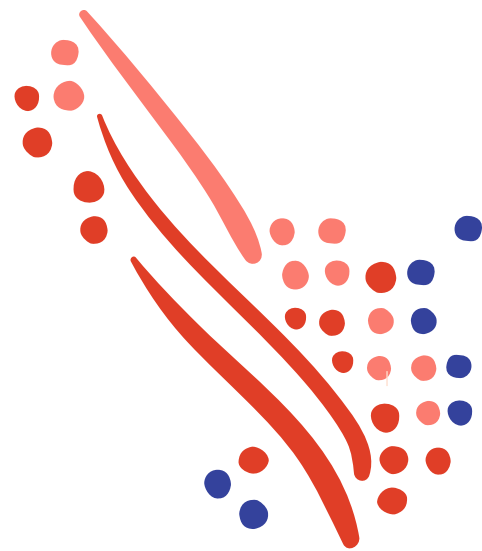




The Workforce View in Europe 2019

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Foreword



Don McGuire, President ESI

Welcome to The Workforce View in Europe 2019, bringing you the latest insights on the issues and trends that are impacting employees across the continent. With opinions from over 10,000 workers across eight key economies in Europe, with this research now in its fourth year, these findings provide a unique opportunity to learn about the changing attitudes of Europe's workforce – both for our own teams here at ADP and for wider use.

Recent years have seen positive trends in the world of work, with steady increases in regards to economic growth and employment levels. However, there has also been a great deal of uncertainty and many unanswered questions. Will the prospect of increased automation become a reality? How will Europe adapt to life after Brexit? While we don't have the power to predict the future, this year's report sheds a light on some of these critical issues, revealing how they're impacting employees today, and what that could mean for the years ahead.

"As an organisation founded on technology and innovation, ADP always has one eye firmly fixed on the future, and we pride ourselves on helping HR leaders prepare for tomorrow."

As an organisation founded on technology and innovation, ADP always has one eye firmly fixed on the future, and we pride ourselves on helping HR leaders prepare for tomorrow. One way we do that is through our technology, but the other is by providing unique tools, like this report, that give you the insights you need to drive greater engagement and productivity among your people.

With that in mind, I'll let you read on to discover what's really going on in the minds of Europe's workforce. I hope that you find the report interesting reading and that it helps you to make the most of your people today, while also planning for the years to come.

Introduction

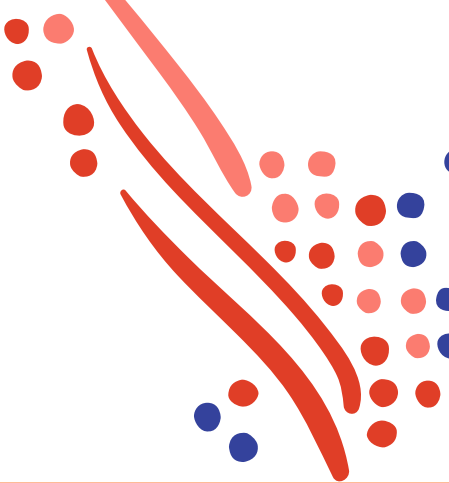
Europe's employers and employees have a lot on their plates as we enter 2019, with the challenges of political change, digital disruption and new ways of working to navigate. On the political front, Brexit has brought widespread uncertainty to workplaces across the region, as organisations try to prepare for what the implications may be. In many respects, it falls on HR to manage the planning and transition to a post-Brexit Europe by ensuring their organisation is prepared for all eventualities, while also keeping employees onside.



Meanwhile, the rise of new technologies continues to bring a different kind of disruption to numerous sectors and roles by overhauling existing business models and threatening the status quo. The prospect of automation looms large, with wild predictions of job losses and a hyper-efficient robot workforce. But look around you, and the chance of this happening still seems a long way off.

Then, at a more human level, the last 12 months have seen people from all walks of life rise up as part of grassroots movements for change, including #MeToo and #TimesUp. We live in an age of protest, and employees everywhere are finding their voices and challenging their organisations to uphold fairness and respect for all in the workplace. Employers must stand up and take notice.

These are just a few of the themes that we explore in The Workforce View in Europe 2019, which provides a unique barometer of how employees are feeling. By surveying over 10,000 workers across eight key economies – France, Germany, Italy, the Netherlands, Poland, Spain, Switzerland, and the UK – we reveal how employees are responding to the most important issues of the moment and how their attitudes are changing over time.



Executive summary

About the report

The Workforce View in Europe in 2019 explores employees' attitudes towards the current world of work and what they expect from the workplace of the future. The findings provide important insight into business-critical issues, such as employee optimism, organisational threats, new ways of working, mental health and discrimination.

The research was carried out by independent market research agency Opinion Matters on behalf of ADP, in October 2018. The sample consisted of 10,585 working adults in eight territories across Europe: France, Germany, Italy, the Netherlands, Poland, Spain, Switzerland and the UK.



Employees in 'wait and see' mode

Optimism levels are unchanged since last year (79%), as it remains to be seen how political and technological shifts will play out. A fifth of Europe's workforce are concerned about Brexit, while over half (56%) are anticipating significant changes due to automation. And it's the Millennial demographic, with their careers ahead of them, who anticipate the biggest impacts.



