordination in European research projects. All partners know what it is to collaborate in scientific research at the European level, and several have been European Project Co-ordinators. All partners have already collaborated with at least two other partners of the consortium in previous European research on changes in work. This way, a European Research Area is indeed already in development. This creates a high-committed group where trust and confidence are already well established, and are in addition substantially enhanced during the intensive process of preparing this proposal;
4. as can be read in the CV's several partners were involved in the European research projects that form the basis for enhancing knowledge on changes in work as is aimed in this project in particular: EMERGENCE, STILE, SIREN, WWW-ICT, eLIVING;
5. further, several partners have specific leading roles in their own national research, for instance K.U.LEUVEN (involved in three Research Policy Centres), UESSEX (holding crucial data for the execution of the quantitative analyses), LONDONMET (data base on industrial relations).

The composition of the consortium and the specification of the role and tasks each partner is involved in, is described in the matrix under section 6. The explanation of the role of Scientific Board, Subgroup (Leader), WP Leader and WP Second is explained in section 7.

### A.1 General description of the partners

#### A1.1 K.U.LEUVEN - Katholieke Universiteit Leuven (Catholic University of Leuven), Hoger Instituut voor de Arbeid (Higher Institute for Labour Studies) - Co-ordinator

The Higher Institute for Labour Studies (HIVA - Hoger Instituut voor de Arbeid) is a research institute attached to the Catholic University of Leuven (K.U.Leuven) in Flanders, Belgium. It was set up in 1974. The Higher Institute for Labour Studies is specialised in policy-oriented research. The research in the Work and Organisation sector is carried out from three main perspectives: organisation, personnel policy and participation. Research covers various related themes, such as: stress and quality of work, HRM, the external labour market, groups at risk, gender, collective and individual labour relations, flexibility, ICTs, occupational profiles, the learning organisation, vocational training, management of diversity, participation and organisational development, etc. The quality of working life is always a key element in this research. A consistent link is made with the wider labour market. The staff of this sector has a variety of training backgrounds, thus making possible an interdisciplinary approach. The sector has come to occupy a key role

in a number of leading consortia at European level. This makes it one of the top Flemish research departments participating in the EU science programmes in the field of human sciences. HIVA has institutional relationships with three leading Policy Research Centres of the Flemish region. Monique Ramioul is a co-promoter of one of the Research Groups of the *Policy Research Centre 'Entrepreneurship, enterprises and innovation'*, a.o. responsible for organising the Flemish Survey of Panel Organisations. Further the Sector has long-standing research relationships with the *Policy Research Centre Employment, Labour Market and Education* (a.o. co-partner in the STILE project). Finally, HIVA is the co-ordinator, promoter of the *Policy Research Centre of Career in Education and Labour Market*.

#### *Relevant research projects*

The following recent research projects are illustrative for the experience of the Work and Organisation sector: STILE Statistics and Indicators on the Labour Market in the eEconomy, co-ordinated by Monique Ramioul; Estimation and mapping of Employment Relocation in the New Communications Environment (EMERGENCE); The learning chemical organisation (ORGLearn); Socio-Economic Change, Individual Reactions and the Appeal of Extreme Right (SIREN); Social convoy and sustainable employability: innovative strategies of outplacement/replacement counselling (SOCOSE); Industrial relations and innovation. Information society, work and the generation of new forms of social exclusion (SOWING), Work process knowledge in technological and organisational development (WHOLE), Panel of Organisations Survey Flanders (PASO), Longitudinal analysis of the cultural values in Flanders: attitudes about work.

#### *Project personnel*

**Monique Ramioul** is a sociologist (sociology of work and organisation). From 1985 until 1990 she worked as a researcher at the Department of Sociology of Work and Organisation – K.U.Leuven. After that (1990-1995) she worked as an advisor at the Flemish Foundation for Technology Assessment, where she conducted research on issues like the impact of technological innovation on the organisation of work, outsourcing, flexibility, the position of female workers on the labour market and related issues. In 1995, she returned at the university. Between October 1999 and September 2000, Monique Ramioul worked as a case officer at the Policy and Programme Evaluation Unit of the Information Society Directorate General, European Commission (Brussels). From September 2000 on, she is Head of the Work and Organisation Sector at HIVA, the Higher Institute for Labour Studies (K.U.Leuven). Her main research topics concern the information society, organisational innovation and labour market issues. From November 2001 on, she is the co-ordinator of STILE, a multi-annual project with 9 European partners within the Fifth Framework Programme of the IST programme. Further, she is one of the core partners in the PASO Flanders project (Panel Survey on Organisations), an economy-wide organisations panel research on organisational innovation and Human Resources Management, and co-promoter of the Policy Research Centre 'Entrepreneurship, enterprises and innovation'.

#### Relevant publications

- Ramioul M. (1994), 'Two-speed flexibility and the position of females on the labour market in Flanders', in G.C.N. Beets et al. (red.), *Population and family in the Low Countries 1992: Family and Labour*, n° 26.
- Dejonckheere J., Ramioul M. & Van Hootegem G. (2002), *Is small finally becoming beautiful? Small and medium-sized enterprises in the new economy*, HIVA-K.U.Leuven/IES, Leuven/Brighton.
- Huys R., Van Hootegem G., Maenen S. & Ramioul M. (eds.) with Promberger M. (2004), *Is ICT transforming the world of work? And how to know about it?*, STILE report, HIVA-K.U.Leuven, Leuven (Deliverable 4.1 of STILE Work package 4).
- Ramioul M. (2003), 'E-work challenges the e-society. STILE: Innovative Methods to Measure the Impact of ICT on Work and Organization', in P. Cunningham, M. Cunningham & P. Fatelnig (red.), *Building the Knowledge Economy. Issues, Applications, Case Studies* (part 2), IOS Press, Amsterdam, p. 1172-1179.
- Jagger N. (ed.) with Bertin I., Ester P., Huws U., Oteri C., Perryman S., Ramioul M., Román A., Stimpson A., Verlinden R. & Zerr C. (2004), *The missing E. The use of national elements of the LFS for eWork analysis*, STILE report, HIVA-K.U.Leuven, Leuven (Deliverable 2.2 of STILE Workpackage 2).
- Bellmann L. & Promberger M. (eds.) with Ester P., Maenen S., Ramioul M., Román A. & Van Hootegem G. (2004), *Towards convergence? Current state and future ways of establishment based ICT- and labour market monitoring in Europe*, STILE report, HIVA-K.U.Leuven, Leuven (Deliverable 4.3 of STILE Workpackage 4).
- Oteri C. & della Ratta (eds.) with Altieri G., Bates P., Bertin I., Bollen A., Huws U., Lakatos J., Makó C., Pratt J., Ramioul M., Tamási P. & Tickner N. (2004), *Working at a distance. How to know about it?*, STILE report, HIVA-K.U.Leuven, Leuven (Deliverable 5.3 of STILE Workpackage 5).

**Dr. Rik Huys** is MA in social sciences. He received his PhD at the Faculty of Social Sciences of the Catholic University of Leuven in 2000. He worked with a post-doctoral grant at the Department of Sociology of Labour & Organisation from 2000 to 2002. In 2003 he joined the Higher Institute for Labour Studies, where he works as a senior research associate in the Sector Work and Organisation. His main research areas are new forms of work organisation and their implications for the quality of working life.

#### Relevant publications

- Huys R. & Van Hootegem G. (1995), 'Volvo-Gent: a Japanese transplant or beyond?', in A. Sandberg (ed.), *Enriching production: perspectives on Volvo's Uddevalla plant as an alternative to lean production*, Avebury, Aldershot, p. 231-248.
- Huys R., Pollet I., Van Hootegem G. & Wouters L. (1997), *Construire et façonner la qualité du travail*, HIVA-K.U.Leuven/CCTBB, Leuven/Bruxelles.
- Huys R., Sels L., Van Hootegem G., Bundervoet J. & Henderickx E. (1999), 'Toward less division of labor? New production concepts in the automotive, chemical, clothing and machine tool industries', *Human Relations*, vol. 52, n° 1, p. 67-94.
- Sels L. & Huys R. (1999), 'Towards a flexible future? The nature of organizational response in the clothing industry', *New Technology, Work and Employment*, vol. 14, n° 2, p. 113-128.
- Huys R. & Van Hootegem G. (1999), 'Volvo-Ghent: a third way?', in J.P. Durand, J.J. Castillo & P. Stewart (eds.), *Teamwork in the automobile industry. Radical change or passing fashion?*, Macmillan, Houdmills, p. 308-324.
- Huys R., Sels L. & Van Hootegem G. (2000), *Trendrapport organisatieconcepten, kwaliteit van de arbeid en arbeidsmarktimplicaties: een noodzakelijke en haalbare kaart*, HIVA-K.U.Leuven, Leuven, 96 p.
- Huys R. (2001), 'Organisational learning between standardisation and non-standardisation', in M. Fischer & P. Röben (eds.), *Ways of organisational learning in the chemical industry and their impact on vocational education and training*, Institut Technik + Bildung, Universität Bremen, Bremen, p. 35-54.
- Huys R. & Van Hootegem G. (2001), 'De lopende band in de jaren negentig: terug van nooit weggeweest', *Tijdschrift voor Arbeidsvraagstukken*, jg. 17, nr. 4, p. 333-347.
- Huys R. (2001), *Uit de band? De structuur van arbeidsverdeling in de Belgische autoassemblagebedrijven*, Acco, Leuven, 475 p.
- Huys R., Van Hootegem G. & Sels L. (2001), *The delayed transformation? Socio-organisational transformation in the chemical, automobile and machine-tool industry*, Department Sociologie-K.U.Leuven, Leuven, AB/2001-4.
- Doorewaard H., Van Hootegem G. & Huys R. (2002), 'Team responsibility structure and team performance', *Personnel Review*, vol. 31, n° 3, p. 356-371.
- Huys R. & Van Hootegem G. (2002), 'Changes in the division of labour and their implications for learning opportunities', N. Boreham (ed.), *Work process knowledge*, Routledge, London, p. 183-200.
- Huys R., Van Hootegem G., Maenen S. & Ramioul M. (eds.) with Promberger M. (2004), *Is ICT transforming the world of work? And how to know about it?*, STILE report, HIVA-K.U.Leuven, Leuven (Deliverable 4.1 of STILE Work package 4).

#### **A1.2 FORBA, Forschungs- und Beratungsstelle Arbeitswelt (Working Life Research Centre) - Partner 2**

FORBA is an independent research institute, established in 1991 as a not for profit organisation specialised in social science research in the area of working life. Currently eleven researchers and four administrative and support staff are working for the institute on a permanent full-time or part-time basis. In part researchers are also teaching as lecturers at different universities and colleges in Vienna (e.g. University of Vienna, Vienna University of Economics and Business Studies, College for Social Work). Technical support, translation services, financial consulting etc. are provided by additional experts working for the institute on a contract basis. Both in terms of education and work experience the academic staff covers sociology, political science, business administration, computer science, psychology and statistics. Changes in working life are at the core of FORBA's research programmes. These cover both the macro level of trends in the labour market and the micro level of innovations in the workplace. Long-standing research programmes with a series of empirical projects are:

- 'Work, Organisation and Information Technology' (information and communication technology; skills, learning and new forms of work organisation);
- 'Economic Internationalisation and Work' (shaping of work organisation, industrial relations and employment opportunities through economic 'globalisation');
- 'Gender, work and employment' (women on the labour market, equal opportunity policies);

- 'Industrial relations' (developments both at the level of the company and the level of trade unions and employers' associations);
- 'Work, employment and social security' (changing forms of employment and welfare provision).

For many years FORBA has been participating in and co-ordinating international research projects and networks. Contractors and clients include the European Commission, the European Foundation for the Improvement of Living and Working conditions, the Austrian Ministry of Science and Education as well as the Ministry for Economy and Labour, the Austrian Chamber of Labour, trade union organisations, and work councils. Relevant research projects are: 'Estimation and Mapping of Employment Relocations in the Global Economy in the New Communications Environment' (EMERGENCE), 'Asian EMERGENCE', European Commission, Asia IT & C Programme (in progress); 'Information Society, Work and the Generation of New Forms of Social Exclusion' (SOWING), 'Employee's resource and social rights in Europe' (RESORE), Socio-economic change, individual reactions and the appeal of the extreme right' (SIREN), 'Professional and Ethical Codes for Technology-Related Socio-Economic Research' (RESPECT), 'Minimum income as the social protection of last resort: safety net, trap and/or springboard?', 'Pacts on Employment and Competitiveness - Implications for European Employment Policy', European Foundation for the Improvement of Living and Working Conditions (2001-2002); 'Collective Bargaining on Employment and Competitiveness', European Foundation for the Improvement of Living and Working Conditions (1998-1999); 'Perspektiven transdisziplinärer Genderforschung (bezahlte und unbezahlte Arbeit)', Austrian Ministry of Education, Science and Culture, development of long-term perspectives for transdisciplinary gender-specific research and strategies for the promotion of gender research in Austria in the area of 'paid and unpaid work'; 'Work beyond Boundaries and Chances for Participation', Austrian Ministry for Education, Science and Culture, Research Programme.

#### *Project personnel*

**Univ. Doz. Dr. Jörg Flecker** is scientific director of Forschungs- und Beratungsstelle Arbeitswelt. He studied at the University of Economics and Business Administration in Vienna and completed a postgraduate programme in sociology at the Institute for Advanced Studies in Vienna in 1985. A researcher at the Institute for Advanced Studies from 1986 to 1990 specialising in new technologies, work organisation, skills, corporate restructuring and industrial relations, he received a doctorate from the University of Economics and Business Administration in Vienna in 1989. He worked for the University of Central Lancashire, UK, as a visiting research fellow and was appointed head of the Forschungs- und Beratungsstelle Arbeitswelt (FORBA) in 1991. Throughout the 1990s he taught at the University of Economics and Business Administration in Vienna and is now teaching sociology at the University of Vienna, where he received his Habilitation in 2003. Jörg Flecker has collaborated in, managed and directed numerous national and international comparative research projects on work organisation, qualification, participation, IT, internationalisation and employment. He presently is co-ordinator of the EU-funded research project 'Socio-economic Change, Individual Reactions and the Appeal of the Extreme Right' (SIREN) and is in charge of the comparative analysis in the project 'Asian EMERGENCE' on ICT-based relocation of work to and within South and Southeast Asia. In addition, he currently acts as a policy reviewer of projects for the EC's GD Research.

