



Developments and Future Prospects in the World of Work*

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Abstract

This paper presents an overview of the state of research and policy analysis pertaining to the developments and prospects in the world of work and draws parallels with the European Centre's contributions. We start by identifying the key themes and challenges dominating public and academic discussions, namely non-standardisation of employment and work fragmentation; labour market segmentation, inequality and precarity; adaptation to new skill demands and types of work; unemployment, activation and inclusion; un(der)declared and any other falsely declared work; internationalisation of work and its opponents; transformation of industrial relations; and professionalisation of policymaking. We then present and discuss our recent research on active labour market policy, labour mobility and migration, labour standards and working conditions, and industrial relations while demonstrating their links to the themes identified. Finally, we outline several developing and interlinked trends such as digitalisation and automation, the reorganisation of work, demography and migration, climate change and green transition, which we consider imperative to incorporate in future research.

* This discussion paper was prepared for and presented at a dedicated session on employment and labour mobility at the Invitational Conference 'The Future of Social Welfare Policy and Research' on the occasion of the 50th Anniversary of the European Centre for Social Welfare Policy and Research. We are grateful for the feedback provided by the discussants Michael Blauburger, Paris Lodron University Salzburg and Tadas Leončikas, Eurofound, Dublin, Ireland, as well as the insights from the panel participants: Marta Kahancova, Central European Labour Studies Institute (CELSI), Slovakia; Thore Hansen, Directorate of Labour and Welfare, Norway; Jan Drahokoupil, European Labour Authority, Slovakia; Anna Daimler, Vida/Austrian Trade Union in the transport and service industries; Natasha Ghulam, Austrian Chamber of Commerce (WKO). The authors would also like to thank Daria Jadric for proofreading and Anna Obernberger for the layout.

1 Introduction

The world of work is in constant transformation. Currently, we are seeing multiple phenomena influencing and shaping work at all levels, from the micro (individual) level to the macro (policy) level. Megatrends such as digitalisation and automation, globalisation, demographic change, migration, climate change, as well as armed conflicts, are transforming labour markets and labour processes at an unprecedented pace. These trends set important research priorities from the perspective of policymaking, business model development, enforcement, and protection of labour standards and rights. Through research and policy analysis, the Employment and Labour Mobility team at the European Centre for Social Welfare Policy and Research aims to deepen public and stakeholder understanding of these emergent labour trends and their far-reaching impacts.

The research team covers not just employment narrowly defined but the world of work as a whole. Work is understood as ‘any activity performed by persons of any sex and age to produce goods or to provide services for use by others or for own use’ (ILO, 2019). Work shapes our lives. It affects our residence, education, health, consumption habits, and interpersonal relations. Under this definition, employment is only that part of work performed for pay or profit, while other forms of work include own-use production work, unpaid trainee work, volunteer work, unpaid domestic or care work, and other forms of work, including exploitative ones (ibid). Staying true to our profile as an applied research institute, distinguishing between work and employment allows us to conduct a deeper and more thorough study of the intricacies of the world of work, particularly in understanding the structures and patterns that produce vulnerability and inequality, as well as in recommending and designing measures to counteract mechanisms of disadvantage.

This discussion paper presents an overview of the state of research and policy analysis pertaining to the development and the prospects in the world of work. We also highlight parallels with our research and analysis. We argue that the ongoing labour market transformations provide both opportunities and risks for labour market actors. Opportunities, for instance, lie in the expansion and diversification of industries, more sustainable business models and forms of production, the performance of work with safer and more accessible practices, more inclusive and flexible employment arrangements, and the creation of new jobs and professions. Risks, on the other hand, lie in the fragility of certain industries and economic operators to afford the costs of transformations, loss of jobs for those in industries and companies that will become obsolete, the restriction of access to new jobs for those without the right skills, the reinforcement of labour market segmentation for vulnerable groups, and the further precarisation of employment. These opportunities and risks also influence social dialogue and the activities of industrial relations actors, for instance, by prompting employer and worker organisations to revise collective bargaining agreements that facilitate just transitions for affected industries while upholding labour standards.

The paper is structured as follows: we start by identifying the current themes and challenges in the world of work, followed by an overview of the European Centre’s contributions to research in the field. We then discuss the emerging trends and perspectives and conclude with final remarks.

2 Current themes and challenges of work

In the last decade, several themes have dominated the public and academic discussions related to the world of work. In this section, we present the key themes and the related challenges. In some cases, challenges are transversal to more than one labour market development, which we discuss with respect to the relevant theme.

2.1 Non-standardisation of employment and work fragmentation

In 2021, close to 40% of the EU's working population was in some form of non-standard employment, such as part-time work, temporary agency work, self-employment, or temporary contract work (European Commission, 2023a). While non-standard forms of employment have become an increasingly important form of employment and, therefore, a relevant topic of inquiry, when looking at the EU, trends also point to some positive developments, such as pay rates in standard employment and inclusion of women in the labour market (Eurofound 2024c). Nevertheless, considering its growth, non-standardisation of employment and its consequences on work and workers should be examined as its impact on the labour markets and lives of citizens goes far beyond the considerations regarding pay and wages and cross-cut various domains ranging from social benefits, pensions, and access to protections to psycho-social effects of such work and working conditions.

An important driver of such employment trends is partially rooted in work fragmentation, which is the process of labour division into increasingly smaller tasks that are distributed to various operators, building complex multi-employer subcontracting chains of companies of various sizes that could be both local and transnational (Marchington et al., 2005; Mezzadra and Neilson, 2013). Such configurations have aimed, among others, to make the work process and, therefore, employment more flexible, which has eventually given rise to non-standard employment – that is, employment other than on a permanent, full-time contract (ILO, 2016). As a result, workers have varying degrees of pay and access to employment and social protection, depending on their contractual status (Flecker, 2009).

Several other factors have contributed to the development and growing presence of non-standard forms of employment (ILO, 2016). First, as a cost-saving strategy in the context of globalisation and international competition, companies in the manufacturing sector, for example, outsource tasks that used to be done in-house to external service providers or temporary workers. Next, non-standard employment is also used to satisfy the need for flexibility in contractual arrangements, which traditional employment ostensibly cannot offer, as is the case in the seasonal hospitality industry. Third, new technologies have also played a role. Importantly, digital labour platforms have created vast opportunities for the 'gig economy', where mostly self-employed individuals provide task-based services ranging from food delivery to rental services to coding (Drahokoupil & Jepsen, 2017).

