



Inovantage



THE ADECCO GROUP



Dear Readers,

We are happy to introduce to you our fifth edition of Inovantage discussing Workforce Investment – Reshaping Approaches to Human Capital, in the context of our usual big three - employment, education and the economy.

Rethinking the dynamics of human capital investment has never been more relevant. 2020 has started with a disruptive pandemic, forcing countries in deep lockdowns amid efforts to save lives and prevent healthcare systems from being overwhelmed. There are already indicators – at least in the short term – of economic downturn and a rise in unemployment. However, we are still only learning about how deeply the pandemic will affect daily life. It's an opportune time to look at empowering the workforce.

This edition of Inovantage report sheds a specific light on the areas to invest into in order to future-proof the workforce. The report analyses global trends in workforce development and participation, but it focuses on the Central Europe and MENA region, including Poland, Czechia, Slovakia, Hungary, Slovenia, Croatia, Romania, Bulgaria, Serbia, Greece, Turkey and the United Arab Emirates.

The Adecco Group strongly believes in making the future better for everyone. We have worked closely with governments,

universities & corporations in the past couple of years to develop three holistic and sustainable upskilling models best suited for different needs.

We transition the conversation of investment in re-skilling with a call for an increase in flexibility, with a focus on 'flexicurity'. This means improving flexibility with improved social security for the same.

The move towards flexible work has been paralleled by some fundamental societal changes. The 2020 coronavirus pandemic has been a powerful catalyst for flexible working arrangements. Throughout Europe and the wider world, governments and companies have spearheaded numerous flexible working arrangements. The third piece that is relevant to human capital investment are the demographic shifts prevalent in society.

It's common to have 3 generations in the workplace right now and it is becoming increasingly important for companies and education systems to focus on middle aged and older adults. Life-long learning is no longer a 'nice to have', it defines how we work in the 21st century.

Key takeaways:

- ▶ More skilled workers lead to better productivity, better individual incomes and more security in a flexible labour market.
- ▶ Futureproofing the skills of workers

reduces shocks caused by technological change and leads to pro-active adaptation.

- ▶ Workforce skills are an asset for individual organizations, making investments in reskilling and upskilling rewarding in the long run.
- ▶ Many countries lag behind in adopting flexible working practices, but the post-pandemic recovery could include significant changes to the workplace.
- ▶ For true flexicurity, social security systems need to change and adapt to the new labour market.
- ▶ Lifelong learning represents a broader form of upskilling and reskilling, often regulated as part of public policies preparing societies for technological change and an ageing workforce.

We sincerely thank our academic & commercial partners for their contribution to the report and for supporting us in the publishing of valid research material, with a CEE focus, in the sphere of employment & education.

Happy Reading!

Yours Sincerely,

Angelo Lo Vecchio & Sandhya Sabapathy
Regional Team (Eastern Europe, Middle East and North Africa)



Editor's Note





Intro



Talent is increasingly becoming the key factor behind sustainable, long-term growth and development in the 21st century economy. While land was the source of wealth before 1800 and manufacturing after, wealth creation in the 21st century is increasingly reliant on skills and workforce development. And not just in the workplace, but at all levels: talented governance, skilled entrepreneurship and transformative leadership have the power to generate success in the new economy like never before. And it is in this context that workforce development becomes a crucial component of growth both within companies and across national economies.

This edition of Inovantage analyses global trends in workforce development and participation but it focuses on the Central Europe and MENA region, including Poland, Czechia, Slovakia, Hungary, Slovenia, Croatia, Romania, Bulgaria, Serbia, Greece, Turkey and the United Arab Emirates. These countries are transitioning or have transitioned from emerging market to high income status (World Bank Data Help Desk, 2020). However, as they seek to avoid falling in the dreaded middle-income trap, it becomes clear that economic growth and social development cannot power ahead without a new approach to workforce development. One that is life-long in nature, and that requires both the efforts of governments – especially when

it comes to initial education and training – and of companies.

2020 has started with a disruptive pandemic, forcing countries in deep lockdowns amid efforts to save lives and prevent healthcare systems from being overwhelmed. There are already indicators – at least in the short term – of economic downturn and a rise in unemployment. However, we are still only learning about how deeply the pandemic will affect daily life. It's an opportune time to look at empowering the workforce. This report hopes to shed a specific light on the areas to invest into in order to future-proof the workforce.



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Investing in reskilling and skill development

Employment panorama in the CEE and MENA region

Trends in employment in the CEE and MENA region are highly diverse and are bound to national economic conditions. Among the former socialist countries in Central and Eastern Europe, there has been a broad rise in the employment rate for active age people over the past few years. Various programmes have tried to increase workforce participation, ranging from the use of EU funding to improve workforce training to changing legislation, boosting upskilling schemes and attempting to reform education systems. But the key factor has been sustained growth, with most countries in the region seeing a more dynamic recovery than other parts of Europe in the post-crisis period.

This has been reflected in the growing demand for workers. Some countries have had a noteworthy performance in increasing workforce participation. **Czechia, Hungary, Poland, Romania and Turkey have all seen employment rates in 2019 surpass pre-crisis levels by 5 percentage points or more,** while Serbia has seen a recent upswing in employment rates too.

With the exception of Greece, labour markets in the region can broadly be seen as more dynamic than before the 2008 global financial crisis. It should be noted that a few countries, notably Romania, Bulgaria and Croatia, have seen significant international mobility, with many people being employed abroad.

The upswing in employment rates has caused labour markets to become tighter as they increase. When it comes to growth in labour costs, countries in Central and Eastern Europe are EU-wide leaders (Eurostat, 2020).

This has a few key effects on companies in the region, including:

- ▶ Companies increasingly struggle to find sufficient staff. In some countries the situation is extreme, with vacancy rates in Czechia passing 6% in parts of 2019.
- ▶ The switch from a low-wage model in ensuring competitiveness requires a rise in productivity and better skilled workers.
- ▶ The reduced supply of workers in the labour market places more pressure on companies to retain staff.

Many of these changes have increased as workforce participation in the labour market approached saturation. After this rate hits 80%, the potential for further recruitment of workers declines as there is always a number of people who remain outside both employment and training (NEETs). This trend has partially fuelled recent wage growth and has encouraged companies to invest more in developing their existing workforce.

Employee training and development initiatives need to demonstrate increased adaptability in the aftermath of the pandemic we have all gone through at the beginning of 2020. For example, companies need to invest their often limited training resources to develop employees' skills with a direct impact on individual and organizational performance. They will need to clearly understand how

the environment and the market changes and act accordingly in order to provide employees with the required skills. These will certainly have to include a number of soft skills, such as adaptability, resilience and flexibility, which have appeared to be really important during the pandemic.

Dr Ioannis Nikolaou, Associate Professor in Organisational Behaviour at the Athens University of Economics and Business (AUEB)

It should also be noted that across the countries in the region, companies must contend with a wide variety of outcomes from initial education and training. Some countries in Central Europe have developed German-style dual vocational training. Others, such as Poland, manage to offer high quality literacy and numeracy skills for their secondary school students, an aspect reflected in the country's high testing scores (OECD PISA, 2019).