A skills boost

Skills confidence has rebounded, with nine in ten (89%) respondents saying they are confident they have the skills they need to succeed in their career, an increase of six percentage points on last year. Workers in Spain are the most confident in their skills level (93%), followed by the Swiss (90%), while older workers are leading the way, with an eight-percentage point jump in skills confidence since last year.

Executive summary



Freelance popularity peaks

The number of employees actively considering becoming freelance or self-employed has dropped to just 15%, down 11 percentage points since 2016, while the proportion who might consider these options has fallen to 34%, from 40% last year. Workers in the UK are the most likely to be considering freelancing or self-employment (21%), a slight increase on 2017, closely followed by Poland (20%) and Italy (18%).



Time is money

Nearly two thirds (60%) of respondents say they work unpaid overtime, reporting that they work almost five hours for free each week on average. A significant minority – almost one in eight (12%) – believe they are working more than 10 hours per week for free, rising to a worrying high of 22% in the UK.



Mental health taboos

More than a quarter (28%) of employees believe their employer is not at all interested in their mental wellbeing, while nearly one in three (30%) wouldn't feel comfortable disclosing a mental health issue at work. However, attitudes are changing, with 16 to 34-year-olds far more comfortable talking about mental health issues than their older colleagues (78% vs. 61%).



Doing more with less

More than half (56%) of Europe's workforce agree that, if they had the choice, they would prefer to work a four-day week, rising to a high of 63% in Spain. The majority of those who favour this option (44%) would rather work four longer days and earn the same salary, while more than one in ten (13%) would prefer a four-day week of standard-length days at a reduced salary.



Can you manage?

For the second year running, bad management is the biggest barrier to productivity, and the issue appears to be getting worse. Nearly a quarter (23%) of the survey respondents name bad management as the biggest drain on productivity, up four percentage points on last year. Workers in Spain are the most likely to face this issue (31%), with a huge eight-percentage point increase on last year.



Equality strides forward

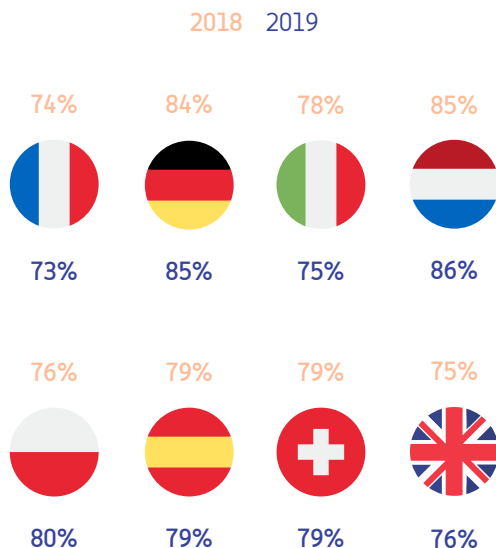
Reports of discrimination are on the decline, down four percentage points to 30% this year. Support for gender pay reporting has also increased to 27% from 22% last year. Meanwhile, nearly two thirds (60%) of workers would consider looking for another job if they found out there was an unfair gender pay gap at their company, increasing to nearly three quarters (72%) of women.



An uncertain future

How would you describe your levels of optimism for the next five years in the workplace?

Optimism Levels



'Wait and see' mode

Optimism levels have remained stable since last year's report, suggesting Europe's workforce is in 'wait and see' mode, until the implications of important macro trends become clearer. Just over three quarters of European respondents (79%) say they are 'very' or 'quite' optimistic about the next five years in the workplace – unchanged since 2018 – while the proportion who feel 'very' optimistic has increased by one percentage point, to 26%.

It's a similar picture within individual countries, with Dutch employees once again the most optimistic (86%), an annual increase of 1%, and up 2% since 2016. While at the other end of the scale, over a quarter (27%) of French workers are pessimistic about the next five years at work, the highest of any European country, and a slight 1% increase year-on-year.



Braced for Brexit

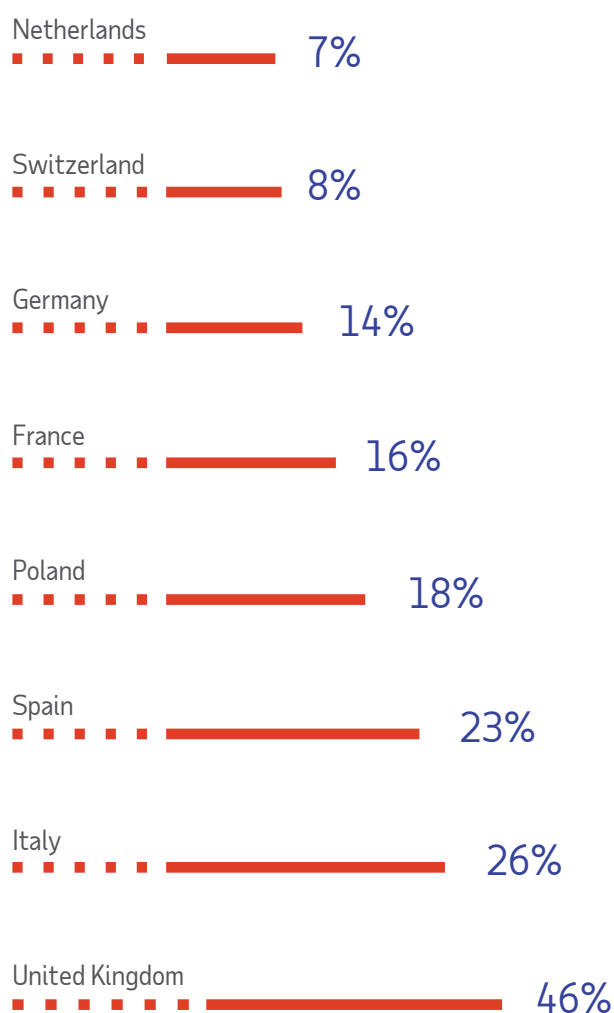
Perhaps the biggest political issue of the moment, the UK's decision to leave the EU has sent shockwaves throughout Europe and has led to a great deal of uncertainty among Europe's workforce.