#### Relevant publications

- (1998), 'Capitalising on Subjectivity: The 'New Model Worker' and the Importance of Being Useful', in P. Thompson & Ch. Warhurst (eds.), *Workplaces of the Future*, Macmillan Press, Houndsmill, London (with Hofbauer J.).
- (1999), 'The end of institutional stability. What future for the 'German model'?', *Economic and Industrial Democracy*, vol. 20, n° 1 (with Schulten Th.).
- (2002), 'La flessibilità: una via obbligata? Riorganizzazione dell'impresa e forme di occupazione flessibili', in R. Lodigiani & M. Martinelle (eds.), *Dentro e oltre i post-fordismi*, Milano.
- (2000), "Sachzwang Flexibilisierung? Unternehmensreorganisation und flexible Beschäftigungsformen", in H. Minssen (ed.), *Begrenzte Entgrenzungen. Wandlungen von Organisation und Arbeit*, Edition Sigma, Berlin.
- (2000), 'Zwischen unerledigter Humanisierung und wettbewerbsorientierter Modernisierung: Zur politischen Gestaltung von Arbeitsorganisation', *Österreichische Zeitschrift für Politikwissenschaft (ÖZP)*, 4. Jg.
- (2001), 'Co-ordination and Control in Transnational Business and Non-Profit Organizations', in L. Pries (ed.), *New Transnational Social Spaces*, Routledge, London (with Simsa R.).
- (2002), *Jobs on the Move: European Case Studies in Relocating Work*, Institute for Employment Studies, Report 386, Brighton (with Kirschenhofer S.).

- (2003), 'Restrukturierung von Unternehmen und die Folgen für die Arbeit - das Beispiel der Verlagerung von eWork, in B. Mahnkopf (ed.), *Globalisierung von Wirtschaftsprozessen*, Edition Sigma, Berlin.

**Dr. Ulrike Papouschek** is a sociologist and senior researcher at Forschungs- und Beratungsstelle Arbeitswelt. She studied sociology and ethnology at the University of Vienna and social work at the Academy of Social Work in Vienna and holds a doctorate in sociology. An independent social researcher from 1988 to 1991, she was a scientific researcher at the Vienna Institute for the Documentation of Social Sciences from 1991 to 1994 and a scientific researcher at the Federal Academy for Public Administration in 1995. In 1996, she began to lecture at the Vienna University of Economics and Business Administration and, in the same year, joined Forschungs- und Beratungsstelle Arbeitswelt (FORBA) as a senior researcher and board member. In 2000, Ulrike Papouschek was awarded the Käthe-Leichter Austrian State Award for her contributions to women's studies. Ulrike Papouschek has carried out, managed and collaborated in many national and international research projects on gender-specific issues, including paid and unpaid work, equal opportunities and gender mainstreaming, qualification and women in science and IT. She has been a member of the Austrian Ministry of Education, Science and Culture's expert group on 'Equal Opportunities in Science' and is a member of the Austrian platform 'Gender IT!'

#### Relevant publications

- (1998), *Im Aufbruch - Betriebliche Frauenförderung in Österreich* (ed. with Bendl R., Pastner U.), Peter Lang Verlag, Frankfurt.
- (1999), *Über die Entwicklung der Bildung und Berufsausübung von Frauen in Österreich*, Band 3 des Hochschulberichts, ed. BMWV, Vienna (with Pastner U.).
- (2001), 'Geschlecht als Bildungsbarriere - eine überholte Fragestellung?', in J. Flecker, U. Papouschek & Th. Riesenecker-Caba (eds.), *Herausforderungen der Arbeitswelt. Beiträge zu neuen Arbeitsformen, Geschlecht, Informationstechnik*, Rainer Hampp Verlag, München/Mering.
- (2002), *Wissenschaftlerinnen in der außeruniversitären Forschung, Materialien zur Förderung von Frauen in der Wissenschaft*, Band 13, Bundesministerium für Bildung, Wissenschaft und Kultur, Vienna (with Pastner U.).
- (2003), 'Was tut Not? Anmerkungen zu einer geschlechtersensiblen Arbeitsforschung', *Kurswechsel*, 3. Jg. (with Mairhuber I.).
- (2003), 'Von Gleichstellung noch weit entfernt - Wissenschaftlerinnen in der außeruniversitären Forschung in Österreich', in H. Matthies et al. (ed.), *Gleichstellung in der Forschung - Organisationspraktiken und politische Strategien*, Edition Sigma, Berlin.

### **A1.3 LONDONMET – London Metropolitan University, Working Lives Research Institute - Partner 3**

The Working Lives Research Institute is a new centre for research and teaching based at the London Metropolitan University. The Institute undertakes socially committed academic and applied research into all aspects of working lives, emphasising equality and social justice and working for and in partnership with trade unions. The Institute has brought together a group of researchers with extensive and diverse experience to carry out multidisciplinary research across a wide range of important issues in the area of work life science, both nationally and at a comparative international level, including: Employment practices, employment law and issues of work/life-balance; Partnership, human resource management and conflict at work; the relationship of work and environmental protection; The history and contemporary organisations of working people, the trade unions and social movements; The evolution of training and lifelong learning; Corporate ethics and governance; Gender relations and issues of sexuality, health and ethics; Nationality, race and ethnicity in employment.

The Working Lives Research Institute includes several distinct areas of activity within its orbit: the Centre for Trade Union Studies; the Centre for Equality Research in Business; the Centre for Environmental Protection; and the exceptionally rich resource of the TUC Library Collections and the Women's Library. WLRI has eleven staff plus a further 25 internal and external research associates. It can draw upon a range of disciplines including political economy, sociology, labour history and industrial relations as well as expertise in human resource management, education and training, organisational theory and behaviour, labour markets, environmental protection, gender studies, comparative social policy analysis, employment law and corporate ethics and governance. This means the Institute can capture the dynamic relationship between work, household, family, society and community and how work is shaped by economic and political choices, but in turn influences social identities, divisions and cohesion.

The Institute also provides an excellent environment for advanced study and research into working lives, employment relations and labour studies, with four taught postgraduate programmes as well as doctoral studentships.

#### *Relevant projects*

Racial and ethnic minorities, immigration and the role of trade unions in combating discrimination and xenophobia, in encouraging participation and in securing social inclusion and citizenship (RITU), European Union Framework Five. Representation and voice in Small and Medium-sized European enterprises (SMALL), European Union Framework Five. Relationship between work and exclusion TSER Framework Four. Work and Performance in Post-modern Firms, Européen université du travail in Paris; Teleworking and Gender and Flexible Labour Markets and Benefit Systems in Europe, DG Employment and Social Affairs, Estimation and mapping of Employment Relocation in the New Communications Environment (EMERGENCE), DG Information Society, Professional and Ethical Codes for Technology-Related Socio-Economic Research (RESPECT), DG Information Society, ICT-based relocation of work to and within South and Southeast Asia (Asian EMERGENCE), EuropeAid's Asia-ITC programme. Information society, work and the generation of new forms of social exclusion (SOWING), DG Research, Tableau d'Observation Sociale des Centres d'Appel (TOSCA), DG Information Society, Statistics and Indicators on the Labour Market in the eEconomy (STILE), DG Information Society.

#### *Project Personnel*

**Professor Steve Jefferys**, BSc(econ), MSc, PhD, is Director of the Working Lives Research Institute and Professor of European Employment Relations at London Metropolitan University. In this post he manages several research projects and a staff of thirteen. He was previously Research Professor at the Business School of the University of North London and has been Visiting Professor at the École supérieure des affaires, Université Pierre Mendès-France (Sciences Sociales), in Grenoble.

He has published numerous books, reports and articles and carried out research for a variety of clients including local government employers, the Low Pay Commission and trade unions - most recently UNIFI and the CWU.

#### Relevant publications

- (1999), 'Job regulation and the managerial challenge to trade unions: evidence from two union membership surveys', (with C. Whitston and A. Roe), *Industrial Relations Journal*.
- (2000), 'A 'Copernican revolution' in French Industrial Relations: are the times a'changing?', *Journal of Industrial Relations*, June.
- (2000), *Management, Welfare and Work in Western Europe: an historical and contemporary analysis*, (with M. Carpenter), Edward Elgar, Aldershot.
- (2001), *European Working Lives*, (editor with F. Mispelblom and C. Thornqvist), Edward Elgar, Aldershot.
- (2003), *Liberté, Egalité and Fraternité at Work: Changing French Employment Relations and Management*, Palgrave, London.

**Professor Ursula Huws** is Professor of International Labour Studies at the Working Lives Research Institute at London Metropolitan University. Her work for the European Commission includes evaluations, project reviews and expert consultancy as well as substantial involvement in research projects, with a special focus on the reorganisation of work in the knowledge society and its social and policy impacts. As well as directing the RESPECT and Asian EMERGENCE projects, she is currently carrying out a policy review for DG Research of projects on Information Society issues. In addition she has been requested to take over the scientific co-ordination for the L@W project (DG Information Society). She has also played a key role in the organisation of several major international conferences including 'Where in the World? eWork Location in a Global Digital Economy' (Budapest 2000), 'the World, the Workplace and We, the Workers' (Brussels 2002), 'Globalization, Innovation and Human Resource Development for Competitive Advantage' (Bangkok, 2002) and 'Real work in a Virtual World: the human impact of organisational transformation in a digital global economy' (Vienna, 2003).

Her research clients at an international level include the European Trade Union Confederation, the International Labour Organisation, the World Health Organisation, the United Nations Development Programme and the United Nations University Institute of Technology. She has also carried out research and consultancy and presented seminars for government departments and/or government-funded conferences in Australia, Canada, France, Austria, Denmark, Ireland, Germany, Sweden, Belgium, Portugal,

Ireland, Italy, Spain, Hungary, Latvia, Japan, India, Malaysia, and the USA as well as in the UK where she has carried out research for many national and local government bodies and QUANGOs. Between 1990 and 1996 she was a senior lecturer in social research methodology at the University of North London, developing courses in labour market research, researching gender, policy analysis, equal opportunities in education and research ethics. She has extensive publishing experience, both as an author and as an editor.

#### Relevant publications

- Huws U. (1996), 'Le Télétravail', in *Diversification du Temps de Travail, Itinéraires Professionnels et Egalité Professionnelle*, Conseil Supérieur de l'Egalité Professionnelle, Ministère des Affaires Sociales, de la Santé et de la Ville, Paris.
- Huws U. & Gunnarsson E. (1997), *Virtually Free: Gender, Work and Spatial Choice*, NUTEK, Stockholm, Sweden.
- Huws U. (1997), 'Distansarbete Kraver en Valfardsstat', in L. Skold & G. von Sydow (eds.), *Manniskan Jobbeet & den Nya Industrin*, Svenska Industritjänstemannaförbundet (SIF), Stockholm.
- Huws U. (1998), 'Flexible Labour Markets and Equality Between the Sexes: threat or opportunity?', in N. Mosconi (ed.) *Égalité des Sexes en Éducation et Formation*, Presses Universitaires de France, Paris.
- Huws U. (1998), 'Flexibilisierung und Sicherheit: Auf dem Weg zu einem neuen europäischen Gleichgewicht', in H.G. Zilian & J. Flecker (eds.), *Flexibilisierung - Problem oder Lösung?*, Edition Sigma, Berlin.
- Huws U. (2000), 'Società dell'informazione, occupazione e cittadinanza sociale', in M.L. Mirabile (ed.), *Lavoro e Welfare della New Economy, L'Assistenza Sociale*.
- Huws U. (1999), 'Telearbeit in Europa/Teleworking in Europe', in E. Cyba & M. Knipp (eds.), *Arbeit 2002: Zukunft der Frauen/Employment 2002: the Future for Women*, Federal Ministry for Women's Affairs, Austria, in association with the European Commission and Archimedia (bilingual German/English), Vienna.
- Huws U. (1999), 'Beyond Anecdotes: on Quantifying the Globalisation of Information Processing Work', in Mitter & Bastos (eds.), *Europe and Developing Countries in the Globalised Information Economy*, United Nations University Institute of Technology, Routledge, London.
- Huws U. (2000), 'The Changing Gender Division of Labour in the Transition to the Knowledge Society', in K. Rubenson & H.G. Schuetse (eds.), *Transition to the Knowledge Society: Policies and Strategies for Individual Participation and Learning*, University of British Columbia Press, Vancouver.
- Huws U. (2002), 'Grenzüberschreitende Verlagerung von eWork: Wo kommen die Jobs hin?', in J. Flecker & H.G. Zilian (eds.), *eWork: Neue Jobchancen – real oder virtuell?*, Arbeitsmarktservice, Vienna.
- Huws U. (2002), 'The Restructuring of Employment in the Information Society and its Implications for Social Protection', *Work Organization and Social Exclusion in the European Information Society*, Campus Frankfurt/M, Frankfurt.
- Huws U. (2003), *The Making of a Cybertariat: Virtual Work in a Real World*, Monthly Review Press, New York and Merlin Press, London.

#### **A1.4 FTU – Fondation Travail-Université, Work & Technology Research Centre - Partner 4**

The Fondation Travail-Université (FTU) was established in 1967 in order to build up a bridge between academic research and social organisations in the French speaking part of Belgium. Nowadays the FTU is an independent para-academic research institution, recognised by the Ministry of the French Community as a general service for continued education. The status of the FTU is a non-profit organisation of public interest, registered as ASBL (association without lucrative purpose). The main purpose of the Work & Technology Research Centre of FTU is to develop a capacity of research, analysis and intervention on the social aspects of technological changes. For more than fifteen years, it carries out research projects granted by Belgian or European programmes. It participates in international research networks. It works out methodological tools for research and continued education. The current activities of the Work & Technology Research Centre address three research areas: information society, work and employment; technology assessment, technology and society; innovation, environment and sustainable development.

The FTU Work & Technology Research Centre has a longstanding research and networking experience at the European level: for the European Parliament (Scientific and Technological Options Assessment, STOA); DG Research; DG Information Society; DG Employment; DG Education and culture; the European Social Fund (objective 3). FTU also conducted many research and dissemination activities at the national level for different Ministries and research funds and also for social organisations: for the Ministry of the Walloon Region for R&D (General directorate for research, technology and Energy); the Federal Services for scientific, technical and cultural affairs (SSTC); the Belgian Minister of work/employment and equality; the Walloon Scientific Policy Council (CPS) and the Economic and Social Council of the Walloon Region (CESRW). As its specificity is to build up a bridge between academic research and social organisations, FTU

has also a long tradition of co-operation with policymaking bodies, social actors and users groups at regional, national and European level.

New forms of work organisation are at the core of the activities of the Centre: flexible work practices, distance working, time use and work/life-balance, gender relations at work, quality of work in innovative sectors (ICT, business and financial services, publishing, etc.).

FTU puts a strong emphasis on dissemination and involvement with social actors. Besides research reports, the Work & Technology Research Centre publishes a quarterly Newsletter on technology & society, entitled 'La Lettre EMERIT', and a series of books in co-operation with various publishers. It organises conferences and seminars.