Employment panorama in the CEE and MENA region

Table 1 **Employment among people aged 20-64.** Source: Eurostat

COUNTRY	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bulgaria	70.7	68.8	64.7	62.9	63	63.5	65.1	67.1	67.7	71.3	72.4	75
Croatia	64.9	64.2	62.1	59.8	58.1	57.2	59.2	60.6	61.4	63.6	65.2	66.7
Czechia	72.4	70.9	70.4	70.9	71.5	72.5	73.5	74.8	76.7	78.5	79.9	80.3
Greece	66.3	65.6	63.8	59.6	55	52.9	53.3	54.9	56.2	57.8	59.5	61.2
Hungary	61.5	60.1	59.9	60.4	61.6	63	66.7	68.9	71.5	73.3	74.4	75.3
Poland	65	64.9	64.3	64.5	64.7	64.9	66.5	67.8	69.3	70.9	72.2	73
Romania	64.4	63.5	64.8	63.8	64.8	64.7	65.7	66	66.3	68.8	69.9	70.9
Serbia	:	:	:	:	:	:	54.8	56	59.1	61.4	63.1	65.2
Slovakia	68.8	66.4	64.6	65	65.1	65	65.9	67.7	69.8	71.1	72.4	73.4
Slovenia	73	71.9	70.3	68.4	68.3	67.2	67.7	69.1	70.1	73.4	75.4	76.4
Turkey	48.4	47.8	50	52.2	52.8	53.4	53.2	53.9	54.4	55.3	55.6	53.8

A changing economic environment

Despite strong efforts aimed at improving initial education and training, rapid technological and economic change is making it increasingly difficult to tune education systems and the immediate needs of companies. Furthermore, as global populations age and demand for talent rises, countries in Central, Eastern and South-Eastern Europe have often felt the brunt of out-migration flows among their highly skilled workers, reducing the local availability of much needed competences.



In this light, there are growing efforts to try to better link education and labour markets, to retain and retrain local talent and to ensure that skilled individuals are primarily employed locally. In Europe, these efforts have been both institutional (initiated by governments) and driven by the private sector. Among the former, we can remark the development of qualification frameworks (that describe education outcomes in terms of competences and qualifications), increased investment in vo-

cational and professional training programmes and efforts to ensure graduate tracking.

Most countries have taken stock of labour market trends, which include the 4th industrial revolution, growing importance of creative industries, a rising share of cross-border provision of services, a growing global competition for talent but also the emergence of a gig economy in which individuals have either chosen or needed to become entrepreneurs in order to adapt to growing service sector flexibility.

The European Union, which includes many of the countries covered here, is a clear example of a shifting labour market. Over the past two decades, it has seen a steep decline in agriculture and manufacturing employment and a steady rise in the share of people employed in various professional services, technical activities, trade and food services and other tertiary sector activities. These now dominate employment and indicate a growing role for the support economy.



A changing economic environment

Table 3 **Employment among people aged 20-64.** Source: Eurostat

SECTOR	1996	2016	2017	2018	2019
Agriculture, forestry and fishing	8.4	4.5	4.4	4.2	4.1
Industry (except construction)	20.8	15.3	15.3	15.3	15.2
Construction	6.9	6.3	6.4	6.4	6.5
Wholesale and retail trade, transport, accommodation and food services	23.0	24.7	24.8	24.7	24.7
Information and communication	2.2	2.9	3.0	3.1	3.1
Financial and insurance activities	2.7	2.6	2.5	2.5	2.4
Real estate activities	0.9	1.1	1.1	1.1	1.1
Professional, scientific and technical activities; administrative and support	7.6	12.8	13.0	13.1	13.2
Public administration, defence, education, human health and social work	22.2	23.7	23.6	23.6	23.6
Arts, entertainment and recreation; other service activities;	5.2	6.1	6.1	6.0	6.1

While these changes have been incremental and driven by the private sector, some countries have directed widespread economic transformation as part of national strategies. An outstanding regional example of rapid adaptation to a modern, global economy is the United Arab Emirates. With breakneck speed, it has started an ample process of transformation from a resource-dependent economy to becoming a global emporium, finance and services centre and logistics hub. Dubai is

now a prime tourist destination and a global travel hub. In fact, both Dubai and Abu Dhabi host well-connected airlines, taking advantage of their excellent geographical position that enables non-stop flights to all continents. This gives the UAE the unique capacity to be a global transit hub. At the same time, the workforce of the UAE differs from that of most other countries, consisting almost entirely of foreigners and migrant workers.

Countries in Eastern Europe - albeit with fewer resources - have also modernized their economies over the past two decades, with some hitting remarkable benchmarks in terms of workforce employment. Czechia has managed to lower unemployment to just around 2%, having the lowest unemployment in the EU and being close to full employment. It also has one of the highest rates of employment for immigrants in the EU, suggesting a balanced policy of recruiting foreign skilled workers. Czechia,

Poland and Slovenia are also remarkable in that they are the only three EU members in which industry remains the top employer, which reflects the fact that global trends are moderated by national and regional contexts.



»Countries in Eastern Europe albeit with fewer resources have also modernized their economies over the past two decades, with some hitting remarkable benchmarks in terms of workforce employment.«



20 th CENTURY LABOUR MARKET	21 th CENTURY LABOUR MARKET
Male dominated, especially in decision-making positions	Global, diverse, gender balanced workforce
Continuous employment with lockstep career progression	Discontinuous career progression
Linear and siloed vertical career progression	Nonlinear career paths
Deep functional expertise valued	Multidimensional expertise valued, with both technical and transversal skills valued
Full-time employment models	Flexible employment models – part-time, asymmetrical workloads, seasonal
Face-to-face work interaction	Virtual workplace and face-to-face blend
Expectation of only one chance to advance career (in 30s) -no second chances	Expectation of only one chance to advance career (in 30s) -no second chances
Work, family, community separate	Any time is good as long as performance is sustained
Monetary rewards as motivators	Family-community-work intertwined
Government heavily regulates jobs	Monetary and nonmonetary rewards or 'perks'
STABLE AND PREDICTABLE ENVIRONMENT INCREMENTAL CHANGE RIGID HIERARCHIES	Government engages flexibly with employment
	STABLE AND PREDICTABLE ENVIRONMENT INCREMENTAL CHANGE RIGID HIERARCHIES

Still, many countries in the Eastern part of Europe have reactive labour markets. Direct involvement in Western European supply chains is a common driver for growth in the industrial sector. Countries with a strong ecological and geographic potential such as Greece and Croatia have high rates of employment in the hospitality industry, with Greece seeing a full third of its labour force employed in wholesale and retail trade, transport, accommodation and food services.

The natural evolution of in-demand skills and sectoral weight represent only part of the picture. There is also a change taking place within occupations. This monumental shift is happening in the demographic composition of the workforce, career advancement patterns and employer relations Some features are listed below.

Investing in training

In the past few years, there is some evidence that investment in on-the-job training has been stagnant or even declined across many developed countries, with labour markets taking a low priority for investments (McKinsey, 2017).

However, if companies and government want to emulate the rapid growth seen in some of the highly adaptive tiger economies across the world and to avoid limiting productivity growth, urgent investment is needed in particular sets of skills. Skills that could bring added value across sectors include:

- ▶ The development of IT and other competences useful in using ICT
- ▶ Communication and customer services skills
- ▶ Leadership and teamwork skills
- ▶ Creativity & Negotiation skills

The Adecco Group has worked extensively in the past couple of years to develop holistic and sustainable training models best suited for different needs.

The first model aims to combat the tendency to treat upskilling and reskilling as an incurring cost and to guarantee that training is an integrated part of a company's

long-term development strategies. This emphasizes the fact that acquired skills are assets for companies. By approaching reskilling as an asset of economic value, departments, corporations and even whole economies can draw upon new skills to provide long-term benefits.