Apart from benefiting businesses, non-standard work arrangements such as part-time work or self-employment have also been advantageous for some workers, particularly in cases when the choice of

such flexibility of employment is voluntary. Thus, individuals with care obligations may not have the availability to work full-time and with a fixed schedule, so non-standard remote work options provide access to gainful employment. Delivering food through an online platform, for example, can be an attractive opportunity for university students who prefer flexible schedules to earn (supplementary) income (Schor et al., 2020, Geyer & Prinz, 2022). However, in many cases, non-standard work is involuntary and primarily affects already disadvantaged societal groups such as women, young people and migrants (ILO, 2016). In addition, flexible employment arrangements often come with lower pay, less job security and, especially for (solo) self-employed, limited social protection in terms of unemployment insurance or sick pay (European Commission, 2023a).

2.2 Labour market segmentation, inequality and precarity

European labour markets are demonstrably segmented, leading to a multitude of socio-economic inequalities, which have been identified as an important challenge in the past decades (Heidenreich, 2016; Salverda et al., 2014). One important factor underpinning such segmentation is the growing prevalence of non-standard forms of employment, which, as discussed above, enable flexibility for both employers and workers. However, such jobs often add more instability to employment relations, allowing contracts that offer lower wages and inadequate social conditions and impacting the organisation of work and collective agreements negatively by creating inequalities, division, competition and tensions among the different strands of the workforce (Weisstanner, 2021; Wolf, 2024). Such new employment forms, therefore, further widen the gap in labour market conditions among workers, contributing to the already dualised nature of the workforce characteristics in Europe (Emmenegger et al., 2012).

Another form of segmentation and source of inequality persists based on skills and jobs, often also referred to as the dualisation of the labour market. This division separates (high-)skilled, well-paid and stable occupations or shortage occupations available to a 'core' workforce from less skilled and "undesirable" labour-intensive jobs, such as those at risk of being lost to automation or jobs where a higher supply can be found at low wages in the periphery (Wilkinson, 2013). Another intersecting dynamic in this cleavage is based on other socio-demographic factors, which cluster disproportionately in the peripheral labour market and non-standard jobs, namely, migration status, gender, disability, and age (old and young, especially new/first entries) (Chung and van der Horst, 2018).

Those in the so-called periphery of the segmented labour markets face challenges related to the precarity of their employment conditions, which may stem from a multitude of factors. First, these workers lack control over their work, which means their workload, working hours and days, and the place where they deliver work are unpredictable to the very least (Chung, 2019). Second, there is the questionable voluntariness of the job status, that is, whether the individual worker would, in fact, prefer a different type of employment contract (full-time employment, for instance) due to better social protection coverage and level of job security but cannot have it because of a lack of viable alternatives. Third, in segmented labour markets, a proportion of the workforce experiences high job insecurity even in relatively controlled labour markets where the core workforce ultimately has secure and

protected labour conditions. Due to such a lack of employment and income stability, employees have difficulties in their eligibility for social security benefits, lower living standards, and lower work and life quality. Finally, precarity and the cleavages underpinning this divide within the workforce also can become circular since precarious workers have difficulty raising their collective voice or grievances, thus resulting in worse chances for improving their conditions (Doellgast, Lillie and Pulignano, 2018).

2.3 Adaptation to new skill demands and types of work

The rapidly and constantly emerging new technologies and how they define, shape and form what constitutes work highlight the salience of education, training and vocational education and training (VET) for firms and workers to enable their consistent application. New technologies such as Artificial Intelligence (AI) tools and robotics require trained staff to handle them, assess the risks associated with their correct application and offer opportunities in new occupations and types of work. Against this backdrop, lifelong learning that promotes the development of key competencies and basic skills from an early age is an important theme in employment studies (European Commission, 2024).

However, employees might perceive lifelong learning as a sword of Damocles (i.e., a constant threat). For this reason and within the German-speaking community, the term *Lebensbegleitendes Lernen* is frequently used, meaning life-accompanying learning (see, for instance, 'erwachsenenbildung.at'). Moreover, upskilling is too often presented as a 'panacea'. However, this approach overlooks the diverse contexts of workers, and the essential supports needed to make upskilling effective. For instance, upskilling is presented as a promising strategy for retaining older workers in employment. However, this is not without challenges; to meet the needs of older workers, workplaces also need to be adapted, learning environments adjusted, and learning modalities modified (Scoppetta, Naegele and Valmerova, 2024). To be effective, upskilling efforts should thus be considered in combination with other measures and consequently implemented. Particularly, there is a need to invest in reducing barriers for workers to enhance their key competencies and skills.

2.4 Unemployment, activation and inclusion

Unemployment is another key theme that significantly impacts individuals and their families, with vulnerable groups such as the long-term unemployed, older workers, persons with disabilities, and ethnic minorities facing additional stigma and disrespect. As a critical labour market indicator, unemployment trends compel countries to implement labour market policies. The EU, for example, has a long history of adapting labour market programmes to unemployment risks, such as the short-time work schemes during the COVID-19 pandemic. These policies, managed by increasingly professionalised institutions like Public Employment Services (PES), aim to upskill the workforce, match market supply and demand, and integrate unemployed persons into the labour market. The growing collaboration with NGOs has also improved policy implementation and support for individuals in uncertain job phases.

The changing economy, driven by green policies, digitalisation, and automation, necessitates active labour market policies to prevent workforce displacement and loss and to integrate the unemployed.

As discussed above, employment forms and relationships have already drastically changed, including job types, professions, contracts, tasks and working conditions, impacting work-life balance and overall job quality. Work, working conditions, the 'quality' of work, as well as the 'sustainability' of work are of high importance, for instance, regarding active and healthy ageing (Leichsenring & Sidorenko, 2024). The rising career length further pressures firms and workers, highlighting the need for sustainable work practices, understood as the concept developed by Eurofound (2024b), i.e., promoting a holistic approach that considers workers' health, education, skills, and social responsibilities.

In addition, the increasing divide of interests and needs between individuals with different skills, coupled with an ageing European workforce, exacerbates social exclusion. Current labour markets often exclude certain groups who face job insecurity, low pay, and high precarity. For instance, gender segregation remains a significant issue, with women more likely to hold part-time, lower-pay jobs frequently in 'female' occupations such as care and social services. Youth, ethnic minorities, and migrants also experience high levels of labour market segmentation. Unpaid domestic labour, predominantly performed by women, is excluded from economic value, perpetuating discrimination and unsustainability (Scoppetta, Naegle and Valmerova, 2024). Further division is generated by technological changes and the resulting new forms of work (Eurofound, 2024a), as well as the ageing and shrinking of European workforces, while social policies lag. Without radical policy shifts towards increased support for the vulnerable through redistribution, these transformations will likely benefit certain segments of the workforce and disadvantage others (often the low-skilled and non-digitals). To combat social exclusion, policies must proactively address structural inequalities and labour market segmentation, ensuring a fairer, more inclusive society. Activation and inclusion policies, rooted in human rights, should assist vulnerable individuals step-by-step in integrating into the labour market and society.