#### *Relevant projects*

- Flexible work practices and communication technology (FLEXCOT), FP4, TSER programme.
- Widening Womens' Work in Information and Communication Technology (WWW-ICT), FP5, IST.
- Social inclusion in the information society in Europe (eInclusion@EU), FP6, Priority 8.

#### *Project personnel*

**Patricia Vendramin** is co-director of the Work & Technology Research Centre of the Fondation Travail-Université (FTU). She has a background in sociology, communication sciences, and development studies. She started doing research at the University of Louvain-la-Neuve in 1983 and joined FTU in 1988. Since 1992, she is involved in the scientific management, design and implementation of research projects on social and economic aspects of the information society, mainly in the areas of work transformations and e-inclusion. Her main research interests are flexible work practices, women's work, distance working, new work organisation in manufacturing and services, evolving forms of labour relations, new needs in skills and training, and e-inclusion. She has a long experience in research and networking at the European level. She is author or co-author of various books and articles, in French and in English, on new forms of work and social issues in the information society.

**Gérard Valenduc** is co-director of the Work & Technology Research Centre of the Fondation Travail-Université (FTU) and lecturer at the University of Namur (Institute for Informatics). After a postgraduate in nuclear physics (UCL) and some years of research in this area, he specialised in research on societal assessment of technological choices and science policy, mainly in two areas: on the one hand, information and communication technologies and on the other hand, innovation fostering sustainable development. In 1984, he created the Work & Technology Research Centre and since then he manages many projects concerning the social aspects of technological innovation, on a regional, national or European scale. He is author or co-author of various books and articles on technology and society, and on new forms of work in the information society.

Both co-directors of the Centre have a long experience in co-ordination of European research projects in FP5 (WWW-ICT, in the IST programme) and FP4 (FLEXCOT, in the Targeted Socio-Economic Research Programme), as well as in co-ordination of European partnerships in research and training projects for the European Social Fund and the European Trade Union Confederation.

#### Relevant publications

- Valenduc G. & Vendramin P. (1997), *Le travail à distance dans la société de l'information*, Editions EVO, Bruxelles [ISBN 2-87003-342-7] (*Distance working in the information society*).
- Vendramin P. & Valenduc G. (1999), *Advanced communication technologies and local development*, *Leader Magazine*, European Commission, Brussels, January.
- Gillespie A., Richardson R., Valenduc G. & Vendramin P. (1999), *Technology induced atypical work-forms*, report for the Office of technology assessment of the European Parliament (STOA), Luxembourg, April.
- Vendramin P. & Valenduc G. (1999), *New work forms and challenges for public policies*, in the Proceedings of the 6th European Assembly on *Telework and new ways of working*, Aarhus, Denmark, September 1999.
- Vendramin P. & Valenduc G. (2000), *L'avenir du travail dans la société de l'information – enjeux individuels et collectifs*, Éditions l'Harmattan, Paris, décembre 2000 [ISBN 2-7384-9957-0] (*The future of work in the information society*).
- Vendramin P., Valenduc G. & Rolland I. (FTU), Richardson R., Gillespie A. & Belt V. (CURDS), Carré D., Maugéri S. & Combès Y. (LabSIC), Ponzellini A., Pedersini R. & Neri S. (Fond. Seveso) (2000), *Flexible work practices and communication technology (FLEXCOT)*, Report for the European Commission, DG Research, TSER programme, SOE1-CT97-1064, Brussels.

- Valenduc G. & Vendramin P. (2000), 'Electronic resource planning: its roaring success and the risks', *Communications & Strategies*, IDATE, Montpellier, n° 37.
- Valenduc G. & Vendramin P. (2001), 'Telework: from distance working to new forms of flexible work organisation', *Transfer - European Review of Labour and Research*, vol. 7, n° 2, Brussels, p. 244-257.
- Vendramin P. & Valenduc G. (2002), *Technologies et flexibilité*, Editions Liaisons, Collection Entreprises et Carrières, Paris, [ISBN 2-87880-428-7] (*Technology and flexibility*).
- Vendramin P., Valenduc G. & Guffens C. (FTU), Wagner I., Birbaumer A. & Tollar M. (TUW), Ponzellini A. & Moreau M.P. (FRPS), Webster J. (RCWE) (2002), *Women and ICT professions: conceptual framework and state-of-the-art of current research*, Report D1, Project WWW-ICT, Programme IST, European Commission, October 2002. Downloadable from <http://www.ftu-namur.org/www-ict>.
- Valenduc G. & Vendramin P. (2002), 'ICT, flexible working and quality of life', in K. Verlaeckaert & V. Vitorino (eds.), *Unity and diversity: the contribution of the social sciences and the humanities to the European Research Area*, European Commission, Brussels (EUR 20484), p. 186-190.
- Warrant F. & Valenduc G. (2002), 'Innovation in services: a set of criteria to compare innovation support policies', *International Journal of Services Technology and Management, Indersciences*, vol. 3, n° 3.
- Vendramin P. & Valenduc G. (2003), *Internet et inégalités*, Editions Labor, Bruxelles [ISBN 2-8040-1778-8] (*Internet and inequalities*).

#### **A1.5 UPSPS – Panteion University of Political and Social Sciences, Department of Social Policy & Social Anthropology of Panteion - Partner 5**

The Centre for Social Morphology and Social Policy (UPSPS) was founded in 1989 by decision of the Senate of Panteion University of Social and Political Sciences (Athens) and constitutes the research unit of the Department of Social Policy and Social Anthropology. Since the beginning of its operation, the Centre's research activity has concentrated on the following areas: education, immigration flows, employment and industrial relations, gender equality policies, the family, voluntary organisations, living conditions in rural areas, the social dimensions of addiction. Funding agencies of its various international or national programmes have been mainly the EU, as well as other international organisations and national agencies. UPSPS has the requisite infrastructure and human resources to carry out and co-ordinate small and medium size research projects. It employs at present around 30 researchers in its various projects and has links with a great number of national and international research organisations.

##### *Relevant projects*

UPSPS has co-ordinated two RTD projects in the funded by FP4 and FP5 and participated as partner in four such programmes. Overall recent experience in international/EU research programmes includes three projects with UPSPS as co-ordinator and ten projects with UPSPS as partner. Lifelong Learning: The Implications for the Universities in the EU (LLLU), FP4 - TSER; Gender-sensitive and women friendly public policies: a comparative analysis and assessment of their progress and impact (EQUAPOL), FP5 - IHP; Improving Policy Responses and Outcomes of Socio-economic Challenges: Changing Family Structures, Policy and Practices, (IPROSEC), FP5 - IHP; Innovative enterprises, local know-how and euro-mediterranean partnerships (EUROMED HERITAGE II); Does Implementation Matter? Informal Administration Practices and Shifting Immigrant Strategies in Four Member States-IAPASIS, (FP5 - IHP); Reconciliation of Work and the Family, Fifth Action Programme on Gender Equality.

##### *Project personnel*

**Georgia Petraki** is Lecturer on work sociology at Panteion University, Department of Social Policy and Social Anthropology (Greece). She studied economics and sociology in Athens and Paris. She holds a PhD in Sociology of work. She was associate researcher of INE-GSEE from 1993 to 1999. She has participated in research on work organisation-technological changes-labour market. She has published two books on labour markets and several articles about segregation in labour market, work organisation, social structure. Her current research focuses on New Forms of Work Organisation on which she is writing a book.

##### Relevant publications

- Petraki G. (1996), *Industrial politics in employment management and control of work: suggestions on period sequences (1950-1993)*, INE-GSEE, Athens, 182 p.
- Petraki G. (2000), 'Technological changes and the organisation of work in oil and chemicals industry', *Reviews of INE-GSEE* (Institute of Work-General Confederation of Greek Workers), Athens, p. 18-19.

Petraki G. (forthcoming), 'A discussion on class restructuring in modern Greek society', in Koniordos, Maratou-Alibranti & Panayotopoulou (ed.), *Social developments in Greece: Work, family, Deviation*, National Center of Social Research.

**Maria Stratigaki [mstrati@panteion.gr]** has studied economics, sociology and women's studies in Athens (University of Athens), Paris (Paris IX, Paris VII) and New York (NYU). She holds a Doctorate Degree in sociology of work (1994) (title of thesis: Computerisation and gender division of labour. The case of the National Bank of Greece).

She has worked in private business from 1974-1987, in a women's research centre (Diotima) from 1988-1991, and in the European Commission (DG V-Equal Opportunities Unit) from 1991-1999. Her tasks in the EC included action-promoting women in the decision-making and the design of EU gender mainstreaming strategy. She has initiated, co-ordinated and evaluated a large number of studies, policy assessments, conferences and seminars in a variety of gender equality relevant issues. From 1999-2002, she was the Director of the Research Centre for Gender Equality (KETHI) in Greece. Her tasks included direction of research and studies as well as designing of positive actions in favour of women and gender mainstreaming in the Community Support Framework (2000-2006). She has organised the development of Counselling Centres for unemployed and social excluded women in Greece.

She is currently lecturer at Panteion University (Department of Social Policy and Social Anthropology) teaching on Gender, Social Policy and European Social Policy. She has participated in a think tank of the Ministry of Foreign Affairs with a view of integrating gender in foreign policy during the Greek Presidency of the EU (2003).

She has participated in research on women's work, gender and technology, gender in the labour market and gender equality policies. She is currently scientific responsible for the Research Project EQUAPOL (women's friendly public policies) funded under FP5.

She has written articles and books (both in Greek and in English) on gender and technology, women's work and the European social policy.

She has participated and contributed in seminars, congresses, conferences on gender issues at Greek and European level.

She is elected President of the Advisory Committee of Equal Opportunities of the European Commission (2003).

#### Relevant publications

Stratigaki M. & Vaiou D. (1994), 'Women's work and informal activities in Southern Europe', *Environment and Planning*. Special issue on 'Gender in Europe', vol. A. 26, n° 8, p. 1 221-1 234.

Stratigaki M. (1996), *Gender, Work, technology*, O Politis, Athens (in Greek).

Vaiou D. & Stratigaki M. (1997), 'Women in the South: Diverse Experiences of Work in a Unifying Europe', in G. Dijkstra & J. Plantenga, *Gender and Economics. A European Perspective*, p. 104-117, Routledge, London.

Stratigaki M. (2000), 'The European Union and the equal opportunities process', in L. Hantrais, *Gendered policies in Europe: Reconciling employment and family life*, Macmillan, London.

Stratigaki M. (forthcoming), 'The co-optation of gender equality concepts in the EU. The case of reconciliation of work and family', *Social politics*, Oxford University Press.

**Stavros P. Gavroglou** is head of the Labour Market Research department of the Employment Observatory - Research Informatics S.A. (PAEP) in Athens - where he has worked as a researcher from 1998 to 2002. He holds a doctorate in Political Science from Columbia University, New York. He is the representative of Greece in the European Work Organisation Network (EWON). He has participated in international research projects relating to the organization of work. He has edited a book on new forms of work organization and employment. He has written articles on comparative labour market analysis and the socio-economic impact of globalization.

#### Relevant publications

Gavroglou S.P. & Kikilias H. (2001), *Organisation of work and new forms of employment in Greece and Europe*, Sakkoulas, Athens.

Contributor in P. Savage (ed.), *New forms of work organization: the benefits and impact on performance*. Thematic Paper presented to DG Employment & Social Affairs by the European Work Organisation Network EWON, April 2001.

Gavroglou S.P. (2002), 'Globalisation, demystification, and the autonomy of politics', in M. Chletsos (ed.) *Globalization, myths and realities: an interdisciplinary approach*, Patakis, Athens.

Gavroglou S.P. (2002), 'New forms of work organisation, new forms of employment and the quality of work', *Labour Market Yearbook 2002*, PAEP, Athens.

Gavroglou S.P. (2003), 'Part-time employment: dimensions, characteristics, prospects', *Labour Market Yearbook 2003*, PAEP, Athens.

#### **A1.6 UT – University of Twente, School of Business, Public Administration & Technology - Partner 6**

The University of Twente is an entrepreneurial research university for social and technical sciences. It was founded in 1961 and offers education and research in areas ranging from public policy studies and applied physics to biomedical technology. The UT is the Netherlands' only campus university. The school of Business, Public Administration and Technology has its research organised within the Twente Institute for Governance Studies. The department of Organisational Sociology participates both in the school and the research institute. This department has a strong tradition in labour market and welfare state research.

##### *Relevant research projects*

Current projects include, among others, ICT and the emergence of Transitional Labour Markets, A new Organisation of Time Throughout Working Life, Private Pensions and Social Inclusion in Europe, and The Privatisation of Employment Policies.

##### *Project personnel*

With respect to the work to be done for the Consortium WORKS, all the activities will be co-ordinated by dr. Willem Trommel. A second, highly qualified researcher will participate in the IP-team, namely, dr. B. De Vroom, as well as two young fellows who recently received their PhD's, namely dr. R. Ossewaarde and dr. M. Hoogenboom.

**Dr. Willem Trommel**, Associate Professor of Organisational Sociology. Received his PhD from the University of Leyden in 1995, on a thesis analysing firm-level policies towards the early exit of older workers. He is co-ordinator within the Twente Institute for Governance Studies. Member of the Cost A13 network on Changing Labour Markets and Changing Welfare States. Wrote a comprehensive literature study into the impact of Information and Communication Technology on work patterns. Just finished a project reviewing a new institutional organisation of employment policy in the Netherlands and is currently doing a project on the emergence of transitional labour markets. Has extensive experience in case studies and international comparative labour market research.

##### Relevant publications

Trommel W.A. (1994), 'The Loreley-effect of Early Exit', in F. Naschold & B. de Vroom (eds.), *Company and National Policies of Labor Force Participation at the End of the Working Life in Industrial Countries*, Walter de Gruyter, Berlin, p. 51-117.

Trommel W.A. (1997), *De doe-het-zelf-loopbaan. Arbeid, zekerheid en solidariteit in een risicosamenleving*, Labour, Security and Solidarity in a Risk Society, Welboom, Amsterdam.

Van der Veen R. & Trommel W.A. (1999), 'Managed Liberalization of the Dutch Welfare State', *Governance*, vol. 12, n° 3, p. 289-310.

Trommel W.A. (2000), *ICT en nieuwe arbeidspatronen*, ICT & New Work Patterns, Rathenau Instituut, Den Haag.

Trommel W.A. & de Vroom B. (2002), 'New Institutional Forms of Welfare Production: some implications for citizenship', in P. Jensen & J. Goul Andersen, *Changing labour markets, welfare policies and citizenship*, Bristol Policy Press.