Stavroula Yvonne Voulgari is a Sales & Marketing Manager at a manufacturing & production company in Athens, Greece, *she says*, 'When planning a training module a company should pay attention to the education, learning level, personal skills, the job description and the professional development of its employees. As a personal life-long learning initiative, I'm taking courses in foreign languages and advanced excel. For future long-term employability I am looking into psychology, crisis management and business management.'

The second model revolves around the idea of setting up individual accounts for each employee to increase their employability. This both integrates training into the perks system developed by a company and offers employees the guarantee that the company is committed to offering them support in career progression. This has the potential added benefit of motivating employees in a modern work setting.

Maciej Switek who works as a Sales Director at a Banking & Insurance company in Warsaw Poland adds, 'In order to increase my long-term employability I'm

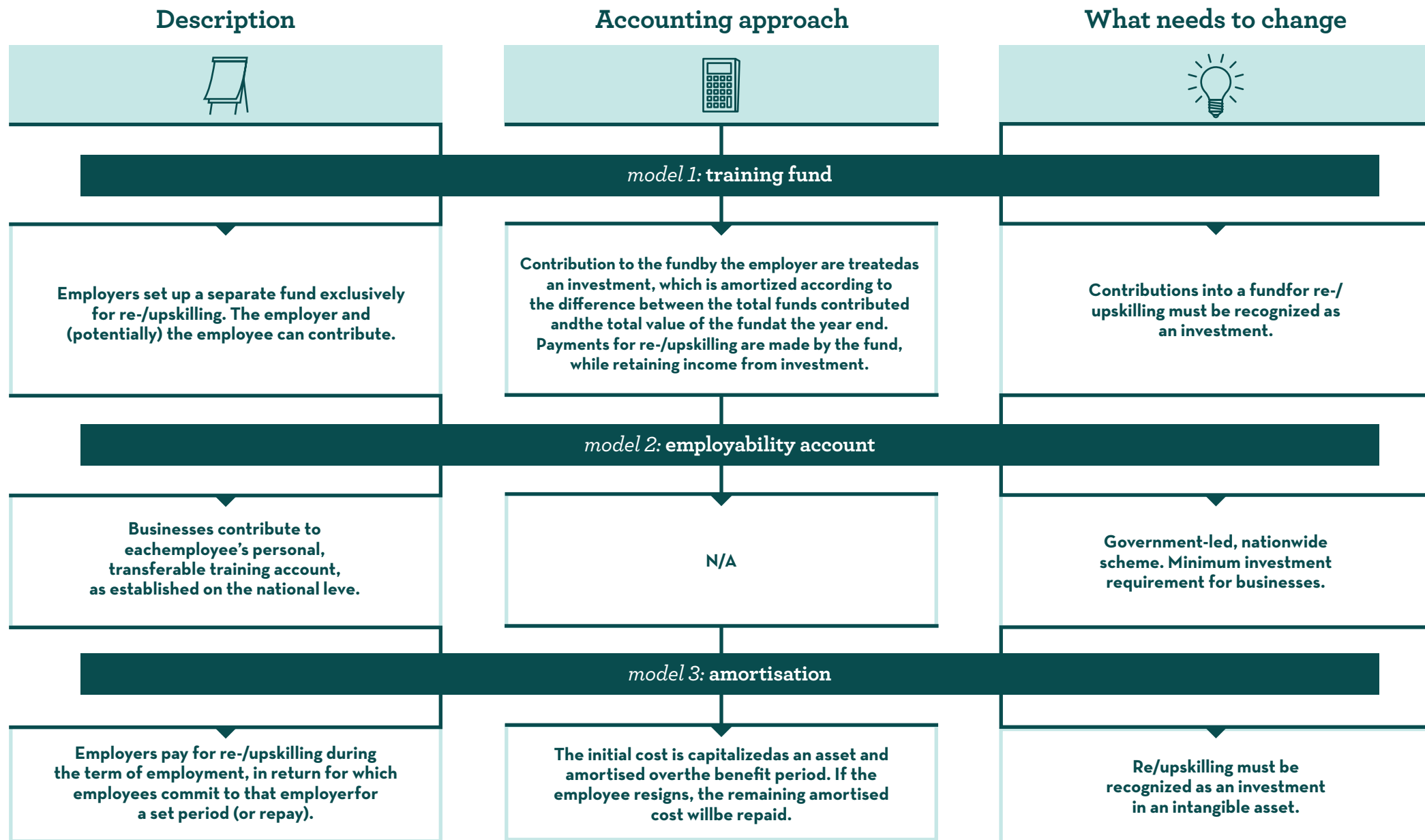
working on my hard skills - financial/analytical proficiency, computer programming. The slow-down during the Covid pandemic offers an opportunity for upskilling so during this period I've been working on my finance management/ accounting skills & knowledge.'

Lastly, the final model guarantees that employees use skills acquired via training within the company setting – at least for an amount of time – by linking training activities to contractual obligations (e.g. a pledge not to move to another company). If contractual obligations by the employee are not met, the latter are required to reimburse at least a part of the training investment costs, thus minimizing any losses for the employer.



Investing in training





Reskilling Trends in The UAE – Case Study

A growing number of organizations worldwide are looking for new methods to upskill their staff to fill a rising amount of jobs generated by the digital revolution. In the UAE, public authorities have taken several initiatives for reskilling/upskilling the workforce. All those initiatives are primarily oriented toward the new technologies and the digital industry. Among, the most noticeable initiatives in the country, we can mention the following:

- ▶ One million Arab Coders: the initiative intends to create employment opportunities and prepare students for the jobs of the future. Under the framework of this initiative, the UAE Ministry of Education seeks to enable young people in the field of computer science and coding education. The initiative also aims to upskill the Ministry employees in the fields of data and AI.
- ▶ The 'Cloud center of Excellence': is an initiative Abu Dhabi Smart Solutions and Services Authority (ADSSA), the emirate agency for developing technology related solutions for the local government. Through this initiative, the authority aims to upskill the emirate's public sector workforce with skills related to high tech. Indeed, the vision of the Emirate is to provide public institu-

tions with skilled human capital with the aptitude to deal with the newest digital solutions and advanced technology².

- ▶ The "Centre of Digital Innovation" (CODI): CoDI emphasizes capacity building and research and development activities aiming to produce knowledge generating products and services mainly in Information and Communication Technology (ICT). CoDI has established an ecosystem of partners and stakeholders from different sectors and launched various initiatives. For example, The "Smart Government Virtual Academy", also known as, Tadreeb is an online training platform founded by the as a principal component of the Smart Government transformation.³
- ▶ "Injazat Data System": It has been established by Mubadala, the investment arm of the Government of Abu Dhabi, for supporting the digital transformation of the private sector in the UAE and in the region. Injazat put people transformation at the heart of its intervention in businesses. For doing so, Injazat set up the Digital Academy Programme. The academy bring staff up to speed on the key knowledge and skills they will require to take part to the transformation project.

Whether it is for students, private sector employees or local and federal govern-

ment staff, the trend of upskilling/reskilling people is ongoing in the UAE with the key skills being related to the use and implementation of new technologies.