2.5 Internationalisation of work and its opponents

Internationalisation in the EU labour market has two key dimensions: intra-EU mobility and labour migration from third countries. Intra-EU mobility faces significant challenges, including the inconsistent implementation and monitoring of EU transnational frameworks and directives, such as those concerning the posting of workers and seasonal workers (Arnholtz and Lillie, 2023; Bruzelius and Seeleib-Kaiser, 2023; Ruhs and Palme, 2019). EU-level migration and mobility provisions, along with Member States' national policies, impact third-country nationals (TCNs) and service providers from outside the EU, further driving internationalisation. There is compelling evidence indicating that the TCN workforce in the EU is more vulnerable, experiencing exposure to discrimination and unequal treatment by employers as well as institutions in host countries. These issues affect both TCNs and EU workers, leading to lower wages, limited access to social protection and risks of wage and social dumping in host countries (Bernaciak, 2015; Blauburger and Schmidt, 2014).

Moreover, internationalisation of the workforce in the EU occurs not only through work-related entries but also via family migration, displacement from conflict areas and other humanitarian reasons. A significant recent event was Russia's military aggression against Ukraine in 2022, resulting in around 3.8 million citizens from Ukraine receiving temporary protection status in the EU by the end of 2022

(European Commission, 2022). For these categories, effective job-skill matching is crucial to avoid brain waste and to effectively address labour shortages in the receiving countries.

Turning now to the skill demands of the receiving and the supply side of the workforce in the sending countries, we highlight the following dimensions. Skill shortages persist in essential sectors, exacerbated by the COVID-19 pandemic, and are evident in medium-skill occupations. For instance, in 2023, 26% of construction companies cited staff shortages as a production constraint, up from 11% in 2022 (Kohlenberger, 2024). These shortages are driven by skill needs and demographic factors, particularly an ageing workforce in most EU Member States. Yet, the EU and its Member States are lagging in the global competition to attract ‘the best and the brightest’ (OECD 2023), struggling to fill vacancies across all skill levels. Temporary solutions to systematic labour shortages lead to instability for the companies in need of such skills, as well as socio-economic risks and potential precarity for the international workforce. Additionally, regional inequalities in skill needs and job availability manifest themselves in a clear brain drain from the East/South to the West/North, impacting the sending countries of migrant workers.

Internationalisation of the workforce shows no signs of slowing down and cannot realistically be halted (not even temporarily) considering globalisation, Europeanisation, the growingly transnational nature of production and the evident labour market shortages in advanced democracies in Europe and elsewhere. However, managing immigration and mobility remains challenging, particularly when addressing systemic issues and developing durable and sustainable solutions. In addition, it also has cultural and political implications for the host societies (Kayran 2024; Grande et al 2019).

Today, at a time when sound and evidence-based immigration and mobility policies are needed to have mutually beneficial results for workers, labour markets, and institutions in both sending and receiving countries, debates on foreign labour are weaponized by certain political movements, which base their platforms on discrimination and xenophobia (Halikiopoulou and Vlandas 2022). Thus, the internationalisation of the workforce, which has already been one of the most salient and contentious issues within Europe in recent years, continues to cut across social, economic, and political issues.

2.6 Un(der)declared and any other falsely declared work

Undeclared and/or underdeclared, as well as other kinds of falsely declared work within the EU, is defined as “any paid activities that are lawful as regards their nature, but not declared to public authorities” (European Commission, 2023b). Amongst them are incorrect payments violating minimum wage regulations or false declarations of working hours. These practices impact both state budgets and workers. This means that states are losing taxes that could be used otherwise to invest in public policy, and workers are not guaranteed their rights.

Companies proactively engage in un(der)declaring work to reduce costs and maximise profits. Policies effectively tackling undeclared work, as described by the European Commission (2023b), including an increase in public awareness around tax compliance requirements, a combination of audit and penalty, and the need to take indirect revenue (revenues generated by side activities, not the core

business) into account when appraising is required. Despite the existence of these measures, one must acknowledge that enforcement activities offer diminishing returns on investment and are never able to fully transform undeclared work into declared work. A change in mindset, especially targeting the underlying tax morale to ensure effective enforcement, is required. A European Commission study on the effectiveness of policies to tackle undeclared work notes: ‘Where tax morale is low, enforcement alone will not remedy the issue of undeclared work’ (ibid, p.91).

Apart from cost-benefit reasons, work informality is also created and sustained in circumstances where the most vulnerable have no other access to the labour market. These vulnerable workers often do not claim their rights because of their dependence on their employers. Compared to other forms of work, whether standard permanent or non-standard temporary jobs, informal work is the most disadvantageous and precarious as it is completely under the public authorities’ radar, with labour standards and rights (equal pay, collective bargaining terms) and social rights (e.g., health insurance, pension) impossible to enforce. Even other ‘lesser’ forms, such as partial informality or falsely declared work, produce layers of vulnerability for workers under these conditions (Williams & Windebank, 2002). While public authorities identify the deliberate circumvention of the rights of workers, it remains a particularly challenging task for enforcement authorities to monitor compliance with labour and social rights due to complex legal configurations, such as chains of secondment contracts (supply chains), especially within an increasingly global market and international workforce (Williams, 2019).

2.7 Transformation of industrial relations

The fragmentation of labour and rising precarity of peripheral workers has coincided with, and arguably has been facilitated by, the weakening of trade unions and social dialogue. Under the competitive pressure of globalisation and as a consequence of policy choices at the EU and national levels, trade union power and collective bargaining coverage across EU countries have been declining since the 1980s (Waddington, Müller & Vandaele, 2023). Employer organisations have also had to redefine their position, considering the significant changes in work relations and, more recently, in the face of the increasing presence of labour market intermediaries such as temporary work agencies or digital labour platforms with implications for collective bargaining (Barry and Wilkinson, 2011; Piasna, 2024). These are important trends to watch out for as strong social dialogue can contribute to inclusive labour markets and has the potential to shape political and social responses to recent and future developments in the labour markets in a more just, efficient, and equitable way.

