# DIRESOC

# DIGITALISATION AND RESTRUCTURING:

## WHICH SOCIAL DIALOGUE?

Results from the transnational survey

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# Preface

This report was made possible with the involvement of many people: researchers, members of workers' and employers federations at all levels, colleagues, independent experts, workers, etc. First, we thank those who contributed to the drafting of the questionnaire by giving pieces of advices and expressing their points of views on the different proposals. Second, we thank everyone who agreed to send out the survey to their professional networks. Finally, we thank those who took the time to fill in this questionnaire. The findings of this report could not have happened without them.

# INTRODUCTION

This report is part of a larger European project called "**Digitalisation and restructuring, which social dialogue**?" (DIRESOC). Carried out by a network of independent academic experts and independents organisations, it intends to provide a better understanding of the way social dialogue[1] contributes to shape the ongoing processes of restructuring resulting from digitalisation and the way the ongoing processes of restructuring resulting from digitalisation contribute to shape social dialogue. Digitalisation has been at the centre of academic and public sphere for several years. However, the conclusions about its impact on the world of work leave room for debate, mainly because the nature, shape and scope of this impact are influenced not only by technological development; but by economic, social and institutional factors as well. Among those factors is **the role of social partners, whose relation with digitalisation and restructuring the project aims to analyse**.

Several research activities were developed to capture the sense of these phenomena in the four selected sectors of the project *i.e.* manufacturing, bank/insurance, postal services/logistics, and tourism. Included in those actions was the development of a transnational survey questionnaire to be addressed to both employers' and trade unions' representatives of the eight participating countries to the project (Belgium, Bulgaria, France, Germany, Italy, Portugal, Spain and Sweden). The survey pursued **two objectives**. On the one hand, to assess the opinion of social partners representatives on the current state of social dialogue, more specifically on digitalisation and on restructuring. On the other hand, to assess their opinion on the future of these interrelated topics through an innovative approach derived from prospective scenarios. Ultimately, findings of the questionnaire and other actions of the project will lead to recommendations addressed to policy makers and social partners for action on national and transnational levels.

The content of this document is divided into four sections on, respectively: (1) the design and methodology used; (2) the profile of respondents; (3) the current state of social dialogue, digitalisation and restructuring; (4) the future of social dialogue and digitalisation.

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[1] Social dialogue is defined by the ILO to include all types of negotiation, consultation or simply exchange of information between, or among, representatives of governments, employers and workers, on issues of common interest relating to economic and social policy. (https://www.ilo.org/ifpdial/areas-of-work/social-dialogue/lang--en/index.htm)

# 1    DESIGN AND METHODOLOGY

As stated in the introduction, the objective of the survey was twofold: to assess the opinion of social partners on the current state of social dialogue, more specifically on digitalisation and on restructuring; and to assess their opinion on the future of these interrelated topics. Hence, survey was split into two main bodies. For comparison purpose, a single tool and methodology was used for all countries involved.

In the first part of the survey, participants were asked **to express their views and perceptions of the current practices of social dialogue**. Questions focused on the perceived quality of social dialogue; the relative importance of the topic of digitalisation and reasons as to why it is (or not) a concern in terms of social dialogue; the different ways social partners can approach the topic of digitalisation, etc. A specific section was also dedicated to the perceived restructuring (in the terms intended by Degryse in 2016, that is job destruction, job creation, change(s) in the nature of job and shift(s) of the job status) in the company or at sector level and the potential role of digitalisation as an explaining factor. Open-ended questions were enclosed in this section in order for respondents to clarify details of the restructuring. More than 450 comments were thematically analysed and their contents synthetized.

In the second part of the survey, we chose **to address the questions of the future of social dialogue through an innovative approach derived from prospective scenarios**. Two scenarios presenting variations in the future of digitalisation, restructuring and social dialogue were presented to the respondents. The design of these scenarios is based on a similar initiative from the European Trade Union Institute (ETUI)[2]. In the case of ETUI, potential future patterns of employment market were elaborated and presented to groups of participants in meetings. The objectives of the group meetings were to assess the participants' perception of the challenges posed by digitalisation on work content, work context and social dialogue. In our case, the writing of the scenarios was streamlined in order to fit the inherent constraints of a quantitative survey. First one focused on the extension of new forms of employment; the other one on the extension of new ways of working. Scenarios will be detailed and explained in the dedicated section of this report. Questions were then asked about their probability and desirability; the perceived capability of the social dialogue to answer to the challenges posed; the most relevant actors and levels of social dialogue; and, finally, suggestions of measures that could be undertaken.

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[2]    See    https://www.etui.org/About-Etui/Foresight-unit2/News-and-activities/Six-scenarios-for-the-future-of-work-in-the-digital-economy

**The survey has been addressed to employers and trade unions' representatives at company and sectoral levels of the four target sectors**, within the eight participating countries of the DIRESOC project. The English version of the survey (see appendix) questionnaire was developed from November 2018 until March 2019 and translated in seven additional languages (Bulgarian, Dutch, French, German, Italian, Portuguese and Spanish). These versions were encoded on the Qualtrics platform and launched in April 2019 until the end of August 2019. A snowball sampling method was used for dissemination through various means including the website of the project, LinkedIn, professional networks of the researchers as well as diffusion lists of several members of the European federations of employers and trade unions of the four sectors of the project.

In addition to a descriptive analysis of the survey database, we chose upon receiving the results to **breakout the analysis by dimensions** and to conduct correlation analyses, for several reasons. First, we wanted to get a better and deeper understanding of the phenomena by exploring differences and similarities between groups (see section 2) towards the same question. Second, we wished to test assumptions generally made about certain groups of respondents. Third, categorisations and correlation analyses helped mitigate the sometimes-unbalanced coverage of some socio-demographic or social dialogue characteristics. We conducted correlation analyses on selected questions, of which we present the significant results throughout the report[3].

First classification relates to the **social dialogue position**, in which we divide the sample between *employers representatives* and *trade unions representatives*. Second one separates the participants to the survey according to their **social dialogue level**, whether they have a function in social dialogue at the *company level* or at the *sectoral level*. A third classification also linked to the respondent's status is the **seniority in social dialogue,** that is the number of years they have occupied that function. Based on the term of office of trade unions representatives of most participating countries to the project[4], three groups were created corresponding to *0 to less than 4 years of seniority*; *4 to 12 years of seniority* and *more than 12 years of seniority*. Based on a Eurofound report from 2017, we gathered the countries of work of respondents into 4 **systems of industrial relations**: *social partnership* (Germany and Belgium); *state-centred* (France, Italy, Portugal and Spain); *transition economies* (Bulgaria) and *organised corporatism* (Sweden). Given the still small number of respondents in the last

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[3] In most cases, we excluded from the analyses respondents who were unable/unwilling to express their opinion on the questions by not considering the "don't know" answers. This allows us to search for differences in opinions amongst those who expressed their views. However, for the part regarding the current state of social dialogue, we included the "don't know" modality in order to have an overview about the state of knowledge of respondents regarding current practices.

[4] See http://www.worker-participation.eu/Systemes-nationaux/Pays

two systems, only responses between social partnership system and state-centred system were compared. Correlations analyses were also performed regarding the **sector of work.** We assembled the sectors in three categories: *bank/insurance*, *manufacturing* and *other* (tourism, post/logistics and other responses). This category was included as a control variable. Finally, a last division was based on a **social dialogue quality index** (SDQI), built from the questionnaire[5]. It splits respondents between those who qualify social dialogue as *good*; *fair* and *poor*. This index was built to check whether a high-quality social dialogue can play an effective role in managing digitalisation resulting from restructuring. In 2016, a Eurofound study confirmed the key role of social partners in achieving win-win strategies for dealing with organisational change. The study found that

> Companies with 'trusting' forms of social dialogue were able to introduce even difficult restructuring measures with trade union or employee support, especially where there had been consultation at an early stage to allow compromises to be reached and to build commitment to a common goal. (…) Companies in the 'trusting' social dialogue group had the most positive outcomes for both organisations and employees. (p. 2)

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[5] This index was built based on the answers to the four items shown in figure 4 (see section 3). Each answer modality was given a score (fully disagree = 0, rather disagree = 1, rather agree = 2, fully agree = 3) and the total score of each respondent was calculated. We used the rule of three for respondents who answered "I don't know" to give their other answer the same weight. When the score ranges from 0 to 1, the quality is considered to be "poor". When it ranges above 1 and below 2, it is considered to be "fair". Finally, from 2 and above, it is considered to be "good".

# 2    RESPONDENTS

Aimed at and disseminated to both employers and trade unions representatives, 741 surveys were completed, totally or partially. Thus, response rate varies depending on the question. Most responses originate from trade unions representatives, whose main function in social dialogue is either at company (70%) or at sectoral (20%) level. From our previous experiences in carrying out surveys across employers' and trade unions' representatives, we can provide two hypotheses to this imbalanced distribution. First, employers are in most cases more reluctant to participate to this



Figure 1 - Main function regarding social dialogue (%; n=741)

- Trade union rep. [company]
- Trade union rep. [sector]
- Employer rep. [company]
- Employer rep. [sector]

kind of survey, especially if they are not promoted by business associations or related research centres. Second, trade unions generally have a keen interest in gathering data on the impact of digitalisation in order to better understand the phenomenon and to express their opinion on the subject. In average, survey participants have carried out that function for 12 years.
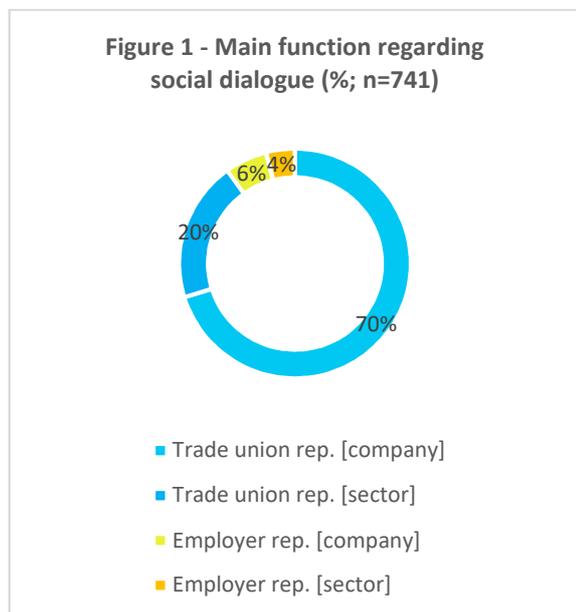
One characteristic of the dataset is the prevalence of Spanish-based participants who are 361 to have taken part to the survey, followed by Belgian-based (126) and Italian-based (81) participants. The same type of disparities can be observed in the division by sectors, which show that most respondents (50%) work in the bank/insurance sector, followed by a nearly a quarter of respondents (19%) working the manufacturing sector. The relatively low number of respondents from both tourism and postal services / logistic sector may be linked (but not solely explained by them) to our finding from the national reports[6] which showed that digitalisation processes are less advanced in these sectors. Other sectors mentioned are, for example, the energy sector or services. The snowball sampling method, which does not set prior selection for respondents, can explain their presence. We did not prevent participants from going further, in order to re-classify respondents who mistakenly selected this category (whereas they in fact belonged to the selected sectors of the DIRESOC project).

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[6] See www.diresoc.eu for the national reports

Figure 2 - Responses per country of work (n=724)



Figure 3 - Responses per sector (%, n=727)
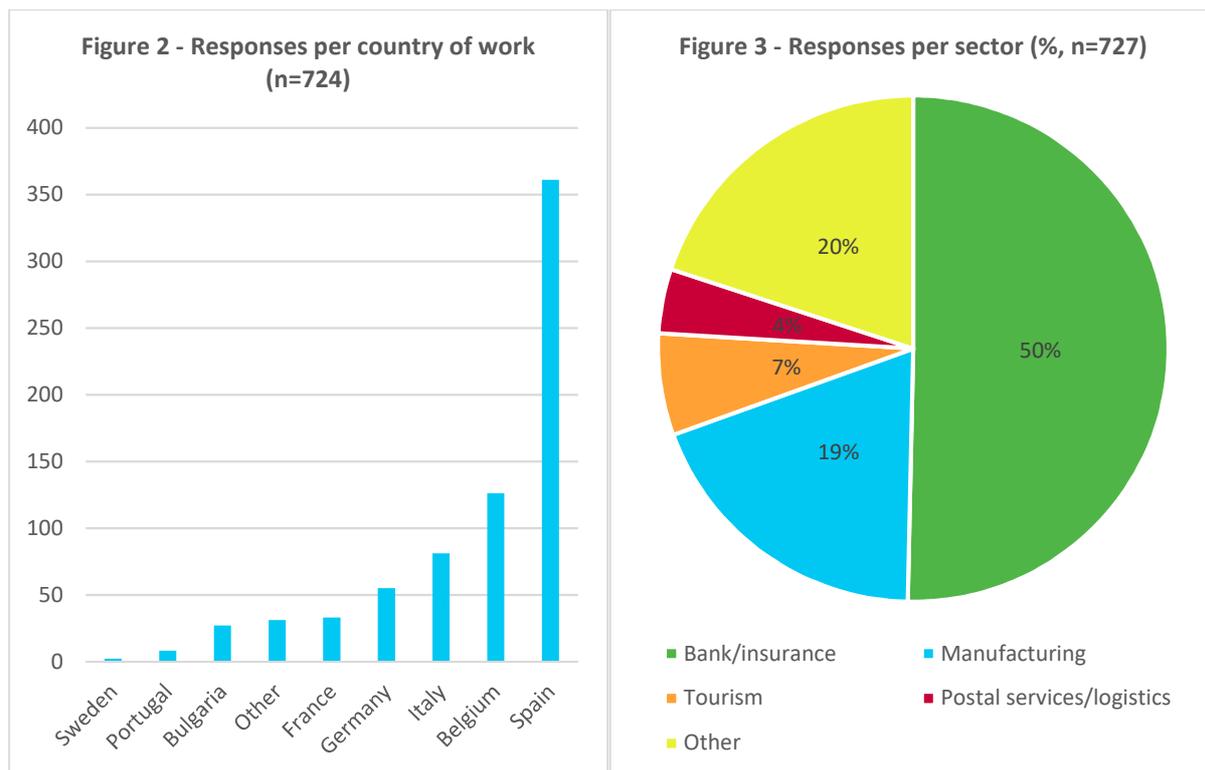
As stated in the above section, this descriptive analysis calls for a breakout of the dataset on six dimensions, mainly to try to observe difference and similarities between groups *via* correlation analyses. The table below summarises the distribution of the sample based on these classifications.