Case study provided by Moez Ben Yedder
Ph.d, Assistant-Professor in HRM, Abu Dhabi University (UAE)



Reskilling Trends in The UAE





Take aways

- ▶ More skilled workers lead to better productivity, better individual incomes and more security in a flexible labour market.
- ▶ Futureproofing the skills of workers reduces shocks caused by technological change and leads to pro-active adaptation.
- ▶ Workforce skills are an asset for individual organizations, making investments in reskilling and upskilling rewarding in the long run.



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Investing in flexibility



Investing in flexibility

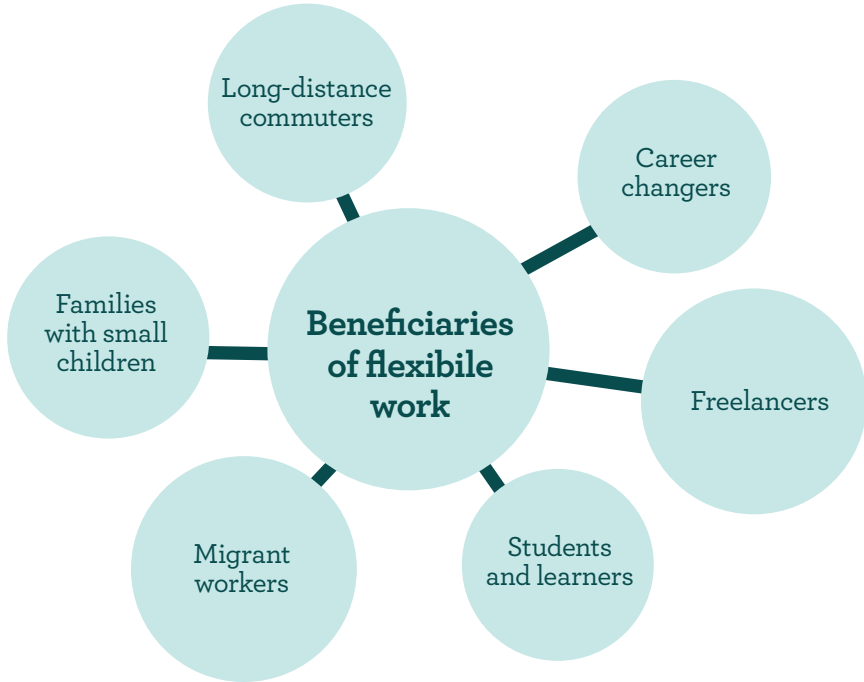


Flexible workforce solutions, in various shapes and sizes, have been star concepts in the world of human resources management over recent decades. It has also been the subject of extensive social commentary and at times is controversial, but this report attempts to bust some of the myths.

The move towards flexible work has been paralleled by some fundamental societal changes. Firstly, rapid technological change has become rapid and a shift in sectoral weight has accompanied automation. Some traditional services like food delivery & transport have been disrupted by increased accessibility. A second trend is the increased globalization of traditionally public services. Health services and higher education increasingly seek cus-

tomers across borders. A third trend is the emergence of the Internet of things, which is on track to decrease reliance on local infrastructure. Lastly, the speed at which technology transforms employment needs means that lifelong careers are largely obsolete.

Social needs have also changed. Making family life compatible with work is increasingly important in efforts to make labour markets more inclusive (European Commission, n.d.). This has often meant that families need childcare services and increasingly flexible working arrangements in order to balance out personal and work-related commitments. But they are far from the only beneficiaries of flexible working solutions. Broad categories include:



Cross-border mobility as a dimension of flexible work

One way to mitigate workforce shortages has been migration. A classic regional example is the United Arab Emirates, which heavily relies on the recruitment of labour from abroad, thus minimizing the pressure on local sourcing of skilled workers. Other countries in the region that have high levels of development have also seen a surge in the recruitment of foreign workers. Poland, for example, is now actively recruiting hundreds of thousands of Ukrainian and other workers in order to meet labour shortages. In fact, in recent years it has awarded the highest number of first-time work permits in the entire EU (Eurostat b, 2020). Czechia has also seen a rise in foreign workers, with some reports claiming that a quarter of Prague's workforce consists of foreigners (Expats_Cz, 2019).

The sourcing of workers from abroad has some considerable limitations, however. In many countries there is a political cost, and it is likely that an issue of availability could arise as many developing countries now also have ageing populations.

What is common across contexts is the need for flexible arrangements in order to accommodate migrant workers. Seasonal work is a form of flexible work that has advantages for both workers and employers. Employers fill seasonal labour shortages (for example harvest workers active in agriculture in Poland) during peak

times. They return to their home countries for the remainder of the year, where the purchasing power differences give them more 'bang for their buck'. Furthermore, they could resume regular employment in their home country, making seasonal work a form of peak income for a limited part of the year.

Technology has also meant that cross-border employment is now possible even with limited physical mobility, especially for many freelancers doing contract-based work. Technological barriers have disappeared, but also institutional barriers to a large extent. The number of independent contractors (freelancers) who have been able to practice their profession, working for example in their home in Wrocław and implementing a project in a company located in Shanghai, has been increasing for at least several years. Increasingly (especially in the services sector) we will observe hybrid forms of work, which are a mixture of a traditional form of work (physical presence in the workplace) and online work. Krzysztof Jajuga Ph.D., professor of finance Wrocław University of Economics,

Flexicurity

A common criticism of flexible working is the fact that arrangements often reduce the level of financial security per employee. This is particularly true for contracts with flexible numbers of hours (and pay) per month. This

has brought about a lot of discussion on the topic of flexicurity: maximizing the flexibility of contracts for workers while minimizing the risks and potential insecurities. The European Union has been an early proponent of flexicurity and has outlined four common flexicurity principles and has identified four components aimed at achieving these (European Commission b, n.d.):

- ▶ flexible and reliable contractual arrangements
- ▶ comprehensive lifelong learning strategies
- ▶ effective active labour market policies
- ▶ modern social security systems

These approaches were earmarked as key components of the Europe 2020 strategy and the overall ambition of the European Union to achieve a 75% employment rate among the active age population in the block. Greater labour market flexibility enables people who would otherwise struggle to balance multiple commitments to access the labour market, some of the key beneficiaries being identified above.

Labour research indicates that flexible working arrangements help limit chronic unemployment via higher labour market turnover, allowing companies to better respond to seasonal fluctuations in turnover and reduce barriers for young people trying to access the labour market (Andersen, 2015).

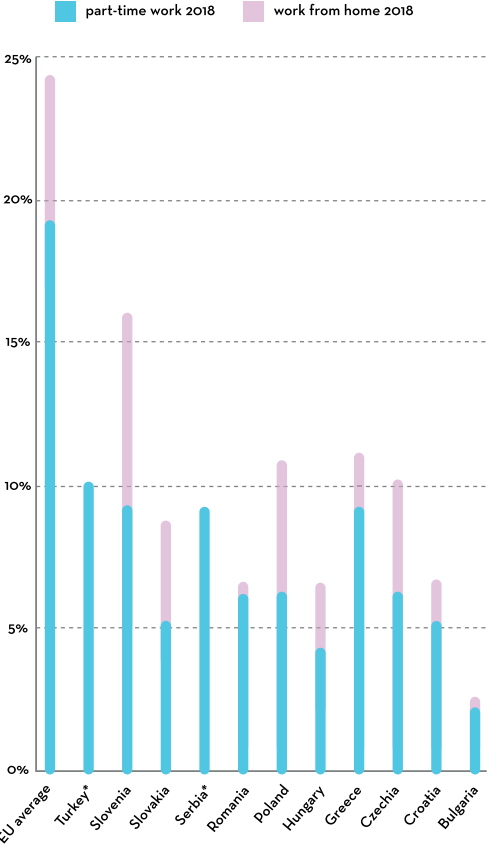
Nevertheless, **for flexicurity to truly work, it needs to happen amid a wider rethink of existing social security and other systems.** The high turnover of labour, on one hand, and the fact that numerous institutions are designed around the traditional working model can pose challenges which have to be addressed. For example, access to some forms of credit is conditioned on the existence of a 'traditional' work contract. Such approaches risk hurting both an increasing share of employees and credit institutions themselves.