For example, collective bargaining has been proposed as a suitable tool for regulating the collection of worker data by companies and the use of automated decision-making processes because negotiations between companies and workers move faster and are thus better able to address rapidly changing technologies than legislation (De Stefano, 2019). Similarly, the OECD emphasised the positive role social dialogue can play regarding artificial intelligence, noting that “AI adoption tends to result in better outcomes for workers when their representatives are consulted on the matter” (OECD, 2023). In addition, trade unions have a role to ensure that cross-border workers enjoy the same protections as those who work in the same country where they live. The organisation of employers under

consolidated structures is also necessary for a robust social dialogue and representation of a wide range of interests spanning from the self-employed to large companies.

Maintaining regulatory and bargaining power seems to have become more challenging for social partners in both Western and Eastern Member States (Kahancová, Mrozowicki & Ščepanović, 2024; Waddington et al., 2023). In addition to organisational issues, they struggle with technical issues, too, and sometimes lack the legal expertise necessary to regulate new technologies and new labour market mechanisms (OECD, 2023). And, despite continued efforts for transnational action, especially in the EU context concerning the transnational workforce across sectors (Seeliger, 2019), industrial relations actors and their institutions continue to operate within national boundaries.

2.8 Professionalisation of policymaking

The final theme, which is drawn from our team's interest in policy analysis and policy-oriented research activities, relates to the professionalisation of policymaking. While we frequently experience policy reactions implemented by public authorities in response to market failures and demands, evidence-based policymaking has increasingly been applied by public institutions within the United Nations Economic Commission for Europe (UNECE), particularly in the EU countries. In this context, the professionalization of policymaking involves an increase in monitoring and evaluation (M&E) activities. It also includes a shift towards a service-oriented approach by public authorities, which incorporates the perspectives of beneficiaries and citizens. Additionally, there is a professionalization of activities aimed at fulfilling essential state functions in social and employment policies. This includes the introduction of Key Performance Indicators (KPIs), benchmarking, and labour market forecasting within public employment services across the EU. Governance structures have evolved, and responsibilities have been distributed among various public institutions. Necessary policy and process alignments have also been implemented, resulting in increased interagency cooperation, including partnerships. Moreover, labour market measures that were once experimental have now become 'mainstream'. An example of this is the 'experimental labour market policy' that was implemented in Austria during the 1980s and 1990s (Lechner et al, 2017). Today, as part of the professionalisation of policymaking, social innovation is actively promoted, research studies are increasingly published, and a diverse array of labour market measures is available to both unemployed individuals and companies (wage subsidies, counselling services, etc.).

At the same time, given such professionalisation, the challenges to which public authorities are required to respond have changed over time. Social policies, for instance, still struggle to provide adequate answers to guarantee the rights of vulnerable workers in a proactive, forward-looking way. For example, remote work is not regulated within the EU countries regarding social protection to the extent needed so that firms do not have to bear the risk of covering the costs of work accidents when their workers work remotely in another EU country. So far, "reactive rationalisation," i.e., responding to a social problem once compelling evidence emerges (see Scoppetta et al., 2007), has been the primary approach taken by public authorities and policymakers. This strategy is clearly ineffective. Instead, there is a need for a proactive adjustment and redesign of policies that look ahead and anticipate upcoming changes in an internationalised and increasingly digitalised world of work.

3 Our work: the European Centre's contributions

In this section of the paper, we present our work. We start with an overview of how the thematic areas of the Employment and Labour Mobility team have developed. Next, we discuss the main findings of our research and policy analysis, namely on active labour market policy, labour mobility and migration, labour standards and working conditions, and industrial relations.

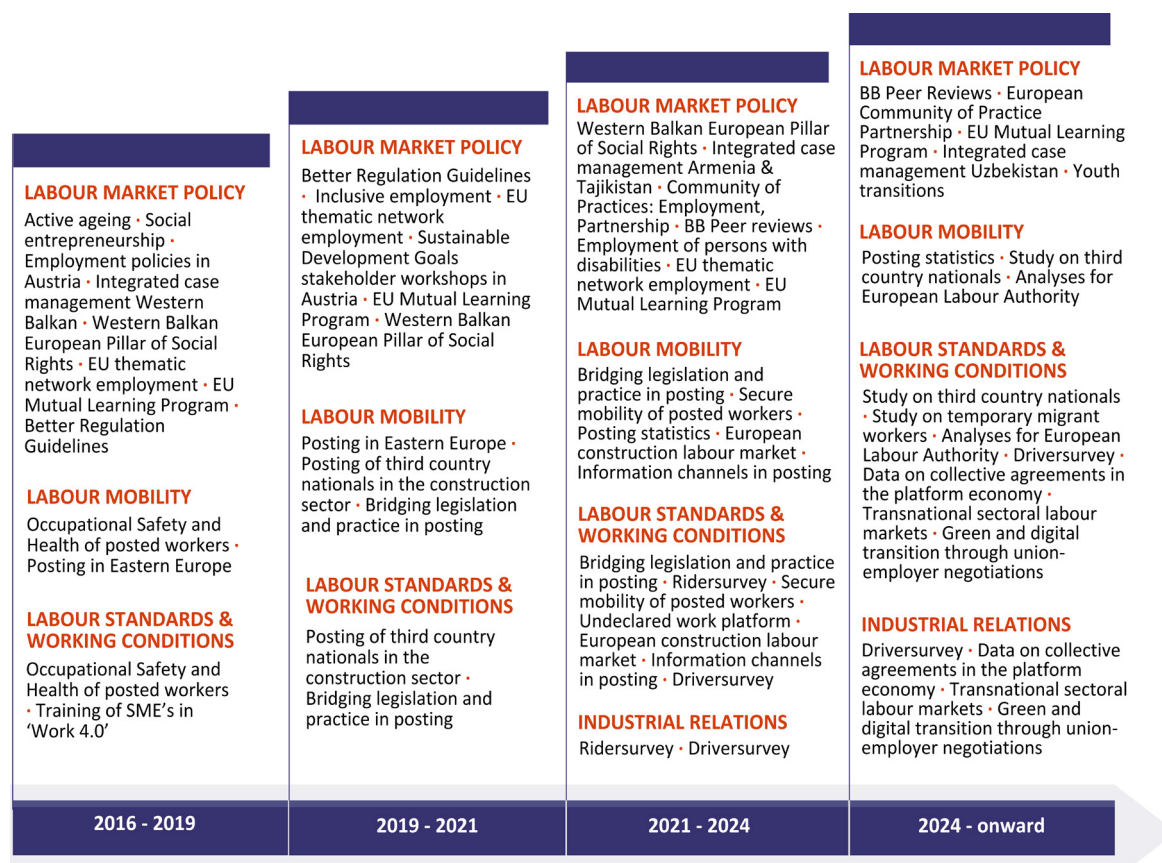
Employment and labour mobility have been part of the European Centre's work for the past 50 years, having received a more direct focus since 2016 with the establishment of the Work and Welfare Unit, later restructured into the current Employment and Labour Mobility and Social Protection and Inclusion research teams. The projects implemented during 2016-2019 were intended to expand upon the European Centre's established focus areas, such as ageing, long-term care, social innovation and social inclusion. These projects notably incorporated themes such as digitalisation and the relationship between ageing and employment into the European Centre's body of work. Soon after, a series of projects on active labour market policy measures (e.g., [ICM: Integrated Case Management in the Western Balkans](#); [CoP: Community of Practices Employment, Education and Skills](#)) and posting of workers (e.g. [POW-BRIDGE: Bridging the gap between legislation and practice in the posting of workers](#); [INFO-POW: Assessment of the channels of information and their use in the posting of workers](#)) contributed to making **employment and labour market policies** and **labour mobility and migration** two of the key thematic areas of the European Centre's research on employment and labour mobility.