The findings show that a fifth (20%) of European workers are concerned that their job will be impacted by Brexit, while 22% believe their company will be hit. However, it's the Millennial demographic that is losing the most sleep over the impending changes, with 29% anticipating an impact on their job and nearly a third (31%) worrying that their company will be affected – significantly more than those in older age groups.

Predictably, UK workers are the most concerned about Brexit, with 45% worried about the implications for their job and 48% about how their company will be affected. Yet, despite these concerns, the British maintain a positive outlook, with optimism up one percentage point year-on-year (from 75% to 76%), and with a six-point increase among those saying they are very optimistic (27% vs 21% in 2017).

But it isn't just UK workers who are worried about Brexit, with a significant proportion of those in Italy (26%) and Spain (23%) reporting concern for their jobs, perhaps due to the employment opportunities afforded to them via freedom of movement into the UK. In contrast, workers in Switzerland and the Netherlands are least concerned about how they'll be affected by what is to come (8% and 7% respectively).

Employees concerned about their job being impacted by Brexit.



An uncertain future

Automation

Another looming issue is the rise of automation, which, if reports are to be believed, threatens to replace thousands of human workers in the coming years. And the signs are that European workers agree, with over half (56%) saying they believe automation will drive significant changes to the world of work in the coming years, more than any other technology, including artificial intelligence (42%), Internet of Things (39%), biometrics (35%) and blockchain (23%).

However, when it comes to the prospect of robots taking human jobs, the majority of respondents remain philosophical. While almost a third (29%) believe this will happen at some point in the future, a very slight increase on last year (28%), just 15% believe it will happen in the next five years and just 7% in the next two.

British workers are the most concerned about an automated future by quite a considerable margin, with 40% saying they believe their role will be automated in the future and 27% predicting it will happen in the next five years. This could be due to the prevalence of financial services and IT roles in the UK, the two sectors with the highest number of respondents who believe their jobs will be automated (45% and 39%).

As with Brexit, it's younger workers who are most concerned about the threat of automation, with 39% saying they think it threatens their future career and nearly a quarter (23%) saying they think a robot will replace them in the next five years. However, despite this concern, the optimism of youth appears to prevail, as Millennials (16 to 34-year olds) are the most positive about the future among all age groups (82%).



A skills boost

Despite the tricky challenges on the horizon, there are signs that Europe's workforce is ready to take them on, with a significant boost in skills confidence since last year. Nearly nine in ten (89%) of this year's respondents say they are confident they have the skills they need to succeed in their careers, up six points on last year. Meanwhile, two in five (40%) say they are very confident they have the skills to succeed, a five-percentage point rise on 2018.

Workers in Spain are the most confident in their skills level (93%), while those in Poland feel the least adept to face the future (86%) - despite a big jump year-on-year (from 79%). It's also surprising to note that the most optimistic demographic - the 16-24 age group - is also the only group to experience a drop in skills confidence, down one percentage point from 86% to 85%. In contrast the over-45s have seen the biggest increase in skills confidence, up eight percentage points on 2018.

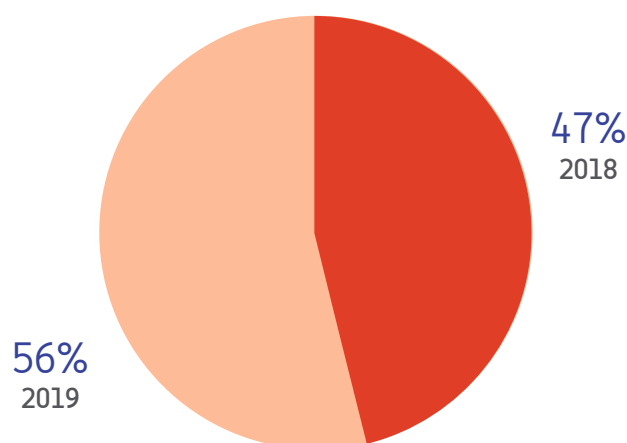
The impact of the GDPR

Following much preparation and discussion, the General Data Protection Regulation (GDPR) came into force in May 2018, putting the onus on organisations to protect employee and customer data and respect each individual's data privacy.