**Dr. Bert De Vroom**, Associate Professor of Sociology and Public Policy. Received his PhD from the University of Leyden on a thesis analysing the development of business interest associations in the Dutch food processing and pharmaceutical industry. Has an extensive experience in labour studies, both on the sectoral and firm level. Participates in the management team of Cost A13 and participated in several European research projects, together with Martin Rein, Friedrich Naschold, Anne-Marie Guillemard, and others. Recently he published (with others) a report on the new organisation of working time throughout the working life. Currently he is also working on 'Private Pensions and Social Inclusion in Europe', financed from the fifth framework.

##### Relevant publications

de Vroom B. (2000), 'The Ageing Society', *Employment and Social Policy for Older Workers. USA, the Netherlands, UK, France, Germany, Sweden and Japan, Tokyo*, The Japan Institute of Labour, p. 143-201.

de Vroom B. & Guillemard A.M. (2002), 'Institutional Changes at the End of the Worklife. From Externalisation to Integration of Ageing Workers', in P. Jensen & J. Goul Andersen (eds.), *Changing Labour Markets, Welfare Policies and Citizenship*, Policy Press.

Naegele G., Barkholdt C., de Vroom B., Goul Andersen J. & Krämer K. (2003), *A new organisation of time over working life*, European Foundation, Dublin.

### **A1.7 UESSEX - University of Essex, Institute for Social and Economic Research - Partner 7**

The Institute for Social and Economics Research (UESSEX) is directed by Professor Jonathan Gershuny and employs 51 staff, 28 of whom are researchers at the University of Essex. It incorporates two interdisciplinary research centres with core funding from the Economic and Social Research Council. These are the Research Centre on Micro-social Change (MiSoc) and the UK Longitudinal Studies Centre (ULSC). The ULSC, the survey side of the Institute, generates data and makes it available to the academic community for further analysis. Its first-class research team in MiSoc undertakes a major programme of research on a range of social issues.

The Institute was established in 1989 to conduct the British Household Panel Survey (BHPS), in which the members of 5,000 households are interviewed annually and asked a range of questions about family structure, employment, income, the allocation of household tasks, consumption, health and social values. After 1997 the BHPS formed the basis for the UK contribution to the European Community Household Panel survey.

MiSoc's researchers are drawn from economics, sociology, demography and social statistics. Its programme of research includes the study of income dynamics, demographics, labour market behaviour, education and regional studies.

#### *Relevant research projects*

MiSoc developed major expertise in the quantitative analysis of ICT behaviour through research projects such as *Home-OnLine*, a three-year panel study of the take-up and usage of ICT in the Britain (funded by BT), and the FP5 IST project, *eLiving*. It is a centre of expertise for the study of time use and holds a major historical archive of time-use data.

#### *Project personnel*

**Malcolm Brynin**, a sociologist, is Principal Research Officer in the Institute for Social and Economic Research at the University of Essex. His main research interests are in the impact of education and skills on labour market outcomes and in the effect of eWork on work process and pay, using a number of large-scale data sets such as Labour Force Surveys, the British Household Panel Study, the German Socio-Economic Panel, and eLiving. Recent work includes quantitative analysis of changes in the value of qualifications during a period of rapid educational expansion, the productivity effects of use of a computer on pay, the gender differential in computer usage and its effects, and changes in telework over time and its causes. Malcolm Brynin is Principal Investigator for the UESSEX contribution to eLiving - a Framework 5 IST Programme project which is a panel study over two years of ICT behaviour in 1,750 households in six European countries.

#### Relevant publications

- (2000), 'Education, employment and gender inequality in the family - A comparative analysis of British and German households (with Schupp J.)', *European Sociological Review*, vol. 16, n° 4, p. 349-366.
- (2002), 'Graduate density, gender, and employment', *British Journal of Sociology*, vol. 53, n° 3, p. 363-381.
- (2002), 'Overqualification in employment', *Work, Employment and Society*, vol. 16, n° 4, p. 637-654.
- (2002), 'Teleworking and skills', in B. Stanford-Smith, E. Chiozza & M. Edin, *Challenges and achievements in e-business and e-work*, IOS Press, Amsterdam, p. 395-402.
- (2003), 'Using CASMIN: the Effect of Education on Wages in Britain and Germany', in J. Hoffmeyer-Zlotnik & C. Wolf, *Advances in Cross-National Comparison: A European Working Book for Demographic and Socio-Economic Variables*, Kluwer, Amsterdam, p. 327-344.
- (2003), 'Skill relativities, computers and pay', in P. Cunningham et al. (eds.), *Building the knowledge economy*, IOS Press, Amsterdam, p. 1 526-1 531.

### A1.8 ISB – MTA Szociológiai Kutatóintézete, Institute of Sociology of the Hungarian Academy of Sciences – Partner 8

The Institute of Sociology Budapest (ISB) is affiliated to the Hungarian Academy of Sciences (HAS), which is the highest and most prestigious scientific institution in Hungary. Like all other institutes of the HAS, it functions as a non-profit public organisation. It publishes scientific books and journals.

Its main research topics are: analysis of social processes and inequalities; communications research; East- and Central European comparative research; the elderly; empirical research on social transformation; environmental concepts; innovation processes; institutional changes; modernisation of the economic and technological systems; processes of the information society; the role of human resources; social anthropology and social history; social policies; sociology of organisations; sociology of work; systems of management.

The institute has a Sociological Research Group for Organisation and Work headed by Professor Csaba Mako, having seven research fellows: Peter Csizmadia, Miklos Illesy, Roland Keszi, Daniel Mester, Agnes Simonyi, Akos Szepvolgyi, Peter Tamasi.

The Institute of Sociology has long-standing experience in international comparative research, dating back to the late 1970s. It has co-operated with research partners from all over the world (e.g. Australia, Austria, Belgium, Czech Republic, England, France, Germany, Holland, Italy, Japan, Poland, Russia, Slovakia, Slovenia, Spain, Sweden, United States).

#### *Relevant projects*

Mapping the Relocation of Employment in the Global Information Society (EMERGENCE), EU: Fifth RTD Framework Programme; Statistics and Indicators on the Labour Market in the eEconomy (STILE), DG Information Society. Professional and Ethical Codes for Technology-Related Socio-Economic Research (RESPECT), Information Society Technologies-Programme. Comparing Management Style and Labour Process: Roles of Multinationals and Indigenous Firms, Research Project supported by the Hungarian Social Science Council, Budapest. Regional Innovation System in Comparison: Eleven Countries Project, Research Project supported by EU. Directorate General XII. Targeted Socio-economic Research. Interactions and Synergy between Social Security and Employment - Hungarian Case Study, ILO project. New Systems of Employment - the Intervention of New Actors on the Labour Market, Social Workers Facing the Employment Crisis, French-Hungarian Comparative Study, partner A. Jacob, Paris X. Nanterre). Corporate Social Responsibility, Firm Level Welfare, Comparative study, European Foundation on the Improvement of Living and Working Conditions, Dublin, Ireland. Work and Labour Market Related Securities, ILO Peoples' Security Survey, Hungary.

#### *Project personnel*

**Prof. Csaba Makó** holds both a degree in economics and a doctorate in sociology as well as a number of distinguished professorships. He has held visiting fellowships at the University of Glasgow Business School (under the PHARE programme), at the Institute for Social Sciences at Cho University in Tokyo, and in the USA, under the Eisenhower Foundation Exchange Fellowship scheme. He has also been a visiting professor at Hitotsubashi University, Tokyo, the University of Trento, the University of Quebec in Montreal and the Autonomous University of Barcelona. His research interests include organisational innovation, social conditions of labour, changes in work, skill use, different forms of knowledge, small firm networks, technology transfer and industrial relations in transition. He is president of Management Science Committee, Hungarian Academy of Sciences (member: 1990–, president 1999–); consulting Member of the (IXth) Division of Law and Economics, Hungarian Academy of Sciences (1999–); President of the Committee of 'Management of Transformation Processes' (MOST), Hungarian UNESCO Committee (1999–).

#### Relevant publications

- (1995), 'Employment Relations in Multinational Companies: the Hungarian Case', in E. Dittich, G. Schmidt & R. Whitley (eds.), *Industrial Transformation in Europe: Process and Context*, Sage Publication, London, p. 255–277 (co-authored with Péter Novoszáth).
- (1995), 'Generalists versus Specialists: Skill Use in Comparative Perspective', in E. Asp & H. Leimu (eds.), *Work and Network in Changing Societies*, Sociological Research Reports, University of Turku, Turku, p. 17-31 (co-authored with Péter Novoszáth).
- (1996), *Manpower and Skill Use in the Post-Socialist Firm*, Rikkyo University/Institute for Social Conflict Research, Hungarian Academy of Sciences, Tokyo/Budapest (co-authored with Kiyoshi Kasahara).

- (1997), 'From Monism to Divided Unionism', in G. Schienstock, P. Thompson & F. Traxler (eds.), *Industrial Relations between Command and Market*, NOVA Scientific Publisher Inc., New York, p. 24-43.
- , *Transferring Managerial Competence and Organisation from Western to Eastern Europe*, Final Research Report - EU PHARE ACE Programme, Proposal n° P95-2625, University of Glasgow Business School, Glasgow, March, p. 125.
- (1998), *Workers, Firms and Unions*, (Industrial Relations in Transition), Peter Lang Publishing House, Frankfurt am Main, p. 284 (co-authored with Martin R., Ishikawa A. & Consoli F.).
- (1998), 'Changing Patterns of Employment and Employee Attitude at the Firm Level: the Hungarian Case', in R. Martin, A. Ishikawa, Cs. Makó & F. Consoli (eds.), *Workers, Firms and Unions*, Peter Land Publishing House, Frankfurt am Main, p. 191-210 (co-authored with Péter Novoszáth and Ágnes Veréb).
- (1998), 'Une dimension oubliée du changement systémique: la place des cadres dans la hiérarchie de l'entreprise', *Revue d'études comparatives Est-Ouest*, vol. 29, no. 2, p. 95-110 (co-authored with Marc Ellingstad).
- (1999), 'A Twofold Objective: model their countries' labour relations systems on those of the most developed countries of the European Union, taking into account specific national contexts', *Collective Bargaining: A Fundamental Principle, a Right, a Convention*, Labour Education, Geneva, n° 114-115, January-February, p. 116-124 (co-authored with Ágnes Simonyi).
- (2000), 'Management in Hungary', in M. Warner (ed.), *Management in Europe - Regional Encyclopedia of Business & Management*, Business Press - Thompson Learning, London, p. 252-260 (co-authored with Antal Mokos-Zoltán).
- (2000), 'Changing Patterns of Skill and Manpower Use: Improving Labour Flexibility - An International Comparison', in A. Ishikawa, R. Martin, W. Morawski & V. Rus (eds.), *Workers, Firms and Unions*, Part 2 (The Development of Dual Commitment), Peter Lang Publishing House, Frankfurt am Main/New York, p. 139-156 (co-authored with Péter Novoszáth & Ágnes Veréb).
- , 'Globalisation, Foreign Direct Investments and Modernising Management Practices', *Journal for East European Management Studies*, vol. 5, n° 4, p. 341-360 (co-authored with Marc Ellingstad).

#### **A1.9 ISF MUENCHEN - Institut für Sozialwissenschaftliche Forschung e.V. - Partner 9**

The Institut für Sozialwissenschaftliche Forschung (ISF), München, established in 1965, is a registered non-profit association. ISF MUENCHEN carries out research on topics ranging from new developments in society and work, related to restructuring, technology implementation, personnel and training systems, labor market developments, industrial relations and health. Research findings are prepared for scientific publications, practitioners from companies, and social partners. Projects are funded by the German Federal and State ministries, the European Union, (current project from the 5<sup>th</sup> framework on Policy and Innovation in Low Tech Knowledge Formation (PILOT), various foundations and public agencies, and private companies, the latter usually in conjunction with publicly supported research projects. Currently ISF employs about 20 scientists with degrees in sociology, political science, economics, and engineering as well as doctoral and undergraduate student interns. There are about 8 employees in administrative and support services.

##### *Relevant research projects*

New competency requirements under conditions of distributed work processes; development chances and training needs at the workplace; the co-operative network for prospective work research (KOPRA), all funded by German Federal Ministries; The transformation and restructuring of industrial relations in a political economy of insecurity, funded by the German Research Foundation (DFG). Global structures and governance: the role of national systems of employment regulation, funded by the Volkswagen Foundation.

##### *Project personnel*

**Pamela Meil** is a senior research fellow, director of international projects, and member of the governing board at the Institute for Social Science Research (ISF, München) where she has worked since 1991. Main research interests include: the use of knowledge and skills, work organization and labor market developments, systems of employment regulation in an internationally comparative perspective. She was a member of the Expertenkreis Zukunftsstrategien deutscher Industrie (Advisory group on future strategies for German industry 1995-1998); Euro Net, a working group on issues of qualification, labor-management relations and technology development in the US and Germany funded by the US Ministries of Commerce and Labor; FUTUR, an evaluatory group to set guidelines for future research programs for the German Ministry of Education and Research.

##### Relevant publications

Meil P. (Hrsg.) (1996), *Globalisierung industrieller Produktion*, Campus, Frankfurt/New York.

- Meil P. (1998), 'Der Blick von außen - View from Outside', in B. Lutz (Hrsg.), *Zukunftsperspektiven industrieller Produktion*, Campus, Frankfurt/New York, S. 11-44.
- Flecker J., Meil P. & Pollert A. (1998), 'The Sexual Division of Labour in Process Manufacturing: Economic Restructuring, Training and Women's Work', *European Journal of Industrial Relations*, vol. 4, n° 1, p. 7-34.
- Meil P. (2000), 'The Role of German Labor Organizations in the New Economy', in P. Berg (ed.), *Creating Competitive Capacity*, Sigma, Berlin, S. 81-90.
- Meil P. (2000), 'Blick über die Grenzen - Problemsicht und Lösungsansätze anderer industrieller Länder', in B. Lutz, P. Meil & B. Wiener, *Industrielle Fachkräfte für das 21. Jahrhundert*, Frankfurt/New York, S. 129-157.
- Schmierl K., Heidling, E., Meil P. & Deiß M. (2001), 'Umbruch des Systems industrieller Beziehungen', in U. Beck & W. Bonß (Hrsg.), *Die Modernisierung der Moderne*, Suhrkamp, Frankfurt am Main, S. 233-247.
- Meil P. & Heidling E. (2003), 'Competency Development in Distributed Work Environments', in G. Zülch, S. Stowasser & H. Jagdev (eds.), *Proceedings of the International Working Conference on Human Aspects in Production Management*, vol. 1, *European Series in Industrial Management*, vol. 5, Shaker Verlag, p. 180-187.
- Meil P. & Heidling E. (2004), 'Competency Development in Distributed Work Environments', in G. Zülch & S. Stowasser (eds.), *Integrating Human Aspects in Production Management*, Kluwer Academic Publisher (forthcoming).
- Reuding T. & Meil P. (2004), 'Predictive Value of Assessing Vehicle Interior Design Ergonomics in a Virtual Environment', *Journal of Computing & Information Science in Engineering* (forthcoming).
- Heidling E., Meil P. & Rose H. (2004), 'Neue Anforderungen an Kompetenzen erfahrungsgelernten Arbeitens und selbstgesteuerten Lernens bei industriellen Fachkräften unter Bedingungen verteilter Arbeit', in F. Böhle & N. Sevsay-Tegelhoff (Hrsg.), *Die Bewältigung des Unplanbaren*, Hampf Verlag.

