Industrial relations and work adaptation

Supporting industrial relations in the field of work adaptation to enable the employment of older or disabled populations:

Case Study Guidelines

2017

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Praxis Center for Policy Studies is an independent non-profit think tank in Estonia that supports engagement and analyses-based policy making. Praxis has conducted policy research for more than ten years and is one of a kind in Estonia. The mission of Praxis is to improve and contribute to the policymaking cycle by conducting independent research and promoting public debates.

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1. Short Overview

1.1.   Objective

Labour market participation and employment opportunities of persons with reduced work capacity, including disabled and ageing persons, are influenced by their access to suitable employment, i.e. accommodated work and working conditions (see literature review section "1.2.   Key accommodation practices" regarding definition and examples of work accommodation). The project aims to improve social partners' expertise and industrial relations in the field of work accommodation, and as a result promote labour market inclusion of disabled and older workers.

BOX 1 DISABILITY AND AGE – DEFINITIONAL ISSUES

> 〉 As discussed in the literature review (please see also the discussion in the literature review), the study proceeds from the social model of occupational disability, i.e. the spatial, technical and social organisation of work should avoid favouring certain types of bodies and minds over others.
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> 〉 This includes that the study does not only focus on formal disability, i.e. eligibility rule for government policy measures, including replacement income and services. In other words, not all disabled people want or could take up government policy measures.
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> 〉 Similarly, the study does not only focus on formally specified group of old people. For instance, old people eligible of old age pension or other policy measures might not be the only group of population that would need suitable terms and conditions of employment.
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> 〉 However, reviewing and discussing national research and documents, the definition in these documents could be transparently used. E.g. in the statistical report we used the cut-point of 50 years and the statistical definitions of disability in the surveys.

The study design is based on participatory action research methodology.

FIGURE 1. PARTICIPATORY ACTION RESEARCH MODEL
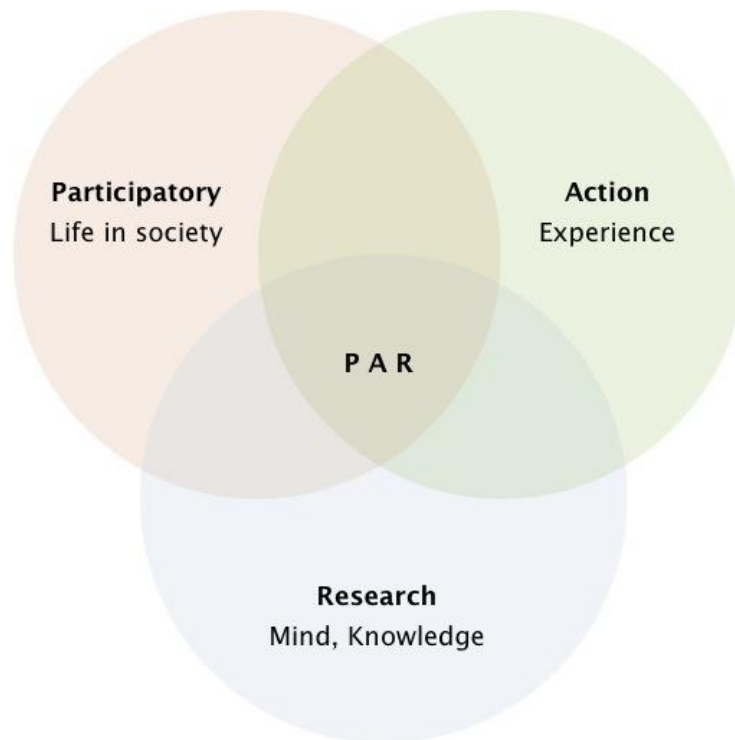
Source: Chevalier and Buckles, 2013, p. 10

The study design combines research, social partners' involvement aiming for behavioural change. The retrospective desk study analysis will lay the foundations for discussion seminars with social partners in Estonia, Poland, Hungary, with the aim of documenting what practices already exist and looking forward and discussing how these might be improved. In general terms, the study focuses on the three questions:

1. **What exists?** - What is the current situation with the work accommodation and how industrial relations enable and motivate accommodating work for disabled or ageing persons?

2. **What could be?** – What would be the reasonable objective in changing labour market participation and employment opportunities of persons with reduced work capacity via industrial relations of work accommodation?

3. **What and how is achievable?** – What realistic steps social partners could make to influence demand and supply of accommodated work and working conditions?

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Throughout the document, the study design, tasks and expectations are discussed. However, not everything is in this document:

- **Subject matter of the study, i.e. work accommodation and industrial relations** is described in the literature review:

  - Masso, M., Nurmela, K., Forester, D. 2016/2017. Industrial relations and workplace adaptation. Supporting industrial relations in the field of work adaptation to enable

the employment of older or disabled populations: Literature review. Poliitikauuringute Keskus Praxis.

■ **Reflections on carrying out industrial relations relevant participatory action research** could be read from the following article:

■ Huzzard, T., Björkman, H., 2012. Trade unions and action research. Work, Employment and Society 26, 161–171. doi:10.1177/0950017011426314

■ **Some thought provoking tips how to organize the discussion seminars with social partners could be mined from the following guideline:**

■ Chevalier, J. M., Buckles, D. J. 2013. Handbook for Participatory Action Research, Planning, Evaluation. SAS2 Dialogue, Ottawa. http://www.sas2.net/sites/default/files/sites/all/files/manager/Toolkit_En_March7_ 2013-S.pdf[1]

1.2.   Tasks and schedule

The case study involves 5 major interrelated tasks:

1. **Case study guideline, topics guide (**i.e. the very same document you are reading**)**. During the inception/first stages of action, the analytical framework and guidelines for the case study is developed. We would like you to review the guideline and topic guide to give us feedback so that we could improve the framework and to achieve better applicability for the specific case countries.

   The review is crucial, because the designed framework and guidelines influences and shapes data collection and analysis and therefore the results of the research project.

   The expected outcome of the review and discussion is shared understanding that the research design delivers expected results, and if required improvements will be made.

   The length of the report is about 35 pages.

   The deadline: we discuss the guideline during the seminar on the 19-20 January 2017

2. **Background report:** The report outlines what is known about the topic and relevant in national context. Background report should be based on national research and legislation. Relevant information shall also be gathered from interviews with key experts (policy makers and implementers, representative organizations of disabled people, etc.) who could tell the story and explain the rationale behind how the current situation in the state has formed. We will have some input to background report in the form of literature review, statistical analysis that could be further interpreted in national context (this is in the topic guide, case study guideline, see the first task).

   The length of the report is about 10 pages.

   The deadline is the 28th February 2017. In a week after submitting the reports, Praxis will review the background reports and draft a brief overview report based on the three case

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[1] (There is also a book: Chevalier, J. M., Buckles, D. J. 2013. Participatory Action research: Theory and Methods for Engaged Inquiry, Routledge UK)

study report for mutual learning during the seminars. We are also encouraged to have interim Skype meeting to discuss the crucial results and lessons learnt from the background report.

