***Enhancing the Effectiveness of***

***Social Dialogue Articulationin Europe***

***(EESDA, Project No. VS/2017/0434)***

**Kick Off Meeting – 12thFebruary 2018, Bratislava, Slovakia**

**NOTES**

**GENERAL REMARKS ON PROJECT INFRASTRUCTURE**

* CEPS coordinates
* CELSI as scientific coordinator (responsible for analytical framework, guidelines for interviews, survey, country reports, project website)
* *1st year of project duration*: focus on EU wide topics in SD articulation
* *2nd year of project duration:* focus on nationally specific topics and country reports
* *Two reporting periods on project costs:* Month 12, Month 24
* *Timesheets*: no single template for all partners, to be submitted at the end of the project duration and in line with the project budget per partner
* *Dropbox:* for internal communication within the research team, CELSI/Marta set up the EESDA dropbox folder
* *LANGUAGE:* English
* Unified definitions of key terms throughout the project- e.g., social dialogue, collective bargaining, etc. – use the OECD Glossary (OECD Employment Outlook 2017). Definitions will be part of the analytical framework.

**TIMEFRAME AND PROJECT SCOPE:**

* The project addresses SD articulation in a recent time perspective of maximum 3 years, thus the focus is not on post-crisis related developments
* Data collection should focus on data since year 2015 (media monitoring, local/national sources of literature, statistics, etc.)
* Incorporate also the development of and discourses related to particular negotiations and/or bargaining rounds relevant from the point of view of SD articulation, if such evidence is available
* Data collected via an EU-wide survey, interviews with national stakeholders in 6 countries, network analysis on data from 6 countries, and case studies on 4 sectors in those 6 countries
* Data analysis: EU-wide data will be analysed using descriptive statistical analysis; national and sectoral data are subject to a more qualitative analysis.

**WP1: LITERATURE REVIEW AND CONCEPTUAL FRAMEWORK**

* Lead CELSI (M1-M7: January 2018- July 2018)
* shed light on the current state of knowledge on SD articulation
* develop a conceptual framework that will guide empirical research. This will be done by CELSI, but feedback is expected from all partners.
* literature review and a methodological note – to be done by CELSI and CEPS
* guideline for empirical part- to develop questionnaire for survey (WP 2-4), to be done by CELSI
* template to provide input for country specific evidence – to be done by CELSI and CEPS
* template for interviews specifying questions to be used in the process of data collection of national data for country reports – to be done by CELSI and CEPS
* deliverables: D1.1: working paper (literature review on SD articulation – EU, national and sub-national levels -> CELSI); this WP also provides background evidence to guide the EU-wide survey on social partners’ experiences with SD articulation and its effectiveness

D2.2: preparation of thesurvey (questions); finding relevant links between questions in the survey and data needed for the network analysis. All partners invited to comment and suggest case studies and inputs for network analysis.

WP1 is the preparatory phase for data collection. 4 data collection and/ or data analysis within EESDA3modes of data collection within EESDA:

1. **EU-WIDE ONLINE SURVEY (WP2)**: cover all 28 member states, respondents: social partners in the whole EU, not restricted to specific sectors.
* Unit of analysis in the survey: topics in SD within national SD agenda, not its EU-level impact
* Each partner is expected to contribute with 10 respondents per countryto whom we will send the link to the survey. Each partner is assigned specific countries, for which respondents should be filled in the table (see dropbox file ‘*EESDA contact list social partners for survey*’)
* Each partner is expected to comment on the draft survey questionnaire, to be prepared by CELSI around mid-June. Suggestions are welcome based on relevant ongoing debates within social dialogue (check also the EU-level sectoral SD agenda)
* Topics to be covered in the EU-wide survey will be selected from the list of topics that resonate within EU-level SD and were discussed at the kick-off meeting (see below)
* Topics of traditional concern of social partners (e.g. membership, structure of members) shape their perceptions of newer topics/new challenges, e.g. digitalization of work, intergenerational relationships
* The research team should uncover diversity in actors’ attitudes, uncover where interests align (e.g., lifelong learning) and where their interest differ (e.g., migration, low wages)
* The EU-wide survey may include additional 2-3 questions, to be implemented in 6 countries only, that are relevant for the social network analysis; questions to be discussed with Carl Nordlund
* Preliminary list of topics to be selected from (2-3 topics will be selected for the survey, CELSI/CEPS make a pre-selection and circulate to all partners):
	+ ***Atypical work*** – e.g. crowd-workers, platform work, consider what is ‘atypical’ and for whom, whether flexible work is the standard, what are the old/new interpretations of atypical work (e.g. employment via temporary work agencies vs. platform workers);
* ***Bogus self-employment***
* ***Labour migration***
* ***Low wages*** – actors from different MS have different views on this. E.g., the CEE perspective is that it is effective if SD deals with low wages; but the Nordic stakeholders maintain that the most effective is if low wages are not subject to SD at EU-level at all.
* ***Active ageing*** – SD may have a different function in different countries to influence the EU-level policy in active ageing
* ***Working time*** – social partners’ views and vertical coordination (EU-level, national and sector level) regarding the implementation of the Working Time Directive
* ***Lifelong learning and vocational education*** – mapping the structures how actors interact across the EU on this topic
1. **STAKEHOLDER INTERVIEWS (WP2):**10interviews per country (in 6 member states), identify organizations and experts to be interviewed:
* Each partner will prepare a list of potential respondents- social partners in their respective country: representatives of employers and workers, representatives of influential trade unions and employer organizations, government representatives, experts
* A semi-structured interview questionnaire will be developed by CEPS/CELSI in autumn 2018 to be used for interviews in 6 countries (IE, SE, EE, SK, CZ, PT). Comments by all partners, implementation of interviews see WP3 below
* Data from the interviews also serve as an input for network analysis
* Each partner prepares summaries of its interviews that are then used by CEPS in the preparation of the working paper on stakeholder’s views (Deliverable 2.2).
1. **SECTORAL CASE STUDIES**
* Offer an additional more specific insight into how certain SD topics flow from the EU-level through the national level to the sector level SD (e.g., implementation of working time directive in healthcare/hospitals)
* The cases studies are to also be supported by interviews, this time, sector oriented. Each partner should interview 4 people (min.) within each sector (per country).
* When picking topics, have specific occupation on mind, for example nurses-> low wages; alternatively, specify an organization (union, association, etc.) and investigate their actions/interactions on behalf of nurses in relation to SD topics
* Not all topics are relevant for all sectors
* Select cases that offer good and bad examples of effectively articulated SD, link to the topics covered in the EU-wide survey and the national stakeholder interviews
* Sectoral case studies shall offer additional insight onto general SD developments discussed in the national context
1. **NETWORK ANALYSIS**:
* Important: network analysis will be conducted only on cross-nationally important topics, and use data only from 6 countries (IE, SE, EE, SK, CZ, PT), thus NOT the EU-28 survey. Restricted to 6 countries but no particular sectors
* The survey for 6 countries will therefore likely include 2-3 additional questions, not asked in the remaining 22 countries
* The interviews within WP2 (10 per country) will also support the network analysis
* Think about how can this methodology be applied, *What kind of networks are there?What will be added value from network analysis*?
* Think about own strategy of actors, not only existence of networks, rather use networks to understand the topics in SD
* Discuss what kind of data Carl needs for network analysis, add questions to the survey questionnaire
* For SNA, think relational:
* Who are the actors?
* What is of their interest? How do they interact on these topics of interests? Vertical/horizontal coordination/cooperation?
* What kind of questions can you ask to be applicable in all member states?

**WP2: STAKEHOLDERS´ VIEWS ON AND EXPERIENCES WITH THE ARTICULATION OF SOCIAL DIALOGUE**

* Lead CEPS (M8-M17: August 2018- May 2019)
* Implementation of the EU-wide survey (28 countries) and country-specific interviews (6 countries)
* Deliverables: D2.1: list of surveyed and interviewed social partners and stakeholders

 (all partners contribute, see dropbox file ‘*EESDA contact list social partners*

*for survey*’, later a file ‘*EESDA contact list social partners interviews’* will be

added to dropbox)

 D2.2: working paper presenting findings -> CEPS

* Unit of analysis: topics in country-specific SD
* Division of 28 EU member states per research partner for the EU-wide survey:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **CEPS** | **CELSI** | **UT** | **UG** | **CCP** |
| EU-level | CZ | EE | SE | ES |
| BE | SK | LT | FI | PT |
| NL | PL | LV | DK | IT |
| FR | HU | MT | DE | GR |
| LX | HR |  | AT | CY |
| IR | SI |  |  |  |
|  | RO |  |  |  |
|  | BG |  |  |  |

-> Each partner is responsible for listing 10 survey respondents per assigned countries, list these in the dropbox list of survey respondents, distribute the survey link to these and follow up or select additional respondents in order to collect at least 10 survey responses per country.