A few months on, the regulations seem to have had a positive impact on employee confidence, with more than half of respondents (56%) saying they feel confident that their data is being stored responsibly and securely by their employer, a rise of eight points since last year. However, more than a quarter (26%) still worry that this isn't the case, rising to more than a third (34%) of French workers, suggesting a significant number of organisations need to do more.

The biggest concern among employees is that they have no control over the data being stored (11%), followed by worries that their organisation's systems are vulnerable to a cyber-attack or data breach (10%). A further 7% are concerned that too much data is being held without their consent.

Are you confident that your personal data is being stored securely and responsibly by your organisation?



New ways of working

Has the popularity of working freelance peaked?

The last few years have seen employees shun 'jobs for life' and the 9-to-5 grind, as freelancing, self-employment and 'portfolio careers' have come to the fore. However, it appears the shine of these alternative ways of working could be starting to fade as the tide continues to turn back towards more traditional career paths.

The number of employees actively considering becoming freelance or self-employed has dropped to just 15% in this year's study, down five percentage points on 2018 (20%) and 11 percentage points on 2017 (26%). Furthermore, the number who would consider going independent has dropped six percentage points to 34% since last year. There has also been a continual increase in those who state they are not interested in self-employment or freelancing opportunities at all. In 2017, just 32% of respondents were not interested in working independently – a figure that increased eight percentage points in 2018 (40%) and has now risen to 47% in 2019.



Independent working is more popular in some countries than others, with workers in the UK the most likely to be considering freelancing or self-employment (21%), a slight increase on 2017, followed by Poland (20%) and Italy (18%). However, the proportion of workers in Italy actively considering this option has dropped considerably, from 26% in 2017 to 18% in 2018.

Interestingly, this shift away from self-employment has also coincided with an increase – albeit slight – in 'jobs for life', with just over a quarter (27%) of respondents anticipating staying with their organisation for the rest of their career, a rise of two percentage points on last year. On average, employees believe they'll stay with their current employer for just under four and a half years, a slight increase on 2018.



Lucas van Wees, President of the European Association for People Management, commented that:

“The decline in self-employment may well be related to improved economies with more opportunities for regular employment. It’s still a fact that collective arrangements such as pensions and disability insurances are not yet well regulated for self-employed workers, although we are seeing increasing pressure and debate to resolve this.”

Based in Germany, the European Association for People Management assembles 32 national HR Associations with a membership base of 250,000 HR professionals.

New ways of working

Doing more with less

European workplaces are continuing to experiment with new ways of working, with numerous media reports claiming that a four-day working week can revolutionise productivity, improve employee worklife balance and lower stress levels. For example, following a six-week trial of a four-day week, one British company reported that they were able to achieve just as much in a shorter working week and even saw signs of growth.

And it appears that Europe's workers agree with this assessment, with more than half (56%) saying that, given the choice, they would prefer to work just four days each week. However, there is a split in terms of how that would impact their overall hours and pay levels, with more than three quarters (78%) saying they would rather work four longer days to earn the same salary, while 22% said they would prefer standard hours at reduced pay overall.

Spanish workers are the most enamoured by the idea, with nearly two thirds (63%) saying it would be their preferred way of working, compared to just 38% of those in Poland.

The Spanish are joined by the French as the countries most likely to opt for a four-day week with the same salary and longer hours (50%). And while working a four-day week at reduced pay proved unpopular across the nations, the UK saw the highest number of employees opt for this (16%). Polish employees meanwhile are the most satisfied with the status quo, with 62% saying they are happy to continue working regular hours.

Percentage of employees actively considering self-employment or freelancing as a career option:





56%

would prefer
to work just four
days each week

78%

would rather
work four longer
days to earn
the same salary

22%

would prefer
standard hours
at reduced
pay overall

Across the different age groups, those in the middle phase of their career are most in favour of the idea. Of workers between the ages of 25 to 44, 59% say they would like to work a four-day week, perhaps due to the challenge of balancing work with family and other responsibilities. And again, the great majority of those interested in a four-day week would be prepared to put in longer hours to maintain their pay levels (78%).

However, of those who simply want more time overall, it was the Millennials who were most likely to choose this option, with 15% of 16 to 34-year-old workers saying they would like to work a four-day week at reduced pay.

Time well spent

Time is money

They might wish for a four-day week, but many European workers appear to have the opposite problem, with 60% of respondents saying they regularly work unpaid overtime.

On average, employees across Europe believe they are working almost five hours (4hrs 47mins) each week for free, while almost one in eight (12%) say their overtime reaches more than 10 hours per week, whether over lunch breaks, staying late or working at the weekend.

The issue is most prevalent among those in Germany (71%), Spain (67%) and the UK (66%), and least common in Poland (43%). At the extreme end of the scale, nearly a quarter (22%) of UK workers believe they work at least an extra 10 hours a week for free, more than twice as many as in Switzerland (8%), Poland (9%), the Netherlands (10%), Germany (11%) and Spain (11%). Unpaid overtime also rises significantly among the youngest demographic, with 17% of Europe's 16 to 24-year-olds saying they do more than ten hours per week.

Bad management on the rise

Longer hours don't necessarily mean higher productivity, and with Europe experiencing stagnant or slow productivity growth over the last few years, the findings suggest that all that overtime isn't having the impact you might expect. So, what is holding back the productivity of Europe's workers?