Action research. The aim of the action research is to in cooperation with social partners find and/or elaborates workable and easily implemented practices, measures that could be used to support their own activities that encourage and enable older people and disabled people employment via adaptation of works and working conditions. Action research takes place in a form of a series of consecutive seminars.

The action research involves recording and documenting the seminar discussions and drafting the case study report. The length of the report is about 25 pages, and includes the fine-tuned background report

The deadline is the 31th May 2017. NB! However, after we all have carried out the design seminars by the end of April/early May, we shall draft clear and concise interim case study report that would focus on sharing lessons learnt from the case study that would be crucial for mutual learning and sharing during the final feedback seminar approximately in the middle of May.

We are also encouraged to have interim Skype meeting(s) to share the experience and outcomes of the seminars.

3. **Overview report.** In addition to carrying out the case study, we will need your contribution to writing horizontal-comparative report. We will centrally analyse cases horizontally and comparatively and compose the 1st draft of overview report. Then, we would like you to review the overview report and expect you to give us comments and suggestions for improving synthesize report and your case country descriptions for more grounded and info-rich analysis/comparison.
The length of the overview report is about 35 pages.

We will submit the draft report for reviewing no later than the 31th August 2017.

The deadline for the feedback is the 29th September 2017. The sooner the better.

4. **Dissemination at national level.** We would also need you contribution to disseminate national level and supranational level results to social partners, representative organizations of disabled people and ageing persons and general public.

We foresee that the most of the dissemination would be completed by the end of the year, i.e. 29th December 2017.

In the following sections, the steps are described in more detail. However, there will be things that you would like to ask and us to clarify. Also, at the very end of the document, there is an annex that describes the study from social partners' perspective. This section aims to help you in explaining and coordinating their participation and role in the action.

1.3. Support

We have committed ourselves to carry out rather innovative action research. This will challenge both social partners and will challenge you as researcher and facilitator of the seminars with social partners. We will have to be resourceful in pursuing the goal and open when we are challenged to the extent that we need outside help in figuring out the issue and how to tackle the issue.

Also, ae are also encouraged to have interim Skype meeting(s) to exchange the experience, lessons learnt and outcomes/results of the seminars.

Should you experience any problems or want to discuss the guidelines during your research, do not hesitate to get in touch as soon as possible.

The main contact for the study is Märt Masso (mart.masso@praxis.ee).

2. Background Paper

2.1. Guidelines

The aim of the background paper is to briefly outline what is known about work accommodation and industrial relations in your country and this way set agenda for further study and discussions during the following steps of the project.

The paper, firstly, is expected to help you in preparing for the following seminar discussions; secondly, it also used for mutual learning and horizontal analysis and synthesizing research results (see also section *Reviewing overview report*).

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Methodology. We expect the report to be based on national policy documents and research papers. Regarding the latter, we are especially interested in research papers that specifically focus on work accommodation and industrial relations. However, in case there is an expert in the field that could be interviewed for finding and filling the policy description and research gaps, expert interviews are more than encouraged for the excellent research quality. For instance, interviews with key experts, e.g. retired expert from representative organizations of disabled people, social partners organisation, government organisation etc.) could tell the story of work accommodation and industrial relations in your country and explain the rationale and contingencies behind how the current situation in the state has formed.

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Content. The report shall follow the common structure. The report shall be written and results shall be presented in the way that the different case studies could be horizontally and comparatively analysed. In case the topic is not relevant /applicable or there is no information available, the brief comment shall be made. Thus below we outline the topic guide and structure of the report.

NB! The foreseeable challenge is that the policy measures directly address disabled people but not ageing workers. Try to make distinction regarding disability and ageing while writing the report, answering to the questions in the report.

Before starting reviewing the national policy documents and research papers, we encourage and ask you to read the literature review. It helps to understand the concepts and make country specific decision what is relevant and worth drafting into the report. Also, the references to the specific sections are made in the topic guide below.

Style, formatting, editing. In general, the indirect speech is preferable in writing the reports.

We do not specify style guide. However, the report is a stand-alone document and we expect that the country reports and the report are intended for publication. Thus please pay attention to editing, proof-reading, visual look and take into account the best practice of your organisation publishing guidelines. Also, references to (1) EU funding and (2) copyright[2] are required.

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[2] I.e.: /…/Praxis AND/OR … has the copyright. Licenced to the European Union under conditions. Please refer when using any information from this material.

We expect the length of the report max 10 pages without graphs, tables, annexes etc.

2.2. Topics Guide and Structure

The proposed structure of the background paper is outlined next.

Note that the list of possible questions is lengthy, especially the questions regarding government employment policy are detailed. We understand that not every question has an answer due to lack of information, and also your deliberate discretion is needed to make the choice what is crucial for understanding your country and discussing the situation during the seminars in your country.

1. **Conclusions** (about 1 page). Please summarise concisely the descriptive analysis and main conclusions presented in the report, including issues meriting further attention by researchers or stakeholders. We expect that all of the points that have been made so far are combined to create overarching opinion or idea.
2. **Contextual aspects and Background** (about 2 pages). Overview of older people and disabled people in labour market, access to suitable employment and work accommodation. We expect this section to be based on national (in-depth) research on the topic and national descriptive statistics.
   In addition to national statistics, we have been doing some horizontal analysis using EU quantitative data on employment, industrial relations, work accommodation based on EU-LFS and EWCS. You are free to use the figures calculated throughout your seminars. Also, in case you think that there is something missing let us know and we look into it and consider what we can do about it.

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   Specifically, we would be interested in the following things:
   2.1. What is the situation of disabled and older in the labour market (e.g. activity rate, employment rate, unemployment rate)? What are the main obstacles of participation? What are the main drivers, opportunities for employment (e.g. shortage of labour)? What is their situation in the labour market in terms of occupational segregation, compensation, learning opportunities?
   2.2. What role suitable terms of employment, suitable working conditions play in their labour market participation? What is known about the work accommodation, including but not limited to (1) demand and supply of accommodated work, (2) factors describing differences in demand and supply, (3) employment relations practices in negotiating work accommodations, and (4) outcomes for employees, employers, and society?
3. **Overview of state/government policy of work accommodation** (about 3 pages). Overview of member state policy and policy debate on disability management and ageing management (also equality management, equality bargaining) with the focus on work adaptation and working conditions adaptation. Specifically, we would like the following questions to be addressed:
   3.1. Describe briefly the policy debate in the parliament, government, in general public about labour market participation of disabled or old population focusing on work accommodation. What

are the key features and main arguments in this debate? What are the drivers, reasons? Has there been considerable policy reforms regarding disability or ageing and working conditions, terms of employment, i.e. work accommodation?