Table 1 – Distribution of sample by dimensions

| Social dialogue position | Employers representatives | | Trade union representatives | |
|---|---|---|---|---|
| | 10% | | 90% | |
| Social dialogue level | Company level | | Sectoral level | |
| | 76% | | 24% | |
| Seniority in social dialogue | 0 to less than 4 years | 4 to 12 years | | More than 12 years |
| | 21% | 34% | | 45% |
| Systems of industrial relations | Social partnership [DE, BE] | State-centred [FR, IT, PT] | Transition economies* [BG] | Organised corporations [SE]* |
| | 26% | 70% | 4% | 0,3% |
| Sector of work | Bank/insurance | Manufacturing | | Other [tourism, post/logistics, other responses]** |
| | 45% | 17% | | 38% |
| Social dialogue quality index | Poor | Fair | | Good |
| | 22% | 34% | | 44% |

\* Not included in the analyses given the still small numbers of respondents

\*\* Included as a control variable

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Finally, the respondents are in average 51 years old. The female participation rate is 33%. 37% of the respondents have completed a bachelor or equivalent. These characteristics are provided for information purposes only. No further analyses were performed on these variables as they were out of or scope of work.

**Table 2 – What is the highest degree or level of school you have completed? (%, n=501)**

| | |
|---|---|
| None | 0,6% |
| Primary education | 1,6% |
| Secondary education (lower or upper) | 17,4% |
| Post-secondary non-tertiary education or short cycle tertiary education | 16,2% |
| Bachelor or equivalent | 37,3% |
| Master or equivalent | 25% |
| Doctoral or equivalent | 2% |

# 3 SOCIAL DIALOGUE, DIGITALISATION AND RESTRUCTURING

## QUALITY OF SOCIAL DIALOGUE: A PICTURE

In the survey, the concept of quality of social dialogue is approached through four indicators (see figure 4). In most cases (78%), **respondents agree on the fact that there exist written agreements resulting from social dialogue** in their company or sector. **In two-third (67%)** of the enterprises or sectors, employers' and trade unions' representatives **communicate at least once a month**. However, about **half (49%) of the respondents do not believe social dialogue is satisfying** and **more than half of them (53%) do not think there is a climate of mutual trust between social dialogue partners**. These mixed results could be explained by the legal and mandatory structures of social dialogue, which require social partners to often produce some type of written agreements and exchange pieces of information; but has little effect over the perception of a feeling of trust or satisfaction.

**Figure 4 - To what extent do you agree with the following sentences about social dialogue in your company/sectir in the last three years? (%)**

| Statement | Fully/ rather agree | Fully/ rather disagree | Don't know |
|---|---|---|---|
| There are written agreements that result from social dialogue in my comp./sec. (n=659) | | | |
| There is regular (i.e. monthly) communications between employers' representative and trade unions' representative in my comp./sec. (n=659) | | | |
| There is a climate of mutuel trust between employers' representatives and unions' representatives in my comp./sec. (n=659) | | | |
| I think social dialogue in my comp./sec. is satisfying (n=663) | | | |

## DIGITALISATION AS A SOCIAL DIALOGUE TOPIC

The importance of digitalisation as a social dialogue topic has been addressed through several questions. On average, **around two third (63%) of trade unions and employers representatives who answered the survey indicate that digitalisation is a concern in terms of social dialogue within their company or sector**. These results are very similar to the ones gathered by Voss and Riede (2018) for the European Trade Union Confederation. In their report, they state that "around 65% of all trade union representatives and company level worker representatives reported that digital change has emerged as a topic of information and cons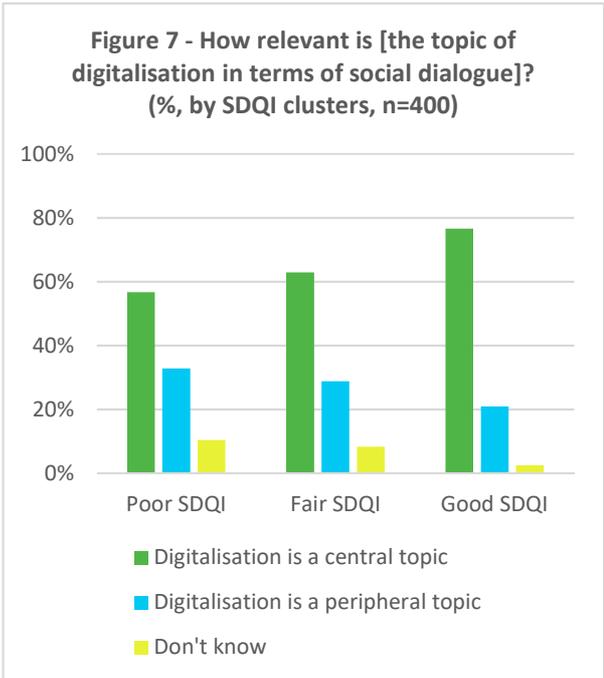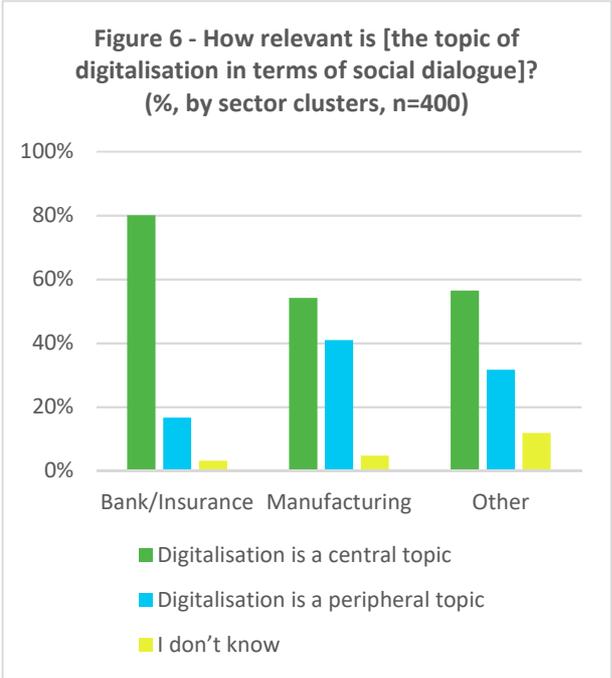ultation at various levels (cross-industry, sectoral and company)" (p. 17). They however contradict results from the national reports that showed that digitalisation was rarely a subject of social dialogue as such, even though it affects the life of companies. Looked at the other way, **more than one third (37%) of our respondents disagree with this statement**.

Figure 5 - Within your company/sector, is digitalisation a concern in terms of social dialogue? (%, by SDQI clusters, n=665)
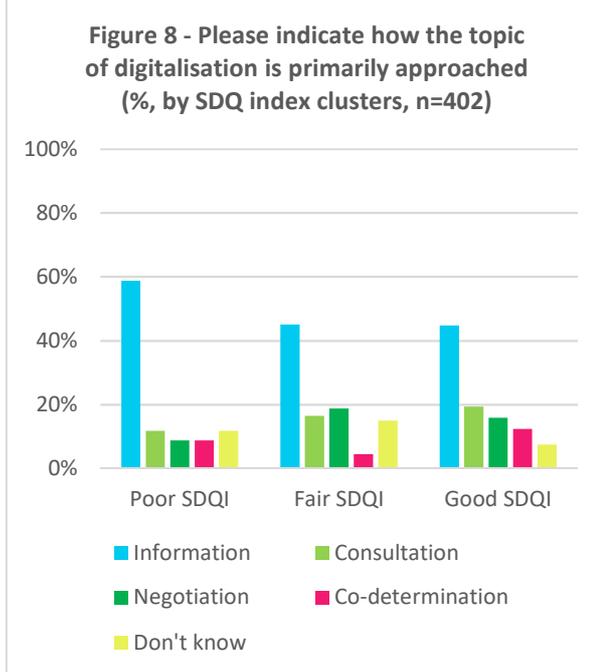
Differences between industrial relation systems appear to exist, as 81% of participants working in Germany or Belgium indicate that digitalisation is a concerned in terms of social dialogue within their company or sector compared with 55% in France, Italy, Portugal and Spain. The national reports highlighted that the debates about digitalisation and work remained at a very general level. They indicated that social partners are having difficulties translating these debates into concrete actions within the companies. Differences also exist regarding of our SDQI[7]. The higher the SDQI, the more digitalisation is taken into account in social dialogue (73% when the SDQI is qualified as "good"; whereas 47% when the SDQI is qualified as "poor" (see figure 5). When digitalisation is a concern in terms of social dialogue, the question remains as to whether the topic belongs to the core of social dialogue's discussions or is perceived as marginal. Results show that **in nearly seven cases out of ten (69 %), digitalisation is considered to be a central topic**. Again, this contradicts results from the national reports, which mentioned that digitalisation was rarely a subject of social dialogue and, when it was, figured as one amongst many others.

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[7] As a reminder, the social dialogue quality index splits respondents between those who qualify social dialogue as *good*; *fair* and *poor*. It was built based on the answers to the four items shown in figure 4 (see section 3).

This opinion is shared even more sharply in the bank and insurance sector (see figure 6) in which it applies in more than 8 cases out of ten (80%) and by respondents who have been representatives for more than 12 years (75%). It is also correlated to the SDQI (see figure 7): the greater the SDQI, the higher the percentage. It is also worth noting that 14% of those who have been involved into social dialogue negotiations and bargains for less that 4 years are unable to comment on this issue. The same feature appears elsewhere on other questions throughout the report.



Figure 6 - How relevant is [the topic of digitalisation in terms of social dialogue]? (%, by sector clusters, n=400)

Legend:
- Digitalisation is a central topic
- Digitalisation is a peripheral topic
- I don't know



Figure 7 - How relevant is [the topic of digitalisation in terms of social dialogue]? (%, by SDQI clusters, n=400)

Legend:
- Digitalisation is a central topic
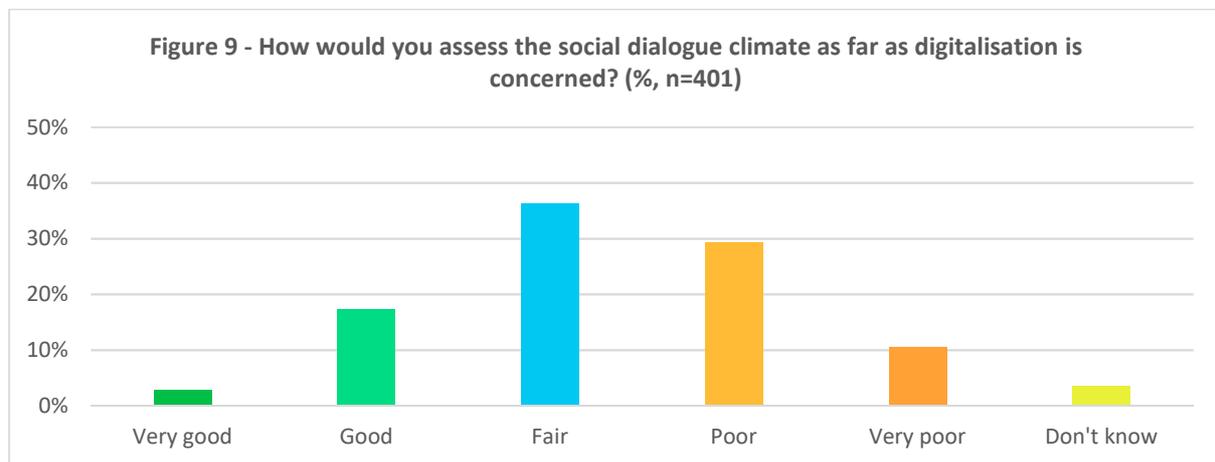- Digitalisation is a peripheral topic
- Don't know

The way in which social partners approach the subject remains at **the stage of information procedures in nearly one case out of two (47%)**. This also means that in nearly the same amount (42%) of social dialogue bodies, social partners go beyond simple information procedures and undertake exchange processes such as consultation (17%); negotiation (16%) or even co-determination (9%). Co-determination process is more frequent in the manufacturing sector (17%) whereas rarely used in the bank/insurance sector (4%). It is also more likely to be found in the social partnership system of industrial relations (16%) that in the state-centred one



Figure 8 - Please indicate how the topic of digitalisation is primarily approached (%, by SDQ index clusters, n=402)

Legend:
- Information
- Consultation
- Negotiation
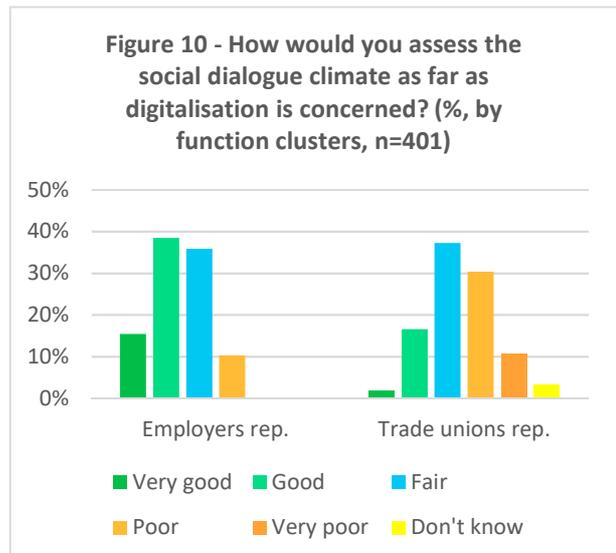- Co-determination
- Don't know