Building on the tradition of our organisation to focus on vulnerable groups, the projects on employment also concentrated on specific marginalised groups such as persons with disabilities, posted workers, long-term unemployed, platform workers, and migrant workers. In addition to policy analysis, our work has increasingly focused on analysing labour standards, working conditions, and workers' rights (e.g. [POOSH: Occupational safety and health of posted workers](#); [Rider survey: Researching delivery riders' working conditions and perceptions of trade unions in Austria](#)) making **labour standards and working conditions** the third key theme. In recent years, we have also focused on studying social partners and industrial relations institutions (e.g., [GDPower: Recovering workers' data to negotiate and monitor collective agreements in the platform economy](#); [JUSTMIG: Sustainable and socially just transnational sectoral labour markets: Industrial relations and labour market adjustment to the rise in temporary labour migration](#)), and by so doing contributed to the development of the fourth thematic key area, namely **the relationship between workers, employers and social partners**. These developments are presented visually in Figure 1 below.

The diversity of project sizes, geographical scope, target groups and sectoral focus has also grown progressively throughout the years. Our body of work now includes projects of national, cross-national and transnational focus funded by grants and requests for services through individual, framework, and multiframework contract formats. Geographically, our projects have covered multiple EU

countries and specific regions, as well as countries in the Western Balkans and the Eastern Partnership (Bridge Building countries).^{*} Our target groups have also expanded, including non-standard workers, posted EU and third-country workers, temporary migrant workers, platform workers, persons with disabilities, youth and the elderly, SMEs and big companies, social partners, enforcement agencies and policymakers.

Figure 1: Evolution of the European Centre's work on employment



These themes are examined in terms of the practical implementation of policies and their impacts on the labour market, particularly how such policy application influences both institutional and corporate practices, as well as the working lives of employees.

In terms of sectors, we have expanded our expertise in construction, food delivery, ride-hailing, long-term care services, and food production, and will soon start new research in energy production and automotive manufacturing. Since we are also a partner of the consortia implementing the Mutual Learning Programme under the [European Employment Strategy](#) for the European Commission/DG Employment, Social Affairs and Inclusion, we provide content expertise on certain promising

^{*} The European Centre has set a special focus on the Western Balkans and the Eastern Partnership countries - the so-called Bridge Building countries which aims to assist in improving social welfare policies through research, policy advice, capacity-building, networking and peer exchange activities. See <https://www.euro-centre.org/aboutus/bridging>

practices implemented within the EU in our key competence areas and contribute to the successful implementation of mutual learning events within the EU.

3.1 Active labour market policy

Within this key competence of our team, the European Centre focuses on various themes that ultimately aim at examining the integration of certain social groups into the labour market, especially vulnerable groups such as persons with disabilities, young people 'not in employment, education or training' (NEETs), older workers, and long-term unemployed. Our work includes scientific research, policy advice, and capacity-building activities, primarily commissioned by the European Commission and international organisations such as the UNDP and ILO, as well as consultancies via framework contracts of the European Commission, the European Parliament and others.

Integrating marginalised groups into the labour market requires person-centred, step-by-step approaches. The support provided to individuals should follow a specific sequence. Moreover, since no single institution can address the various needs of vulnerable groups on its own, collaborative efforts are essential, with local services that are embedded locally. Assessing the capacities of PES and social service offices in the six Western Balkans countries and various Eastern Partnership countries, we found that different stakeholders like the PES, public authorities responsible for social work and NGOs best work in partnership with others, especially when they pool all available resources for the benefit of the client and bring their strengths into the partnership (Scoppetta, Danaj & Reitzer, 2018; Scoppetta and Zolyomi, 2024). In those contexts, as is the case with other regions, NGOs, for instance, have better access to marginalised groups than public authorities (due to stigmatisation) and hence are frequently involved in outreach activities.

When offering research and policy advice services in this area, we have followed an inclusive and integrative approach by linking aspects of different policies with each other. Our work on Integrated Case Management (ICM) exemplifies how integrating employment and social policies is further enhanced by linking it to other policy-relevant aspects such as education, health, and the economy. Furthermore, we have guided ministries and other key stakeholders in building respective policy frameworks at a multi-governance scale by providing know-how on aligning policies at the international, national, regional and local levels (e.g., Scoppetta and Sandu, 2022). Another example is our assistance to stakeholders in applying the partnership principle through the European Community of Practice on Partnership (ECoPP), a forum for those involved at all levels in the implementation of cohesion policy funds across Europe to exchange and reflect on partnership practices (ECoPP, 2024).

In other projects, we studied innovative employment measures, such as job carving and job crafting, facilitated the exchange of lessons learned when implementing these measures in different contextual settings, and helped create fruitful learning environments between interested institutions. An example of such activity is the Bridge Building Peer Review and Training project that ran for nearly three years (2021-2024), funded by the Austrian Federal Ministry of Social Affairs and Consumer Protection.