3.2.   How is the work accommodation regulated in employment law?

NB! The most recent review on the very same question was published this summer:

> *Ferri, Delia, Anna Lawson, European Commission, Directorate-General for Justice and Consumers, Maynooth University, and University of Leeds. 2016. Reasonable accommodation for disabled people in employment contexts a legal analysis of EU Member States, Iceland, Liechtenstein and Norway. Luxembourg: Publications Office. http://dx.publications.europa.eu/10.2838/53553.*

We expect that you find the most up-to-date description and discussion on the legislation here. However, we consider the following questions the most important:

3.2.1.   How is the work accommodation regulated in employment law in your country? Are there disability or ageing specific stipulations, including whether the policy includes ageing employees, disabled people not formally disabled (i.e. defined as disabled in the social security system;)? Whether and how the legislations specify how a need of an employee has to be assessed? Is the duty to provide accommodation placed on all employers' regardless size, legal form or other segmentation?

3.2.2.   How the legislation provides conditions employer can refuse a work accommodation? How is the "reasonable" defined or other way around "disproportionate burden" defined? Are there guidelines, process that help parties to consider what is reasonable? Does the regulation clarify how decisions should be made about the point at which the cost of an accommodation should be regarded as not sustainable?

3.2.3.   Similarly, how is the "accommodation" defined? What are the scope of measures, results that this covers (e.g. physical environment, working time, etc.)? Is there general definition, exhaustive or non-exhaustive list of adjustments?

3.2.4.   Is there requirement to consult with employee/disabled or older worker or his/her representative regarding work accommodation? Is there requirement to consult third parties, including government organisation or social partner organisation?

3.2.5.   How is the employment law regarding work accommodation obligation enforced, how is it made effective? What kind of remedies there are for breach? Are employers subjected to administrative sanctions in case failing to provide reasonable sanctions? What kind of sanctions there are applicable to infringements of the obligation? Are courts ably to order employers take action? Is there financial compensation (material, non-material damages) in case of infringement or non-application? What are the barriers to accessing justice (e.g. cost of legal proceeding)? Is the obligation inspected by the labour inspectorate or any other administrative unit?

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3.2.6.   In addition to directly regulating work accommodation, are there any other rights and obligations stipulated in the employment law that motivates work accommodation: (1) is there regulation on preferential employment (e.g. employment quotas) in your country?; (2) is there binding stay at work, return to work process employers, employees need to adhere to?; (3) is there regulation regarding termination of employment relationship that indirectly motivates work accommodation practices?

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3.3. Are there **economic incentives** that promote or motivate the employment of disabled people and ageing in the open labour market by contributing to the cost of adjustments? Is there financial assistance for employers or employees for accommodations? What are the rules of the policy, including the target group, qualification criteria, and conditions of the assistance?

  3.3.1.   Are there tax exemptions for accommodating work, including technical aids, natural support? What are the policy rules of these measures?

  3.3.2.   Are there benefits, allowances or other schemes that subsidise the costs of accommodation and thus motivate demand and supply of work accommodation? What are the policy rules of these measures?

  3.3.3.   Are there additional taxes (or other transfers, charges) to compensate incapacity to provide reasonable accommodation (i.e. are there *sticks, punishments to induce behaviour*)?

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3.4. Have there been awareness raising, guidance (training, information and knowledge sharing activities, e.g. campaigns, consultation services, etc. for employers and employees? What are the policy rules of these measures?

  3.4.1.   Do what extent the awareness raising and guidance measures exceed only explaining legal rights and obligations, and thus providing additional resources for accommodating work?

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3.5. Has there been any **counter factual impact assessments** carried out to evaluate the policy measures (or even the policy mix)? Please give briefly overview of what the analysis examine, the methods used and the main results.

3.6. Has there been any other type of policy analysis/program evaluations carried out, e.g. take-up analysis, process tracing etc.? Please give briefly overview of what the analysis examine, the methods used and the main results.

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4. **Overview of industrial relations, social dialogue and work accommodation** (about 4 pages)**.** Overview of industrial relations, social dialogue in the country with the focus on social partner's involvement in encouraging and enabling employment of disabled people and older people. Special attentions is on their involvement in work and working conditions adaptations but understandably the available information is scarce and this is also under observation of the following steps/tasks.

Note: There is no need to just reproduce the description of industrial relations system; we can also use the descriptions in Eurofound and ETUI country profiles. However, what is essential is your interpretation and evaluation from the perspective of disability management, equality bargaining, work accommodation and industrial relations.

Specific questions:

4.1.   The **industrial relations legislation** might stipulate limitations that influence the role of industrial relations in work accommodation. For instance, in the legislation might predetermine

what kind of working conditions could be collectively bargained or the terms and conditions that could be extended with collective agreements to the sector, other sectors etc. Please describe the general and specific contingencies in the industrial relations legislation that could influence industrial relations of work accommodation.

4.2.   Disabled or ageing employees could be represented both by labour unions and advocacy organisations (e.g. chamber of disabled people, on EU level ETUC vs European Disability Forum). Discuss the relative importance of labour unions in representing older or disabled people in employment relationships. What are the drivers, reasons?

4.3.   Whether and how has social partner organisations, employee and employer representative organisation addressed the issues related to employment opportunities in general and work accommodation in particular of disabled or older populations? What is their reasoning, what are the drivers and obstacles?

4.4.   What practices social partner organisations, employee and employer representative organisations have used to influence employment opportunities in general and work accommodation in particular of disabled or older populations?

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5. **References/Bibliography.** The report shall accurately reference to administrative documents and literature used in the report. We would prefer that all the citations and references in Chicago style. However, more important than that is that one style is used consistently in your report.

6. **Annex: Methodology.** In case you will use methods addition to desk study (for instance expert interviews), please also clearly and concisely describe the methodology, and if applicable lessons learnt regarding the methodology of this methodology.

3. Action Research Seminars

3.1. Introduction: objective and methodology

The **aim of the action research seminars** is, in cooperation with social partners, to find and/or elaborate workable and easily implemented practices, measures that could be used to support their own activities that encourage and enable employment of older and disabled people via adaptation of works and working conditions. Hence, focus is foremost on the **practices of social partners as parties of collective employment relationship**, i.e. trade unions and employer representatives/associations.

What we want to achieve with the action research is:

- increase social partners' awareness and expertise in work accommodation;

- increase social partners' awareness of the potential of industrial relations and social dialogue in supporting work accommodation;

- support social partners' willingness to negotiate and have dialogue over work and working conditions adaptation;

- help social partners draw up an action plan, set of measures to initiate a real change in their own behaviour as social partners and in cooperation with other partners.

In broad terms, the aim is to give social partners the necessary information and support them through various techniques of discussions and brainstorming sessions to come up with their own ideas and solutions to support their own activities on work accommodation.

In order to reach these aims, the action research involves a series of **seminars** with trade union and employers' associations.