(4%). The presence of Germany in this system of industrial relations could explain such difference, being a country spearheading this type of involvement of unions in companies' decision-making processes. At the company level, respondents are at the same time more hesitant on the matter (13% picked the "I don't know" modality) and more at the information level (49%). **According to our SDQI, digitalisation remains at the information level for 59% of the respondents when they evolve in a context qualified as "poor", and for 45% when it is qualified as "fair" or "good"** (see figure 8)**.** Co-determination is also higher (12%) when the SDQI is "good". Similar to the opinions on the question of relevance of digitalisation for social dialogue, 18% of those who have been trade union or employer representatives for less than 4 years are unable to comment on this issue.
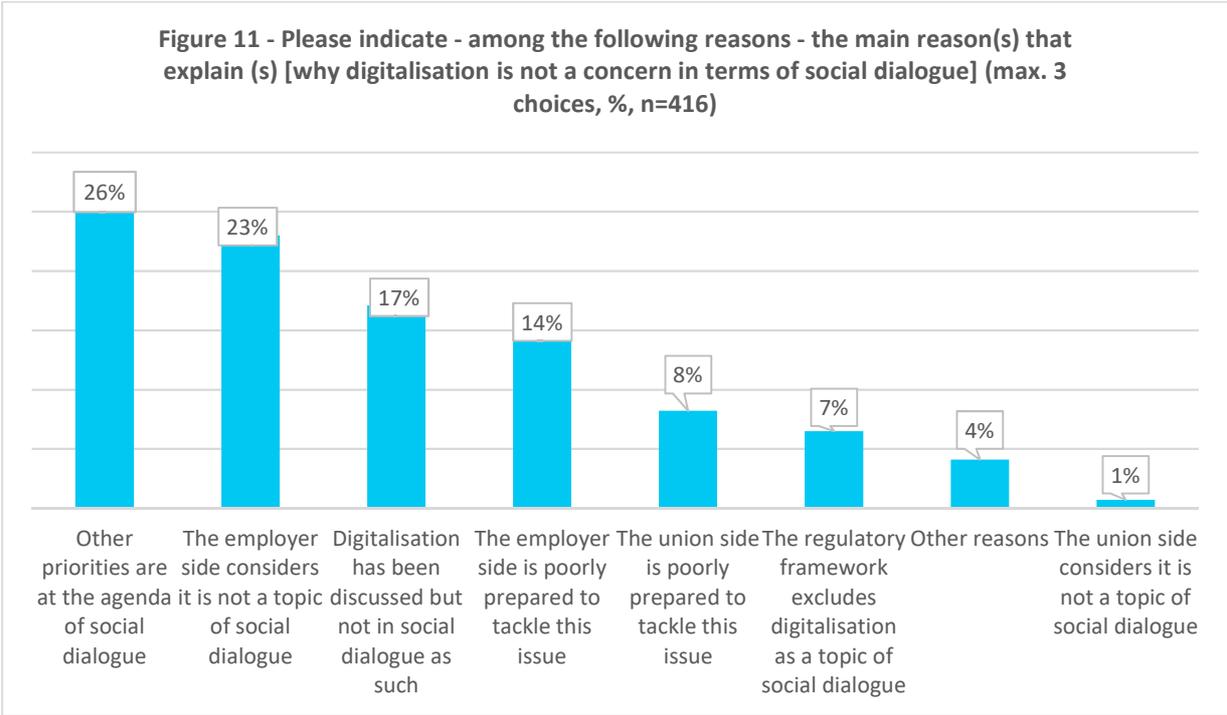
Finally, for representatives considering digitalisation as a social dialogue topic, **56% of them assess its climate as "very good", "good" or "fair"**, and 29% as "poor" or "very poor" (see figure 9).



Figure 9 - How would you assess the social dialogue climate as far as digitalisation is concerned? (%, n=401)

**The perception of the social dialogue climate regarding this specific theme is influenced by the function held** (see figure 10). More than one employer representative out of two tend to qualify it as "good" or "very good"; whereas trade unions representatives' views are more distributed, leaning towards fair (37%) or poor (30%). It should be pointed out that no employer representative has qualified social dialogue climate regarding digitalisation as "very poor".



Figure 10 - How would you assess the social dialogue climate as far as digitalisation is concerned? (%, by function clusters, n=401)

Reasons as to why **digitalisation is not included as a topic is social dialogue** are firstly linked to the fact that **other priorities are at the agenda of social dialogue** (see figure 11). This confirms some of the first impressions we gathered through the interviews with trade unions and employers' representatives during the primary step of the project[8] who stated that the topic is being evicted because of the urgent nature of other subjects. Secondly, respondents perceive that the employer side might be reluctant to consider digitalisation and its impacts as a theme that should be collectively discussed. This characteristic had also already been highlighted during the primary step of the project. Thirdly, it might happen that digitalisation is actually discussed within the enterprises or the sectors, but not within formal structures of social dialogue, as it has also been identified in the national reports.

**Figure 11 - Please indicate - among the following reasons - the main reason(s) that explain (s) [why digitalisation is not a concern in terms of social dialogue] (max. 3 choices, %, n=416)**

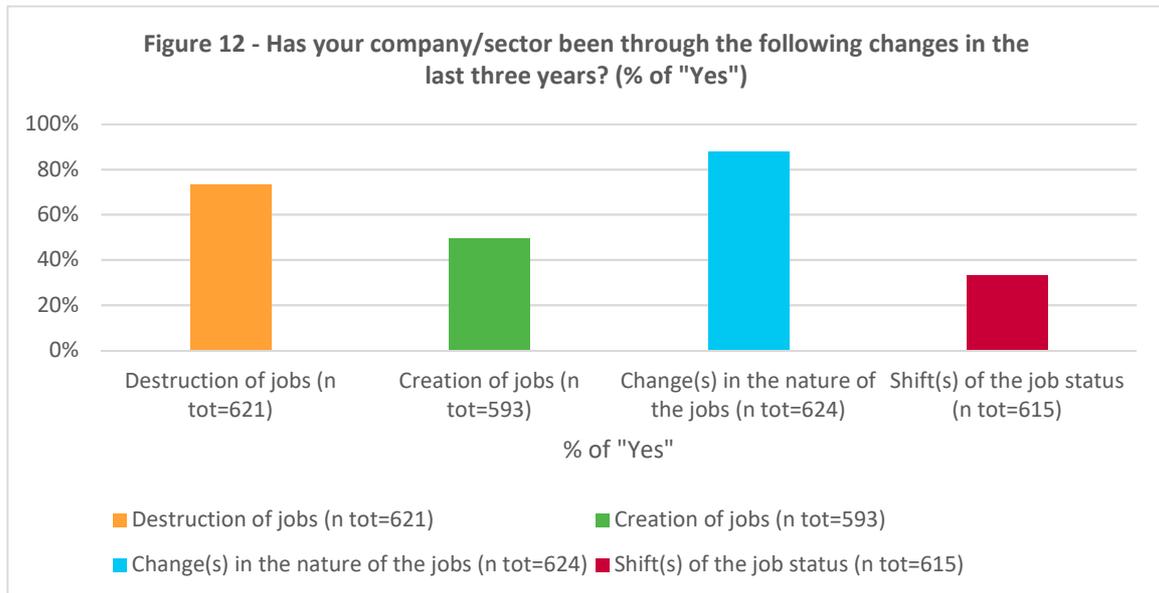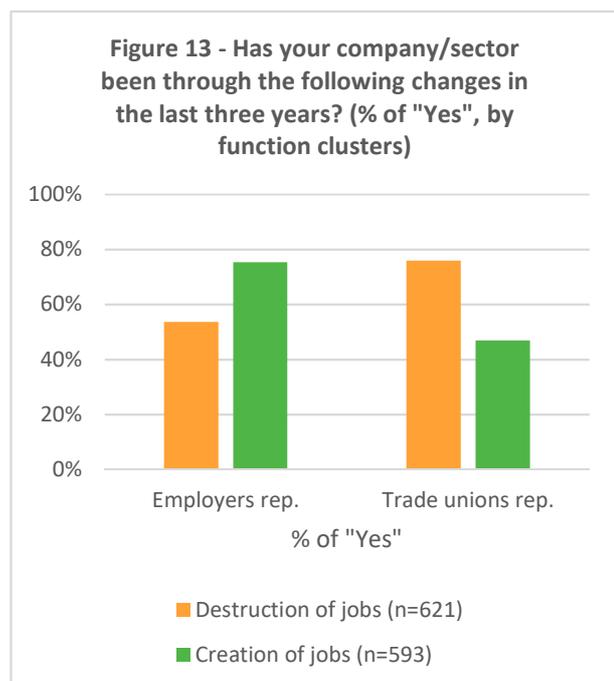| Other priorities are at the agenda of social dialogue | The employer side considers it is not a topic of social dialogue | Digitalisation has been discussed but not in social dialogue as such | The employer side is poorly prepared to tackle this issue | The union side is poorly prepared to tackle this issue | The regulatory framework excludes digitalisation as a topic of social dialogue | Other reasons | The union side considers it is not a topic of social dialogue |
|---|---|---|---|---|---|---|---|
| 26% | 23% | 17% | 14% | 8% | 7% | 4% | 1% |

## DIGITALISATION AND RESTRUCTURING

In order to contextualise the impact of digitalisation on restructuring, one must first be aware of the perceived changes participants related for the last three years. Overall, a vast **majority of respondents** (88%) state that **their enterprise or sector underwent change(s) in the nature of jobs** such as modification of working conditions or tasks performed. Destruction of jobs are perceived in 73% of cases and creation of jobs in 50% of cases. Quite surprisingly, a third (33%) of survey's participants also states their enterprise or sector

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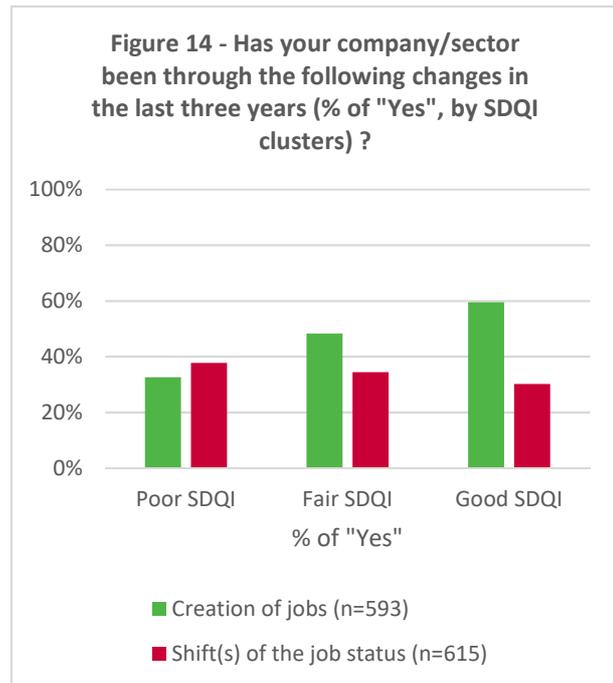[8] See nationals reports on our website www.diresoc.eu

underwent shift(s) of the job status, such as more workers becoming self-employed (see figure 12). This share is higher than expected in regard with the national reports' findings, in which little data about possible shifts of job status were reported (to the exception of the Italian report). More broadly, they were few mentions of the specific issues related to the platform economy.



Figure 12 - Has your company/sector been through the following changes in the last three years? (% of "Yes")

**Employers representatives and trade unions representatives share the same opinion on the change(s) in the nature of the jobs and the shift(s) of the job status**. However, **they have opposing views regarding the creation and destruction of jobs**: 54% of employers' representatives perceive job destructions; and 75% of them perceive job creation. Opinions are opposite for trade unions representatives, where 76% perceive destruction of jobs and 47% perceive creation of jobs (see figure 13). Perception of destruction and creation of jobs are also affected by the system of industrial relations. **State-centred systems experience at the same time more destructions of jobs (76%) and less creation of jobs (43%).** Social partnership systems experience less destruction of jobs (66%) and more creation of jobs (68%). **The same variations in that pair of variables can be observed for the sectors:** more destructions of jobs (77%) and less creation of jobs (51%) in the bank/insurance sector; less destruction of jobs (65%) and more creation of jobs (58%) on the manufacturing sector.



Figure 13 - Has your company/sector been through the following changes in the last three years? (% of "Yes", by function clusters)

Our analyses also highlighted the link between the SDQI and both perception of creation of jobs and shift(s) of the job status (see figure 14). **The higher the SDQI, the higher the perception of creation of jobs and the lower the shift(s) of the job status.** The most probable hypothesis is that a context in which new workers are hired and maintained as such set up a favourable environment for a serene social climate. It could also be argued that it is social negotiations in themselves that contribute either to the hiring of new workers or to preventing a shift of their status. Finally, on the matter of potential shift of the job status, 18% of representatives with less than 4 years of seniority do not know how to position their opinion, a percentage significantly higher than the ones gathered for more experienced representatives.



Figure 14 - Has your company/sector been through the following changes in the last three years (% of "Yes", by SDQI clusters) ?
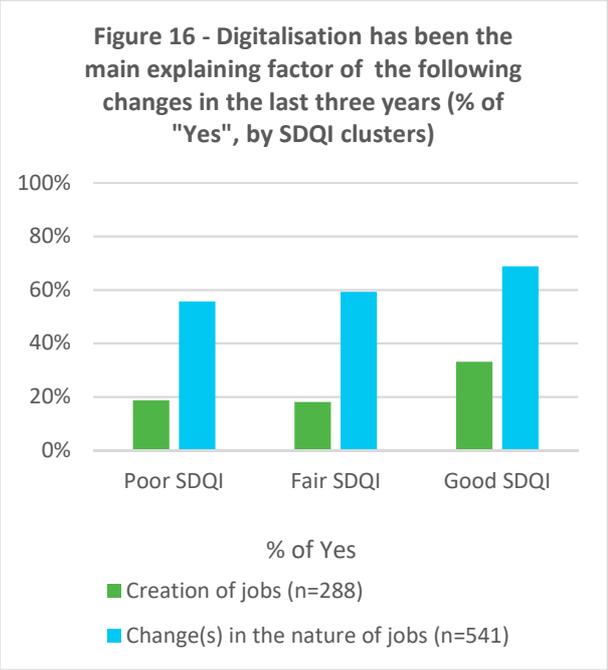
The extent to which digitalisation is perceived as connected to these restructuring varies greatly (see figure 15). According to respondents, **nearly two-third (63%) of the changes in the nature of the jobs would be provoked by digitalisation**. Changes in the working conditions are thus both the most frequent type of restructuring and considered as the most linked to digitalisation (see figure 11 as well). As cited in Warhurst *et al.* (2019, p. 32), "*there is a discernible turn in debate about the future of work to acknowledge that, along with job destruction and creation, tasks will change within existing jobs (Eurofound, 2016)*". Survey's results then indicate that respectively 42% and 39% of the shifts of the job status and the destruction of jobs could mainly be linked to digitalisation. Finally, a quarter (26%) of the jobs created in the last three years would be due to digitalisation.