For the second year running, bad management is named as the biggest barrier to productivity. Worryingly, the problem is on the rise, with nearly a quarter (23%) of respondents naming bad management as the biggest productivity drain for them, up from 19% last year. This places it significantly ahead of other issues, such as inefficient systems and processes (18%) and a lack of staff support (18%).

Workers in Spain are the most likely to face bad management (31%), a huge eight-percentage point increase on last year (23%), and it's a similar story in Italy (27%, up from 22%), Poland (27%, up from 25%) and Germany (24%, up from 19%). Meanwhile, those in the Manufacturing & Utilities sector are most likely to face this challenge (30%).

4h 47mins

The average extra time that employees across Europe believe they are working for free.

3 Biggest barriers to productivity



Bad management



Inefficient systems
and processes



Lack of staff to support

Another emerging issue is staff shortages, with 18% of respondents saying their productivity has taken a hit due to a lack of team members to support them, a rise of 14% since last year. This is a particular issue in Germany (24%) and Spain (23%), as well as in the healthcare (24%) and retail (21%) sectors.

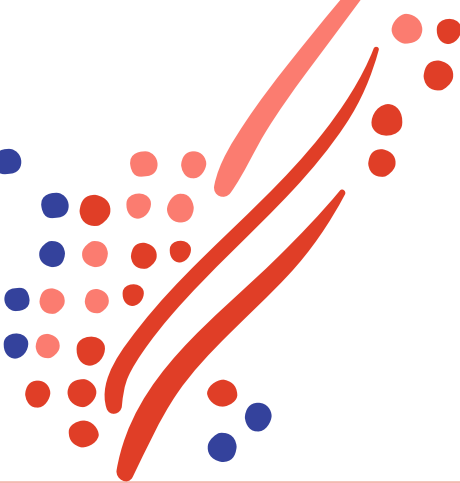
Surprisingly in the age of social media and the attention economy, personal phones are a minor productivity problem for the majority of the workforce (4%). However, phone-based distractions rise significantly among younger workers, with one in ten (10%) 16 to 24-year-olds saying this one of the biggest barriers to their productivity in the workplace.



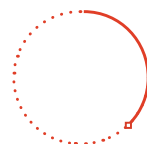
The full range of productivity barriers across European employees are detailed below:

Biggest barriers to productivity 2019

Bad management	23%
Inefficient systems and processes	18%
Lack of staff to support	18%
Slow and inefficient technology	16%
Too many meetings	11%
Too stressed	11%
Colleague distractions	10%
Lack of flexibility over location/hours	10%
Too many internal emails	9%
Too many work phone calls	8%
Too many external emails	7%
Social media	5%
Not engaged with my work	5%
Personal phone distracting	4%
Skills shortages	3%
I don't have the right skills	3%



Would you realise if you were paid incorrectly? **No.**



34%

Age 16 - 24



28%

Age 25 - 34



27%

Age 35 - 44



24%

Age 45 - 54

Payslip...ups

Is Europe's workforce being paid correctly? Millions of European workers could be receiving the wrong pay without realising it, with almost a quarter (24%) of respondents saying they wouldn't notice if they were paid incorrectly, rising to 28% of employees in the UK and 30% in France.

Employers are legally required to provide a pay slip to all employees (each time they are paid) that outlines their earnings and tax deductions for that period. This is particularly important for workers whose earnings fluctuate due to shift work or irregular hours.



19%

Age 55+

However, it appears that in many cases these documents aren't doing their job properly, with 14% of employees admitting they don't check their pay slip and one in ten (10%) saying they find it confusing. The issue is even greater among the 16-to-34 age group, with a third of workers (34%) saying they wouldn't notice if they were paid incorrectly, compared to just 19% of over 55s. Around one in six of 16 to 34-year-olds (16%) say the document confuses them, while 18% say they don't bother to check it.

Mental health and stress at work

Mental health – it's good to talk

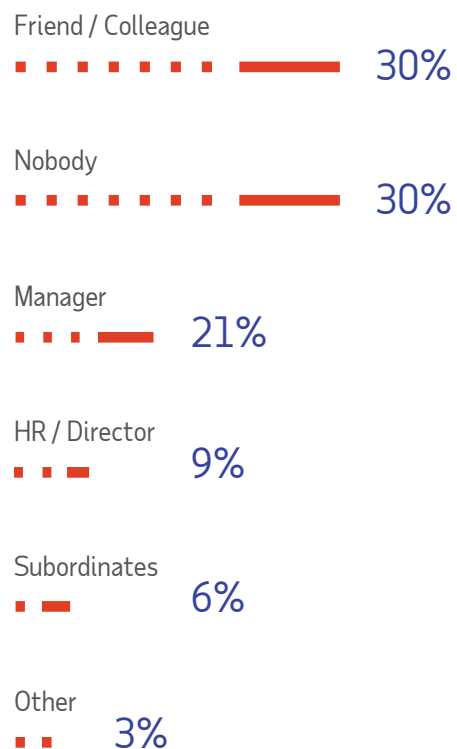
General awareness of mental health issues may have risen over the past few years, yet the findings suggest that this isn't always reflected in Europe's workplaces. More than a quarter (28%) of employees believe their employer is not at all interested in their mental wellbeing, and a further 38% believe their interest is only superficial.