During the seminars, the following questions are discussed systematically and answers elaborated:

- **Exploring the Challenge.** What is the current situation of industrial relations and disability management, age management and **work accommodation** in particular? Why it is or why it is not the issue of work accommodation considered industrial relations focus of practice? What is currently done via industrial relations to nudge supply for and demand of work accommodation in different unions/associations? What have been the main contingencies or barriers that influenced the practices or have kept trade unions/employers' associations to focus on the issue?

- **Collecting insights and ideas.** What would be the next step of influencing work accommodation via industrial relations? What is the problem, what are its causes and effects, that the next step is expected to tackle? What would be the realistic objective the next steps would help to achieve/what the success would look like? What would be workable and applicable practices, measures that social partners could design and implement to foster labour market participation of people with reduced work capacity?

- **Developing and refining ideas.** Which of these possible measures are the most plausible in the sense that it would make contribution to achieving goals and would be feasible? What would be the design and implementation strategy of these measures? In other words, what are the building blocks, intervention logic, steps required for implementation of the possible

future practices? What are the anticipated challenges? What can be done with these challenges? How and why these measures could work or could not work? What are the strengths and weaknesses of these measures? What are the enabling factors, what are the barriers to implementation of these practices?

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- **Potential partnership, expectation to other stakeholders** What would be the observations, suggestions, and ideas for other stakeholders, e.g. state, EU, HRM specialists, advocacy/representation organisations that are worth or crucial to be communicated? What are the key factors to success that require partnership outside collective employment relations, social dialogue? What are the steps to make the partnership happen?

BOX 2 INDUSTRIAL RELATIONS AND WORK ACCOMMODATION

The action focuses on industrial relations, i.e. social partners practices (that is. not pointing fingers at government actions and lack of actions), measures on changing the workplace practices, behaviour of employers and employees (see also section in the literature review "1.5.   Initiatives Focused on Changing the Workplace practices, Behaviour of Employers and Employees: Literature Review; 1.5.1.   Industrial relations"). Although we expect that the future practices and measures are conceived and proposed by social partners, we also need to be ready to nudge them to think outside the box and consider measures that they not thought about.

Thus we encourage you to think well ahead the meetings and seminars about possible old and new measures social partners in your country could consider. We have started compiling the following list, your input to fine tuning and improving the list could be mutually beneficial for preparing for the action research.

⟩   Binding collective agreements that both confirm stipulations in the employment law and goes beyond it. This includes support in bargaining, for instance providing companion/instructions about the equality bargaining and bargain suitable employment, and support in making the agreements effective, for instance joint commission for improving awareness and certainty of implementation.

⟩   Social pacts. Instead of binding agreements, goodwill agreements could be concluded especially when the solution to the problem is complex, involves mix of measures and step by step process that not only involves implementation of certain agreed practices but also figuring it out. The focus is agreeing on aims, setting targets, and work processes.

⟩   Joint networks, commissions. The key thing is that establishing networks, commissions or similar is alive institutional form to discuss the issue, for mutual learning, figuring out and disseminating best practices. This might also include interest conflict resolution regarding what shall be considered reasonable accommodation (i.e. case solution, case consulting).

⟩   Awareness raising, knowledge sharing via recorded /written materials and in person communications. Setting up webpages, webinaries, guidelines etc. to promote and share the best practices of work accommodation could be resultful in spreading the knowledge from knowledgeable to less knowledgeable.

⟩   Industrial action, especially positive industrial action to acknowledge and appreciate implementing work accommodation. For instance campaigns to highlight socially responsible workplaces, symbolic decorations etc. Also negative but constructive attention to workplaces or representatives that have awfully missed the idea.

⟩   Tools and practices to support workplace level representation, including assisting and pushing disability and ageing management into workplace level personnel policies, empowering employers, HRM people, employees in negotiating accommodations and solving interest conflicts. This includes starting new online tools to present and defend their views, even collectively. Help to opt for alternative forms of representation at the company level, i.e. encourage employers to audit and improve disability policies and offer independent advice and guidance on disability issues to employees.

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⟩   (Involvement of employers' associations and employees' unions to lead to the best government

> policy design and implementation)
>
> 〉   ...

3.2. Seminar Guidelines and Tool-Kit.

We foresee number of seminars and other communicative practices needed for translating what is known to social partners' expertise and conceive the next steps how industrial relations could influence work accommodation. We aim on lesson drawing; knowledge sharing and this way help social partners draw up an action plan/set of measures to initiate real change in social partner practices

In this section we describe required steps and approaches to the seminars. However, we also foresee that these activities could be adapted or changed taking into account your competencies and skills for this kind of task, and situational contingencies in your country. The crucial thing to keep in mind is aim high, be resourceful, make the process of the research transparent and encourage social partners' involvement, and attain the objective of the action research.

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Some general methodological and ethical things to keep in mind:

- The project is not so much about top-down teaching process, but involves collaboration with the members of the organisations. It is organizational learning process that emphasizes co-learning, participating, organisational transformation. Our role is to facilitate the discussions (listening not lecturing, probing instead of simply passing on)

- We aim for effective group discussions, so. our role as researchers is to facilitate, moderate the discussions, including making sure that all members have a chance to express their ideas, a variety of points of view are put forward and discussed, and members can receive and respond respectful honest and constructive feedback. Also, be aware researchers bias and knowledge power position; Therefore, we encourage facilitators to think ahead of possible barriers, questions, situations related to social partners agenda/interests/motivation/etc, that might arise during the seminars/between the seminars and how to handle them.

- Even if employers and employees representatives or members in group discussion have different interests and opinions, everyone is entitled to work together to solve a problem, create a plan, and make a decision from which it can move on. So it is important to create a safe place for participants to express honest opinion as the aim is to find plausible measures for social partners themselves that would work in their current actual practice and not abstract practice. It is not a question of creating a conflict-free space, but rather of ensuring that the conflicts that are revealed can be jointly discussed; that they can either be solved or, at least, accepted as different positions; and that a certain level of conflict tolerance is achieved.

- Ethical considerations. During the cooperation with social partners and research, there are some ethical considerations that we need to take into account and be transparent:

    - Personal data protection. In principle, the action, including the seminars and drafting the reports does not involve collecting and processing personal data. However, during the seminars participants might present cases that might be personally

identifiable. Thus, before the seminars, encourage social partners not disclose personal data and data that could be used to identify physical person, exact human being, and also while drafting conclusions and reports about the seminar discussions, avoid presenting discussions, including case examples presented in the seminar in the form that could be used to identify the case and person.

■ Confidential information protection. The action focuses on social partners' organisations, including employee and employee representatives' present and future practices. They have right to consider some of the information confidential, and not want to disclose it during the seminars or disclose the information for dissemination. Thus, before the seminars and during the seminars we have to be absolutely transparent regarding the information that is going to be discussed and disseminated. That includes asking them to be aware that the results of the seminars will be made public, and nudging them to be tell us in case some information they disclose during the seminars is confidential and not to be recorded, drafted into conclusions of the seminar, reports (i.e. case study reports, overview report). For this, also sharing the short notes of conclusions after the seminars and discussing with them conclusions to be disseminated during and after the seminars is important.