Figure 15 - Digitalisation has been the main explaining factor of the following changes in the last three years (% of "Yes")
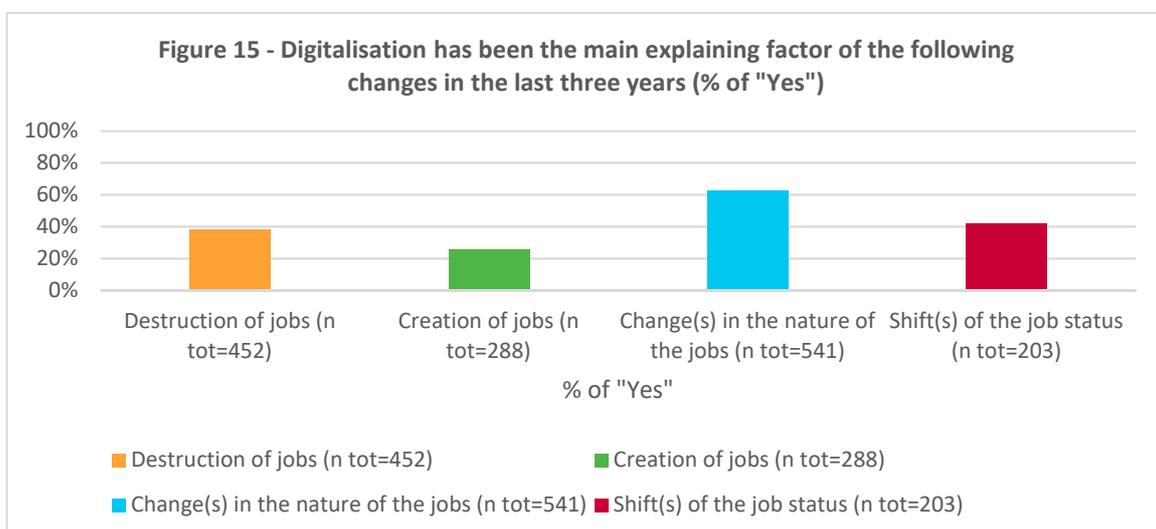
Analysis by dimensions shows that digitalisation would have more impact, both in terms of creation and in terms of destruction of jobs, in the bank/insurance sector than in the manufacturing sector. Similarly, changes in the nature of the jobs would be even more frequently caused by digitalisation in social partnership systems of industrial relations than in state-centred systems. Regarding the impact of digitalisation on the creation of jobs, 24% of representatives with less than 4 years of experience in their function are unable to comment on the issue. Again, this percentage is significantly higher than the ones observed in the cases of more experienced representatives.

**The SDQI is also linked positively with the impact of digitalisation on both creations and changes in the nature of jobs (see figure 16).** When the SDQI is qualified as "good", 33% of respondents agree on the fact that digitalisation has been the main explaining factor of the creation of jobs in their enterprise or sector; and 69% agree on that explanation for the changes in the nature of the jobs. By comparison, when the SDQI is qualified as "poor" they are only 19% and 56%. Our explanation would be that high quality social dialogue provides for direct discussions about employment developments, which in returns provides more visibility to social partners on these phenomena.



Figure 16 - Digitalisation has been the main explaining factor of the following changes in the last three years (% of "Yes", by SDQI clusters)

% of Yes
- Creation of jobs (n=288)
- Change(s) in the nature of jobs (n=541)

As stated in the methodology, more than 450 comments clarifying the nature of the restructurings have been thematically analysed. We present results by type of restructuring and by sectors in the frames below. Readers should bear in mind that the prevalence of negative comments about these changes might not reflect the entire diversities of situations. Proportionally, a larger part of respondents concerned by job destructions and job changes commented on the issues than respondents concerned by job creations, for example.

## Destruction of jobs

In the **bank/insurance sector**, the most affected functions concern administrative management, e.g. back office, reception and operator. One of the most salient observations is the decrease of direct face-to face customer interaction. Digitalisation supresses certain tasks or even positions and allows customers to access remote digitalised services via websites for example. The disappearance of some entities is explained by the centralisation of numerous activities in technology support centres, which functions are more and more specialised and the decline of "face-to-face" positions. One approach to carry out these changes is the non-replacement of retirees and the use of early retirement scheme, instead of collective redundancies.

**Manufacturing sector** respondents emphasize the productivity and efficiency gains resulting from the digitising workstations and the growth of outsourcing activities to other low-wage countries. Some also point out that digitalisation has eliminated exhausting tasks, such as heavy loads, repetitive gestures, etc. One of the strategies led by companies in this sector is also the early retirement of their employees.

In the **postal sector**, respondents notice a significant decrease in the use of letters and magazine subscriptions, as already identified in the national reports analyses. There is a significant reduction in purely operational and executory functions.

The **tourism sector** is more than ever competitive with the advent of new players such as "*pure players*" (internet companies). Companies have been forced to implement online booking tools available to customers to strengthen their place on the market and therefore suffer from the reduction of human intervention in customer services. Indeed, according to respondents, computer programs progressively replace customer relations, reservations, orders, etc.

## Creation of jobs

In the **bank/insurance sector**, jobs are created principally in the IT department. Current recruitments mainly affect IT, commercial and marketing functions. In Belgium, respondents also commented that companies are increasingly using temporary contracts via temporary workers or external consultants.

In the **manufacturing sector,** new departments are established to develop the digitalisation of customer service communication. New profiles of workers better trained to digitalisation are sought.

In the **postal sector**, the presence and the growth of e-commerce led to a considerable increase in package activities and, consequently, the creation of positions in parcel logistics. Increasing demand for digital services from both professional and private customers is also creating specialised positions related to the digitalisation of services.

In the **tourism sector**, respondents highlight a considerable shift in job descriptions and worker profiles. They are now required to possess skills such as web-design, e-marketing or digital marketing, which often leads to the hiring of new workers.

**Shifts of the job status**

The **bank/insurance sector** is increasingly focusing on external consultants or subcontractors.

**The postal sector** also has recourse to workers of various statuses (salaried workers, public servant, self-employed, temporary workers) in order to better cope with the growing flexibilization of the work.

**Changes in the nature of the jobs**

In the **bank/insurance sector,** digitalisation changes the nature of jobs by pushing workers to complete their tasks away from customers. They now work essentially by telephone calls, which according to respondents depersonalises customer relationships. The increase in time and work rates, the change in productivity standards, the need for adaptation and flexibility in the face of changes, coupled with frequent lay-offs generate a great amount of stress and competitiveness among company workers. This leads to more individualism in working relationships.

In the **manufacturing sector,** respondents mention a change in the nature of their jobs, requiring now digital and technical skills. Indeed, operational tasks disappear in favour of monitoring and control of production processes, requiring more procedures, reporting and information sharing in real time. This conversion enables workers to have higher responsibilities, which can however lead to more stress and pressure for low-skilled workers in terms of qualification to acquire.

In the **postal sector,** respondents perceive a large increase in parcels following the exponential development of e-commerce. They experience more pressure related to the management of these packages but, in return, the management of letters decreases considerably. However, this also means a search for alternatives in terms of activities to compensate the decrease in letters.

In the **tourism sector,** the change of work positions is also characterised by a remote customer relationship. Moreover, the computer scripts to be used directly by the workers reduce the added value of the technicality of employees. These types of workstations are therefore perceived as less attractive in this industry.

# 4 THE FUTURE OF SOCIAL DIALOGUE AND DIGITALISATION

## TWO CONTRASTING PATHS

In order to address the questions of the future of social dialogue, survey's participants were presented with two foreseen scenarios showing variations in the future of digitalisation, restructuring and social dialogue.

The first scenario (technological changes linked to digitalisation) focused on the extension of new forms of employment through a future in which economically dependent self-employees and platform workers have become the norm. The second scenario (technological changes linked to artificial intelligence, automation and robotization) focused on the extension of new ways of working through the impact of AI and automation, in a future in which new skilled jobs have been created while challenging employment rate of low skilled workers. Scenarios were presented as follows:

### SCENARIO I

Year 2030 – technological changes linked to digitalisation

◊ Economic landscape is now made up of a multitude of small enterprises – often digital platforms.
◊ Most "traditional" companies had to restructure in a hurry to face this new competition.
◊ Atypical jobs (freelancers, employees made available by a service provider, economically dependent self-employees, platform workers with no specific status) have become the norm.
◊ Traditional employee pattern is now the exception, reserved to occupations with labour shortages.
◊ In terms of social dialogue, the main challenge is to avoid a degradation of the quality of work and social protection of these workers with heterogeneous profiles.
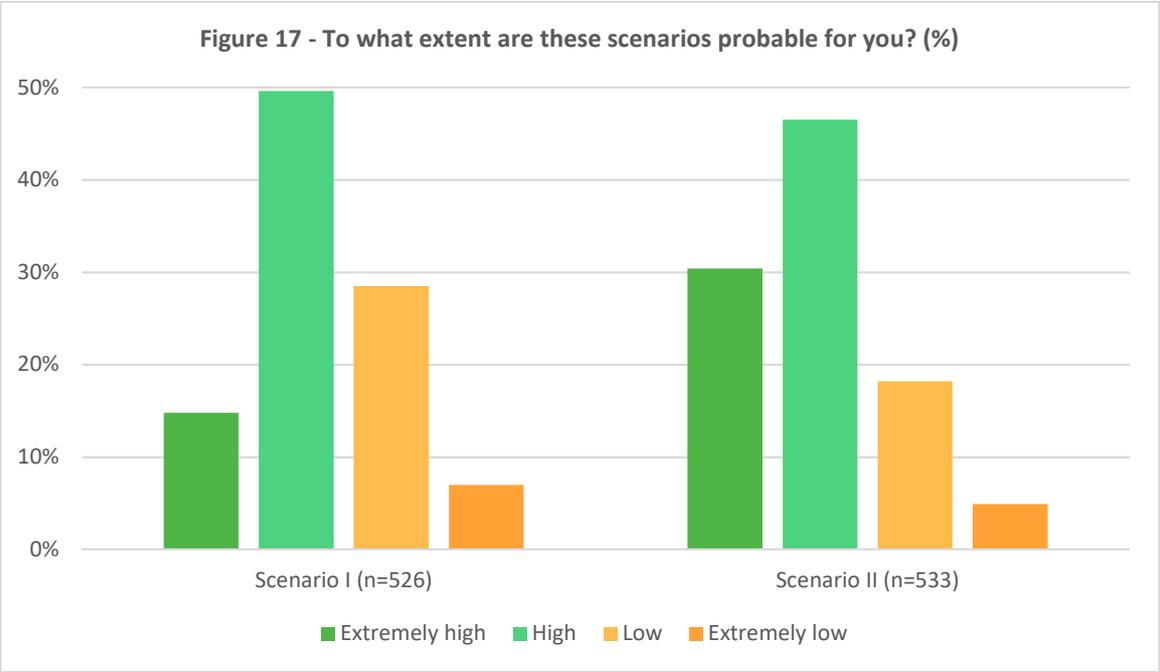
### SCENARIO II

Year 2030. Technological changes linked to artificial intelligence, automation and robotization

◊ A whole range of functions traditionally occupied by salaried workers has been fully automated.
◊ New functions have been created and provide skilled jobs.
◊ At the same time, there is a risk of unemployment for workers who do not possess the appropriate skills.
◊ In terms of social dialogue, the main challenge is to support both capacity building for the less skilled workers and retraining of more skilled workers, in an attempt to reduce a growing dualization of the labour market.

In general, **both scenarios are considered to be highly probable**, especially scenario II for which 20% of respondents find the probability to be extremely high (see figure 17). We did not find any differences in the subgroups using correlation analyses.

**Figure 17 - To what extent are these scenarios probable for you? (%)**



On the question of desirability for social dialogue, **a majority of respondents rejects scenario I whereas opinions are divided for scenario II**, leaning towards the neutral position (see figure 18).