A new social contract needs to be designed in which a flexible career progression and the advantages it generates for the individual (in terms of skills, contacts, income accumulation) is accepted as intrinsically valuable.

I think that the age we live in allows us, due to technology, to develop various ways of carrying out our activities on the labour market. We must take advantage of this opportunity so as to diversify our working methods. Obviously, legislation will have to become more and more flexible, and each employer will have to choose ways to allow their employees to be as efficient as possible, while carrying out their work tasks comfortably.

Mădălin Bunoiu, Associate Professor, Ph.D Vice-Rector for academic and student affairs West University of Timișoara

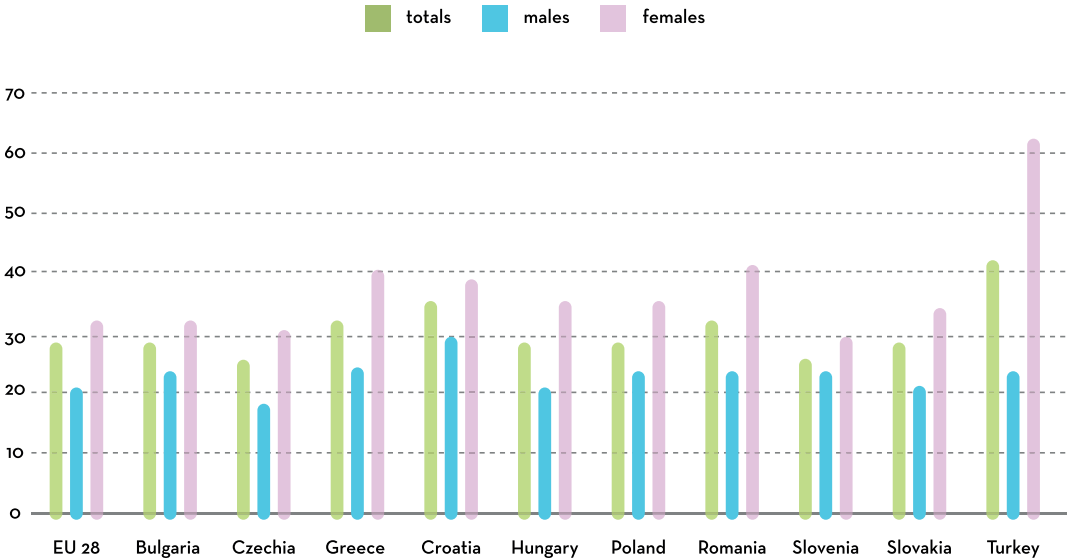
The CEE region tends to lag in terms of overall use of flexible working arrangements when compared to economies situated further West. While there is no one single statistically accepted definition for flexible working, part-time work and work-from-home can be good proxies. Eurostat data clearly indicates that countries in the region lag behind their western peers.



The data above indicate that conservative approaches to employment tend to be dominant across the region. Furthermore, there is no significant rise in work from home, for example, though a few countries (such as Slovenia and Czechia) have seen fairly consistent growth when compared to the pre-2008 crisis period. Of course, while the offer for flexible work in the region is still somewhat limited, the likely demand is not. We see that the countries of CEE and MENA have higher rates of active-age persons outside the workforce than comparable situations in developed countries. That is to say that the combined number of employed and unemployed people leaves out a large number of residents that are not seeking employment. This situation is particularly problematic in Turkey, where over 40% of the entire active aged population is not a part of the work force and female workforce participation is very low, though Romania, Croatia, Greece, Bulgaria and Poland also see high rates. In fact, only Czechia has workforce participation rates that are comparable with the EU average and the rates seen in many developed countries. The factors that limit workforce participation are complex, but more flexible arrangements respond to numerous issues pertinent to the region. This includes low numbers of daycare places available in some countries and even extremely high commute times caused by heavy traffic, a factor which limits the geographic scope of commuter belts?



Flexible approaches to working in the region



The coronavirus pandemic

The 2020 coronavirus pandemic has been a powerful catalyst for flexible working arrangements. Throughout Europe and the wider world, governments and companies have spearheaded numerous flexible working arrangements, which include:

- ▶ An increased focus for working from home wherever possible
- ▶ Differentiated schedules aimed at avoiding rush hour crowding on public transport
- ▶ Special arrangements for workers with small children who have been left locked out of daycare or school
- ▶ Furlough or technical unemployment schemes aimed at ensuring incomes for workers rendered unemployed due to the crisis

Such arrangements are broadly designed to be temporary but could pave the way for a long-term rethinking of labour markets in the 21st century. For example, the protection mechanisms designed for workers left redundant during the steep downturn could become a part of a new approach to social security, while work-from-home schemes could influence companies that have been slow to adopt remote working beforehand.

Also, the pandemic has allowed individuals to invest in themselves whilst doing their daily jobs. Florentina Coltescu, associate analyst in IT&Telecommunications, Bucharest, Romania, says, 'The Covid -19 situation may be dire, but it also translates into more time to upskill and reskill. Staying at home has allowed me to enroll for online courses to enhance my digital skills. I have also sought to acquire practical knowledge and gather resources in the field of communication and management.'

In the short term, the pandemic has seen a new prioritization of workplace safety, with the Adecco Group actively working towards the dissemination of good practices in ensuring a safe return to work for employees across the world (The Adecco Group, 2020). Going further, the Adecco Group has identified four key priorities for organizations coping with the pandemic and its aftermath. These are:

- ▶ Putting people first, including employees. Emphasizing employee wellbeing as a key value, and creating a purpose-driven culture has the potential to improve workplaces after the end of the pandemic.
- ▶ A renewed focus on customers, which will include the integration of new communication tools developed during the pandemic into common practice.
- ▶ A focus on quality and proactive leadership, especially as lockdowns ease but heightened health and safety concerns remain in place.
- ▶ A general adaptation to the „new normal” of a flexible labour market. The pandemic has shown that more safety nets and support tools can and should be developed for gig economy workers.



The coronavirus pandemic





Future outlook



Future outlook

The Adecco Group has backed flexible solutions for companies across the region in the past few years. One of the advantages of a networked company such as Adecco is the capacity to communicate simultaneously both with multiple potential employees and employers, thus offering better matching opportunities across an otherwise dynamic labour market. Adecco consultants advise and help candidates to find flexible work that suits their lifestyles. In fact, networked solutions are probably an important part in making flexible working compatible with individual needs for both personal financial security and in reducing the risks of frequent redundancies.

‘Flexible work solutions enable companies to leverage talent wherever they are- limitations to accessing talent based on location, commute to work or family commitments no longer exist. Companies unlock a massive competitive advantage and increase the inclusivity of their culture when they become flexible to their staff working from home.’