■ Related to confidential information protection, we have to be transparent on social partners' expertise and critical evaluation. The participatory research puts the social partners' expertise, their evaluations and interpretations into the focus. However, there are at least three challenges: (1) the design presumes cooperation between the social partners, however, social partners might have different opinions, even conflicting opinions, and focus on cooperation might also conceal opinions that might be source of interest conflict; (2) documenting the seminars for critical evaluation is also challenging as there are number of subjects who mediate the information. i.e. social partners discussion are documented by the case study research in PL, HU, EE, and their records are interpreted by Praxis and Cardiff University researchers; (3) finally, adding value to the records presumes interpreting the documented discussions in the face of previous research literature and researches subjective perceptions and knowledge. In the end, the interpretations might be contradicting with the social partners' opinions, interests. In sum, the question of research ethic emerges as the dialogue of social partners are channelled, recorded, evaluated in the way that their actual interests and opinions might be concealed or misinterpreted.

Three steps will be made to be transparent: (1) we will make our best efforts to record the discussions during the seminars and share the summary of the seminars with social partners and are willing to revise the notes according to their feedback; (2) we discuss with them the dissemination plan, i.e. what would be the message after the seminars that participants would like to be the focus of the dissemination.

■ Involvement of disabled people and old people. In the participatory research, employees' representatives and employers' representatives participate - we are interested in their role and responsibility, and in the end would like to influence their action. We are interested in nudging them, empowering them in representing disabled or elderly people, and help them plan behavioural change in making the

work accommodations happen. Thus the project mostly misses direct targeted design to involve disabled or elderly people or their representative organisations. In sum, the question of research ethic emerges as employment issues of disabled or older people are discussed without their direct involvement, participation.

Three steps will be made to be transparent: (1) in the introductory seminar the disability and ageing will be discussed with the participants in the face of disability research, including participants are encouraged to think outside the dichotomy and encouraged to think about disability and ageing as continuum happening with all of us and our co-workers; (2) we will encourage social partner organisations to invite in the seminar their members with reduced work capacity (3) the results of the project are disseminated to representative organisations of disabled people, elderly people.

BOX 3 MOTIVATING SOCIAL PARTNERS

We encourage you to think well ahead the meetings and seminars about motivation of social partners. There are number of things we can learn from the literature. However, we as country experts shall think beyond that and figure out the extra motivational factors in our country. Thus your input to fine tuning and improving the following list could be mutually beneficial for preparing for the action research.

Macro level arguments:

⟩ Due to demographic trends the population and thus population in employment are shrinking, causing challenges to sustainable economic production and growth. Active and prolonged labour market participation will help in supplying labour and promotes employment.

⟩ Due to demographic trends, the sustainability of social protection system, tax-benefit system is at risk. Active and prolonged labour market participation will help in tackling unbalances social protection system and state budget.

⟩ Active and prolonged labour market participation improves work ability and health of populations.

⟩ More inclusive society, society with equal opportunities is something that we as human beings value and shall value. The society where no-one is left behind improves quality of life for those with disability and for those without disability. The inherent social benefits of creating and sustaining an inclusive labour market.

Workplace and employee level arguments (see also the literature review section "1.4. Evidence on outcomes"):

⟩ Direct benefits: increased the accommodated employee's attendance, increased worker productivity, retain qualified employees, avoidance of costs associated with hiring and training a new employee,

⟩ Indirect benefits: improved interactions with co-workers, increased overall company morale, improve organizational culture and climate, and increased overall company productivity, fostering a sense among all employees that employers recognize both the value of the individual worker as a human being, and the inherent social benefits of creating and sustaining an inclusive workplace.

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In addition to motivational factors related to the subject matter of the participatory research project, there might be other factors. As will be discussed later, we facilitate the discussion, dialogue of social partners with tools and techniques they might not considered or used before. It could be expected that also challenging themselves with new ways of dialogue, discussion is helpful in discussing issues and practices related to other fields of industrial relations and social dialogue.
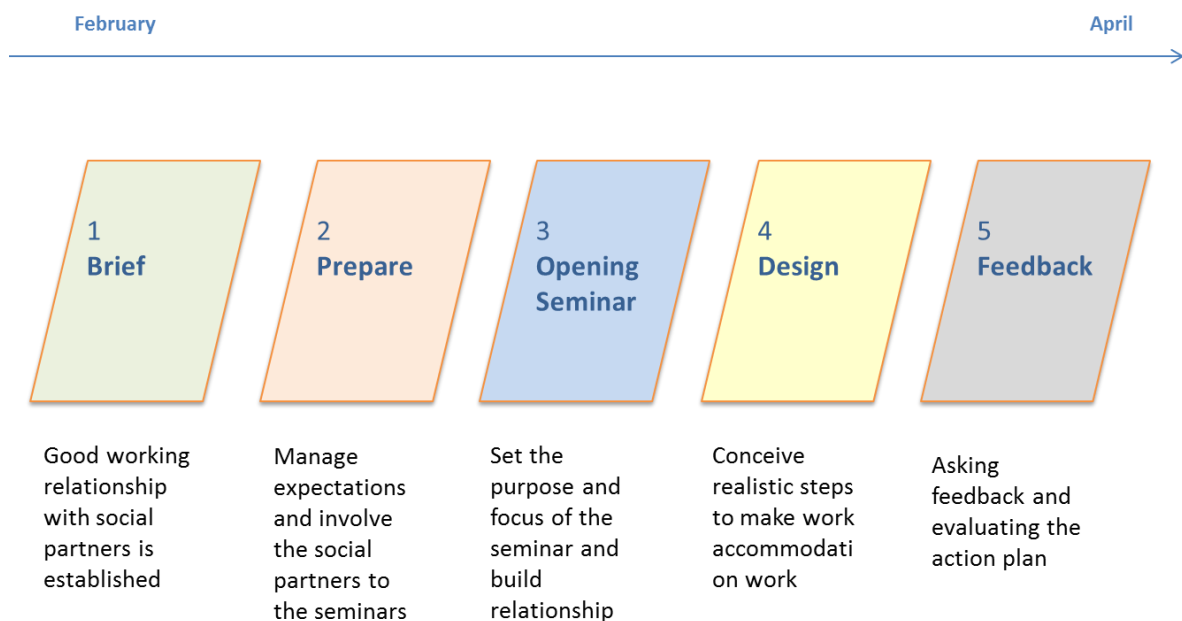
3.2.1. Process

We propose that the process of devising a solution would involve three seminars, including activities for preparing for the seminars: (1) opening seminar, (2) solution finding seminar(s), and (3) follow-up seminar(s).