**Wolfgang Dunkel (Dr. phil.)** studied sociology at the University of Munich (1980-1986), worked within the Special Research Unit 333 of the University of Munich on emotion work and on questions of work/life balance especially in the field of nursing (1987-1993), has been a Project Co-ordinator in the field of Public Health (1994-1996) and has been responsible for quality assurance in welfare work (Bezirksverband Oberbayern der Arbeiterwohlfahrt - 1998-2001). Since 2001 he is a member of the academic staff of the ISF MUENCHEN and is currently engaged in research projects on professionalization in nursing and on the conceptualization of interactive service work in a broader sense.

#### Relevant publications

- Dunkel W. (1988), 'Wenn Gefühle zum Arbeitsgegenstand werden - Gefühlsarbeit im Rahmen personenbezogener Dienstleistungstätigkeiten', *Soziale Welt*, 39. Jg., S. 66-85.
- Dunkel W. (1994), *Pflegearbeit - Alltagsarbeit. Eine Untersuchung der Lebensführung von AltenpflegerInnen*, Lambertus, Freiburg.
- Rieder K., Poppitz A. & Dunkel W. (2002), 'Kundenorientierung und Kundenkontrolle im Zugbegleitedienst', *WSI-Mitteilungen*, 55. Jg., Heft 9, S. 505-509.
- Dunkel W. & Rieder K. (2003), 'Interaktionsarbeit zwischen Konflikt und Kooperation', in A. Büssing & J. Glaser (Hrsg.), *Qualität des Arbeitslebens und Dienstleistungsqualität im Krankenhaus. Schriftenreihe 'Organisation und Medizin'*, Hogrefe Verlag, Göttingen, S. 163-180.
- Weihrich M. & Dunkel W. (2003), 'Abstimmungsprobleme in Dienstleistungsbeziehungen. Ein handlungstheoretischer Zugang', *Kölner Zeitschrift für Soziologie und Sozialpsychologie*, 55. Jg., Heft 4, S. 738-761.

### **A1.10 FZK – Forschungszentrum Karlsruhe GmbH, Institute for Technology Assessment and Systems Analysis – Partner 10**

Forschungszentrum Karlsruhe GmbH is an independent science and research institution in Germany with a staff of about 3,500 employees. In the area of technology and environment, the center devotes its attention to research and development work in the interest of the public. It is owned by the Federal Republic of Germany and the State Baden-Württemberg and a member of the Helmholtz Association of National Research Centres. The Institute for Technology Assessment and Systems Analysis (FZK) is one of 16 institutes within the Forschungszentrum Karlsruhe, owned 90% by the German Federal Republic and 10% by the German Federal State of Baden-Württemberg. The core of research at FZK is comprehensive analysis and evaluation of the development and application of technology and its inter-relationship with processes of societal change. The integration in societal and political decision-making processes on the risks and opportunities of technological development also demands reflection on own research practices.

The research programme of FZK is divided into research areas: Sustainable development, Efficient use of resources, New technologies and the information society, Theory and methodology

Since 1990, FZK is operating the Office of Technology Assessment at the German Parliament (TAB). At the European level, FZK is active within the EPTA network (European Parliamentary Technology

Assessment, the International Association for Technology Assessment and Forecasting Institutions (IATAFI), and the European Science and Technology Observatory (ESTO).

One of the research areas of FZK is ICT & Knowledge Society.

#### *Relevant research projects*

Information Society, Work and New Forms of Social Exclusions' (SOWING), TSER project. Change of Working and Living Conditions in the Multimedia Sector from the Perspective of Gender Research (SMBW). Electronic Media and Public Administration - Democratisation and Rationalisation (BMBF). New Media and Culture (TAB).

#### *Project personnel*

**Bettina-Johanna Krings**, M.A. Studies of Political Science, Sociology and Anthropology at the University of Heidelberg, Germany. From 1990 to 1991 employment as a scientific assistant, which was part of an 'Advanced Training Programme in Educational Management and Administration for Technical and Vocational Education' at the German Foundation for International Development' (Deutsche Stiftung für Internationale Entwicklung (DSE)), Mannheim. Since 1994 employment as a scientific officer at the Institute for Technology Assessment and Systems Analysis (FZK) at the Forschungszentrum der Helmholtz Gemeinschaft, Karlsruhe. From 1996 to 1998 support of the project 'Research Policy for a Sustainable Development' (Forschungs- und Technologiepolitik für eine nachhaltige Entwicklung), commissioned and financed by the Office of Technology Assessment of the German Parliament (TAB). Since 1999 participation in some international projects, i.e. in the international project 'Information Society, Work and the Generation of New Forms of Social Exclusion' (SOWING). The project was commissioned and financed by the European Union and belongs to the 'Targeted Socio-Economic Research Programme' of the EU. Project Co-ordinator of the ESTO-project 'R&D-policy for a sustainable development. ESTO stands for European Science and Technology Observatory and offers both an overview of the German concepts of a R&D-policy for sustainable development and analyses possibilities of an European model of R&D-policy according the indicators of sustainable development. From 2000 to 2002 Project Co-ordinator of the project 'Change of the working and living conditions in the Multimedia branch'. This project was financed by the Ministry for Social Affairs of Baden-Württemberg and has developed a specific scientific perspective (gender perspective) on the working conditions of the new media branch.

#### Relevant publications

- Bechmann G., Krings, B.J. & Rader M. (Hg.) (2003), *Across the Divide. Work, Organization and Social Exclusion in the European Information Society*, Berlin.
- Krings B.J. (2003), 'Hen or Egg? The Relationship between IC-Technologies and Social Exclusion', in G. Bechmann, B.J. Krings & M. Rader (Hrsg.), *Across the Divide. Work, Organization and Social Exclusion in the European Information Society*, Berlin, S. 123-138.
- Krings B.J. (2003), 'Individualisierung der Arbeit. Neue Arbeitsstrukturen in der Informationsgesellschaft', in P. Fischer, Ch. Hubig & P. Koslowski (Hg.), *Wirtschaftsethische Fragen der E-Economy*. Heidelberg, S. 256-272.
- Krings B.J. (2003), *Wandel der Arbeits- und Lebensbedingungen im Multimediabereich aus der Gender-perspektive*, Forschungszentrum Karlsruhe, Karlsruhe (Wissenschaftliche Berichte, FZKA 8692).

### **A1.11 FFCT-UNL – Fundação da Faculdade de Ciências e Tecnologia-UNL - Partner 11**

IET is an inter-disciplinary research center, located at the FFCT-UNL, a university faculty of engineering, science and technology. This research center was founded in 2002 from several research groups with experience on national and international networks. These groups develop their activities in the fields of industrial sociology, quality engineering, ergonomics, management systems, foresight on innovation, economy, and organizational studies. This disciplinary expertise enables the research center to develop different types of studies, but the common technical feature is related with innovative systems, both at enterprise level (networks, management, quality systems, strategy), and at working systems level (organization, labor relations, ergonomics and safety, teleworking). The responsables from the research lines institutionally belong to different departments and units at the FCT Campus: Social Sciences (DCSA), Mechanical and Industrial Engineering (DEMI), UNINOVA-Institute for the Development of New Technologies and MadanPark-Park of Science and Technology of Almada-Setúbal.

Research areas are: quality and innovation; prospective analysis, enterprise and entrepreneurship in the new economy; new forms of work and telework; ergonomics and working safety; innovation systems.

*Relevant research projects*

Advanced Science and Technology Policy Planning (ASTPP), TSER-Targeted Social Economical Research (SOE1-CT-96-1013); Production Planning and Management in an Extended Enterprise (PRODNET II), ESPRIT Programme - 22.647, DG III; Information Society, work and new forms of social exclusion (SOWING), TSER-Targeted Social Economical Research Project 1246, Mudança de qualificações e necessidades de formação no sector das Telecomunicações, FORCE Programme, Novos Modelos de Produção na indústria: Análise de casos (NEWMOD) Estudo sobre a influência da Sociedade da Informação no emprego (IS-Emp) A Sociedade da Informação e o emprego (IS-Emp II) Teletrabalho e relações industriais em Portugal: análise dos sectores têxtil e Vestuário, Metalomecânica e indústria de *software* (TeleRisk) Organização do Trabalho, Tempo e Espaço na Indústria Automóvel em Portugal (WORTIS).

*Project personnel*

**António Brandão Moniz**, Sociologist, Associate Professor of Industrial Sociology in the Faculty of Sciences and Technology (UNL-New University of Lisbon) since 1983. Co-ordinator of DCSA at this Faculty (FCT-UNL) since early 2001.

- Founding member and President of the new Research Center on Enterprise and Work Innovation (IET), with the support of the Ministry of Science and Technology (from 2002).
- Visiting researcher at Fraunhofer Institut für Systemtechnik und Innovationsforschung (ISI FhG) (Karlsruhe, Germany), August 2002-March 2003.
- Member of the Experts Committee of the PROINOV programme on innovation support (Ministers Board Presidency), from 2000 until 2002, and member of the Steering Committee for the European Social Survey, organized by European Science Foundation (Strasbourg), since 1997 until 2001.
- Visiting Scholar at the Brown University, Providence (Rhode Island), March-April 1999.
- Member of the Mission for the Society of Information (Ministry of Science and Technology) in representation of the Ministry of Labour and Solidarity, since 1996 until 2000 and National Delegate to the Programme Committee of the TSER-Targeted Social Economical Research (DG XII, European Commission), from 1994 until 1999.
- Director of journal 'Organizações e Trabalho' (Organizations and Work) of APSIOT (edited by Celta) since 1998 and Member of the Editorial Board of journal 'Sociedade e Trabalho' (Society and Labour) of MTS-Ministry of Labour and Solidarity since 1996.
- Member of the Management Board of RC30 'Sociology of Work', of the International Sociological Association (1998-2002), and member of the Steering Committee of LISTART Project-Lisbon and Tagus Valley Technology & Innovation Strategies (RITTS European Program), (1998-1999).

Relevant publications

- (1997), *Evolução das Qualificações e das Estruturas de Formação em Portugal* (coordenação em colaboração com Ilona Kovács), IEFP, Lisboa, 436 p. (Evolution of Qualifications and Structures of Vocational Training).
- (1998), *Toward The Virtual Enterprise Paradigm: a Cultural and Technological Information Network* (with P. Urze & A.L. Osório), CRI-UNINOVA/ISA, Monte de Caparica.
- (1999), 'Políticas de avaliação e de informação estratégica para a Indústria Portuguesa: um contributo para novas práticas de avaliação e de antecipação' (with C. T. Gomes), in J. Caraça & M.M. Godinho (eds.), *O Futuro Tecnológico em Portugal: Situação e perspectivas*, Celta, Oeiras.
- (2000), *I&D, Inovação e Fomento do Emprego* (with C. Moreno, M. Bairrada e S.F. Casaca), IEFP, Lisboa, 160 p.
- (2000), 'Implementation Methodology of Complex Manufacturing Environment in a Brownfield Site' (with P. Urze), in L.C. Matos, H. Afsarmanesh & H.H. Erbe (ed.), *Advances in Networked Enterprises. Virtual Organizations, Balanced Automation and Systems Integration*, Kluwer, Boston, p. 237-248.
- (2001), 'Condições de cooperação interempresas no conceito de empresa virtual: o caso do setor automobilístico em Portugal' (with I. Kovács), in N.A. Guimarães & S. Martin (orgs.), *Competitividade e Desenvolvimento: Atores e Instituições Locais*, SENAC, São Paulo.
- (2002), 'Technological practices in the European auto industry: Exploring cases from Belgium, Germany and Portugal' (with B.J. Krings and the collaboration of G. Van Hootegem and R. Huys), *International Journal of Automotive Technology and Management*, vol. 2, Geneva.
- (2003), 'Work organisation in industry: Practices of use of IT in Portugal', in G. Bechmann, B.J. Krings & M. Rader (orgs.), *Across the Divide: Work, Organization and Social Exclusion in the European Information Society*, Ed. Sigma, Berlin.

### **A1.12 NIWL - National Institute for Working Life, Department for Research on Development Processes – Partner 12**

The National Institute for Working Life carries out research and development into the conditions of the individual in the changing world of work, focusing primarily on six areas: occupational health, organisation of work, the labour market, ergonomics and stress, physical and chemical health risks, and integration and development processes. The work of the institute is to help to bring together growth and good working conditions to create a sustainable working life. It is also to contribute to ensuring that working life is characterised by diversity and equal opportunities between women and men. Research is multi-disciplinary and is run by the institute or in partnership with other bodies. Working life research has a high status in Sweden and the National Institute for Working Life has leading edge expertise in certain strategic areas. Our goal is to carry out high quality research which is also practically relevant in the world of work. The results of our research are to be of benefit in the workplace, while we in turn draw on experience from the workplace in our research. This requires constant contact and dialogue with those actively involved in working life. With this in mind, the National Institute for Working Life is working to find forms in which fruitful interaction between research and practice can be achieved.

The National Institute for Working Life seeks to act as an arena for encounters between different players in the world of work - an arena which can help to widen public debate on the way our working lives are developing. The National Institute for Working Life's mandate includes acting as a national center of knowledge. This means that the institute is to be responsible for the general provision of knowledge to the sector, passing on and disseminating knowledge and monitoring long-term developments in working life. Our training, e.g. courses for corporate health care specialists and union representatives, is particularly important in placing research in a concrete and practical context out in the workplace. The National Institute for Working Life provides learning opportunities related to the development, problems and opportunities which arise in modern working life. The different pedagogical products take up the experiences and results from the Institute's research activities. The Institute arranges extended as well as short learning programmes at different levels, often in collaboration with colleges and regional universities. Many of our courses are arranged in co-operation with other organisations, for example, adult education associations or labour market organisations.