**Figure 18 - To what extent may this scenario be viewed as desirable for the quality of SD? (%)**
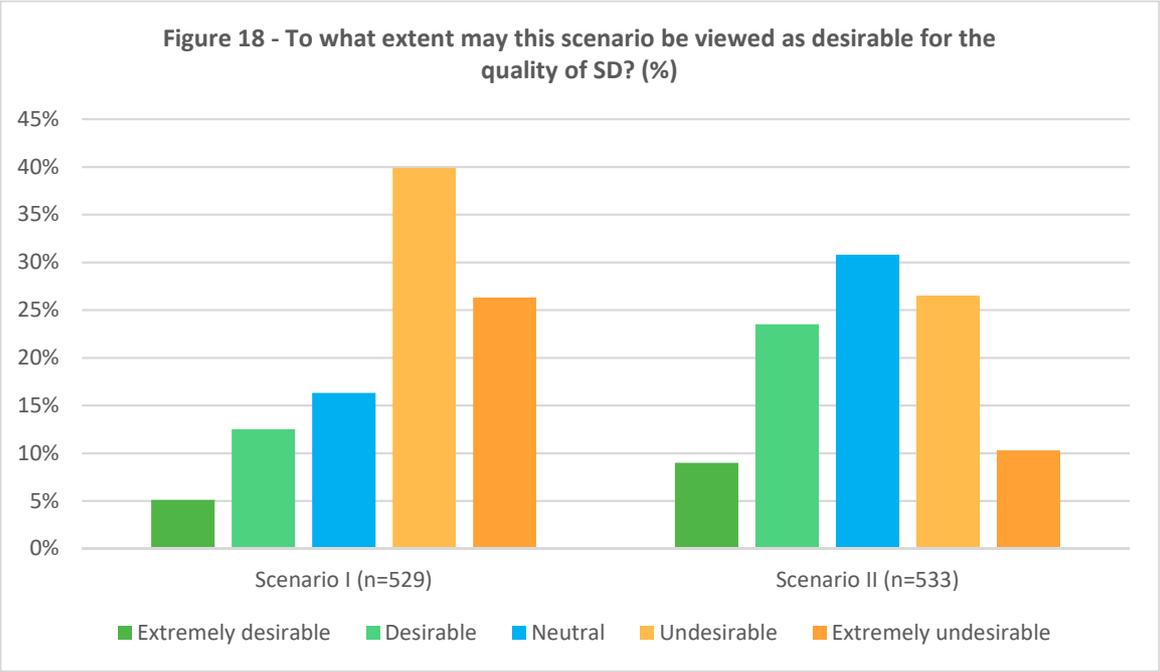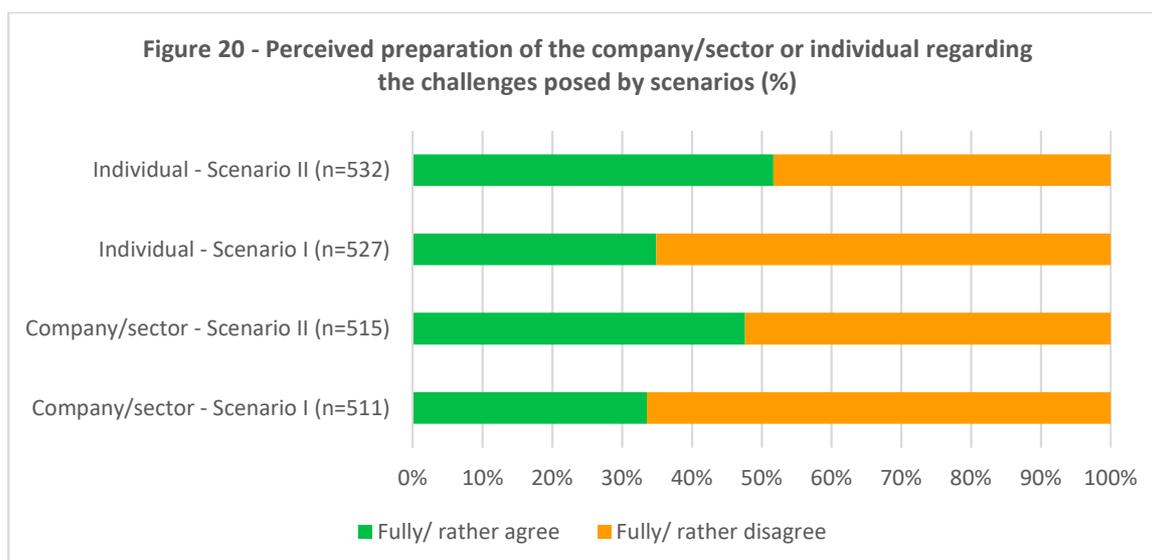
Regarding **scenario I**, there exists a difference in the responses for the quality of social dialogue based on the function held (see figure 19). **Trade unions representatives' respondents' position themselves largely against such situation** whereas employers' representatives' respondents are less cohesive on this issue. This could be linked to the fact that the evolution towards atypical forms of work is generally considered by trade unions to be accompanied by a degradation of the work conditions, as highlighted in the national reports. This scenario could also pose a threat in terms of affiliation numbers to trade unions given that they traditionally do not target these types of workers (see also the national reports). These considerations are also supported by the results in terms of most influent actors for each scenario, which we will discuss further on this section.



Figure 19 - Desirability of scenario I for the quality of SD (%, by function clusters, n=526)
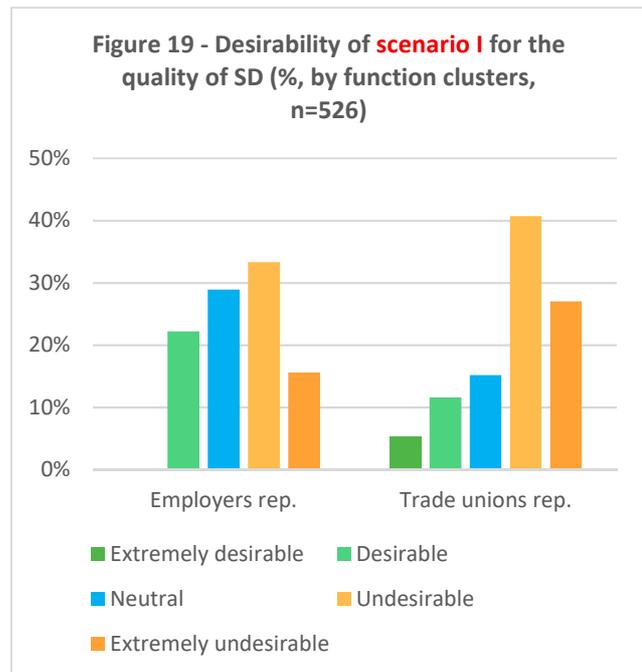
Regarding **scenario II**, we noted a difference on the question of desirability for social dialogue quality based on the SDQI. Respondents evolving in a social dialogue context marked as "good" are more to say that it is extremely desirable (12%) and less to say that it is extremely undesirable (6%). Respondents evolving in a social dialogue context marked as "poor" are only 4% to say it is extremely desirable and 16% to say it is extremely undesirable. One hypothesis could be that a high-quality social dialogue could prevent or attenuate potential deleterious effects of such a scenario in a socially responsible manner.

Figure 20 - Perceived preparation of the company/sector or individual regarding the challenges posed by scenarios (%)
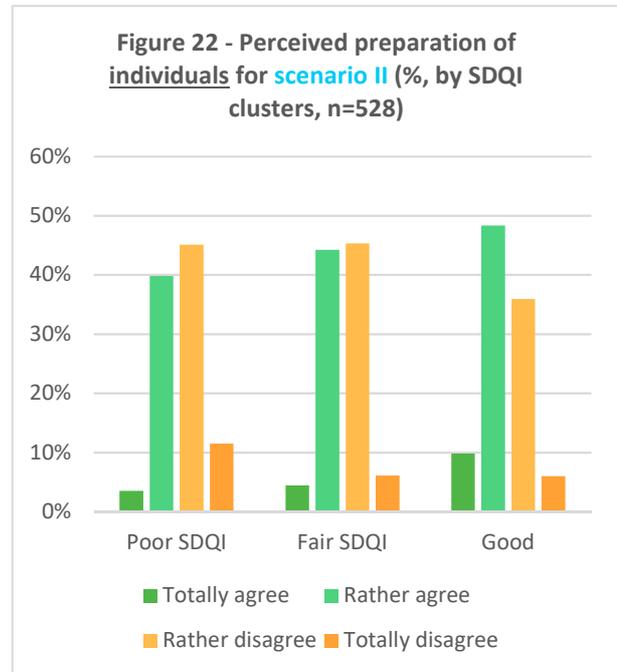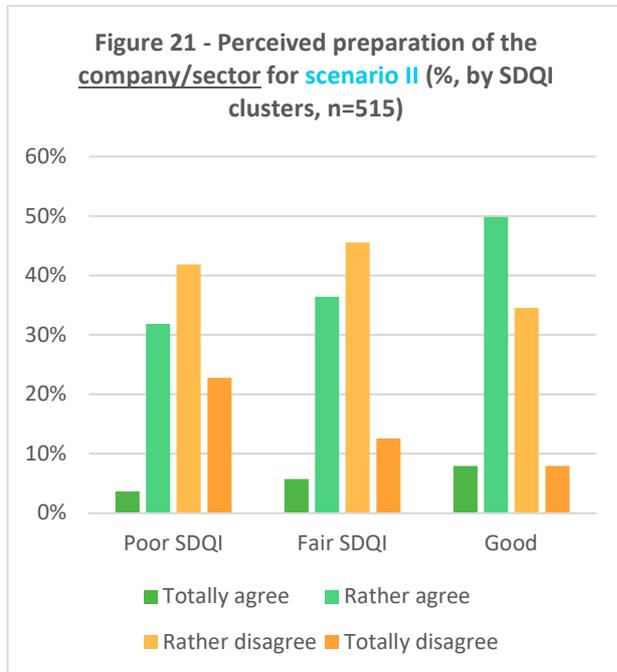


Whether for themselves, or for their enterprise or sector, **respondents in general feel better prepared to face the challenges posed by scenario II** than to face the challenges posed by scenario I (see figure 20). But there exist differences between subgroups, especially regarding the preparation of the structure (company or sector).

**For both scenarios, respondents who are representatives at the company level feel their structures are better prepared** than respondents who are representatives at the sectoral level, the most notable difference being seen for scenario I. In other words, the company as a place of social dialogue feels better prepared than the sector as a place of social dialogue to face the challenges posed by both scenarios. This could be explained by the mechanism of collective labour agreements (CLA) at enterprise level which typically regulate aspects of work organisation and work conditions and therefore, can be seen as more tangible by the social partners who signed it, whereas sector representatives often have a more decentralised view and have to deal with larger sets of variables.

**Regarding scenario I, the system of industrial relations has an influence on the perception of preparation for the structures (companies and sectors) and for the respondents themselves**. In social partnership systems, 26% of the respondents totally disagree with the fact that their structures are well prepared to face the challenges posed by this scenario. They are only 18% in state-centred systems. In social partnership systems, they are also 22% to totally disagree with the fact that themselves as individuals are well prepared; compared to 8% in state-centred systems of industrial relations. These results seem rather counterintuitive given the other differences already highlighted previously in the report. As stated in section 3, countries with a social partnership system of industrial relations are more to indicate that digitalisation is a concern in terms of social dialogue. They experience more co-determination in social dialogue, less destruction of jobs and more creation of jobs

in general, and they are more to attribute the changes in the nature of the jobs to digitalisation.

**Regarding scenario II** this time, the SDQI is linked to the perception **of preparation for the structures (companies and sectors) and for the respondents themselves.** The higher the SDQI, the higher the perceived preparation for both items (see figures 21 and 22).



Figure 21 - Perceived preparation of the company/sector for scenario II (%, by SDQI clusters, n=515)



Figure 22 - Perceived preparation of individuals for scenario II (%, by SDQI clusters, n=528)

Finally, when it comes to **scenario II**, respondents holding a function of employer's representatives are 71% to state that their structure (company or sector) is well prepared. Respondents holding a function of trade unions' representatives are much more nuanced on that matter (see figure 23). An explaining factor could be that the topic of scenario II is usually well discussed in managerial arenas whereas it is still less the case in social dialogue bodies.



Figure 23 - Perceived preparation of the company/sector for scenario II (%, by function clusters, n=515)
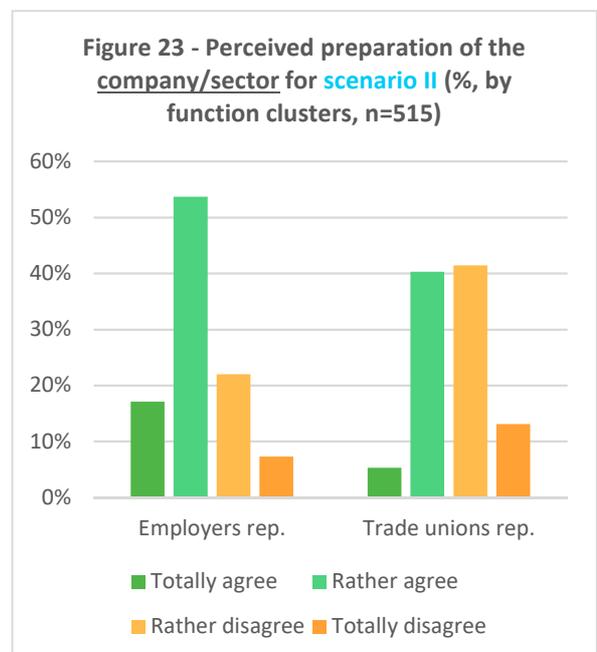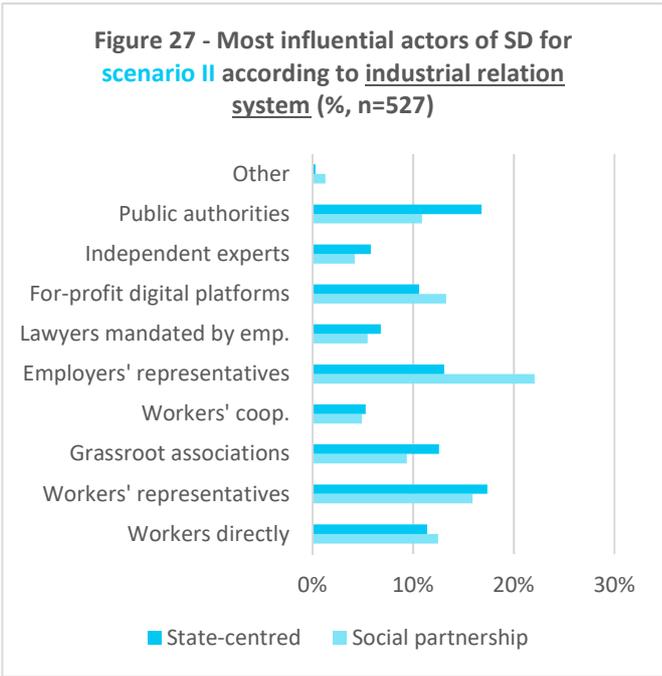
## ACTORS OF CHANGES