However, different national contingencies might require adapted solutions. For instance, for handling participant with conflicting views, separate seminars or a section of separate discussion during one seminar might be needed to overcome possible barriers of motivation, commitment, and constructive solution finding. Here, the crucial thing to think about is how to ensure continuity in participation and effective process of solution finding.

The seminars are multiparty effort. Case study researchers are asked to make the process, roadmap as clear as possible, e.g. drawing timeline infographic illustrating the agenda and people responsible is suggested. For example:

FIGURE 2. ACTION PROCESS STAGES

February   April

1 **Brief**	2 **Prepare**	3 **Opening Seminar**	4 **Design**	5 **Feedback**
Good working relationship with social partners is established	Manage expectations and involve the social partners to the seminars	Set the purpose and focus of the seminar and build relationship	Conceive realistic steps to make work accommodation work	Asking feedback and evaluating the action plan

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1 BRIEFING— INFORMING THE CONTACT PERSON AKA THE REPRESENTATIVES OF EMPLOYEES AND EMPLOYERS ORGANIZATIONS

Objective 1: Introduce the focus, plan of activities and time-frame of the project to the main partners and their contact persons.

Objective 2: Clarify and agree upon common tasks that are included and accounted for in the action research (e.g. who invites participants, exchanges information with them).

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- The first step is setting up for the success, laying the foundation to get the seminars off to the best start. It is crucial that we manage expectations and ensure that representatives of employers and employees organisation are motivated to participate throughout this project. Thus the first step is to present clearly and concisely the purpose, process, expectations to the social partners contact persons. This is crucial for inspiring the social partners to contribute to the action.

- We would recommend that the first briefing meeting with the trade unions and employers should be conducted in person. This way the process is reflective, interactive. Invite the chairperson of the unions/associations together with the contact person assigned for this project from the unions/associations (i.e. contact person/coordinators) side to the first meeting.

- Depending on country contingencies, the briefing meeting could be either together or separately with trade unions and employers' association representatives. For instance, in separate meeting it might be easier to get to know the partners and create strong connection by giving both partners the full attention and answer partners' fears/doubts/expectations/questions and thereby increase their motivation.

- Social partners chairpersons and contact persons will be given project one pagers (in national language) that include descriptions of all project phases together with deadlines. Based on the one pager, the briefing shall include presentation and discussion action research focus and agenda, practical arrangements and schedule, main motivators based on draft country background report, etc.

- The presentation is followed by an informal discussion for feedback and suggestions, and working out the arrangement for the cooperation and the next steps. It is important to discuss how the project and its output fits in their work plans (the project aims to empower them, therefore their interest and commitment to the project is crucial).

- Clarify expectations and responsibilities- once again remind the aim of the project. Divide and communicate the roles and responsibilities of each partner and person (who is responsible for which assignment, how much does it take time). Focus is on issues such as who participate in the working group, who participates in the feedback group; how to recruit, contact and motivate people to participate in working group;

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2 Preparing for the first seminars - informing the members of Trade Unions and Employers of the topic and project

Objective 1: Motivate the select members of Trade Unions and Employers Organisations to engage in the action research, i.e. contribute to the working group by attending brainstorming sessions and devising the action plan.

Objective 2: Enable the engagement and flow of information with the other members of the members of Trade Unions and Employers.

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- Think about who should participate in the working group (although the participation is voluntary and main criterion should be the will and desire to participate in the project, there should be other possible criterions used to preselect participants, as it is important that participants are genuinely interested and motivated and will most likely use the project outputs in practice. Participants should be selected together with trade unions and employers associations contact persons as contact persons know their affiliates. Contact persons will after selection of potential participants address those trade unions and employers associations via personal letter/phone call. Arguments as to why participate

(invitation letter) and project overview/one pager (aim and activities including action research process) together with registration of participants are done by the facilitator.

■ Social partner organisations shall have a say in selecting participants to the seminar. However, in case social partners are not able to hint who shall be considered good candidates, more indirect tools/measures shall be used. For instance, participants to working group might be selected using online quiz platform (e.g. www.qzzr.com). The link of the quiz is sent to all affiliates of the social partners to gather actual industrial relations and workplace level practices. The respondent (trade union or employers' representative) can describe in free-form as clearly and in detail as possible, how their company has adapted its workplace. These examples can be anonymously used in public communication, e.g. by sharing them in the social media channels of Trade Unions and Employers and also by presenting a few at the opening seminar of action research. Facilitator, together with the contact person will select the participants and propose them to participate in the working group (as was done in case of preselected participants). Selection should be based on facilitators and contact persons expert opinion.

■ There should be around 15 people in the working group of social partners' representatives. It cannot be stressed enough that more than the number of participant their motivation, willingness, result orientedness are important. Also keep in mind the balance of opinions of employees and employers representatives. It is important to ensure that both parties are engaged in equal measure. Also, as *only* around 15 people will participate in the working group seminars, not everyone can directly participate in the seminars and conceiving the action plan/set of measures.

■ Additionally, we wish to keep wider circle of social partners, their representatives informed and thus involved about the project and its process and put in place the channel for them to be informed, collect their input and feedback. We aim to contact a wider group of members (i.e. feedback group) and make sure they are informed of the project process and its outputs and their feedback is asked and welcomed via different channels and is used as validation for the working groups work (e.g. whether the ideas and set of measures are suitable, whether something should be changed etc.).

■ The communication channel will be social partners existing communication channel mainly, i.e. contact lists, newsletters and other media. We aim to contact a wider group of members (i.e. feedback group) also by first using the quiz described above.

■ It is also advisable to share one pager described above to participants before the seminar to ensure their understanding on the subject matter, expectations, and arrangements.

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■ This is the participatory research for social partners; they are the experts that engage in discussion and devise a solution. However, in case other experts are necessary, their role and participation has to be planned.

For instance, in case of Estonia, we are thinking about collecting workplace level best practice of work accommodation and might ask the workplace representatives to present the case in the opening seminar. Also, we might have communication expert present that helps them to conceive the message. However, in Estonian case we do not plan to involve government experts, as the study focuses on social partners interventions not government policy.

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3 OPENING SEMINAR –- INFORMING ON THE TOPIC AND SETTING AGENDA FOR SOLUTION DISCUSSION.

- The first seminar extended group of social partners, their representatives. In addition to the work group members, other social partners from the feedback group are invited to the seminar, especially higher level stakeholders like chairpersons.

- We expect the opening seminar to last around 2+ hours.

- The seminar provides an overview of the project's objectives and activities and the theme of adapting workplaces, including, for example, EU statistics, the local problematics, experiences of other countries, theoretical background.

- Also, consider different techniques to make the seminar engaging and effective. For instance, it might be that presenting the issue at stake based on literature review and document analysis is too abstract. To overcome this, plan more informal discussions to share practical examples of work accommodation. Presenting real-life examples like these will contribute to a greater understanding of the topic and inspire seminar participants to seek out ways for potential cooperation.