3.2 Labour mobility and migration

While migration has been the focus of many projects in the European Centre's 50-year-long institutional history, in the last 10 years, we have implemented 12 projects on labour mobility and temporary migration, making this one of our team's key competencies. Our research and policy-oriented work has been approached through case studies, cross-country comparisons, knowledge exchange and mutual learning across the UNECE region, including both EU Member States and Bridge Building countries. By employing various methodologies such as policy analysis, original quantitative, and qualitative data collection and analysis, we have amassed a wealth of data and findings, drawing on the perspectives of workers, companies, public authorities, enforcement agencies, and social partners (e.g., Danaj, Toplak, & Vah Jevšnik, 2024).

In our policy analysis of the regulatory framework for labour mobility and migration, we find that despite common rules of entry and mobility in the EU, differentiated and sometimes easier access is enabled through country-specific rules targeting workers from specific countries of origin or skill levels (Danaj et al., 2023b). In the case of posting of workers, cross-border service provision has pointed to the challenges of enforcing national labour standards vis a vis a transnationally mobile and temporary labour force in the wider European labour market, especially when employment and labour mobility policy intersects with other policies such as migration and temporary agency work (Danaj et al., 2021). In recent years, the posting of third-country nationals (TCNs) has increased, especially from the main sending countries like Poland and Slovenia, which signals at least the complementary role, if not the replacement, of posted nationals with TCNs to sustain the established business models of posting from these two countries (Danaj, et al., 2023c). The participation of TCNs in posting has created new concerns about the enabled access to the larger EU market through cross-border service provision and the new layers of vulnerability TCN workers face (Danaj et al., 2023b; Danaj et al., 2023c).

As a result of the identified challenges in the implementation of the Posting of Workers Directive, the regulatory framework on posting has been repeatedly adjusted through the Enforcement Directive and the 2018 amendments to specific aspects of the Directive, such as the equal pay rule aiming to protect labour standards in the host countries, prevent social dumping, minimise unfair competition between locally based service providers and posting companies, as well as secure fair wages for posted workers. Our findings indicate that while posting regulations are designed at the EU level, how they are transposed in national legal frameworks varies, resulting in significant differences across countries (Danaj et al., 2021), such as in the case of information provision for companies (Danaj et al., 2024). These differences create tension between the two levels of governance, as was the case in Austria, where national legislation against wage and social dumping was originally more stringent regarding administrative fines but had to be revised to more 'proportional' rates based on the decisions of the European Court of Justice, which some local stakeholders have considered as detrimental to the preventative role of the national legislation (Danaj and Kahlert, 2021).

Our research on enforcement shows that despite the instruments developed at the national level, posting companies are more likely to be found in violation of national rules than local companies. For example, in the case of Austria, although the true extent of underpayment of posted workers,

the main form of violation, is not known, data from the Financial Police for the year 2019 showed that one in ten inspected posting companies was suspected of underpayment (Geyer, Premrov and Danaj, 2022). While our research shows the need for greater convergence of rules and better enforcement, it also reveals the complexity of current regulatory frameworks. Looking at compliance from the companies' perspective, our research on access to information on the posting of workers for construction companies in Austria, Belgium, Italy, Slovakia, and Slovenia reveals shared challenges common to all and nuanced dynamics depending on the national contexts, such as the dominance of online channels in information provision, the fragmentation of information on posting across multiple channels, the persistent issue of language barriers, and the need for enhanced accessibility and clarity in disseminating information on posting (De Smedt et al., 2023).

3.3 Labour standards and working conditions

Research on labour standards and working conditions has been part of many projects within our team. We have conducted both qualitative and quantitative research, especially on non-standard employment, cross-border service provision, and new forms of work, such as posted workers, temporary agency work, temporary migrant work, and platform work.

Regarding the working conditions, labour and social rights of labour migrants and cross-border workers, our findings show that EU and TCN migrant workers are not always on equal footing with the rest of the workforce. Migrant workers, especially those on temporary employment or posting assignments, are more vulnerable to risks associated with labour market inequalities regarding their terms of employment, such as unequal pay, and more challenging working conditions, such as high labour intensity, long hours, and occupational safety and health (Danaj and Zólyomi, 2018; Danaj et al., 2020; Geyer et al., 2022). Their vulnerability was further heightened during COVID-19, when job security, social rights access and health safety risks increased exponentially, especially in the first year of the pandemic (Danaj, Kayran and Geyer, 2023a). In line with other authors (Arnholtz and Lillie, 2023), we find the posting regime, in particular, to be highly hierarchised, with third-country posted workers located often at the lower end where precarity is higher due to their double dependency on the employer to secure both their continued employment and migration status (Danaj, Kayran and Zólyomi, forthcoming; Danaj et al., 2023a; Danaj et al., 2023b; Lillie et al, 2022).

Concerning new forms of work, the European Centre has developed significant expertise in the study of platform work. We have conducted two surveys to collect data on platform workers' working conditions and attitudes towards trade unions in Austria: one among food-delivery riders (Rider Survey) and one among taxi drivers (Driver Survey). The Rider Survey found mixed results showing, inter alia, that most riders enjoy their work and appreciate the flexible working hours but were less satisfied with their working conditions and pay. For example, a large share of riders reported being exposed to dangerous traffic situations, verbal abuse and humiliation (Geyer and Prinz, 2022). Preliminary results from the Driver Survey show similarities with food-delivery riders' working conditions. Taxi drivers, too, mostly enjoy their jobs but are less content with working conditions and pay. We found that respondents see online platforms as trying to push down fare prices and assess their overall contribution to the industry as negative. However, price competition is not the only or the most important challenge taxi

drivers face. High gas prices, taxes and the level of taxi tariffs – the price range drivers can charge that is determined at the city level – are even bigger concerns (Geyer et al., forthcoming). Preliminary findings from both surveys also indicate a negative relationship between job satisfaction and income dependency – those who do platform work as side-employment are happier about their conditions than those whose only income comes from platform work (Geyer et al., 2024). In sum, both surveys show important policy challenges in the Austrian platform economy but also underline the industry's heterogeneity and complexity.

More recently, we have expanded our research on the working conditions of platform workers with the project 'GDPower – Recovering workers' data to negotiate and monitor collective agreements in the platform economy', which focuses on the use of data to monitor and (algorithmically) manage workers. Building on a research approach developed by Bowyer et al. (2022), we support workers in using their rights under the European General Data Protection Regulation (GDPR) to request copies of their personal data from platforms and collaboratively analyse and make sense of these data with them.

3.4 Industrial relations

In our key competence of industrial relations, we explore the relationship between employees, employers and their organised interest groups in projects that have often been implemented in cooperation with social partner organisations, who have provided feedback on our methodologies and supported the data collection process.