These attitudes are also reflected in how comfortable employees would feel disclosing a mental health issue at work, with one in three (30%) saying they wouldn't feel comfortable doing so. Of those who would, 43% say they would feel comfortable speaking to close friends or colleagues, while a third (30%) say they would tell their manager. Just 13% would feel comfortable telling HR.

There are significant contrasts between individual countries when it comes to mental health in the workplace, with nearly half (45%) of those in Poland saying their employer takes no interest in their mental health and almost the same number saying they wouldn't feel comfortable telling anybody about an issue. At the other end of the scale, just 16% of those in Switzerland and Germany say their employer doesn't care about their mental health, and in Germany 80% of workers would feel comfortable talking about their own issues at work.

There are signs that attitudes are changing however, with Europe's 16 to 34-year-olds far more likely to be comfortable talking about mental health issues than their older colleagues. More than three quarters of this demographic (78%) say they would open up about a problem at work, compared to just 61% of over 55s.

Who at work would you be comfortable telling about a mental health problem?



Mental health and stress at work

Stress remains high

Meanwhile, Europe's workers remain as stressed out as ever, with more than one in six (17%) employees experiencing daily stress at work. A one percentage point decrease on 2017, this takes stress back down to 2016 levels. However, as in 2017, just one in eight (12%) workers across Europe say they never experience stress, down from more than a quarter (27%) in 2016.

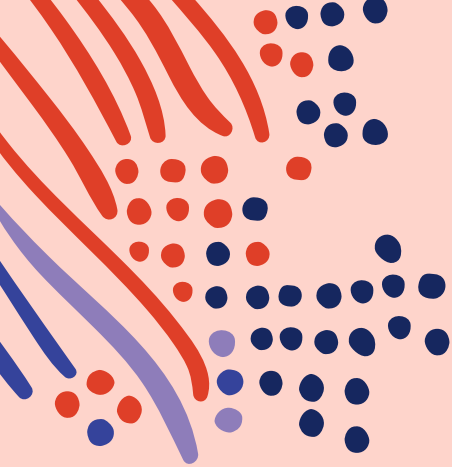
It's a similar picture in individual countries, with Polish employees remaining the most likely to experience stress every day at work (25%), although this has decreased very slightly on 2017 (27%). Similarly, employees in the Netherlands remain the most likely to say they never experience stress (22%), significantly more than in Germany, where just 4% report this level of workplace tranquility.

The most stressed-out sectors are sales, media & marketing, retail, catering & leisure and financial services, all with one in five workers (21%, 20%, 20%) experiencing daily stress, four percentage points higher than the average.

Mental Health Europe, the largest European organisation committed to the promotion of positive mental health, commented that:

"Stress and mental health stigma at work remain a reality in Europe. Persistence of stress can result in physical and mental exhaustion, impair employees' job satisfaction and performance, and affect the productivity and health of the organisation. Regardless of the sector, the costs of poor mental health in the workplace are enormous. Investing in mental health promotion and prevention in the workplace has positive impacts in the short and longterm for workers, employers and society."





Daily experience of stress by sector

15% Architecture, Engineering & Building Arts & Culture	16% Manufacturing & Utilities IT & Telecoms
17% Education Other	18% Travel & Transport
19% Healthcare	20% Retail, Catering & Leisure Financial Services

21% Sales, Media & Marketing
--

Mental Health Europe advises that promoting positive mental health at work can start with:

- Creating a culture of openness where mental health becomes a topic of conversation
- Making an organisational commitment to mental health at board level and championing positive mental health
- Measuring the mental health of employees and reporting to top level management
- Training employers, frontline managers and employees on mental health
- Considering reasonable adjustments for employees experiencing severe or longer-term mental health problems.

Inequality in the workplace

Discrimination declining

Numerous high-profile scandals have brought discrimination and workplace harassment into the public eye in the last 12 months, and the findings indicate that both employers and employees are taking action. While discrimination is far from being eradicated, it's encouraging to see a slight drop in the proportion of people who have felt discriminated against at work, down four percentage points to 30% this year.



Age is once again the most common reason for discrimination among the general population (9%), closely followed by gender (7%). However, among female respondents gender is the most reported reason for discrimination, with one in ten women (10%) saying they have been affected, compared to only 3% of men.

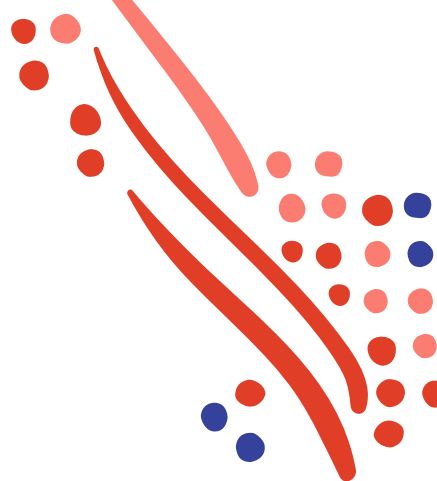
Reports of discrimination are highest in the UK where more than a third (38%) of respondents say they have been targeted, compared to just a fifth (18%) of workers in the Netherlands. Drilling down into the specifics, age discrimination is most prevalent in France (12%), while gender discrimination is most common in the UK (9%).