Catie Brand works as a Senior International HR Director in Dubai/Paris

The Adecco Group believes that a shift to flexible working is a win-win strategy for both employers and employees. Organisations need access to an evolving set

of skills and leadership capabilities, and flexible workforces for business agility. In parallel, employees want to work when, where, and how they wish, doing the work that matches their skills, interests and compensation needs. Flexible working conditions also allow companies to access a wider pool of workers at times of labour scarcity. Mothers and fathers, long distance commuters and even students are more likely to start working if companies are open to taking into account the existence of complex personal circumstances outside the world of work.

‘The business and financial benefits associated with flexible working arrangements include; better retention rates, reduced costs and improved productivity. Employees who avail of flexible working arrangements are provided with a greater sense of control over their working day and are likelier to work harder and increase their output, thus benefiting the business. Flexible working reduces stress and fatigue; factors which may lead to employees losing focus and as a result, underperforming at their job function. Being granted a flexible working environment also allows employees to better balance work demands with personal demands ensuring improved concentration on work tasks during work hours.’

says **Marilena Soulogianni**, who works in an HR Department in Finance & Accounting in Athens, Greece.



Take aways

- ▶ Flexible working allows under-represented groups to better access the labour market, all while reducing the risk of long-term unemployment.
- ▶ Many countries lag behind in adopting flexible working practices, but the post-pandemic recovery could include significant changes to the workplace.
- ▶ For true flexicurity, social security systems need to change and adapt to the new labour market.



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Investing in Lifelong learning

While technology is transforming the workplace, demographic shifts are changing societies in much of the world. Fertility rates, the average number of children that people have over their reproductive life, have fallen below 2.1 and into sub-replacement territory.

That means that many countries are seeing populations that are either declining or set to decline over the long term, all while ageing considerably. Even Turkey, which has traditionally had Europe's most youthful population is on track to see a considerable rise in the average age of its population. It is expected that by mid-century some countries will have an average age of 50 or higher. Numerous governments are raising the retirement age in order to respond to the demographic crisis, contributing to an ageing profile in the workforce and forcing companies to take note of older workers in their efforts to plug staffing gaps.

As these transformations occur, **it is becoming increasingly important for companies and education systems to engage middle aged and older adults.** A dynamic labour market often forces older adults to seek new qualifications, and this trend is likely to intensify as automation reduces or increases demand in various sectors.

Learning for older adults takes place both within and outside companies. Within companies, the objectives of lifelong learning often revolve around vertical mobility, upskilling, changes to procedures, to business models or shifts in employee roles. In this regard, there lifelong learning blends well into training and re-skilling efforts that were discussed previously.

Training outside of companies is far more often linked to obtaining horizontal mobility and new qualifications, that is people shifting to work in new fields. Some countries grant privileges to degree holders (e.g. tax deductions for IT workers in Romania) or require specific qualifications for certain regulated professions, and as such career advancement is sometimes bottlenecked and requires participation into a study programme.

The way in which lifelong learning takes place is increasingly diverse and can include many of the following:

- ▶ Company organized internal course or externally-provided paid course, including tutorials for the use of new software/equipment/procedures that award certifications
- ▶ Company organized course aimed at gaining complex skills
- ▶ Limited duration courses aimed at gaining new qualifications or certifications, sanctioned and recognized by governments
- ▶ Online courses, including MOOCs, free open courses or certifications for micro-credentials offered online by either recognized or prestigious entities
- ▶ Full short-cycle or full-length degrees, including programmes using distance learning within universities
- ▶ Clubs and community activities, including peer and group learning and various types of apprenticeships
- ▶ Informal learning undertaken by individuals in non-organized settings.



Investing in Lifelong learning

Table 5 *Types of lifelong learning*

Within a single career path	While shifting career paths
<ul style="list-style-type: none">▶ Often centred on upskilling and gaining new competences useful in furthering a career.▶ Motivated by the need to introduce new procedures or modes of operation within the workplace or initiated by the learner.▶ Meeting legal requirements for career advancement or better pay.	<ul style="list-style-type: none">▶ Often centred on shifting careers or seeking new employment opportunities.▶ Supported by governments when supporting learners to re-enter the labour market.▶ Self-directed versions include new degrees or participation in online or offline courses.

Universities, including St Kliment Ohridski Sofia University have a long practice of supporting life-long learning by providing a range of post-graduate degrees and qualifications in various areas – economy, social studies, management, languages, art. In addition, the university offers various forms of learning: part-time study, distant learning, e-learning, evening courses, access to online libraries and academic resources, participation in academic and research projects. This facilitates adults in being able to receive a degree or upgrade their skills and still be able to balance with family obligations, raising children and going to work. Irina Yoncheva, PhD, Chartered MCIPD, Sofia University

Some countries have started bridging the gap between informal and nonformal learning and formalized degree certification. This procedure is commonly known as the recognition of prior learning (RPL) and in countries such as France it can even be used towards building up credits aimed at gaining a university degree. The premise of RPL is that learning takes place throughout life and across settings, and recognizes the limitations brought about by qualifications only recognizing learning that takes place in an accredited, institutionalized setting. This new outlook on learning is better tailored to an age in which access to information is more widespread than ever, but does not diminish the importance of testing, given that not all learning is equally valuable and

at times can even facilitate the perpetuation of errors.

Unfortunately, RPL is still not widespread in Central and Eastern Europe or the Middle East. The great diversity in lifelong learning provision often means that the recognition of actual learning has lagged behind certification-driver education provided by state accredited programmes. Informal and non-formal learning is not properly recognized by governments or even by the private sector. Certification of certain competencies (such as via degrees) is still largely conditioned on participation in a state-sanctioned formative process. A person who has learned a trade will often be denied the chance to have his/her skills recognized via testing.

This is why, in addition to the recent development of RPL tools, there is growing talk of the need to offer micro-credentials rather than force learners to go through the laborious process of earning a full degree every time they strive to change track in their career.

Lifelong learning in CEE and MENA

The rate of adult participation in lifelong learning remains relatively low across the CEE and MENA region. Eurostat regularly measures the rate of adult learning within the European Union, and countries in the region lag EU averages for the most part. Romania, Bulgaria, Slovakia and Greece all see participation rates below 5%, while Turkey has an adult participation rate to LLL of 6.2%. The two countries in the region to see lifelong learning participation at rates surpassing the EU average are Slovenia (11.4%) and especially Estonia (16.7%), the country being a champion of numerous education-related indicators (Eurostat, 2019). Recognition of prior learning is also under-developed in the region, meaning that people who use informal or non-formal tools to acquire new skills risk suffering from limited recognition.

Nevertheless, across the region, countries have developed some of the basic tools that are needed in order to advance lifelong learning. For example, most countries have developed multi-level eight-level national qualification frameworks (NQF) covering all levels and types of qualifications from general education and VET to higher education. Levels are described in terms of knowledge, skills and social or transversal competences. In an effort to connect subsystems of education and training, the NQF's introduce descriptors which theoretically permit the recognition and certification of knowledge as such, though methodologies need to be further refined and developed.



Lifelong learning in CEE and MENA



The future of lifelong learning

There is a growing consensus that rapid changes to labour markets and workplace practices require a new formative approach for employees. The Adecco Group has noted that jobs will not necessarily be replaced by automation, but often augmented as sharing tasks between programmes or robots and human workers brings a chance at greater productivity. However, to enable employees to work in this new capacity, new learning is often needed.

As discussed in the section on reskilling, The Adecco Group sees the investment in skills as particularly valuable for both companies and governments. Existing and emerging training

and education capabilities need to further support lifelong learning for individuals and up/reskilling at scale for organisations.