Our research on online platforms finds platform workers have difficulty unionising because of the lack of a shared workplace, high turnover and the frequent (mis)classification as self-employed (Vandaele, 2018; Joyce & Stuart, 2021). Against this background, the Rider Survey also explored the questions of why and under which conditions platform workers become trade union members. Our findings indicate that riders join unions for instrumental reasons, for example, to improve their pay and working conditions, as well as for value-rational reasons, i.e., to express solidarity with other workers or to conform with social customs. Riders working on freelance contracts and those who expect only to do the job temporarily are less likely to become union members, which confirms concerns about structural difficulties with unionisation in the platform economy. However, we also found organisational efforts by a union-supported group of grassroots activists to be highly effective, which shows that labour groups are not without agency (Geyer, Vandaele & Prinz, 2023).

Another aspect we have been studying is social partners' strategies for current issues, such as algorithmic management in platform work and temporary migrant work. So, in GDPower, we explore how far social partners (employers and unions) in the platform economy follow the recommendation to 'negotiate the algorithm' (De Stefano, 2019) and use collective bargaining agreements to regulate what data can be collected about workers and how it can be used. In contrast, in JUSTMIG, we conduct research on the existing relationship between national industrial relations actors and temporary migrant workers in different sectors, as well as on the future potential for transnational social partnership collaborations for the improvement and sustainability of the European labour market

(Kayran and Kadi, 2024). To better understand the intricacies of EU and TCN migrant employment and industrial relations in both sending and receiving countries, the study focuses on six EU Member States, two Western Balkan countries and Ukraine. These two projects add comparative and participatory elements to our research on industrial relations, thus further expanding our applied research focus.

4 Recent trends and future perspectives

Thus far, we have highlighted some key themes regarding employment and labour mobility and the challenges identified in the policy and research discussions, illustrating how our work aligns with these themes. Next, we discuss several developing trends and perspectives, specifically digitalisation and automation, the reorganisation of work, the link between demography and migration, and climate change and green transition, which we consider imperative to incorporate in our work and the work of our peers.

4.1 Digitalisation and automation

Digitalisation and automation will continue to shape labour markets and employment in fundamental ways, offering both great opportunities and significant challenges (Eurofound, 2021). On the one hand, both technologies have the potential to increase worker productivity and create new, well-paying jobs. Furthermore, digital technologies facilitate remote work and automation technology can improve worker safety if it is used to conduct dangerous tasks formerly done by humans. On the other hand, automation and new technologies like AI may require significant workforce upskilling and could result in layoffs in industries where technologies replace human labour. Working conditions, too, may deteriorate as digitalisation creates new ways of monitoring worker behaviour by companies or whether regular employment contracts are replaced with ostensible self-employment in the platform economy.

Studying these changes will require new research methods, some of which we are already developing. For example, the approach to working with workers and learning what surveillance and assessment technologies workers are subject to is a method particularly well-suited for the platform economy where data-driven monitoring and decision-making are among the most advanced. However, given the rapid pace at which new technologies are developed and adopted by companies, even in more traditional industries, the same method may be applied in the future to study work in other sectors as well. Similarly, there will be a need for policies and regulations to ensure that new technologies are used in the most beneficial ways. Inter alia, this will mean providing effective capacity-building opportunities to affected workers, ensuring transparency in algorithmic management practices, preventing overly intrusive monitoring, and supporting social dialogue and collective bargaining practices so that labour and business representatives can negotiate solutions tailored to the specific needs of their industries.

Digitalisation and automation can also be studied from the perspectives of active labour market policy measures and just transitions. Two new Horizon projects, which we will start in 2025, will address

each of these aspects. In the project “Navigating the Next Normal: Innovative Approaches to Enhancing Youth Education-Employment Transitions in Post-COVID-19 Europe” (NEXT-UP), we will explore with stakeholders how to design policies that support young people’s transition from school to work in a post-COVID-19 world characterised by rapid technological change. Whereas in the “Encouraging a Digital and Green Transition through Revitalized and Inclusive Union-Employer Negotiations” (E-GRUiEN) project, we will provide a new and integrated understanding of the current state of key sectors of exposure (automotive and heavy machinery production, energy production, care services, and transport on demand/taxi) to large-scale green and digital transformations, non-standard forms of work, and workforce precarity. The project will examine and evaluate social dialogue’s capacity to navigate the present and future challenges in the workforce and its growing heterogeneity in terms of employment status, types of contracts and socio-demographic characteristics across nine European countries.

4.2 The reorganisation of work and changing working conditions

As discussed earlier in the paper, work organisation is in constant and rapid transformation. One such prevalent trend that has accelerated during the COVID-19 pandemic is the development towards more mobile, flexible, and non-traditional work organisation arrangements such as work-from-home, teleworking, online or on-location platform work, and cross-border work, where work becomes far less geographically and location-wise fixed overall. This trend has provided otherwise difficult-to-achieve flexibility for the workforce and autonomy in their work life and has integrated previously excluded groups into the workforce (working mothers, migrants, people with disabilities, etc.). Yet, researchers and relevant stakeholders alike point to the risks of less secure, less determined, and more fluid forms of work that transform the meaning of work, which may not always operate to the benefit of the workers and in favour of better working conditions (Countouris et al, 2023; Brescoll, Glass, and Sedlovskaya, 2013; European Commission, 2019).

In this vein, we proceed in our research and policy analysis on how work continues to be transformed and how these transformations influence the working conditions of the overall workforce, especially for those already precarious or at risk of becoming so by the ongoing transformation of the labour process and the working conditions. As mentioned above, through the E-GRUiEN project, we are about to research how the dual green and digital transformations shape work in diverse sectors and compare the current approaches taken by social partners to previous historical transformations in the world of work.

4.3 Demography and migration

The first key relevant area at the intersection of demography and migration in Europe is how to address the low and declining fertility rates, and whether such a trend can be counteracted with a migrant workforce. One of the most important challenges for European economic growth, therefore, given the low fertility rates, is to be able to manage legal pathways of migration, including better integration of existing migrants and attracting and matching the right skills to the right jobs and places in Europe. According to Eurostat data (2023a), only 8% of the people living in the EU countries in 2022 were non-nationals, whereas 3% were citizens of another EU country and 5% of a non-EU

country. While debates about migration are highly polarising and politicised (Kayran, 2024), most of the EU population, on average, is not mobile. This requires a change, considering the goal of a sustainable economy in Europe amid a demographic trend of low birth rates. Not just EU but also non-EU migration and workforce need to be attracted, recruited, and integrated.