We then asked respondents about the perceived three most influential actors of social dialogue in the current situation; and their opinion on the same topic should the scenarios happen. In general, key actors in social dialogue remain the same across the three situations: workers' representatives (trade unions); employers' representatives; and public authorities or government are seen as the most influential (see figure 24). Nevertheless, in the case of scenario I, these actors lose influence in favour of the rise of managers or owners of for-profit digital platforms; workers' cooperative or workers platforms; and grassroots associations (such as freelancers unions, professional associations, etc.) (see arrows in figure 24).
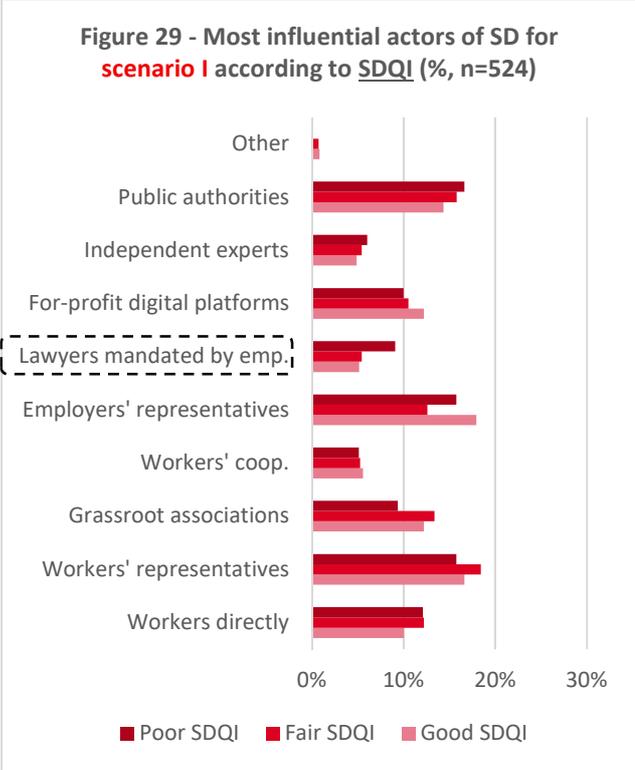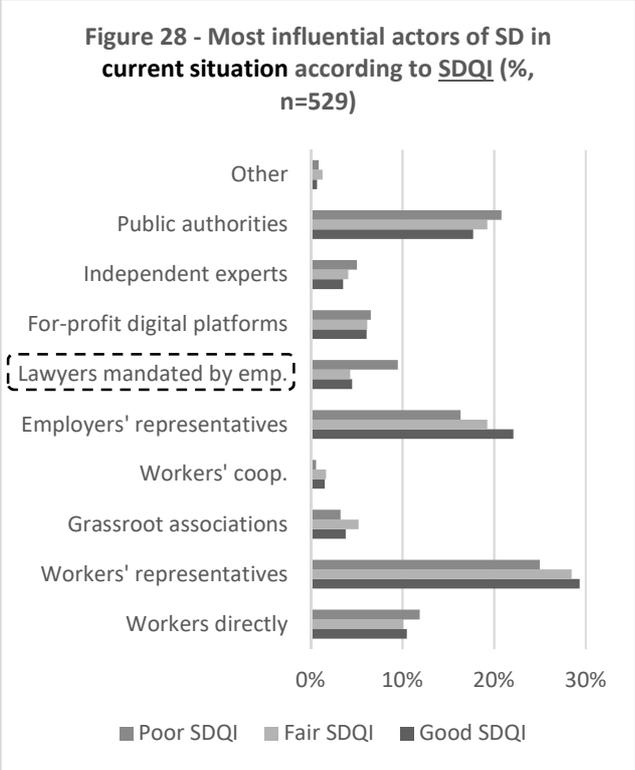


Figure 24 - Most influential actors of SD according to situation or scenario (%)
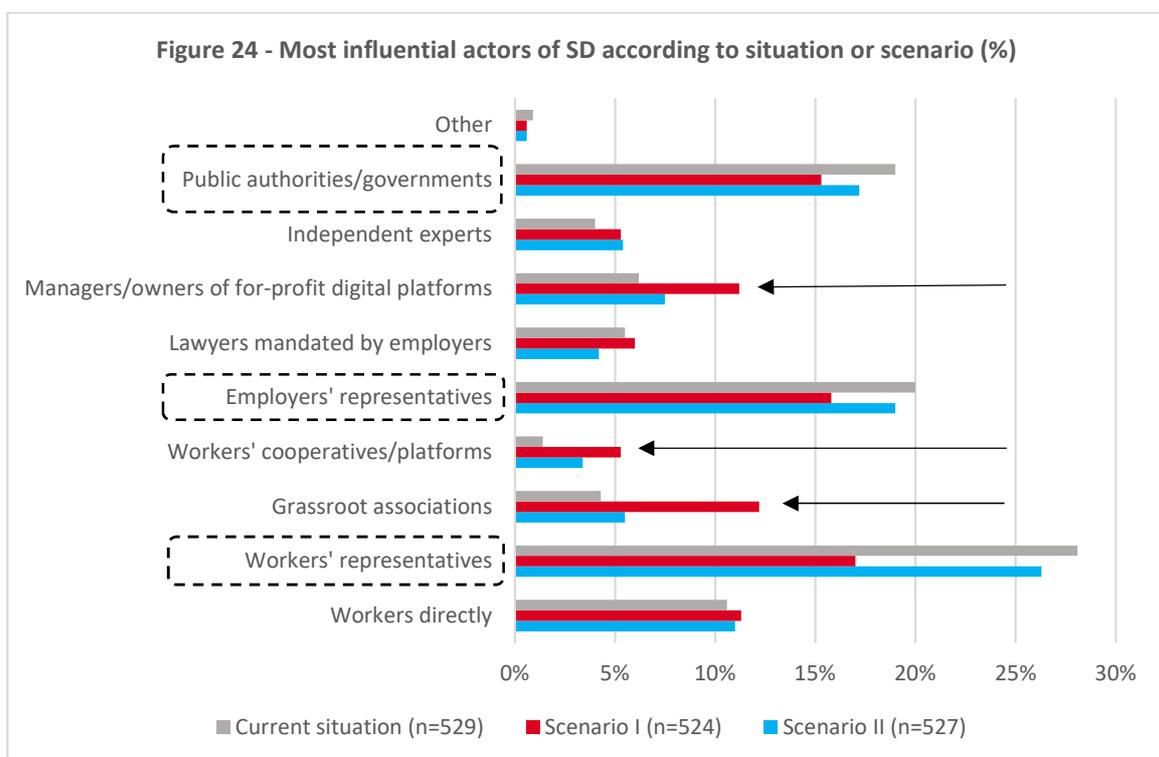
Differences exists between subgroups regarding the influence of actors. It should be emphasized that even if the average weight of the actors is modified depending on some subgroups, the top three actors always remain the workers' representatives (trade unions); the employers' representatives; and the public authorities or government.

**The influence of employers' representatives and workers' representatives differs in current situation and for scenario I based on the function held**. Respondents who are employer representatives place less influence on workers' representatives. Conversely, respondents who are trade unions representatives place less influence on employers' representatives. Trade unions stakeholders also seem to attribute slightly more influence to lawyers mandated by employers, in both current situation and scenario I. Scenario II turns out to gather similar percentages regardless of the function held.

**For all situations (current, scenario I and scenario II), the influence of public authorities or governments and employers' representatives differs based on the system of industrial relations**. Respondents working in a state-centred system attribute logically a greater influence to public authorities or governments and a smaller influence to employers' representatives than respondents working in a social partnership system (see figures 25, 26 and 27).



Figure 25 - Most influential actors of SD in **current situation** according to <u>industrial relation system</u> (%, n=529)



Figure 26 - Most influential actors of SD for **scenario I** according to <u>industrial relation system</u> (%, n=524)



Figure 27 - Most influential actors of SD for **scenario II** according to <u>industrial relation system</u> (%, n=527)

**The influence of lawyers mandated by employers differs in current situation and for scenario I based on the Social Dialogue Quality Index**. Respondents evolving in a social dialogue context qualified as "poor" give a greater influence to lawyers mandated by employers than those who live in context qualified as "fair" or "good" (see figures 28 and 29).



Figure 28 - Most influential actors of SD in **current situation** according to SDQI (%, n=529)



Figure 29 - Most influential actors of SD for **scenario I** according to SDQI (%, n=524)

For scenario II, the influence of employers' representatives differs based on **the Social Dialogue Quality Index.** Respondents evolving in a social dialogue context qualified as "good" give a greater influence to employers' representatives than those who live in a context qualifier as "fair" or "poor" (see arrow in figure 30).



Figure 30 - Most influential actors of SD for **scenario II** according to SDQI (%, n=527)

28
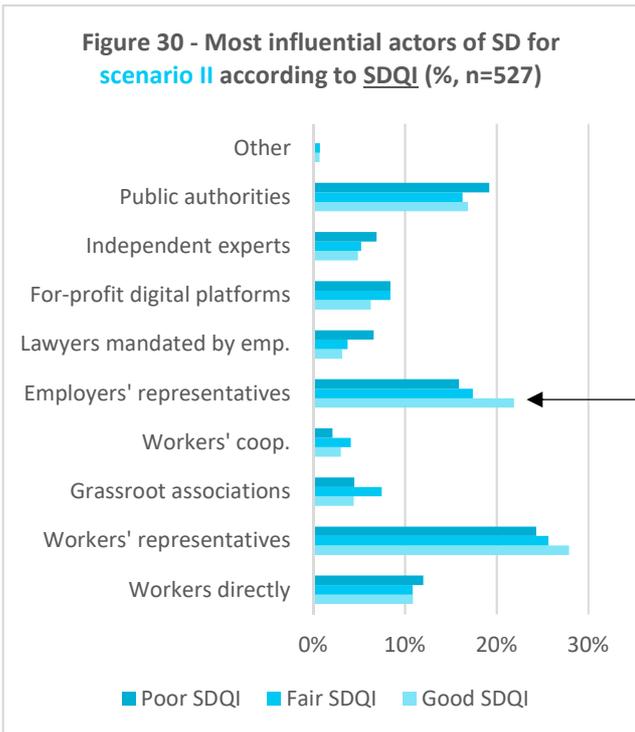
We asked the respondents at which level in priority should actions and discussions take place between stakeholders in order the address the topic of digitalisation and its foreseen developments within the scenarios presented. In general, respondents believe that **priority should be given respectively to sectoral, European and company levels for both current situation and scenario II**. In the case of scenario I, sectoral and European level remain significant but the importance of the company level is lessened in favour of national and interorganisational levels (see arrows in figure 31).



Figure 31 - Most adequate level of SD according to situation or scenario (%)
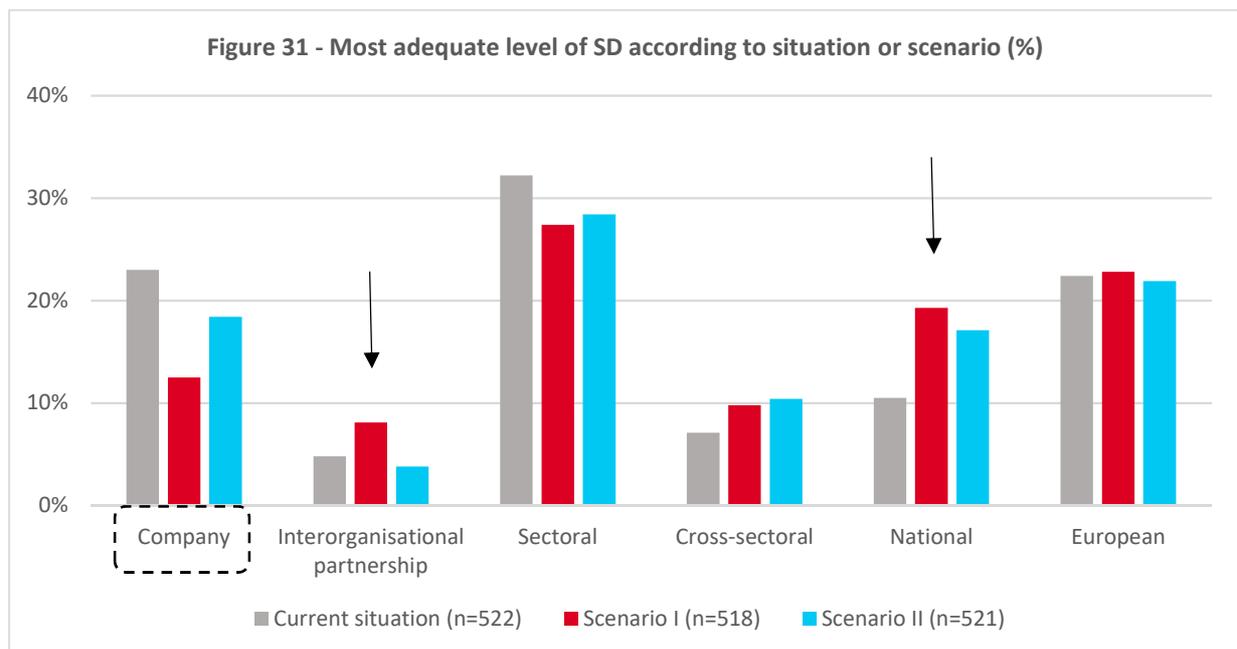
Differences exist between subgroups of respondents regarding the most adequate level in the current situation and for scenario I.
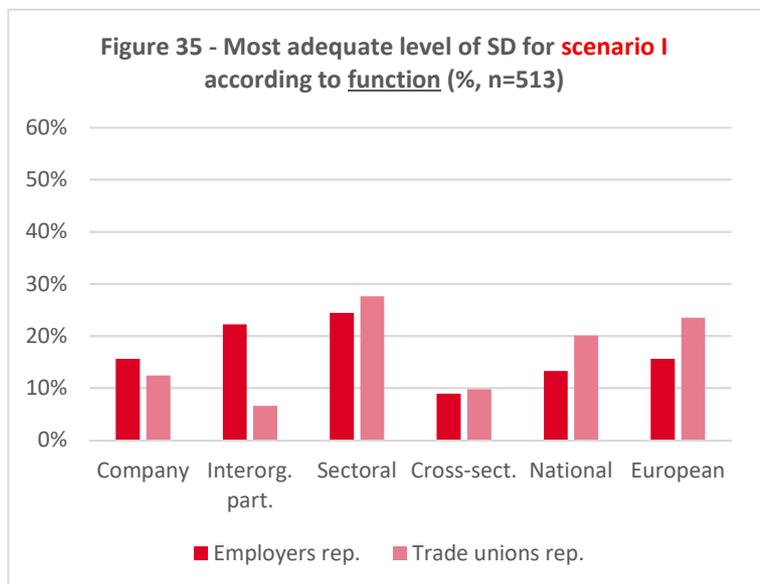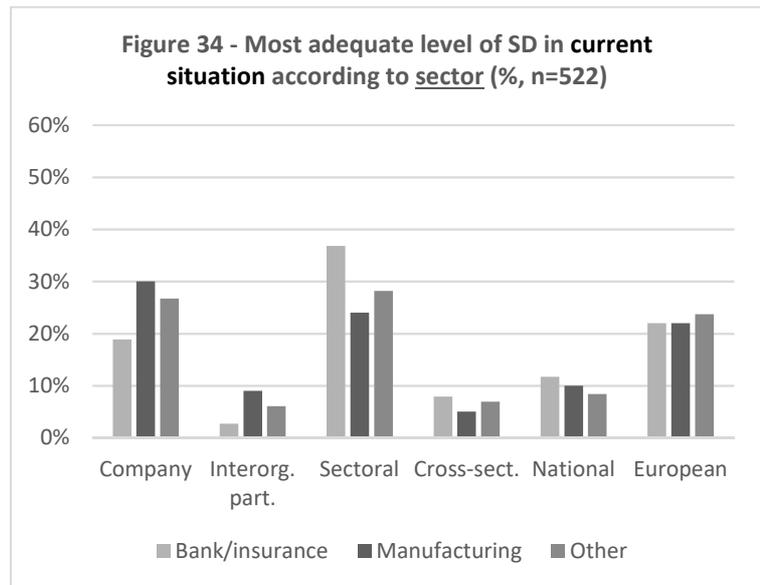
**In the current situation,** more than one employer representative out of two favours the company level whereas only one trade union representative out of five (20%) picks that same level. They advocate mostly for the sectoral (33%) and European (24%) levels (see arrows in figure 32).