Lifelong learning policies developed at national level can be a strong incentive for companies to invest in a certain region or country, especially if they support keeping the workforce skilled in line with current economic trends. Furthermore, state-supported lifelong learning programme are an excellent tool to complement social security programmes by minimizing the risk of long-term unemployment for staff that has become redundant. In the context of the current coronavirus pandemic and the likely economic fallout, backing for adult education and training might prove crucial in efforts to limit lasting social damage.

Tolga Aybas, the Head of Purchase to Pay for the Middle East at a Healthcare & Pharmaceutical company in Istanbul, Turkey says, 'Personally I keep in mind for life-long learning startup presentations in various platforms. I have subscriptions in Udemy and Coursera. I read books related with my job and paersonal development. I'm taking mentoring from a higher-level executive in my company and I enjoy reading online articles all the time. The skills that I'm enhancing for my long-term employability are agility, innovation, lean, simplification, people development and leadership, project management, cross functional contribution, self-confidence and public speaking.'

Granting workers flexible arrangements in order to allow them to take part in LLL programmes is potentially useful and a great way to build a respectful employee-employer partnership. Further still, constant communication with LLL providers in their field of work can allow companies the chance to scout for new employees when recruiting. It also enables companies to establish a feedback loop with education providers, and communicate on the strengths and limitations of existing formative activities.

A photograph showing three people in a workshop or laboratory setting. A woman on the left and two men on the right are looking down at a small electronic device held by one of the men. They appear to be collaborating on a task. The background is dark and industrial.

The future of lifelong learning

A photograph showing a robotic arm holding a smartphone. The arm is white and has a gripper at the end. The background is dark and industrial.

The future of lifelong learning



Take aways

- ▶ Lifelong learning represents a broader form of upskilling and reskilling, often regulated as part of public policies.
- ▶ Lifelong learning is needed in order to prepare societies for technological change and an ageing workforce.
- ▶ Lifelong learning benefits all major stakeholders in the workplace, including employees, employers and public authorities.

SPECIAL THANKS

Prof Moez Ben Yedder

Moez Ben Yedder is an Assistant Professor of Human Resource Management in Abu Dhabi University in the Department of the Academic Programs for Military Colleges. He has a large experience in teaching in the areas of Human Resources Management, Organisational Behavior and in Business Administration to both undergraduate and graduate levels.

His current research area includes Corporate Social Responsibility, Job Quality, International HRM and Family Business with a focus on research involving interdisciplinary teams and outcomes.

He has published several articles in local peer-reviewed journals including *Développement Durable et Territoire* (France), *La Revue Multidisciplinaire sur l'Emploi le Syndicalisme et le Travail* (Canada), *Management et Avenir* (France) and *Gérer et Comprendre* (France) and in international Scopus Based Journals like, *Human Systems Management and Journal of Retailing and Consumer Services* He has also participated in several international conferences organized by top global universities and business schools such ESSEC Business School (France), University Carlos III

(Spain), Pennsylvania University and Georgetown University (USA) and Sydney University of Technology (Australia).

Dr. Moez has a large consultancy and industrial training experience. He has participated in many interventions for both private and public organizations in Tunisia and in the UAE. He has also published professional contribution in outlets such as *Maghreb* (Tunisia), *Questions de Management* (France), *JCSC Journal* (UAE).



Affiliated University Abu Dhabi University

Abu Dhabi University is a private, multi-campus University committed to meeting the education, skills and knowledge needs in the United Arab Emirates and neighboring countries through qualifications and standards that are respected across the world.

Although young, the University is recognized as a world-class institution committed to excellence in teaching, student experience, research and corporate education. We are regularly featured in the Quacquarelli Symonds (QS) rankings as among the best higher education institutions in the region. We hold prestigious international accreditations for the institution as a whole, for particular fields of provision and for specific programs. We were the first private higher education

institution in the UAE and the GCC region to earn international accreditation from the California Western Association of Schools and Colleges (WASC). ADU's College of Business holds international accreditations from the Association to Advance Collegiate Schools of Business (AACSB) and the prestigious EFMD Quality Improvement System (EQUIS). In addition, its College of Engineering has earned accreditation from the world-renowned Engineering Accreditation Commission (EAC), the Computing Accreditation Commission (CAC) of the Accreditation Board for Engineering and Technology (ABET), and the Royal Institute of British Architects (RIBA). The College of Health Sciences is currently in process of attaining accreditation from the Agency for Public Health Education Accreditation (APHEA).

Established in 2003, Abu Dhabi University has over 7,500 students across its four campuses and sponsored programs. Structured into Colleges of Arts and Sciences, Business, Engineering, Law and Health Sciences, we offer undergraduate and graduate programs across arts, law, education, business and management, engineering and sciences, including to Etihad pilots, trainees and personnel of the UAE military. Alongside the well-established campuses in Abu Dhabi and Al Ain, we have launched a new campus in Dubai Knowledge Park and recently opened a teaching facility in the Al Dhafra Region of the Abu Dhabi Emirate..

Dr Ioannis Nikolaou

Dr Ioannis Nikolaou is a Work & Organizational Psychologist, Associate Professor in Organisational Behaviour and Director of the MSc in Human Resources Management at Athens University of Economics and Business.

Dr Nikolaou has gained wide working experience as an Assistant Manager for PricewaterhouseCoopers, Greece at the department of Global Human Resources Solutions and as Head of the Training Department at Egnatia Bank before starting his academic career. He has written the books "Organizational Psychology & Behaviour" and "Managing Human Capital - Greek Case Studies" (in Greek) and co-edited with Janneke Oostrom the book *Employee Recruitment, Selection, and Assessment*.

Contemporary Issues for Theory and Practice. (Routledge/Psychology Press). He has also published in international peer-reviewed academic journals, while his research interests lay in the field of Organisational Behaviour and Human Resources Management, and more specifically in employee recruitment, selection and assessment.

He teaches courses in undergraduate (Organisational Psychology and Personal Skills Development) and post-graduate level (Employee Selection, Performance Appraisal and Development, Organisational Behaviour & Human Resources Management, Personal Skills Development) at Athens University of Economics and Business, while maintaining active links with the industry through Human Resource consulting projects (National Bank

of Greece, Emporiki Bank, Kantor Management Consulting, Attika Bank) and executive training. His most recent collaborations in executive training and management consulting include companies, such as Metro, OTE Academy, EFG Eurobank, Ethniki Asfaltistiki, Misko-Barilla, Lion Hellas, Pfizer, SEAT, Infote, Dodoni, OSE, Metaxas Diagnostics, Intracom, AB Vasilopoulos, etc..



Affiliated university
The Athens University of Economics and Business (AUEB)

The Athens University of Economics and Business (AUEB) was founded in 1920 under the name of Athens School of Commercial Studies. It was renamed in 1926 as the Athens School of Economics and Business, a name that was retained until 1989 when it assumed its present name, the Athens University of Economics and Business. It is the oldest university in Greece in the fields of Economics and Business, its roots tracing to the establishment of a Merchant Academy in Athens. Up to 1955 the school offered only one degree in the general area of economics and commerce. In 1955 the duration of study at the School is increased from three to four years and two cycles of study leading to two separate degrees: one in economics and the other in business administration. In 1984 the school was divided into three departments, namely the Department of Economics, the Department of Business

Administration and the Department of Statistics and Business Informatics, the latter renamed to the Informatics Department in 1995. In 1989, the university expanded to six departments. From 1999 onwards, the university developed even further and nowadays it includes eight academic departments, offering eight undergraduate degrees, 28 master's degrees and an equivalent number of doctoral programs.