  Industrial relations real life examples could be collected via the quiz platform described above (we ask some workplace representatives to present their best practices). Workplace level best practices in work adaptation and adjustment could be collected engaging other workplace representatives directly or indirectly (e.g. pre-recorded short pitch).

- The opening seminar is also good place to manage expectations and make it transparent how the cooperative action will proceed, what is the aim and expected outcomes of the following seminars, what are the roles and expectations for participants during the seminars and between the seminars, what are the ground rules of the seminars.

- The opening seminar will be the first seminar where the working group will meet each other. Social partners participating in the working group are encouraged to share their reservations, fears and expectations.

- Expectation management would involve encouraging social partners representatives to think about the topic, discuss the topic, collect information, brainstorm ideas between the seminars and this way be well prepared for the following seminars and involve the partners not directly participating in the seminars.

- The opening seminar will also discuss dissemination/media plan of the project.

- An opening seminar is an informative event, the structure of which could be the following:
  - Opening words from the director of the project partner, signifying the importance of the topic

  - Welcome words from the representatives of Trade Unions and Employers, indicating their reasons for participating in the project

- An overview of the problems by the project partner (based on a literature review and document analysis)

- Project description and introduction on ways to participate by the project partner.

- After the seminars, it will be advisable to compile a short summary of the discussions to be disseminated among participants and wider circle of social partners. The idea is that recording the key ideas and results will make preparations for the next seminar more effective and it will help in continuing the discussion where it was left.

4 WORKING GROUP CURRENT PRACTICE AND PROBLEMS–BRAINSTORMING SESSIONS

Objective 1: The aim is to focus the working group on what would be the realistic steps social partners could make to influence demand and supply of accommodated work and working conditions and what are current problems that prevent social partners from work accommodation and adjusting working conditions. The seminar focuses on identifying new insights and looking for new opportunities.

Objective 2: Come to terms of steps the partners will make before the next seminar to collect feedback and fine-tune the proposed solutions/actions.

- In different countries different arrangements for the seminars where the solutions will be conceived and evaluated are possible, for instance both a full-day session and two half-day ones might be applicable in your country and deliver good results.

- Before the seminar, the seminar session should be carefully planned (from room layout to use of words) how to avoid confrontation and manage conflict between conflicting statements/agendas, and keep the discussion focused and constructive.

- It is crucial to think ahead of possible obstacles that might arise during the seminar such as the accusation of the state/role of the state in work accommodation; that trade unions represent their members and not disabled people and why should they think about this issue if it does not concern their members (they do not have any disabled union members); examples of problems and solutions (e.g. what should motivate employers to deal with this issue).

- It is crucial to think ahead what the seminar outcomes we will be satisfied with are and what should we do to achieve it. Thus in the invitation communication address already the purposed of the seminar and questions to be discussed in the seminars. This also makes participants think about the topic so that when they come to the seminar, they already might have some ideas.

- Keep in mind that in addition to just brainstorming the ideas (first half of the seminar), it is crucial to make the efforts further to evaluated and design the solution (second half of the seminar). I.e. in addition to a session where different ideas are brainstormed, presented, grouped, prioritised and justified according to their potential for implementation, furthermore, this session necessitates a few the most plausible solutions are thoroughly analysed and evaluated, turning the idea into something tangible.

- Different techniques could be used for facilitating and mediating the discussions. You might have used number of these techniques in your previous work and you can put the experience

into practice here. Different concepts like service design, policy design and evaluation, program evaluation, intervention logic, program theory, are used to refer these techniques. Some of the techniques are also discussed in this paper:

- ■ Chevalier, J. M., Buckles, D. J. 2013. Handbook for Participatory Action Research, Planning, Evaluation. SAS2 Dialogue, Ottawa. http://www.sas2.net/sites/default/files/sites/all/files/manager/Toolkit_En_March7_ 2013-S.pdf[3]

- ■ Nesta. Designing for Public Services: a practical guide. http://www.nesta.org.uk/publications/designing-public-services-practical-guide

- ■ Also, as hinted above, between the seminars, and before and after these brainstorming seminars social partners are reflecting and preparing for the next step. It might be that they ask your helpful hand, in addition to that, be well prepared for facilitating the discussions and finding solutions.

- ■ After the seminars, it will be advisable to compile a short summary of the discussions to be disseminated among participants and wider circle of social partners. The idea is that it will help social partners to give feedback to the discussion and discussion summary, including developing the ideas further, and also help in preparing disseminating the results. Also, the summary will make preparations for the next seminar more effective and it will help in continuing the discussion where it was left.

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[3] (There is also a book: Chevalier, J. M., Buckles, D. J. 2013. Participatory Action research: Theory and Methods for Engaged Inquiry, Routledge UK)

BOX 4 GATHERING IDEAS

❖ Lightning round presentations from the main partner, with the aim of wording the problem question;

❖ A template with questions is prepared for discussions;

❖ First round is individual, i.e. every person presents their ideas for solutions to the questions raised;

❖ Ideas are gathered, grouped (by the moderator), prioritised by vote, after which discussion continues in idea groups;

❖ Participants are divided into said groups (every table will have 5-6 people) and with the help of the moderator (at each table) they will select and conceptualise ideas and provide reasoning for solutions.

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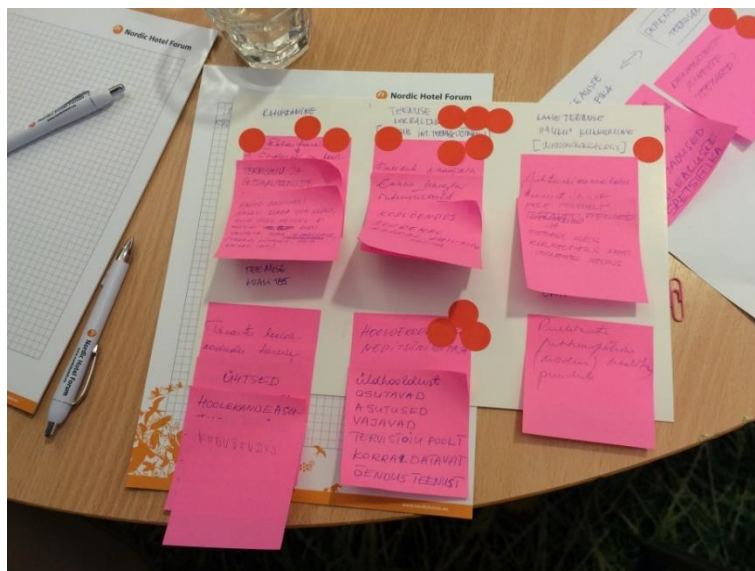
"HOW MIGHT WE …" METHOD

❖ By framing your challenge as a How Might We question, you'll set yourself up for an innovative solution.