A second important issue is related to the available workforce in the region as a whole and the differences within. According to Eurostat population data projections (2023b), the share of Europe's working-age population is expected to decline from 64% of the total EU population in 2022 to around 54% in 2100. As discussed above, the replacement rate of the working population is stagnating in almost all European countries due to low fertility, which could be compensated, potentially, via targeted immigration strategies. Moreover, an ageing population requires a system of contributions to support the public old age pension schemes and a revision of care needs. Rising care needs and the concomitant lack of labour force have triggered a veritable crisis in long-term care across Europe. Strategies to recruit care workers from outside the EU or via intra-EU mobility have increased the number of migrant carers in many Western and North European countries, both in formal care services and in live-in care provided by migrant workers from Central and Eastern Europe (the latter mainly in Mediterranean countries, Austria and Germany). This also raises the question of how the shifts in demographic movement from the East to the West in the EU will likely affect the labour market, family structures and the demography of the new Member States and other source countries in the Western Balkans, among other things.

To address such demographic challenges, measures to harness the full potential of the domestic labour force via better education policies, reskilling and upskilling strategies, and increasing employment of otherwise marginalised groups are necessary. Therefore, future research should carefully analyse this intersection of inclusion policies and demographic challenges and test and pilot new and innovative policy solutions to better adapt and integrate the resident workforce in Europe. Yet, even with the best applications of such policies, these efforts will likely be insufficient. Therefore, as a second part, further research is needed to better understand how, in which areas and to what degree foreign workforce could be legally, sustainably, and fairly integrated into the European labour markets. In this respect, the well-being and future stability of the economies of the labour supply countries, the required skills, and the labour and social rights of workers need to be revisited.

4.4 Climate change and green transition

Decarbonisation, i.e., exit from carbon fuel energy-driven production to green and renewable energy, entails massive changes including, among others, the creation and withering of industries and production methods, jobs, skill demands, professions, and VET that will extensively, if not utterly, impact the European and global economy and labour market (Eurofound, 2023). Measures currently being taken, and those that will be implemented in the future, to stabilise the climate entail certain trade-offs for economic growth, job opportunities and average living standards of European citizens. For instance, in terms of labour markets, this will mean that certain sectors, such as manufacturing, construction, and energy production, will experience high levels of disruptions due to the new forms of energy and fuel transitions. In such highly disrupted sectors, workers will need to be either re-

skilled and re-trained to adapt to green production or will exit and must be re-trained for their re-integration into other sectors or occupations.

Likewise, certain companies and industries will be highly impacted by transformations in their sectors. For instance, there is no doubt that the greening of the economy will lead to the disappearance of certain types of companies that rely heavily on carbon-intensive production methods. In such cases, states and corporations must conduct substantive negotiations, which will increasingly impact the European labour market. Moreover, the greening of the economy will require significant levels of coordination and cooperation between employers and workers, demonstrating the need for better social dialogue, most notably in redeploying the workforce from carbon-intensive sectors such as energy production and manufacturing sectors as well as the new industries such as recycling that will emerge thereof. Therefore, future research should aim to explore existing and new ways of organising social dialogue considering the green transition, among the many other transformations, to identify gaps and future opportunities and test potential avenues in practice.

Overall, the greening of production and work involves important costs and trade-offs, which need to be identified and negotiated to avoid generating further cleavages in society, grievances among the population, and deepening regional inequalities within the EU and between the EU and the rest of the world. Therefore, future research should better understand the intersection of climate change and green transition, their implications on the labour markets, and how the transformations could be collectively discussed and bargained to provide equitable solutions for all, such as via social dialogue. As mentioned above, in our E-GRUiEN project, we will look precisely at these aspects in four distinct sectors, namely, automotive, care, energy production, and on-demand transport, which are affected differently by the twin green and digital transitions.

5 Conclusions

In this discussion paper, we laid out some of the main themes dominating public and academic debates in the world of work. While research on many of these topics is already underway, new perspectives are necessary on the rapid transformation the world of work is undergoing due to factors like digitalisation, globalisation, demographic shifts, migration, and climate change – as well as their intersecting effects. These changes affect labour markets and processes, posing both opportunities and risks, which require targeted research, and new ways of approaching social dialogue.

The European Centre for Social Welfare Policy and Research's Employment and Labour Mobility team works on various aspects of these transformations, with a particular focus on vulnerabilities and inequalities in the labour market. The team addresses research topics such as work fragmentation leading to non-standard employment, internationalisation of work, labour market segmentation, and precarity. We also explore unemployment, activation, inclusion policies, undeclared work, and the current and evolving role of industrial relations. Based on the discussion in this paper, we advanced a few specific research and policy recommendations regarding the challenges and opportunities in employment and labour mobility, focusing on digitalisation and automation, the organisation of work

and working conditions, demography and migration, and climate change and green transition.

Future research should place greater emphasis on these ongoing transformations. It is essential to continue investing in the impacts of digitalisation, demographic changes, migration, climate change, and other factors on work processes and labour markets. This research should not only analyse these elements individually but also investigate their combined effects, particularly how one factor can create conditions that may lead to or exacerbate risks associated with another. Moreover, research and policy analysis should particularly focus on how ongoing labour market transformations affect vulnerable and marginalised groups. Interdisciplinary approaches are essential for gaining a comprehensive understanding of these developments, as they intersect with various fields and societal contexts that cannot be addressed by a single discipline.

From a policy perspective, we note that effective policy responses require professionalisation, transparent, evidence-based approaches, and proactive strategies. Policymakers need to be able to anticipate changes in the digitalised and internationalised work environment, ensuring that social policies protect vulnerable workers and help them adapt to new work arrangements. Digital and green transitions, for instance, require the creation and implementation of upskilling and reskilling policies and continuous learning to adapt to rapid changes. These policies must ensure well-paid employment, worker safety, the creation of good jobs and the improvement of overall working conditions. Implementing strategies to attract and integrate both EU and non-EU migrants is necessary to counteract low fertility rates and declining working-age populations, while also ensuring migration policies are sustainable and just for both sending and host countries. There is an ongoing need to promote the integration of marginalised groups (e.g., working mothers, migrants, persons with disabilities) into the workforce through flexible work arrangements and supportive policies. However, balancing these benefits of flexible work arrangements with measures to ensure job security and fair working conditions, especially for mobile, remote, and platform workers, is crucial. Finally, active participation of civil society organisations and social partners should also be ensured, along with support for social dialogue and collective bargaining in negotiating and developing equitable and sustainable solutions.

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