Interestingly, younger employees are more likely to say they've suffered gender discrimination, perhaps due to greater awareness and changing attitudes to what constitutes discrimination. One in ten (10%) of those under the age of 35 say they have been discriminated against, compared to just 4% of those over 45.

"Younger employees are more likely to say they've suffered gender discrimination, perhaps due to greater awareness and changing attitudes to what constitutes discrimination."

1 2018 Report on equality between men and women in the EU – <https://www.eubusiness.com/topics/social/equality-18>

30%
of people have
reported experiencing
discrimination at work



Spain 34%

Switzerland 34%

Italy 30%

France 30%

Germany 29%

Poland 25%

United Kingdom 23%

Netherlands 11%

Pay gap reporting gains support

Unequal pay has also been in the spotlight over the last 12 months, with high-profile examples showing that it is still a serious problem across the continent. Recent research also found that women are still paid on average 16% less than men across Europe, and some countries, including the UK and France, have introduced gender pay gap reporting, in an attempt to address the issue.

The research shows that there is growing support for this approach, with more than one in four (27%) employees believing that there is a need for gender pay gap reporting in their organisation, up five percentage points since last year. Those in Spain and Switzerland are most likely to think this is a necessary step (34%), compared to only 11% in the Netherlands, despite the latter dropping 16 places in the 2017 global gender equality rankings (World Economic Forum). Meanwhile, financial services employees are the most in favour of any industry (32%).

Further support for equal pay can be found in the fact that nearly two thirds (60%) of workers would consider looking for another job if they found out there was an unfair gender pay gap at their company, rising to nearly three quarters (72%) of women. Workers in Italy are most likely to consider moving if they discovered there was an unfair pay gap at their company (73%), whilst employees in France are the least likely to consider it (54%).

Millennials appear to be more enlightened in this area, with a third (31%) believing that gender pay gap reporting is necessary in their organisation and three quarters (75%) saying they would consider leaving if they found out their employer was paying men and women unequally.

Local issues



Workplace nepotism still rife in Spain and Italy

Contacts are everything in Spanish and Italian workplaces, with employees believing that more than a third of employees (37% and 39% respectively) are hired because of their personal connections, rather than their professional merit.

Perhaps for this reason, around two fifths of workers in Italy and Spain also feel they are overqualified for their current role (42% Italy, 40% Spain), with Italians more likely to believe they should be paid more (21%), and Spanish respondents thinking they should have a more senior role (17%).



Is Britain ready for Brexit?

With Brexit impacting every area of society, from the status of EU workers to trade relations, there has been a great deal of uncertainty in recent times. And at the time of this research in October 2018, just one in seven UK workers (14%) said their company had been clear with them regarding their plans for the changes. In contrast, a quarter said no plans had been communicated with them, while one in five (19%) claimed their employer still wasn't sure how it will affect them.

Financial services organisations prove to be the most organised, with a quarter of the sector's employees (22%) saying that a Brexit plan has been communicated to them, compared to just 5% of those in the arts and culture sector who say the same.



Short-term thinking in Poland

Short-term contracts are a popular option in Poland, affecting a third of respondents (34%), rising to 54% in the arts and culture sector and 43% in sales, media and marketing. Yet, while these agreements give employers greater flexibility, they do come with downsides for individuals.

More than a quarter (26%) of those on short-term contracts say this affects their work-life balance; a quarter say it impacts their ability to get a bank loan; 22% say it has affected their ability to get employee benefits; and 19% say it has caused them cash flow problems.

Furthermore, the majority of Polish employees (71%) say they feel demotivated sometimes at work, giving the most common factors as low pay and remuneration (35%), lack of recognition from management (25%) and poor leadership (19%).



French and Swiss attitudes to freelancers

While the advent of freelance workers seems to be starting to reverse, many permanent European employees have still been faced with a growing presence of more transient workers in recent years.

The findings show that the majority have no problems with their itinerant peers, with nearly two thirds of (61%) Swiss workers and half (46%) of those in France saying they treat freelancers and contractors just the same as other colleagues. However, there is evidence of some friction, with 10% of workers in both Switzerland and France saying they trust freelancers and contractors less than their long-term colleagues.



Local issues



Global ambitions in the UK, Switzerland and France

European workers have the enviable ability to work freely in any other EU country – but how many actually dream of working abroad?

According to the findings, the majority actually plan to stay put, particularly in France where 53% say they would never be interested in taking their skills internationally. Meanwhile, those in Switzerland and the UK are slightly more open-minded, with only 38% and 30% respectively saying they would never consider this possibility.

One in ten (11%) UK workers say a move is on their agenda, compared to only 5% of those in France and Switzerland.