Figure 32 - Most adequate level of SD in **current situation** according to <u>function</u> (%, n=517)
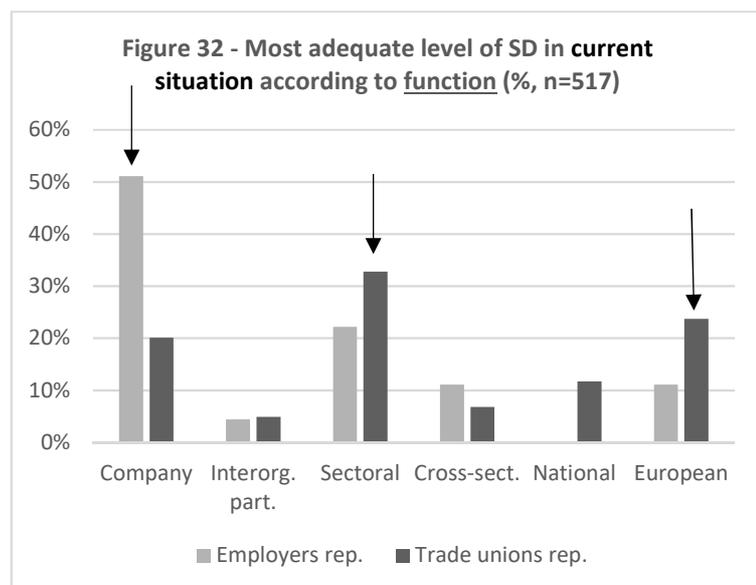
The respondents from the bank/insurance sector believe things should mostly be discussed and developed at the sectoral level (37%), whereas the ones from the manufacturing sector show preference for the company level (30%) (see figure 34).

**In the case of scenario I**, employer representatives favour interorganisational and sectoral levels, whereas trade unions representatives favour sectoral, European and national levels (see figure 35). With little surprise, representatives from the company level select more the company level (15%) than representatives from the sectoral level (5%).

We did not observe differences between subgroups regarding the level based on the dimensions selected for scenario II.

**Figure 34 - Most adequate level of SD in current situation according to sector (%, n=522)**



**Figure 35 - Most adequate level of SD for scenario I according to function (%, n=513)**



## WHAT SHOULD BE DONE?

In terms of all the points mentioned above (probability, desirability, preparation, actors and levels of social dialogue), analyses showed differences between scenarios both on a general level and between subgroups. However, regarding the three most appropriate actions to enrich social dialogue, there does not seem to exist such differences in general (see figure 36). Actions that are favoured for scenario I are also the ones favoured for scenario II. They include **sectoral and national collective labour agreements** regulating restructuring linked to digitalization; a **legal framework** defining rights and obligations for each category of workers concerned by digitalization (from standard employment relationship to nonstandard work arrangements); and **joint actions** at a national level in order to defend and promote the interests of the social partners.

**Figure 36 - Most appropriate actions to enrich SD according to scenario (%)**

Legend: Scenario I (n=493) ■ Scenario II (n=497) ■
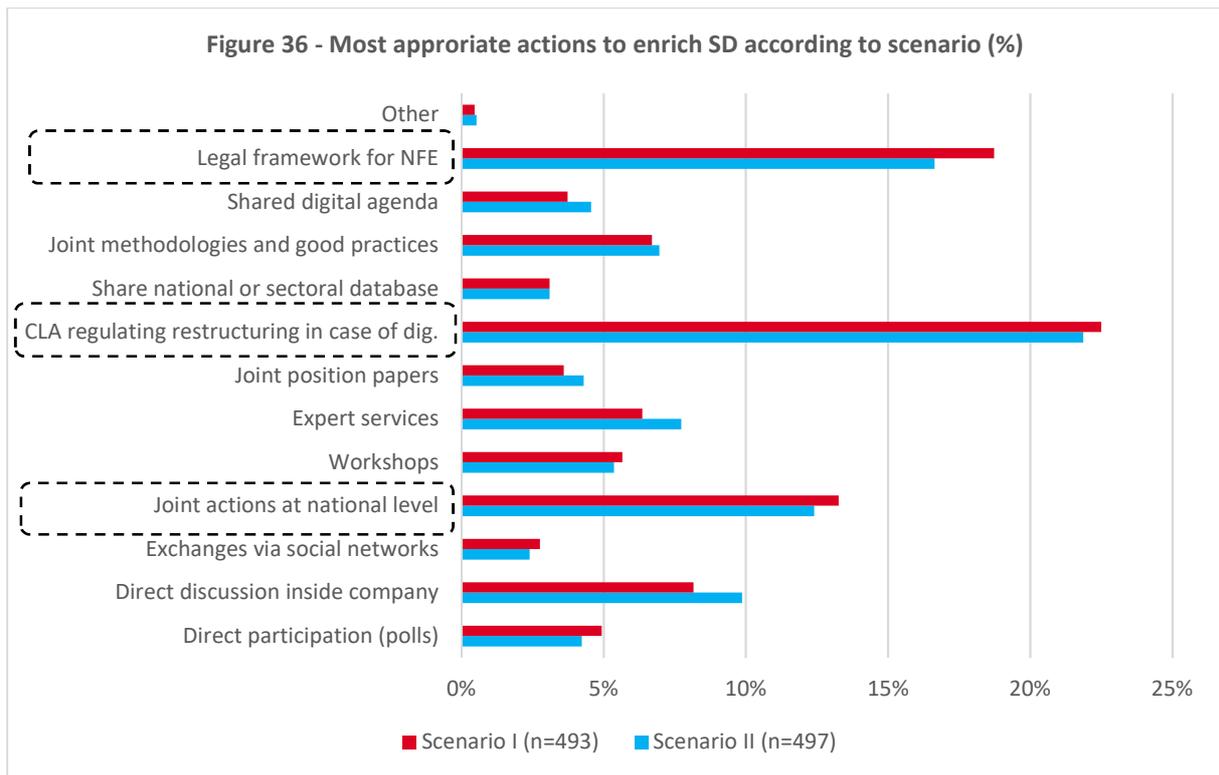
In terms of differences between subgroups based on dimensions, there is an influence of the function held on the types of preferred actions for scenario I as well as for scenario II. In both cases, trade unions representatives recommend more the establishment of a legal framework and CLA than employers representatives' respondents (see arrows in figures 37 and 38). In sum, **trade unions representatives' respondents tend to favour actions that are more constraining**, a fact the national reports also underlined.

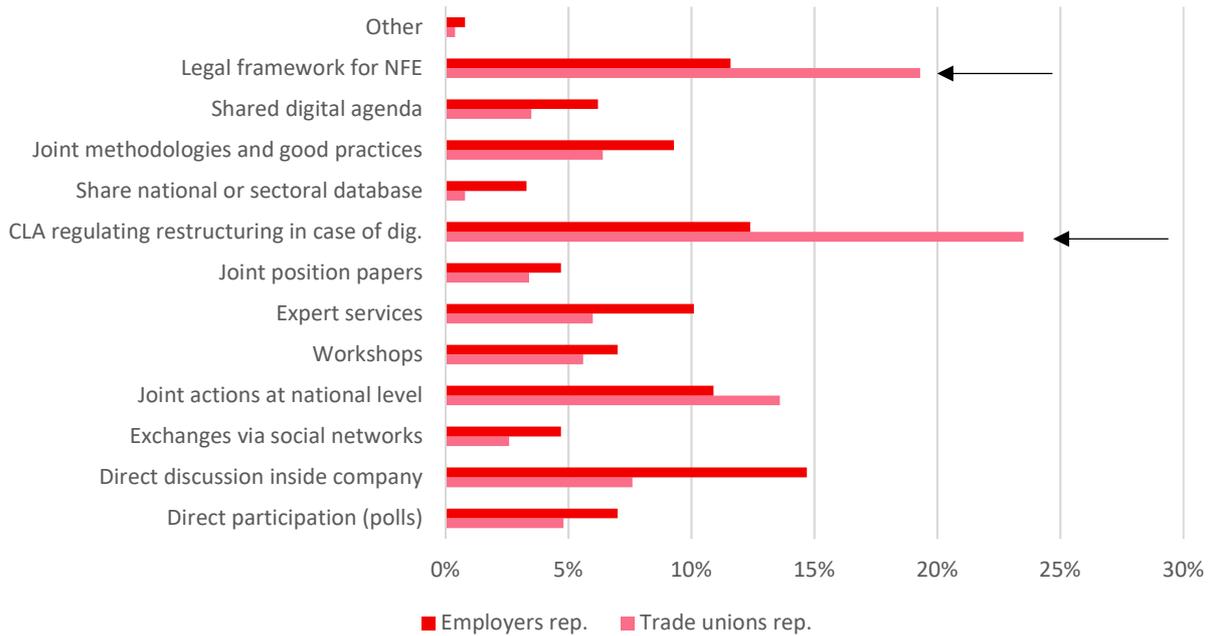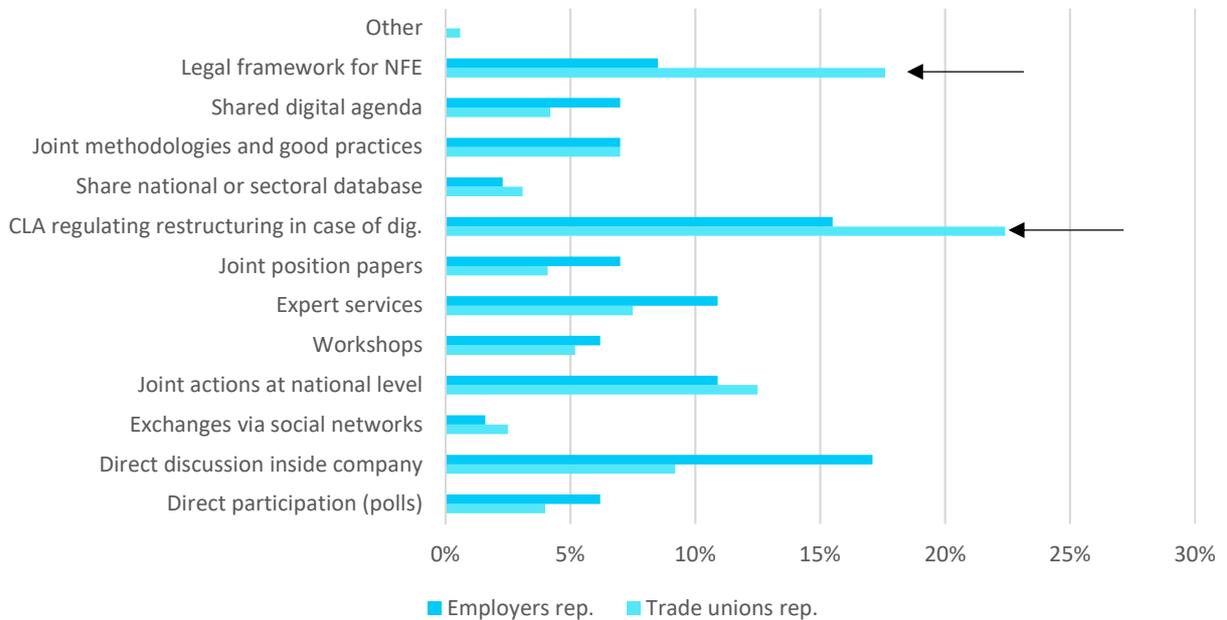**Figure 37 - Most approriate actions to enrich SD for scenario I according to function (%, n=493)**

Legend: Employers rep. | Trade unions rep.



**Figure 38 - Most approriate actions to enrich SD for scenario II according to function (%, n=497)**

Legend: Employers rep. | Trade unions rep.

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# CONCLUSION

The DIRESOC project intends to provide a better understanding of the way social dialogue contributes to shape the ongoing processes of restructuring resulting from digitalisation and vice-versa. On these matters, our online survey shows that 63% of our respondents consider digitalisation as a social dialogue topic, congruent with other studies (see for example Voss & Riede, 2018). Of those respondents, 69% indicated that digitalisation is a central topic. These results however contradict those from the national reports that showed that digitalisation was rarely a subject of social dialogue as such, even though it affects the life of companies. The way in which the subject is approached is split between information procedures (47%) and other exchange processes (42%). Finally, 56% of them assess social dialogue climate for digitalisation as very good, good, or fair. In line with what we found in other research actitivies of the DIRESOC project, the fact that digitalisation is not a concern in terms of social dialogue (37% of the cases) is mainly explained by the presence of other priorities dominating the social dialogue's agenda, something which we previously underlined in the national reports of the project.

Regarding restructuring, changes in the nature of the jobs is the type of restructuring that is most perceived, by 88% of our respondents. It can be assumed that such changes in the nature of the jobs are largely shaped by digitalisation, as 63% of the survey's respondents stated it. This number is congruent with the actual shift in the debate from the destruction and creation topic to an analysis in terms of tasks changed and skills needed (Brynjolfsson, Mitchell & Rock, 2018; Schatsky, Muraskin & Gurumurthy, 2015). A surprising figure of the survey lies in the share of 33% of respondents indicating that their enterprise went under shifts of the job status from salaried status to atypical work arrangements. Among them, 42% consider digitalisation to be the main factor leading to job shifts. These numbers contribute to the limited data already collected on the platform economy.

Opinions on the future of social dialogue were measured through an innovative approach derived from prospective scenarios. The two scenarios are seen as probable by respondents, especially scenario II about automation, AI and robotization. A majority of respondents rejects scenario I (extension of new forms of employments) whereas opinions are divided for scenario II, leaning towards the neutral position. Respondents in general feel better prepared to face the challenges posed by scenario II than the ones posed by scenario I. For both scenarios, traditional social dialogue actors and actions remain relevant. In case of scenario I, respondents estimate this influence would be lessened in favour of other actors. In general, respondents believe that priority should be given respectively to sectoral, European and company levels for both current situation and scenario II. In the case of scenario I, sectoral and European level remain significant but the importance of the company level is lessened in favour of national and interorganisational levels. Finally, respondents share the same opinion on the most appropriate actions to enrich social dialogue, regardless of the scenario. These actions are sectoral and national CLA regulating

restructuring linked to digitalization; a legal framework defining rights and obligations for each category of workers concerned by digitalization; and joint actions at a national level in order to defend and promote the interests of the social partners.