**Additional notes related to survey/interview topics:**

* Max 2/3 topics
* VARIETY OF TOPICS: We will select a mix of cross-cutting topics with more specific topics, to cover a variety that is relevant for different actors
* Some topics relevant at the EU level, some at the national or sector levels
* When choosing a topic- consider who is influenced:e.g., younger vs. older workforce -> bridge to the digitalization challenge
* Which age group thinks/care more about potential topics? -> intergeneration relationships matter for SD

**Additional notes related to social network analysis:**

* What is network on trans-national level? What is organisation then?
* How do trade unions and employers’ associations cooperate with other organizations within and beyond specific sectors?
* structure is predefined; boundaries are easily identifiable
* need to set boundaries: how deeply to go?
* social network analysis -> performed only on EU wide data,national data is too specific -> would make it too complicated
* do not go below level of organisations (important organisations, official members-> look at their relations ), no individuals
* established/representative actors only (some countries more/ some less, define which actors represent which sector? – look at their relations)
* also think about national <-> EU communication (by using network analysis, „What are the ties between organisations?“ „Who do they cooperate with?“ „To what extend these are bilateral relations?“)
* important: to map the structures and communication channels of social partners
* map networks between actors, different collaboration in different topics
* look if they cooperate more at horizontal or vertical levels
* possibly focus on links of a given set of actors -> moving within pre-identified actors may be possible at horizontal/vertical levels
* decide if Google forms or Survey Monkey better for the EU-wide survey

**WP3: SECTORAL CASE STUDIES ON THE ARTICULATION OF SOCIAL DIALOGUE**

* Lead CEPS+ involvement of all partners
* (M12-20: Dec 2018- Aug 2019)
* Deliverables: D3.1: List of interviewed social partners and other stakeholders

D3.2: 6 national reports (covering case studies of 4 sectors),

D3.3: 6 national policy briefs

* 6 countries (EE, SE, SK, CZ, IE, PT)
* 4 sectors: commerce, construction, education and healthcare
* Interviews: min 4 interviews per sector
* Sectors as case studies for data collection on the articulation of SD
* Interview questionnaire – derive from the template implemented for interviews with national stakeholders, template will be provided by CELSI/CEPS in due time before interviews will be implemented
* Create a list of interview respondents, a file‘*EESDA contact list social partners for interviews*’ will be added to dropbox)
* *discourse analysis on sectoral case studies*: Ho*w do social partners negotiate? How would the public react?*Consult also local media as source of data
* Try to do also some comparative analysis (between different sectors, if the topic of SD is present/relevant in several sectors, e.g. the working time directive implementation issue)

**WP4: COMPARATIVE RESEARCH ON SD ARTICULATION AND ITS CONTRIBUTION TO A WELL-FUNCTIONING SD**

* Lead: CELSI, strong involvement of all partners
* (M17-M22: May 2019- October 2019)
* Deliverables: D4.1/2: CELSI: comparative report, integrating evidence collected plus policy brief

on project results (from literature review, case studies, network analysis…)

D4.3: CEPS: policy recommendations report

* National reports + discourse analysis, analysis of data collected via the above-mentioned three methods
* Outcome: comparative report, policy brief based on the comparative report
* Budget is available for translations of the policy brief to national languages

**WP5: DISSEMINATION AND COMMUNICATION**

* Lead: CEPS, strong involvement of all partners
* Duration: M1-M24, Jan. 2018- Dec. 2019)
* CELSI: to set up a project website. Web to be launched by: July 1, 2018. The project website will include all presentations, publications, project results
* Dropbox sharing folder for all project materials within the research team

**WEBINARS**: May 2019/September 2019 (each partner need to do one of them, upload to project website)

* Topics of meetings/webinars- not mandatory, to be decidedafter the survey results
* Can be country focused, but not mandatory- most likely EU topic oriented
* Language: English
* All partners to suggest ideas and brainstorm about topics for the webinars and lunchtime meetings
* All partners to disseminate the online links to webinars

**LUNCHTIME MEETINGS:** May 2019/September 2019 (each partner need to do one of them)

* Should have a national context, present/discuss country case studies
* Language: national
* Responsibility of each partner to organize the meeting, disseminate invitations and advertise the findings in the national context

**FINAL CONFERENCE**: Lisbon, November 2019

 **PUBLICATIONS:**

* Copyright: every partner is free to publish their own data, but needs to request permission to use national data collected by other partners and EU-wide data collected within the EESDA project in general
* Idea to publish all country reports resulting from the project as CELSI or CEPS research reports -> to be discussed between CEPS and CELSI (acknowledging internal publication policies of both partners)
* Academic publication from project findings: preference for journal publications rather than books, to be discussed in the course of the project
* **General strategy for academic publications: start to think about papers and formulate ideas/topics/co-author teams as early as mid 2018 (next EESDA meeting), not only at the end of the project**
* One journal article on network analysis

**WP6- MANAGEMENT AND QUALITY CONTROL**

* Lead: CEPS, strong involvement of all partners
* (M1-M24: Jan. 2018 – Dec. 2019)
* Deliverables - deadlines: D6.1: Kick-off meeting (February 2018), progress meetings (July 2018,

January2019, July 2019),

D6.2: Reporting to the EC (December 2018, December 2019)

* Next meeting: Tatru, Estonia, 11. July 2018