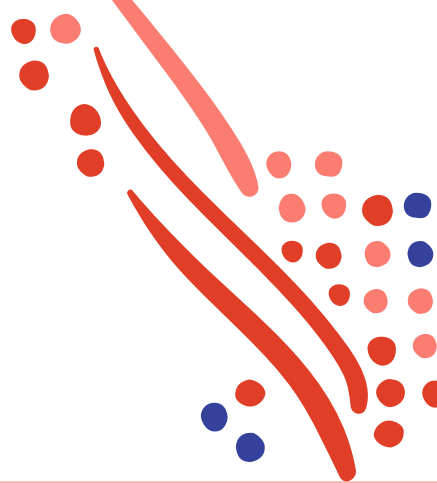


Changing times in Germany and the Netherlands

A fast-moving world means frequently changing job requirements in Germany, with almost two thirds (62%) of workers saying their responsibilities are often shifting. The issue also exists in the Netherlands to a lesser extent, where just over a third (37%) of workers say their role involves frequent changes.

Around half of both German and Dutch workers are taking the changes in their stride though, with 54% of those affected in both countries saying they don't find it difficult to keep up with them. However, the remaining 46% are finding the constantly shifting expectations more of a challenge.





“However, interestingly, British workers are twice as likely as their European counterparts to be actively considering a move overseas in the next years, perhaps due to the Brexit changes around the corner.”

Another area of uncertainty in the Netherlands and Germany is the prospect of the retirement age being extended. This is something that worries more than eight in ten (81%) employees in Germany and three quarters (75%) in the Netherlands, with nearly a quarter (24%) and a fifth respectively (22%) saying that they worry about this very often.

What does this mean for HR?

The Workforce View in Europe 2019 reveals a workforce that, despite many challenges, has much to be positive about. Employees are showing greater commitment to their current roles, with a rise in those claiming they intend to stay in their organisation for the rest of their working life. There is also evidence that their outlook has been buoyed by a boost in skills, and by workplaces that are increasingly fluid, flexible and open to diversity.

Overall, it seems that employees are growing increasingly accustomed to a world of change and are finding their feet amongst the new trends shaping the world of work.

That's not to say it's all rosy, and employers have some work to do around supporting mental health in the workplace. High profile advocates for a more open, supportive culture have gone some way to raising the profile of these issues, however, a change in attitude has to come from the top of the business world. It's the job of leaders, managers and HR professionals to find ways of tackling the stigma around mental health and to take charge of driving the conversation around these issues.



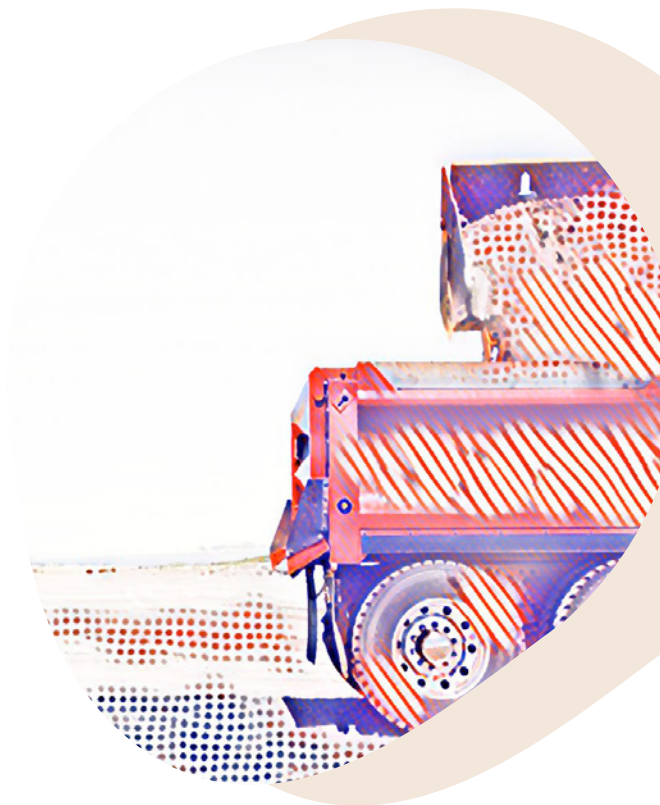
Other key issues include the bad management problem that continues to rear its head. For the second year running, bad management is a cause for concern and the top drain on productivity. With productivity being such an important measure of business potential and success, employers need to invest in recruiting and training up managers to be a real asset to their teams through facilitating, not hindering, productivity. The difference this can make is transformational.



Linked to this is the issue of unpaid overtime with employees reportedly working a worrying number of hours for free each week and many employees seemingly unable to understand their final payslips anyway. While longer working hours might serve organisations well in the short term, it's likely to have severe implications for motivation levels, engagement, retention and productivity. Fair reward for hours worked is a vital aspect of human motivation, and HR teams should have systems and processes in place to ensure this is happening in their organisations.

Meanwhile, the conversation around how to achieve optimal work-life balance continues, with new ideas coming to the fore. While freelancing and self-employment are on the decline, the popularity of a four-day week is rising fast. It might not work for every business, but it's certainly worth consideration as demand for greater flexibility from employees grows. And with such large numbers of workers saying they regularly work unpaid overtime, it seems organisations generally need to think about new structures that will ensure their employees' happiness, engagement and productivity. Ultimately, HR leaders need to think laterally if they want to ensure they attract and retain talent.

So, there's plenty to think about for HR and business leaders, with many changes on the horizon. With an optimistic and forward-thinking workforce, the opportunities are endless. The key is to keep on listening, innovating and educating the business on the needs and wants of employees. Get that right and leaders can help their business succeed.



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