Irina Yoncheva, PhD, Chartered MCIPD, has a doctor's degree in psychology, holds master's degree in Business Psychology from Sofia University „St. Kliment Ohridski” Sofia, Bulgaria, also master's degree in the Management of the Czech Republic from the University of Warwick, UK. Since 2018 she is a professional member of the Chartered Institute of Personnel and Development (CIPD), UK, which is a recognition of the achieved professionalism on a international level. She is a part-time lecturer in Sofia University „St. Kliment Ohridski” teaching Psychology and Organizational Behavior. Irina has numerous publications in the field of HR.

Apart from her university work, she has more than 15 years of experience in management positions in the field of human resources management and development, 9 of which in the outsourcing sector in international companies. She is a holder of various individual and team academic and business awards, including the best knowledge management system of BAUR. Since April 2019 she is the head of the HR department of Adecco Bulgaria, as well



Affiliated university
Sofia University „St. Kliment Ohridski”

The Sofia University “St. Kliment Ohridski” is the first higher educational institution in Bulgaria. Its history is an embodiment and a continuation of centuries of cultural and educational tradition in this country dating back to 1888.

The Sofia University is exemplary in terms of its scientific research and educational activities, both of them enjoying wide cultural and social significance. It forms the nucleus of the Bulgarian scientific and cultural elite and enlightens the Bulgarian national self-consciousness. The University plays an active role in preparing and conducting policies of national, regional and international significance. Sofia University “St. Kliment Ohridski” has the mission to safeguard, enrich and carry through the centuries the spirit of knowledge and the aspirations of humanity to knowledge and truth. The University is the center of the development of science and the education of students in all domains of life; it also cultivates highly educated, nationally responsible personalities who will lead the Bulgarian nation to spiritual feats and social welfare..

Mădălin Bunoiu, Associate Professor, Ph.D. Vice-Rector

Madalin BUNOIU is vice-rector responsible for the academic strategy being directly

involved in all the aspects related to the quality assurance of the university. He is Associate Professor at the Faculty of Physics being specialized in materials science, crystal growth and characterization and educational physics. Since 2014 he is member of the Council of the Romanian Agency for Quality Assurance in Higher Education (ARACIS) and since February 2017 he is the director of the Institutional Evaluation Department of ARACIS.

Madalin BUNOIU has been member of the Romanian Consultative College for Research, Development and Innovation since June 2, 2014 and the president of this board since July 2014. The Consultative College for Research, Development and Innovation and the National Council of Scientific Research are the main advisory mechanisms related to the research strategy of the Romanian Ministry of National Education and Scientific Research. Madalin BUNOIU has accumulated important international experience since 1995. He spent one academic year at Joseph Fourier University in Grenoble – France, after which he continued with his PhD from 1999 to 2003 (at the National Polytechnic Institute of Grenoble – France) and with numerous research programs (Fraunhofer Institute Erlangen – Germany, University of Pennsylvania, Philadelphia – USA).

Madalin BUNOIU has an important experience in academic management gathered as vice-dean of the Faculty of Physics, West University of Timisoara for 7 years, vice-rector of the West University of Timisoara for 6 years. He is also member of professional associa-

tions such as the European Physical Society, the Romanian Physical Society (being the president of the Timisoara branch). He also is, or was, member of some important national associations, councils and boards such as: the National Council for the Recognition of Degrees, Diplomas and Certificates (CNAT-DCU) or the Romanian Agency of Grants and Credits for Students (ACBS). For his research activities, he was rewarded, in 2012, with the „Constantin Miculescu“ prize of the Romanian Academy, Physics Section.



Affiliated university
West University of Timișoara

West University of Timișoara faculties. Classified as a research and education university by the Ministry of Education, it is one of the five members of the Universitaria Consortium (the group of elite Romanian universities). The West University is an institution of the National System of Research, Development and Innovation in its capacity as an accredited higher education institution.

Over the last twelve years, the University has responded to changes in national educational policy, to demographic shifts, to a radically different economy and marketplace requirements, to emerging local and regional needs, and to new technologies. All of these changes have led, in turn, to new expectations on the part of students, staff, and administrators. The University equips individuals with skills needed for effective contribution to society.

This work is currently done through eleven faculties that provide a wide range of undergraduate and graduate programs.

Krzysztof Jajuga Ph.D.

Krzysztof Jajuga is a professor of finance at Wrocław University of Economics, Poland. He holds doctoral degree and habilitation degree from Wrocław University of Economics, Poland, titular professor given by President of Poland, honorary doctorate from Cracow University of Economics and honorary professorship from Warsaw University of Technology. He carries out research within the area of financial markets, asset pricing, risk management, household finance and multivariate statistics. He published numerous papers and monographs in the area of finance and quantitative methods in economic sciences. He is editor-in-chief of JCR journal *Argumenta Oeconomica*. He is full professor in Wrocław University of Economics, lecturer at Warsaw University of Technology and universities abroad (e.g. Shanghai Jiao Tong University). He taught in more than 10 different countries in Europe, Asia and United States. He is chairman of Department of Financial Investments and Risk Management at Wrocław University of Economics. He is founder and president of CFA Society Poland. He advises and cooperates with many financial institutions and enterprises. He was member of Supervisory Board of Warsaw Stock Exchange and member of Scientific Board of National Bank of Poland.



Affiliate university
The Wrocław University of Economics and Business

The Wrocław University of Economics and Business (Uniwersytet Ekonomiczny we Wrocławiu) is one of ten public universities located in Wrocław, Poland. Originally established in 1947 as a private business school (then named Wyższa Szkoła Handlowa, or “Trade College”), it was nationalized in 1954 under the name Wyższa Szkoła Ekonomiczna (“College of Economics”). In October 1974 it was named after the Polish economist Oskar Lange, although his name does not occur in the official English name of the university. Changing the name to the Wrocław University of Economics (Uniwersytet Ekonomiczny we Wrocławiu) in 2008 removed Oskar Lange from the name of the University. The university comprises the following schools (faculties): School of Economic Sciences; School of Engineering and Economics; School of Management, Computer Science and Finance; School of Economics, Management and Tourism (Jelenia Góra). Altogether it employs 784 academic teachers including 142 professors. There is strong interest in economic studies, in the current academic year the University has about 14,000 students, and so far it has produced over 70,000 graduates. The Wrocław University of Economics and Business is ranked among the top economic schools of higher education in Poland, an

important center of education, science, and research. Its activities are aimed at maintaining and strengthening the position of the University on regional, national, European, and international levels, improving competitive advantage and shaping its image of a modern institution, open and friendly to its employees, students, and the environment. Our University is fully authorized to provide academic training in the area of economic and management.



Educational partner
The Center for Educational Policies (CPE)

The center was born in 2014, being the first and only non-governmental organization in Romania that aims to contribute to improving the processes of development, implementation and evaluation of public policies based on impact in the field of education. To achieve its goals, the CPE articulates in a comprehensive set of public policies all the voices of people with expertise in the field of educational policies, who want to contribute to the improvement and development of the Romanian & European education system.

For the present publication CPE contributed through the expertise of **Mr. Robert Santa**. He is one of the center’s experts for equity & white paper development and contributed to the research & copywriting of the present report.

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