#### *Relevant research projects*

- Methodological input from the project around the Nordic anthology: Where have all the structures gone? Doing gender in organisations with example from Finland, Norway and Sweden. This anthology consists of 10 contributors with heavy empirical work from the field of gender and modern organisations. Several of the case studies are particularly interesting with reference to a better understanding of what a knowledge-based society is from a gender perspective. The focus is particularly on making gender visible in new forms of flexible organisations that are strongly promoting informalization and individualisation with example mainly from different kinds of knowledge production companies.
- The project: Gender equity and gender science - an integration and competence increasing project within Vinnova's (a research- and development authority) organisation and field of research and development. This project has an interactive research perspective, meaning that the production of knowledge is based on a close interactivity between the researchers and the so-called practitioners. The project will by using the method of 'pilots of change' initiate development processes aiming at a gender equity integration and an increased competence in the field of gender when formulating programme areas and treating research applications. This company is interesting with reference both to methods used but also it terms of embedded aspects of interpretations of the meaning of a knowledge society.

#### *Project personnel*

**Professor Ewa Gunnarsson** holds professorships at the National Institute for Working Life and Luleå University of Technology, Work Sciences department. With a Master of Science in Ergonomics, from Loughborough University of Technology, Great Britain and a PhD in Work Sciences, Luleå University of Technology, Luleå she was from 1998-2000 assistant head of the Center for Women's Studies, University of Stockholm. She is currently Head of the Metropolis programme at the NIWL and one of four Nordic experts at the The Research Council of Norway, area Culture and Society (including the field of working Life Research).

Relevant publications

- Gunnarsson E. & Trojer L. (eds.) (1994), *Feminist Voices on Gender, Technology and Ethics*, Center for Women's Studies, Luleå University of Technology.
- Gunnarsson E. & Huws U (eds.) (1997), *Virtually Free? Gender Work and Spatial Choice*, NUTEK Förlag.
- Gunnarsson E. (2002), 'Nomads and 'groundeds' in flexible organisations – gendered dilemmas in balancing flexibility, mobility and stability in two Swedish organisations', Paper presented at the EMERGENCE conference *The World, the Workplace and We the Workers*, Brussels, 16-17 April 2002.
- Gunnarsson E. et al. (eds.) (2003), *Where Have All the Structures Gone? Doing Gender in Organisations with Examples from Finland, Norway and Sweden*, Center for Women's Studies, University of Stockholm.

**A1.13 IRES - Istituto di Ricerche Economiche e Sociali – Partner 13**

IRES, Economic and Social Research Institute, was founded in 1979 by CGIL and today is a non-profit association specialised in economic and social researches.

IRES has always strived to develop dynamic linkages between theory and research; knowledge and trade union, thus researches have been focused on issues related to labour, economy and the changing society. The wide range of researches undertaken by IRES over the years necessitated an organisational structure based on various research areas and observatories each with their own tasks and targets. The research areas, run by internal staff members, analyse and interpret the most significant contemporary aspects of their respective fields, constituting the core of the institute's activities. For specific projects or studies IRES utilises a network of consultants and external researchers. The research areas are: Labour market, Welfare and citizenship rights, Environment and sustainable development, Economic and local development, Industrial relations and bargaining. The observatories regularly monitor the following social economic phenomena: Immigration, Atypical work, Hidden labour market, Bargaining.

Relevant research projects

- Representation and voice in small and medium-sized European enterprises: Monitoring Actors, Labour organisations and Legal frameworks (SMALL), 5th Framework Program.
- Globalisation and Industrial Relations (GLO.R.I.), European Commission Employment and Social Affairs DG.
- Small-medium enterprises and industrial relations: which workers participation after the EU directive 2002/14? (SMERI), European Commission Employment and Social Affairs DG.
- The challenge of mainstreaming for trade unions in Europe: how can trade Unions foster Gender Equality in the Work place and in Daily Life (MSU), European Commission; HPSE-CT.
- Statistics and indicators on the labour market in the new-economy (STILE), UE, FPV, DGV; IST-2000.
- Expertises Development in the Local Agenda XXI Work, UE - LEONARDO - Pilot Project –DGXII.
- Lifelong learning enforcement and the empowerment of older workers (LLEEO), UE, LEONARDO, DGXII.
- Estimation and Mapping of Employment Relocation in a Global Economy in the New Communications Environment (EMERGENCE), UE, FPV, DGV; IST-1999.
- Tableau d'Observation Sociale des Centres d'Appel. A picture of social observation of call centres (TOSCA), UE, FPV, DGV; IST 1999.
- Le défi du mainstreaming pour le syndicalisme en Europe: comment intégrer l'égalité entre hommes et femmes, au travail et dans la vie, par les organisations syndicales? (CODELFI), UE, FPV, DGV.
- Information Society, Work and the Generation of New Forms of Social Exclusion (SOWING), UE, TSER.
- Expérience Pilotes de formation de représentants syndicaux pour Négocier la formation professionnelle au Télétravail dans l'Entreprise (EPINETTE), UE, LEONARDO, DGXXII.
- Telework practices in corporate network (Te.Pra.Co.N.), UE, ADAPT-bis, DGXIII.
- Networking for regional innovation processes towards agenda XXI (NERIPRO), ADAPT, DGXIII.
- Community empowerment through distance education in the information society (CEDIS), UE, ISPO, DGXIII.
- Learning Region. Innovating by networking. The innovation architecture and transferability of competence. Strategies for the local system in Emilia Romagna and Basilicata, UE, ADAPT, DGXIII.
- Qualification of the workers' representatives: needs analysis and definition of professional profile (CRETA), UE, ADAPT, DGXIII.

- Women's qualification for new technologies and new forms of work organisation: needs analysis and voc. Upd. Strategies, UE, LEONARDO, DGXXII.
- Qualification Measurement Instruments: Integrated Individual and Company Level Self-Evaluation Instrument to Measure the Contribution of Continuous Training to the Company's Innovation Process, LEONARDO, UE, DGXXII.
- Evaluation of CVT measures and funding models in European Countries through the assessment of costs and benefits. A search for change: the role of intermediate institutions. Attività: Valutazione, attraverso l'analisi costi e benefici delle attività di formazione continua, promosse dalle istituzioni intermedie, UE, CEDEFOP.

#### *Project personnel*

**Giovanna Altieri** has been employed by IRES since 1973 and its director since 1998. An economist and business studies graduate, with a post-graduate diploma in economy management she is the co-ordinator of labour market research at IRES. In this capacity, she has co-ordinated various research groups on themes concerning the labour market and policies to reduce unemployment, social exclusion and to promote equal opportunity. She has carried out studies on new form of employment (related to ICT); labour market segmentation and local market indicators in the prospective to revitalise local areas with deficit of development. She has also organised various seminars and workshops, promoting debate and discussion on these topics with people from different areas (University, institutions, and trade unions). She has also published widely and is an acknowledged authority on gender issues in the labour market.

#### Relevant publications

- (1995), 'Le trasformazioni in atto nel mercato del lavoro: necessità di un approccio di genere', *Sociologia del Lavoro*, n° 59/60, Angeli, Milano.
- (1997), 'Lavoro nero e irregolare: eterogeneità del fenomeno e differenziazione delle politiche per favorire l'emersione', *L'Assistenza Sociale*, n° 3.
- (1997), 'Learning Regions, Una strategia per lo sviluppo dei sistemi locali meridionali' (a cura di G. Altieri e F. Belussi), *Ires Materiali*, n° 1.
- (1998), 'Trasformazioni nel mercato del lavoro italiano: necessità di nuove forme di regolazione', in R. Bellofiore (a cura di), *Il lavoro di domani*, Ed. BFS, Pisa.
- (2000), 'Il popolo del 10%. Il boom del lavoro atipico' (con M. Carrieri), Donzelli ed. Roma.
- (2000), 'Lavori a distanza', *Lavoro e Informazione*, n° 22, 30 novembre 2000.
- (2000), 'Rapporto sul lavoro atipico in Italia' (con C. Oteri), in supplemento a *Nuova Rassegna Sindacale*, del 26/09/2000.
- (2001), 'New economy, lavori atipici e conseguenze di genere', in via di pubblicazione, *Il diritto del mercato del lavoro*, n° 2.
- (2001), 'La flessibilità chiama il call center risponde', *Quaderni di Rassegna Sindacale*, n° 3.
- (2001), 'I lavoratori atipici: analisi e prospettive', *Quaderni di Rassegna Sindacale*, n° 3.
- (2001), *Lavoro flessibile: cosa pensano imprenditori e manager* (con A. Accornero e C. Oteri), Ediesse 2001, Roma.
- (2002), *Lavorare nei call center: un'analisi europea* (a cura di), Ediesse 2002, Roma.
- (2002), 'La flexibilité du marché du travail: débat politique, pratiques de terrain', *Chronique Internationale de l'IRES*, n. 76.
- (2003), 'Le molte forme della flessibilità', *L'Assistenza Sociale*, n° 1/2.
- (2003), *Il lavoro interinale come sistema. Bilancio di un quinquennio* (con C. Oteri) Ediesse, Collana Studi e Ricerche IRES, Roma.

#### **A1.14 SINTEF - Stiftelsen for industriell og teknisk forskning ved Norges tekniske høyskole, Industrial Management – Partner 14**

SINTEF is a multidisciplinary organisation that finds intelligent, profitable solutions based on research and development in technology, the natural sciences, medicine and the social sciences. Technology for a better society is SINTEF's vision. SINTEF is structured into eight institutes and is Scandinavia's largest independent research organisation with about 1700 employees of whom around 70% are researchers. Contracts for industry and the public sector generate more than 90% of income. Contracts for industry and the public sector generated more than 90% of our income, while 7% came in the form of basic grants from the Research Council of Norway. SINTEF is a participant in the EU's Framework Programme - as both Project Co-ordinator and project member. In 2001, SINTEF participated in 66 different projects. The EU funding amounted to approximately NOK 70 million. SINTEF collaborates closely with the Norwegian

University of Science and Technology (NTNU) and the University of Oslo (University of Oslo). Personnel from NTNU work on SINTEF projects, while SINTEF staff teaches at NTNU. The SINTEF-NTNU community involves the widespread joint use of laboratories and equipment. A similar program of co-operation is being developed with the Faculty of Mathematics and Natural Sciences at the University of Oslo.

SINTEF Industrial Management is one of SINTEF's eight institutes. It is composed of eight departments and has 170 employees. SINTEF Industrial Management's goal is to help its clients find solutions that will improve competitiveness and the value-adding process in industry and society. Technology transfer to small companies, research on good working conditions and the development of integrated production systems are among our areas of activity. We also focus on knowledge management in companies and develop risk analysis scenarios for safety in industry, transport and the offshore sector. Other important areas of activity include the development of management skills, processes of change and performance measurement methods.

*The department: SINTEF Industrial Management, New Praxis*

Our research focus is on work environment and enterprise development issues. Key words are: Enterprise/company, organisational and management development, Work environment, Globalisation and socio-cultural studies in and around companies, Evaluation of business development initiatives, Restructuring of public sector (effects of privatisation, public sector activities exposed to competition).

New Praxis employs a total of 17 researchers, as well as a secretary. The researchers have long and broad experience as work-life researchers. Major clients are: Confederation of employers, Trade unions, public agencies as well as private enterprises. The background of the researchers is anthropologists, psychologists, sociologists and social engineers graduated from the Institute of Industrial Economics and Technology Management at The Norwegian University of Science and Technology. We have four advisors from the Norwegian University of Science and Technology in Trondheim (NTNU) and from the University of Cornell, Ithaca, New York.

*Relevant research projects*

Health in Working Life, a multidisciplinary project funded by the Norwegian Research Council (Health and Medicine); Boundless Working Environment as a result of Globalization, funded by the Confederation of Norwegian Business and Industry (NHO); The Faceless Worker: How to develop Call Centers into an attractive working environment?, funded by the Confederation of Norwegian Business and Industry (NHO).

*Project personnel*

**Carla Dahl-Jørgensen** received her PhD at NTNU in 1993 in the area of working life, gender and family planning. In 1993 she started working as a researcher at SINTEF Industrial Management at the department of Social Research in Industry (IFIM) and in the year of 2000 transferred to the department of New Praxis. In 2003 she received her professorship at the Institute of Social Anthropology at the Norwegian University of Science and Technology, NTNU, but also continues her research position at SINTEF. Her research topics are in the fields of health and working environment, new forms of work organization, occupational identity and internationalization of working life.

Relevant publications

- Dahl-Jørgensen C. & Damman S. (2000), 'Kjønn, arbeid og grensesetting blant kvinner i frontlinjeyrker' (Gender, Work and boundary making among women in front line work), in B. Bjerring (ed.), *Hvor går grænsen?*, Samfundslitteratur, Copenhagen.
- Dahl-Jørgensen C. & Elvemo J. (2000), 'Bedrifter uten grenser- betingelser for utvikling i globalEssexte landskap' (Companies without borders- conditions for development in a globalized landscape), in M. Rolfsen (ed.), *Trendenes Tyranni*, Fagbokforlaget, Bergen.
- Forseth U. & Dahl-Jørgensen C. (2002), 'Sur la ligne de feu: transformation du travail relationnel dans un centre commercial et une banque en Norvège', *Travailler- Revue Internationale de Psychopathologie et de Psychodynamique de Travail*, vol. 9.
- Dahl-Jørgensen C. & Dreyer H.C. (2002), 'Norwegian subsidiaries in global companies', *Magma Tidsskrift for økonomi og ledelse*, vol. 5, n° 5/6.
- Dahl-Jørgensen C., Opdahl Mo T. & Saksvik P.Ø. (2002), 'Absenteeism as a coping strategy for better health? The results from an intervention project', *Tidsskrift for samfunnsforskning*, vol. 43, n° 1, p. 3-29.
- Dahl-Jørgensen C., Torvatn H. & Rasmussen B. (2002), 'Faceless from a distance', in B. Rasmussen & U. Forseth (ed.), *Arbeid for livet (Work for a lifetime)*, Gyldendal, Oslo.

Dahl-Jørgensen C. (2003), 'Managing insecurity in a global world: Thinking locally as a way of survival', *Tidsskrift for Arbejdsliv*, vol. 1.

**Hans Torvatn** is senior researcher at the Institute of Industrial management. He received his PhD in industrial economics in 1993 at Norwegian Institute of Technology. Since 1993 he is researcher at SINTEF Industrial Management. He is member of the editorial board of the Journal of Evaluation and Program Planning. His main fields of competence are: Evaluations and theory of evaluations, Public support systems for SMEs, Occupational Health and Safety Systems, Absenteeism, Occupational Health.

#### Relevant publications

Torvatn H. (1998), 'Evaluation of Industrial Development in Norway', *New Directions for Evaluation*, vol. 77, p. 71-87.