These perceptions are shaped by several socio-demographic characteristics. First and most importantly, by the perceived quality of social dialogue, as approached in our study via the building of a social dialogue quality index – SQDI. The higher the SDQI, the more digitalisation is considered in social dialogue, the more central of a subject it is and the more procedures go beyond information to reach exchanges processes. When SDQI is qualified as good, the perception of creation of jobs is higher, along with a lower perception of shifts of the job status. SDQI is also linked positively with the impact of digitalisation on both creations and changes in the nature of the jobs. Regarding the scenarios, a higher SDQI increases the desirability of scenario II, along with the perceived feeling of preparation towards it for respondents and for the company/sector. **The results on the influence of the SDQI confirms previous studies (see Eurofound, 2016) showing the impact of a high-quality social dialogue in creating socially responsible solutions for restructuring. Our online survey reveals this affirmation remains relevant when talking about digitalisation**.

Second, employers' representatives' respondents better assess the quality of social dialogue as far as digitalisation is concerned than trade union representatives' respondents. Employers and trade unions representative respondents have different points of view on the creation and destruction of jobs; and similar points of view for work conditions changes and shifts of job status. Trade unions representatives' respondents consider the scenario I as less desirable for the quality of social dialogue. Trade union representatives' respondents also tend to favour actions that are more constraining (collective agreements, legal framework).

Third, systems of industrial relations also play a major role in shaping the perceptions of the respondents. Respondents working in a social partnership system are more to indicate that digitalisation is a concern in terms of social dialogue. They experience more co-determination in social dialogue, less destruction of jobs and more creation of jobs in general, and they are more to attribute the changes in the nature of the jobs to digitalisation. They however feel less prepared for scenario I. For every situation and scenario, respondents working in a social partnership system attribute a smaller influence to public authorities or governments and a greater influence to employers' representatives than respondents working in a state-centred system.

Finally, it is worth noting that when questioned about the current state of social dialogue, digitalisation and restructuring, respondents with less than 4 years of experience in social dialogue bodies were frequently less able to express their opinions. These results call for a type of "social dialogue literacy" which should be given at entry. This "social dialogue literacy" could increase the ability to perceive the effects of digitalisation on social dialogue and restructuring. Being able to recognize and qualify (in whatever ways) such events is the first step for developing adequate answers and actions within social dialogue bodies.

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# APPENDIX



INTRODUCTION

Thank you for agreeing to take part in this survey, framed by the DIRESOC project.

The DIRESOC project intends to provide a better understanding of the way social dialogue contributes to shape the ongoing processes of restructuring resulting from digitalisation and vice-versa.

Our concept of social dialogue is defined in accordance to the ILO, this is, to include all types of negotiation, consultation or simply exchange of information between, or among, representatives of governments, employers and workers, on issues of common interest relating to economic and social policy.

This survey is divided in two parts. The first one focuses on the current state of social dialogue. The second one focuses on the foreseen changes linked to digitalisation and their potential consequences.

This survey takes around 15 minutes to complete. It is entirely anonymous and responses will be handled in their totality and not individually. It is addressed to employer and trade union representative at company and sectoral level.

Should you have any question, do not hesitate to contact info@diresoc.eu or visit the website www.diresoc.eu

**YOUR SITUATION REGARDING SOCIAL DIALOGUE**

**What is your main function regarding social dialogue?**

- Employer representative at company level
- Employer representative at sectoral level
- Trade union representative at company level [shop steward / company workers representative]
- Trade union representative at sectoral level

*Please answer to the rest of this survey from the point of view of your main function regarding social dialogue.*

**For how many years have you had that function?**

*Please indicate the number of years using the cursor*

**What is the size of your company?**

*If you do not know the exact number, please answer approximately*

**In what country are you working?**

- Belgium
- Bulgaria
- France
- Germany
- Italy
- Portugal
- Spain
- Sweden
- Other
  - o Please specify :

**In which sector are you involved?**

- Bank/insurances
- Manufacturing
- Postal services
- Tourism
- Other
  - o Please specify:

**PART 1 – CURRENT STATE OF SOCIAL DIALOGUE**

**Please indicate to what extent you agree with the following sentences about social dialogue[9] in your company/sector in the last three years**

| | Fully agree | Rather agree | Rather disagree | Totally disagree | I don't know |
|---|---|---|---|---|---|
| I think social dialogue in my company/sector is satisfying | | | | | |
| There is a climate of mutual trust between employers' representative and trade unions' representative in my company/sector | | | | | |
| There is regular (i.e. monthly) communications between employers' representative and trade unions' representative in my company/sector | | | | | |
| There are written agreements that result from social dialogue in my company/sector | | | | | |

**Within your company/sector, is digitalization a concern in terms of social dialogue?**

- Yes
    - **How relevant is it?**
        - Digitalisation is a central topic
        - Digitalisation is a peripheral topic
        - I don't know
    - **Please indicate how the topic of digitalisation is primarily approached**
        - Information
        - Consultation
        - Negotiation

---

[9] Social dialogue is defined by the ILO to include all types of negotiation, consultation or simply exchange of information between, or among, representatives of governments, employers and workers, on issues of common interest relating to economic and social policy.

- ▪ Co-determination
    - ▪ I don't know
  - • **How would you assess the social dialogue climate as far as digitalization is concerned?**
    - ▪ Very good
    - ▪ Good
    - ▪ Fair
    - ▪ Poor
    - ▪ Very poor
    - ▪ I don't know
- No
  - • **Please select - among the following reasons - the main reason(s) that explain(s) this situation (three choices maximum)**
    - ▪ The employer side considers it is not a topic of social dialogue
    - ▪ The union side considers it is not a topic of social dialogue
    - ▪ The regulatory framework excludes digitalization as a topic of social dialogue
    - ▪ Digitalization has been discussed but not in social dialogue as such
    - ▪ The employer side is poorly prepared to tackle this issue
    - ▪ The union side is poorly prepared to tackle this issue
    - ▪ Other priorities are on the agenda of social dialogue
    - ▪ Other:
      - Please specify:

**Has your company/sector been through the following changes in the last three years?**

| | Yes | No | I don't know |
|---|---|---|---|
| Destruction of jobs (job loss) | | | |
| Creation of jobs | | | |
| Change(s) in the nature of jobs (tasks performed – working conditions, etc.) | | | |
| Shift(s) of the job status (from workers to self-employed, for example) | | | |

If yes,

| | Yes | No | I don't know |
|---|---|---|---|
| Digitalisation has been the main explaining factor of destruction of jobs (job loss) in my company/sector | | | |
| Digitalisation has been the main explaining factor of creation of jobs in my company/sector | | | |
| Digitalisation has been the main explaining factor of changes in the nature of jobs (tasks performed – working conditions, etc.) in my company/sector | | | |
| Digitalisation has been the main explaining factor of shift(s) of the job status (from workers to self-employed, for example) in my company/sector | | | |

**Please provide further details on the destruction of jobs that happened in your company/sector due to digitalisation**

Please provide further details on the creation of jobs that happened in your company/sector due to digitalisation

Please provide further details on the change in the nature of jobs (tasks performed – working conditions, etc.) that happened in your company/sector due to digitalisation

Please provide further details on the shift(s) in the job status that happened in your company/sector due to digitalisation

*In this part, you will be shown two scenarios summarizing trends in digitalisation. You will be asked about how you imagine social dialogue can be in each scenario. Please consider these scenarios as if they were exclusive.*

Scenario I – Extension of new forms of employment

Key ideas : extension of new forms of employers : freelancer, economically dependent self-employees and platform workers have become the norm

Year 2030 – technological changes linked to digitalisation

- o Economic landscape is now made up of a multitude of small enterprises – often digital platforms.
- o Most "traditional" companies had to restructure in a hurry to face this new competition.
- o Atypical jobs (freelancers, employees made available by a service provider, economically dependent self-employees, platform workers with no specific status) have become the norm.
- o Traditional employee pattern is now the exception, reserved to occupations with labour shortages.
- o In terms of social dialogue, the main challenge is to avoid a degradation of the quality of work and social protection of these workers with heterogeneous profiles.

Scenario II – Extension of the new ways of working

Key ideas : through AI and automation, new skilled jobs have been created while challenging employment rate of low skilled workers

Year 2030. Technological changes linked to artificial intelligence, automation and robotisation

- o A whole range of functions traditionally occupied by salaried workers has been fully automated.
- o New functions have been created and provide skilled jobs.
- o At the same time, there is a risk of unemployment for workers who do not possess the appropriate skills.
- o In terms of social dialogue, the main challenge is to support both capacity building for the less skilled workers and retraining of more skilled workers, in an attempt to reduce a growing dualization of the labor market.

## TOPIC 1 – RESTRUCTURING

|  | Scenario I<br><br>Extension of new forms of employers : freelancer, economically dependent self-employees and platform workers have become the norm | Scenario II<br><br>Through AI and automation, new skilled jobs have been created while challenging employment rate of low skilled workers |
|---|---|---|
| **To what extent is this scenario probable for you?** | - Extremely high<br>- High<br>- Low<br>- Extremely low<br>- I don't know | - Extremely high<br>- High<br>- Low<br>- Extremely low<br>- I don't know |
| **To what extent may this scenario be viewed as desirable for the quality of social dialogue if the scenario becomes a reality?** | - Extremely desirable<br>- Desirable<br>- Neutral<br>- Undesirable<br>- Extremely undesirable<br>- I don't know | - Extremely desirable<br>- Desirable<br>- Neutral<br>- Undesirable<br>- Extremely undesirable<br>- I don't know |

**Please indicate to what extent you agree with the following sentences**

|  | Fully agree | Rather agree | Rather disagree | Totally disagree | I don't know |
|---|---|---|---|---|---|
| My company/sector is well prepared to face the challenges posed by the scenario I ("extension of new forms of employers , freelancer, economically dependent self-employees and platform workers have become the norm") |  |  |  |  |  |

| | | | | | |
|---|---|---|---|---|---|
| I, as an actor of social dialogue, feel well prepared to face the challenges posed by the scenario I ("extension of new forms of employers , freelancer, economically dependent self-employees and platform workers have become the norm") | | | | | |
| My company/sector is well prepared to face the challenges posed by the scenario II ("through AI and automation, new skilled jobs have been created while challenging employment rate of low skilled workers") | | | | | |
| I, as an actor of social dialogue, feel well prepared to face the challenges posed by the scenario II ("through AI and automation, new skilled jobs have been created while challenging employment rate of low skilled workers") | | | | | |

**TOPIC 2 – ACTORS AND LEVELS OF SOCIAL DIALOGUE**

- **Among the potential actors of social dialogue listed below, please indicate <u>the first three</u> you consider is (current situation) / will be (scenario I & II) the most influential in case the scenarios happen.**

|  | Current situation | Scenario I<br><br>Extension of new forms of employers : freelancer, economically dependent self-employees and platform workers have become the norm | Scenario II<br><br>Through AI and automation, new skilled jobs have been created while challenging employment rate of low skilled workers |
|---|---|---|---|
| - Workers directly<br>- Workers representative (trade unions)<br>- Grassroot associations (freelancers unions, professional association, etc.)<br>- Workers' cooperative / workers platforms<br>- Employers representative<br>- Lawyers mandated by employers<br>- Managers/ owners of for-profit digital platforms<br>- Independents experts<br>- Public authorities / Government<br>- Other : please specify | Top 3 actors | Top 3 actors | Top 3 actors |

- **According to you, which level of social dialogue is (current situation) / will be the most adequate ( = the one social dialogue stakeholders should put the priority on in order to develop actions) to discuss the challenges posed by digitalisation in enterprises?**

|  | Current situation | Scenario I<br><br>Extension of new forms of employers : freelancer, economically dependent self-employees and platform workers have become the norm | Scenario II<br><br>Through AI and automation, new skilled jobs have been created while challenging employment rate of low skilled workers |
|---|---|---|---|
| - Company<br>- Interorganizational partnership (ex.: value chain, worksite, etc.)<br>- Sectoral<br>- Cross-sectoral<br>- National<br>- European | Most adequate level | Most adequate level | Most adequate level |

# TOPIC 3 – PROCESSES OF SOCIAL DIALOGUE

**Please select - among the following actions - the actions you think are the most appropriate to enrich social dialogue in case the scenarios happen (three choices maximum)**

| | Scenario I<br><br>Extension of new forms of employers : freelancer, economically dependent self-employees and platform workers have become the norm | Scenario II<br><br>Through AI and automation, new skilled jobs have been created while challenging employment rate of low skilled workers |
|---|---|---|
| Direct participation via online polls<br><br>Direct discussion between management and workers<br><br>Exchanges about social dialogue and digitalisation issues via social networks<br><br>Joint actions at a national level in order to defend and promote the interests of the social partners<br><br>Workshops about digitalisation handled by social partners<br><br>Expert services about digitalisation to support social partners<br><br>Joint position papers on digitalization co-signed by social partners<br><br>Sectoral and national collective agreements regulating restructuring linked to digitalization<br><br>Shared national/sectoral database between social partners keeping | Top 3 actions | Top 3 actions |

| | | |
|---|---|---|
| tracks of restructuring processes linked to digitalization<br><br>Joint methodologies written by social partners to provide "good practices" about restructuring and digitalization<br><br>Shared national digital agenda for social partners<br><br>Legal framework defining rights and obligations for each category of workers concerned by digitalization (from standard employment relationship to nonstandard work arrangements)<br><br>Other (please specify) | | |

**YOUR SITUATION**

**What is your age?**

*Please indicate your age using the cursor*

**What is your gender?**

- Male
- Female

**What is the highest degree or level of school you have completed?**

*If you are currently enrolled in school, please indicate the highest degree you have received*

- None
- Primary education
- Secondary education (lower or upper)
- Post-secondary non tertiary education or short-cycle tertiary education
- Bachelor or equivalent
- Master or equivalent
- Doctoral or equivalent
- Other
    - Please specify

We thank you for your time spent taking this survey. Your response has been recorded.

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