Nytrø K., Saksvik, P.Ø. & Torvatn H. (1998), Organizational prerequisites for implementation of Systematic Health, Environment and Safety Work in Enterprises', *Safety Science*, vol. 30, p. 297-307.

Torvatn H. (1999), 'Using program theory models in evaluation of industrial modernization programs: Three case studies', *Evaluation and program planning*, vol. 22, n° 1, p. 73-82.

Dahl-Jørgensen C. & Torvatn H. (2000), 'McDonaldUEssex av en annen bransje: Utvikling av arbeidsmiljø for selgere i næringsmiddelindustrien', *Søkelys på arbeidsmarkedet*, vol. 17, p. 235-244.

Hammer T.H., Saksvik P.Ø., Nytrø K., Torvatn H. & Bayazit M. (forthcoming), 'Expanding the domain of the psychosocial work environment: Workplace norms and work-family conflict as predictors of stress and subjective health symptoms', *Journal of Occupational Health Psychology*.

### **A1.15 ATK Arbetstagarkonsultation AB, Arbetsliv – Partner 15**

ATK Arbetstagarkonsultation AB is a small Swedish consultant/research-company oriented primarily towards supporting the employees and their organisations in times of change. The company consists in 2003 of 9 consultants. It has been in operation since 1979. It started up as a company focusing on consultancy to local unions. This was based on the co-determination act and agreements in different sectors allowing local unions to use expertconsultants based on the criteria of change which had severe impact on the level of employment in the company. Based on the knowledge developed through the consultancy assignments and the background and interests of individual consultants ATK has from this developed other services and types of assignments ranging from support to local partnerships to RTD-projects. From the start up until this day ATK has performed over 2,500 assignments (consultancy as well as research, development and evaluation projects). The company is today focused on two business areas:

- *Arbetstagarkonsult. AB* focused on the support to local unions based on sectoral agreements - mainly on restructuring, relocation, outsourcing and organisational and technological change, in the private as well as the public sector, in both industry and in the service sector, large companies as well as SMEs;
- *ATK Arbetsliv* focused on knowledge development and support on work life issues through research and development projects, investigations/evaluations and joint consultancy to local parties.

The specific areas of interest where the company has build up knowledge and support activities are: Change processes and their impact on employees and business development; Redeployment and re-sizing - how to manage organisations and individuals in transformation processes with redundance; Mobility and rehabilitation in co-operation; Industrial relations and systems for co-operation on organisational level - how to build mutual trust and capacity for change; Work environment an how to support the OHS-organisation with knowledge; Work organisation and new technology, i.e. studies on call centers, RTD-strategies in work and ICT.

In 1996 the company initiated the creation of the European Employee Support Network (EESUN) a network of SME:s and research institutes working with consultancy, research and development from an employee perspective. The purpose of the network is to support the members in developing knowledge and services in a European perspective and also to initiate joint projects and assignments.

#### *Relevant research projects*

ATK has carried out transnational projects - two in the framework of the ADAPT-programme.

- Employee participation in the transformation to modern organisations - a project built on case studies in France, Denmark and Sweden - in co-operation between Arete (France), Centre for alternative social analysis (Denmark).

- Joint Union learning; a learning programme for union representatives - union officials and representatives in works councils in France, Sweden, the Netherlands and the UK with the purpose to investigate modernisation and globalisation in working life from an employee and union perspective

ATK has also been involved in two European projects concerning European Works Councils and its functions and operation. The last one (2003) was a joint study on EWC in 40 companies and their subsidiaries in Sweden, France, German, Italy and the UK financed and organised by the European Foundation for the working and living conditions.

#### *Project personnel*

**Per Tengblad**, Master degree in Business Administration, Stockholm School of Economics. ATK since 1985. Before that union official and organisational developer in the Swedish Defence. Works as consultant, researcher and trainer. Key qualifications in the areas of: Organisational development, change strategies and participative organisational design; Human Resource Management with a focus on learning, redeployment, work organisation and work environment: Changes in working life an industrial relations - management and union strategies. A selection of projects and assignments: Project-manager, 'Recycling in working life', European Social Fund/ADAPT and the Swedish Council for Work Life Research (1996-1999); Researcher, Evaluating a pro-active redeployment strategies, The Job-security foundation (1998); Program-leader, 'Joint union learning' - a transnational training programme for union and works council representatives on the globalisation and modernisation in working life, European Social Fund/ADAPT and the National Institute for Working Life (1998-1999); Project Co-ordinator, 'Call centres in development' on sustainable work with customers at a distance. (2000-2001); Project-manager: 'Work & ICT'; A study on the the need for RTD in sustainable work and information technology, The Swedish Council for Work Life Research (2001); Researcher, Information and knowledge support for OHS-officers in Swedish work places/The National Institute for Working Life (2000); Researcher: Functioning of European Works Councils, IMIT/European Foundation for the working and living conditions (2002-2003); Researcher; Developing a programme for supporting co-operation between employers aiming at making the work with rehabilitation and prevention activities; Consultancy assignments between 1995-2002 (examples); The Swedish Government and Ministries, The National Road Authority, The Swedish Police Service, Folksam Insurance Company, The Museum for World Culture, The National Pharmacy, Nolato AB.

#### Relevant publications

Tengblad P. (1999), *To create mobility - social strategies and methods for effective transformation of organisations*, ATK Arbetstagarkonsultation AB.

Tengblad P. (1999), *Strengthen your labour market value - on individual orientation and adaptation in a modern working life*, ATK Arbetstagarkonsultation AB.

Tengblad P. (1999), *Human Respons to modernisation -Organisational and individual adaptation in a changing working life*, The EU ADAPT-initiative (in English).

Tengblad P. (2001), *Work and information technology*, the Swedish Council for Work Life Research.

Tengblad P. (2002), *Sustainable jobs in the information society*, VINNOVA.

Tengblad P. (2002), *Secure in redeployment*, The Job Security Foundation.

Tengblad P., *Case studies on European Works Councils in Atlas Copco, Electrolux and IKEA*, IMIT (in English).

**Caroline Stjernström**, Masters degree in psychology 2000 with focus on work organisation and human resources at the University of Stockholm, Doctoral studies and research projects at Stockholm University, the Department of Psychology, Work as testleader for psychological employment tests at different consultant firms, ATK from 2003. Key qualifications in Qualitative and quantitative research methods in work life research; Work psychology. Assignments and projects: Organisational flexibility and its impacts on employees and their work situation (Stockholm University); Quantitative analysis of individual wage systems and its effects on the employees in the finance sector (Union of Financial Employees); SALTSA project on performance and health (Arbetslivsinstitutet, l'Université Européenne du Travail); Co-operation between employers on rehabilitation and prevention (ATK Arbetsliv); Local wage formation in the state sector (ATK Arbetsliv, ongoing).

#### Relevant publications

-- (2002), *Performance, Decision Latitude and Health in the Modern Working life* (together with Johnny Hellgren), SALTSA report n° 3.

-- (2002), *The modern working life: Its impact on employee attitudes, performance and health - a literature review on Swedish research*, SALTSA report n° 4.

#### A1.16 CEE – Partner 17

CEE is a public research institute connected with both the French Ministries of Employment and Education (the latter also includes research and technology). The CEE has a permanent team of some 40 researchers (sociologists, economists, statisticians) working in partnership with public agencies, with the CNRS and other university research teams. Their research work and studies have helped guide public authorities, along with social and economic leaders, in their initiatives concerning changes in the nature of employment due to market and technological evolutions, the organization of labour and company policy, the evaluation of employment policies, the mechanisms of the labour market, and the status and behaviour of the working population. The Centre d'Études de l'Emploi works closely with the Employment Ministry, with governmental statistical research institutes such as Dares, and other public administered agencies (ANPE, AFPA). The Centre collaborates with diverse public authorities: Ministries of Culture, Education, Environment; Commissariat au Plan; Comité interministériel de l'évaluation; etc. There are also studies assignments contracted with other organizations concerned with employment: local authorities; associations; Agefiph; and several major companies.

##### *Project personnel*

**Nathalie Greenan** is a graduate from Ecole Normale Supérieure de Cachan (France) and a laureate of the 'Agrégation de sciences sociales'. She is also a graduate in Economics and Sociology from the Sorbonne (Paris I and Paris V universities) and she has received a PhD in economics at the Ecole de Hautes Etudes en Sciences Sociales. Nathalie Greenan worked at the French National Institute of Statistics and Economics Studies (INSEE) between 1990 and 1996 and is now a CNRS researcher appointed full time at the Centre d'Études de l'Emploi. Her main interests are in the theoretical and empirical study of organisational and technological change within firms, trying to assess the economic performances of these changes and their impact on the labour market (job content and job satisfaction, skill mix, turnover, wage structure). She has also been responsible for the development of new data sources on these topics in collaboration with the national statistical office and she has worked on related methodological issues.

##### Relevant publications

- Greenan N. (2003), « Organisational change, technology, employment and skills: an empirical study of French manufacturing », *Cambridge Journal of Economics*, Vol. 27, Number 2, pp.287-316.
- Greenan N., L'Horty Y. and Mairesse J. (eds) (2002), *Productivity, Inequality and the Digital Economy*, MIT press.
- Caroli E., Greenan N. and Guellec D. (2001), « Organisational Change and Skill Accumulation », *Industrial and Corporate Change*, Vol. 10, N°2, juin, pp. 481-506.
- Greenan N., Mairesse J. and Topiol-Bensaid A. (2001), « Information Technology and Research and Development Impacts on Productivity and Skills : Looking for Correlations on French Firm-Level Data », in M. Pohjola (ed), *Information Technology productivity and Economic growth*, Oxford University Press, chap. 6, pp. 119-148.
- Greenan N. and Guellec D. (2000), « Technological Innovation and Employment Reallocation » *Labour*, Vol. 14, N°4, winter, pp. 547-590.
- Greenan N. and Mairesse J. (2000), « Computer and Productivity in France : Some Evidence », *Economics of Innovation and New Technologies*, vol. 9, pp. 275-315.
- Mairesse J. and Greenan N. (1999), « Using Employee Level Data in a Firm Level Econometric Study », in Haltiwanger J.C., Lane J.I., Spletzer J.R., Theeuwes J.J.M. and Troske K.R. (eds.), *The Creation and Analysis of Employer-Employee Matched Data*, chap. 19, pp. 489-512, Elsevier Science, 1999.

**Christian Bessy** is graduate from Ecole Normale Supérieure de Cachan (France) and a laureate of the "Agrégation d'Economie et de Gestion". He has received a PHD in economics at the University of Paris-Panthéon-Sorbonne. He is currently attached to the CEE as a CNRS researcher. He is also an Associate Researcher, at Institutions and Dynamics of Historical Economics (IDHE, ENS de Cachan). He is specialised in Institutional economics, Recruitment and labour market intermediaries, Knowledge transfer and intellectual property rights. He has been a visiting scholar at the Washington University of Saint Louis (Missouri).

Relevant publications

- Bessy C. (2004), "Certification of occupational competencies in the UK, comparison with the French experience », in *Nomenclature et Classification*, sous la direction de A. Stanziani et J. Bourdieu ed., série "Actes et communications" dans *Cahiers d'économie et de sociologie rurale*.
- Bessy C. (2003), "Distributed Cognition and the Theory of the Firm: Enriching Nelson and Winter's Evolutionary Analysis of Organisational Learning and Memory", *Economie Appliquée*, n°4, 2003.
- Bessy C. and Favereau O. (2004), « Institutions et Economie des Conventions », *Cahiers d'Economie Politique*, n° 44, 2003.
- Bessy C. (2002), "Institutional Embeddedness of Economic Exchange, Convergence between New Institutional Economics and the Economics of Conventions", in *Conventions and Structures in Economic Organization*, O. Favereau et E. Lazega (eds), Londres, Edward Elgar, 2002.
- Bessy C., Eymard-Duvernay, F., de Larquier, G. and Marchal E. (eds), *Des marchés du travail équitables ? Une approche comparative France/Royaume-Uni*, Bruxelles, P.I.E.-Peter Lang, 2001.
- Bessy C. and Brousseau E., "Licensing of Technology: Various Contracts for Diverse Transactions", *International Review of Law and Economics*, 18 : 451-489, 1998.
- Bessy C. and Eymard-Duvernay F. (eds) *Les intermédiaires du marché du travail*, PUF, 1997.

**Richard Duhautois** is an economist and a researcher at the CEE. He studied economics and statistics at the Ecole nationale de la statistique et de l'analyse de l'information (ENSAI) and received his Phd (on publications) in 2004. He worked at the French National Institute of Statistics and Economics Studies (INSEE) from 1998 to 2004. He has also been an associate researcher at CREST since 2001. Richard Duhautois makes research in empirical labour economics - such as gross job reallocation and workers mobility - and in empirical production economics – such as productivity and investment analysis.

Relevant publications

- Duhautois R. (2004), « Investissement », *Encyclopedia Universalis* version 10.
- Delarre S. and R. Duhautois (2004), « La mobilité intra-groupe des salariés : le poids de la proximité géographique et structural », *Economie et Statistique* n° 369-370.
- Crépon B. and R. Duhautois (2004), « Ralentissement de la productivité et réallocation d'emplois : deux régimes de croissance », *Economie et Statistique* n° 367.
- Duhautois R. (2002), « Le processus d'ajustement de l'emploi en France dans les années 90 : une approche par les flux bruts d'emploi », *Economie et Statistique* n° 351.
- Duhautois, R. and S. Jamet (2002), « Hétérogénéité des comportements d'investissement et fluctuations de l'investissement agrégé », *Economie et Prévision* n° 149.
- Duhautois R. (2001), « Le ralentissement de l'investissement est le fait des petites entreprises du secteur tertiaire », *Economie et Statistique* n° 341-342.

**Michel Gollac** is currently scientific advisor of the director of the CEE. His main research topics are: new technologies at work, new forms of organization, working conditions and equity in pay. Formerly he was scientific coordinator of the "workers and organizations" research unit in CEE and, previously, head of the working conditions and industrial relations division of the statistics and research service in the French Ministry of employment and work. He directed several large statistical surveys and organized several interdisciplinary and international seminars and conferences.

Relevant publications

- Baudelot C., Gollac M., Bessière C., Coutant I., Godechot O., Serre D. and Viguié F. (2003), *Travailler pour être heureux ?*, Fayard, Paris.
- Gollac M. and Volkoff S. (2002), « La Mise au travail des stéréotypes de genre : les conditions de travail des ouvrières », *Travail, genre et sociétés*, n°8, septembre
- Gollac M. and Kramarz F. (2000), "L'informatique comme pratique et comme croyance", *Actes de la recherche en sciences sociales*, n° 134, septembre
- Entorf H., Gollac M. and Kramarz F. (1999), « Technologies, Wages and Worker Selection », *Journal of Labor Economics*, vol. 17, n° 3.
- Gollac M. (1997), "Des chiffres insensés ? Pourquoi et comment on donne un sens aux données", *Revue française de sociologie*, n° XXXVIII-1.
- Gollac M. and Volkoff S. (1996), "Citius, altius, fortius : l'intensification du travail", *Actes de la recherche en sciences sociales*, n° 114.
- Cézard M., Dussert F. and Gollac M. (1992), « Taylor va au marché : organisation du travail et informatique », *Travail et Emploi*, n°54.

**Danièle Guillemot**, statistician and economist, is a civil servant (“administrateur”) from the French National Institute of Statistics and Economics Studies (INSEE). She studied statistics and economics at ENSAE (Ecole Nationale de la Statistique et de l’Administration Economique, 1989-1991) and received a master’s degree in economics (with a specialty in work and human Resources) from the University of Paris I in 1982. As Head of the Living Conditions Unit in INSEE, she organized numerous statistical surveys as the “Minimal income Recipients Survey” in 1998, “Time-Budget Survey” in 1999, “Homeless Survey” in 2001, and “Health Survey” in 2003. She is currently attached to the CEE as a researcher, and co-organizes the new 2006 edition of a matched employer and employee survey on “Organizational Change and Computerization” (C.O.I. survey).

#### Relevant publications

- Guillemot D., Petour P. and Zajdela H. (2002), “ Trappe à chômage ou trappe à pauvreté : quel est le sort des allocataires du RMI ? ”, *Revue économique* n°6, novembre.
- Collin C. Guillemot D., Petour P. and Zajdela H. (2002), “ Le retour à l’emploi des allocataires du RMI : les enseignements de l’enquête sur le devenir des personnes sorties du RMI ”, *DREES, dossiers solidarité et santé*, n°1.
- Guillemot D. (2001), “ L’observation de populations en situation de pauvreté ou de précarité, informations administratives et données d’enquête : l’exemple de l’enquête sur le devenir des allocataires du RMI ”, *Enquêtes, modèles et applications*, Dunod.
- Brondel D. Guillemot D., Lincot L. and Marioni P. (1996) “ La population active devrait augmenter pendant une dizaine d’année ”, *Economie et Statistique* n°300 1996-10.
- Guillemot D. (1996) “ La population active : une catégorie statistique difficile à cerner ”, *Economie et Statistique* n°300 1996-10.
- Guillemot D. and Marchand O. (1993) “ 1982-1990 : la population active continue à croître ”, *Economie et Statistique* n°261.
- Dumartin S., Guillemot D. and Marchand O. (1993) “ Le bilan de l’emploi fin 1992-1993 ”, *Economie et Statistique* n°261.

**Frédéric Moatty** is received a Phd in Statistics and Mathematics from the University of Paris VI in 1981 and a master’s degree in ethnology from the University of Paris VII in 1982. He is currently attached to the CEE as a CNRS Researcher. He is co-director of the CNRS’s research group about “ICT and society”. His research interests include communication, cooperation and ICT at work, teamwork and new forms of work organization.

#### Relevant publications

- Moatty F., Rouard F. and Teiger C. (2004), « Les temps de l’écrit dans les nouvelles formes d’organisation du travail », in collectif GRIOT, Figures du temps - *Les nouvelles temporalités du travail et de la formation*, L’Harmattan, collection Logiques sociales (cahiers du Griot), pp. 149-167.
- Brousseau E. and Moatty F. (2003), « Perspectives de recherche sur les TIC en Sciences Sociales : les passerelles interdisciplinaires d’Avignon », *Sciences de la Société*, « Technologies de l’information et de la communication : approches croisées », n°59, mai, pp. 3-33.
- Gaudart C., Gollac M., Moatty F. and Volkoff S. (2003), « Introduction au dossier ‘Le travail aujourd’hui : Regards d’ergonomes et de sociologues’ », *Travail et Emploi*, n°94, avril, pp. 5-9.
- Georghiu M. and Moatty F. (2003), « Le travail collectif chez les salariés de l’industrie : groupes sociaux et enjeux de la coopération au travail », Document de travail du CEE, n°29, septembre, 32 p.
- Gheorghiu M. and Moatty F. (2001), “Teamworking in french manufacturing industry statistical outcomes and field work results”, 5th International Workshop on Teamworking – IWOT5 10-11 September 2001, Leuven, Belgium, ronéo, 26 p.
- Fraenkel B. and Moatty F. (2000), « La mesure de la littératie au travail : résultats, problèmes, perspectives », in *Illettrisme et monde du travail*, Ch. El Hayek coord., Paris, La documentation française/MES-GPLI, pp. 33-44.
- Gollac M., Mangematin V., Moatty F. and Saint-laurent A.-F. (1999), « A quoi sert donc l’informatique ? revue d’études de cas », in *Innovations et Performances : Approches interdisciplinaires*, D. Foray et J. Mairesse (dir.), Paris, EHESS, pp. 77-130.

**Antoine Valeyre** received a diploma in Economics and Statistics from ENSAE (Ecole Nationale de la Statistique et de l’Administration Economique) in 1972 and a master’s degree in Statistics and Mathematics from the University of Paris VI in 1972. He is currently attached to the CEE as a CNRS Researcher. His research interests include work intensification, autonomy at work, new forms of work organization and their impact on working conditions. He is engaged in projects funded by the Ministry of Employment, including a joint project with Edward Lorenz which uses the third European Working Conditions survey data in order to compare organization forms and innovation across EU member countries.

Relevant publications

- Valeyre A. (2004), "Forms of work intensification and economic performance in French manufacturing", forthcoming in *Eastern Economic Journal*, vol. 30, n°4.
- Lorenz E. and Valeyre A. (2004), "Organisational change in Europe : National Models or the Diffusion of a New 'One Best Way' ?", *DRUID Working Paper*, n°04-04, Aalborg University, Danish Research Unit for Industrial Dynamics.
- Lorenz E. and Valeyre A. (2004), « Les formes d'organisation du travail dans les pays de l'Union européenne », *Document de travail du CEE*, n°32, Noisy-le-Grand, Centre d'études de l'emploi.
- Boisard P., Cartron D. and Gollac M. and Valeyre A. (2003), *Time and work : work intensity*, Luxembourg, Office for Official Publications of the European Community.
- Boisard P., Cartron D. and Gollac M. and Valeyre A. (2003) *Time and work : duration at work*, Luxembourg, Office for Official Publications of the European Community.
- Valeyre A. (2001), « Le travail industriel sous la pression du temps », *Travail et Emploi*, n° 86, avril, 2001, pp. 127-149.
- Valeyre A. (1998), « Les formes d'autonomie procédurale dans le travail industriel. Disparités sectorielles et déterminants organisationnels, cognitifs et marchands », *Travail et Emploi*, n° 76, 3/98, pp. 25-36.

**A1.17 IS - Institute of Sociology, Bulgarian Academy of Sciences – Partner 19**

The Institute of Sociology, Bulgarian Academy of Sciences, is the most important research center in the field of contemporary sociology in Bulgaria. It was founded in 1968. The Institute conducts basic and field research, provides postgraduate education and specialized expertise. Many of the scientists teach sociology at universities and colleges throughout the country. General sociology theory, medium-range theories, methodology and history of sociology, specialized branches of contemporary sociology are elaborated in the Institute. Academic autonomy and freedom secures the coexistence and elaboration of competing sociological paradigms.

The research strategies of the Institute of Sociology are aimed at the study and analysis of social stratification and mobility, institutional transformation and regional development, etc. within the context of globalization and Bulgaria's transitions to a market economy and democracy. These are the basic research fields scientists at the Institute of Sociology: social organizations and politics; work and employment, poverty and unemployment; ethnosociology and social psychology, ethnic communities and conflict, social integration and segregation; deviant behaviour, delinquency, corruption, etc.; science and education, technological innovation and personality; religion and everyday life, secularization, intellectualization and rationalization, moral relativism and quasi-religiousness; village and agriculture; methodology of sociological survey and public opinion studies.

The scientific achievements of the Institute of Sociology contribute to the description, understanding and explanation of society, thus providing an adequate basis for tackling pressing social issues.

Relevant research projects

Telematics and Communications Technology Industrial Comparative Study (TACTICS), European Commission DG XII - INCO-COPERNICUS; Industrial relations in construction sector on Applicant countries, The European Institute of Construction Labour Research, Bruxelles; Representation and voice in Small and Medium-sized European enterprises: monitoring Actors, Labour organisations and Legal frameworks (SMALL), FP 5 project; Social Policy Facing the Problems of Youth Employment, Supporting institution: Open Society Institute/Higher Education Program; Strategy for Reform of Social Assistance in Bulgaria, PHARE-Project; Bulgarian Women in the Period of Transition: Inequalities, Risks, Social Cost, financed under the Social Costs of Economic Transformation in Central Europe - Program of The Institute for Human Sciences, Vienna; The Policies of Social Integration in Europe. System of Collective Action. France, East Germany, Poland, Bulgaria', TSER Project, 4th FPRD, European Union.

Other research activities have been realized on the commission of the Central and Eastern Europe Team of ILO, based in Budapest. In 2001 a Report 'Sectoral Social Dialogue in Bulgaria' was prepared. From November 2003 the project 'Towards Trade Union Strategy for Decent Work' was started.

Project personnel

**Vassil Kirov** is a sociologist (sociology of enterprise, work and organisation). After graduating in sociology and economics at the University of Sofia (1994) and preparing a Master degree (DESS) in the Paris Institute for Political Sciences (IEP de Paris) (1995), he began Ph.D. studies in the Institute of Sociology, Bulgarian Academy of Sciences, Sofia (scientific director Duhomir Minev) and in Paris Institute for Political Sciences

and CNRS LSCI laboratory (scientific director Renaud Sainsaulieu). The Ph.D. thesis, about the privatisation of industrial enterprises in Bulgaria, was presented in Sofia (2000) and in Paris (2002). From 1996 to 1999 Vassil Kirov was an associate researcher in the Institute for Social and Trade-Union Research within the Confederation of Independent Trade-Unions in Bulgaria (CITUB). From the year 2000 Vassil Kirov is a research fellow in the Institute of Sociology, from 2002 - a research fellow 1st degree. From 1999 he became a Vice-President of the newly established NGO for socio-economic research (from 1999 up to now IFPI works on projects commissioned by international organizations such as ILO, EC, UNDP, USAID, Open Society Foundation, la Fondation nationale des sciences politiques, Paris, etc., see [www.innovation-bg.org](http://www.innovation-bg.org)). In 2001 (May-December) Vassil Kirov worked as a senior consultant for the UNDP mission in Sofia, in charge of the Development Co-operation Report preparation. From the year 2002 Vassil Kirov is an associate member of the French LSCI-Laboratoire de Sociologie du Changement des Institutions (IRESCO-SNRS). From the same year he works as a consultant for a Swiss Government project 'Trade Union Support and Social Dialogue in Bulgaria'. His main research topics concern the transformation of enterprises, organisational innovation, industrial relations and social dialogue and labour market issues.

#### Relevant publications

- Kirov V. (1998), 'Balgarskoto predpriatia v kontexta na organizaionnata promiana' (The Bulgarian Enterprise in the Context of Organizational Change), *Sotziologicheski problemi* (Sociological Problems), n° 1-2, p. 108-118 (in Bulgarian).
- Bafoil F. & Kirov V. (2000), 'Héritages institutionnels et innovations locales en matière d'emploi. Une comparaison Bulgarie-Pologne', en collaboration avec François Bafoil, CERAT, Grenoble), *Recherches sociologiques*, vol. 31, no. 2, p. 105-120
- Kirov V., (2000), 'Privatisation, retaylorisation et compromis sociaux en Bulgarie', Actes du Colloque de la AISLF *Guerre et reconstruction des sociétés*, Ohrid, Macédoine.
- Tchalakov I. & Kirov V. (2000), 'Risk Capital and Innovative Entrepreneurship in Bulgaria', in J. Vladimirov (ed.), *Contribution of Social Research to the Economic and Social Recovery Policy*, Sofiiski Novini Edition, Sofia.
- Kirov V. (2001), 'La privatisation des entreprises bulgares: de la contrainte exogène à l'adaptation locale', *Communisme*, no. 64, p. 143-166.
- Kirov V. (2003), 'Bulgaria: a still Undeveloped Component of Industrial Relations', in Y. Ghellab & D. Vaughan-Whitehead (eds.), *Sectoral Social Dialogue in Future EU Member States: the Weakest Link*, International Labour Office, European Commission, Budapest, p. 77-104.
- Kirov V. (2003), 'Bulgaria', in L. Clarke, J. Cremers & J. Janssen, *EU Enlargement. Construction Labour Relations as a Pilot*, Reed Business Information, p. 46-66.
- Kirov V. (2003), 'Restructurations industrielles en Bulgarie post-communiste: mesures d'accompagnement social au niveau des politiques publiques, des actions locales et des pratiques de gestion en entreprise', Report presented at the *European Foundation Seminar 'Responsible Restructuring in Europe'*, Dublin, June 2003 (to be published in a book entitled 'Responsible Restructuring in Europe').

**Dr. Rumiana Stoilova** is a senior research associate at the Institute of Sociology, Sofia. Since 1997 she is a private docent at the South West University Blagoevgrad, Bulgaria, on Social Stratification. Since 1999 she is research fellow at the Institute for the Study of Labour, Bonn, Germany ([www.iza.org](http://www.iza.org)). *Fellowships include*: European Institute, Budapest - 'International Comparative Investigations of Different Regions in Europe' (1991); Institute of Sociology, Vienna University: 'Transfer of Values between Generations in Posttotalitarian Society' (1993); Bielefeld University Germany 'Between Integration and Desintegration' (2000); German Youth Institute Munich, Germany (2001); University of the Federal Armed Forces, Institute for Human Resource and International Management, Hamburg, Germany (2003). Her main research topics concern: Inequalities, Self-employment, Gender, Flexibility of work, Balance family & work.

#### Relevant publications

- Fotev G. & Stoilova R. (eds.) (2000), 'Women's Entrepreneurship', *Women: Justice Today*, Sofia, p. 47-74.
- Stoilova R. (2000), 'Self-employment: an Alternative for the Individual, the Group and the Society during the Post-totalitarian Transition in Bulgaria', in Fr. Gucza (Hrsg.), *Europas Arbeitswelt von Morgen*, Wiener Zentrum der Polnischen Akademie der Wissenschaften, p. 221-243.
- Stoilova R. (2001), *Inequalities and Community Integration*, Monograph, LIK.