❖ How Might We format suggests that a solution is possible and because they offer you the chance to answer them in a variety of ways. A properly framed How Might We doesn't suggest a particular solution, but gives you the perfect frame for innovative thinking.

❖ How might we" (HMW) questions are short questions that launch brainstorms. HMWs fall out of your point-of-view statement or design principles as seeds for your ideation. Create a seed that is broad enough that there are a wide range of solutions but narrow enough that the team has some helpful boundaries.

❖ Begin with your problem statement. Break that larger challenge up into smaller actionable pieces. Look for aspects of the statement to complete the sentence, "How might we..." It is often helpful to brainstorm the HMW questions before the solutions brainstorm. For example, consider the following problems and resulting HMW statements.

Rules of a brainstorm

01 —

Encourage wild ideas

It's the wild ideas that often provide the breakthroughs. It is always easy to bring ideas down to earth later.

02 —

Build on the ideas of others

Think 'and' rather than 'but'.

03 —

One conversation at a time

That way all ideas can be heard and built upon.

04 —

Defer judgement

There are no bad ideas at this point. There is plenty of time to judge later.

05 —

Stay focused on the topic

You get better output if everyone is disciplined.

06 —

Go for quantity

Set an outrageous goal and surpass it.

07 —

Be visual

Try to engage the left and right side of the brain.

BOX 5 HOW TO FIND AND GROUP THE CHALLENGES?

1. Find the challenges

It is necessary to identify the problem that the project seeks to overcome. At first, everybody can write down personally the challenges/ problems (each to 1 Post-It) considering the scope and background info the project leaders have already given.

2. As a Group, Cluster Information Into Themes

Review the challenges that everybody wrote and try to organize them into similar groups or categories. These are called "clusters". Did many people mention the same thing? By discussing about them, select the ones you skip/ or leave.

3. Refine Your Clusters

Create a minimum of three and a maximum of five clusters. Is there a new cluster that you might need
to create? Could two existing clusters be combined?

4. Write Headlines

For each of the clusters that you've created, create headlines, such as "proximity" or "payment".

BOX 6 PROBLEM TREE

A problem tree provides an overview of all the known causes and effect to an identified problem. You can create a problem tree to those clusters you choose to go further on.

1. Settle on the core problem

The core problem is written down in the middle of the paper. Things to help define the core problem include analysis and other research (done in an early stage of the project).

2. Identify the causes and effects

Once the core problem has been identified, participants should consider what the direct causes and effects of the problem are. Each cause statement needs to be written in negative terms. There are a couple of ways to undertake this. Participants can either collectively brainstorm all the negative statements about the problem at hand, and a facilitator writes each negative statement down on a piece of paper. The statements would then be placed on a wall, for the participants to analyse and reorder. Alternatively, participants could work through the cause and effect on a sequential basis, starting from the core problem. The immediate causes to the problem are placed in a line below that of the core problem. The immediate effect is placed above the problem. Any further or subsequent effects are placed above the line of immediate effects.

3. Develop a solution tree

A solution tree is developed by reversing the negative statements that form the problem tree into positive ones. For example, a cause (problem tree) such as "lack of knowledge" would become a means such as "increased knowledge". This tree demonstrates the means-end relationship between objectives.

It is advisable to go through the solution tree and check to see if all the statements are clear, and if there are any missing steps between a means and an end. If so, you may need to revise both the problem and solution trees by adding more statements.

You can use "How might we .." method (see below).

4. Select the preferred intervention

The final step is to select a preferred strategy for the intervention. This step is designed to allow the project design team to select and focus an intervention on a preferred strategy. The solution tree may present a number of separate or linked interventions to solve a problem. Depending on project funding, time, and relevance, a planned intervention may not be able to tackle all the causes. However, it if all the causes cannot be overcome by a project, or complementary projects, it is important to identify if any of the branches are more influential than others in solving a problem. For example, if existing regulations are found to be a dominant factor, but this is not tackled by the project, this would need to be taken into account in the evaluation of the intervention.

Once you have selected your preferred line of intervention, the core problem/solution is your immediate objective or outcome. The branches below are the activities that you need to undertake, and the branches above become the longer term outcomes.
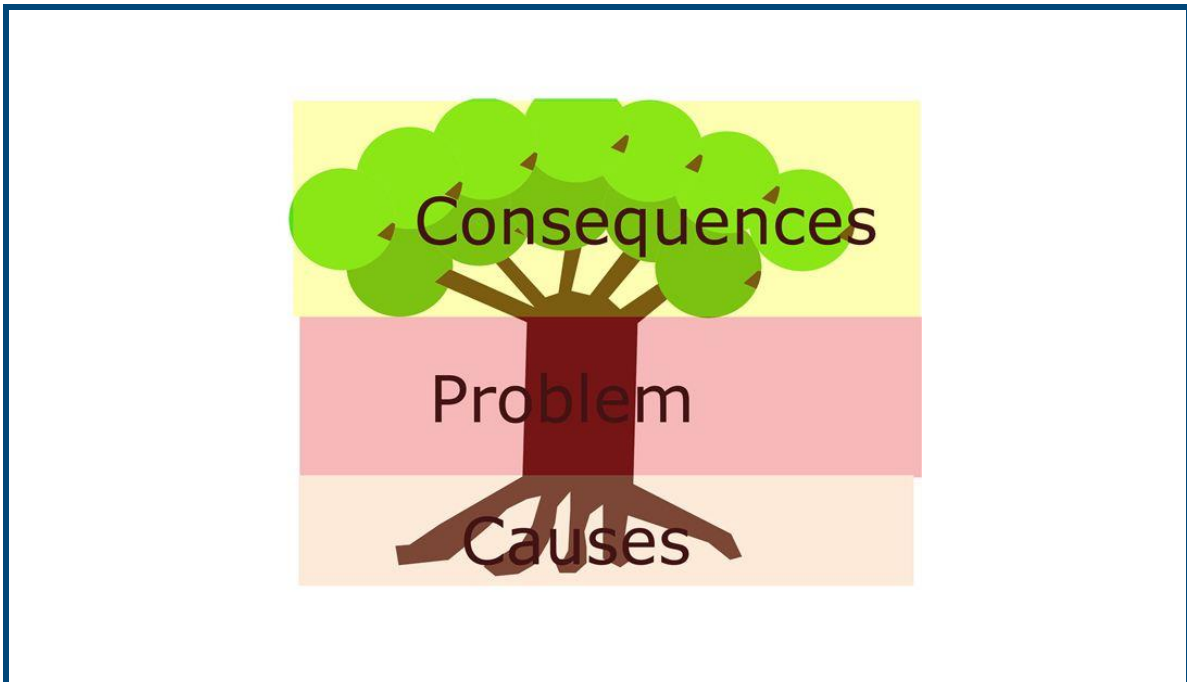
5 EVALUATING AND FEED BACKING – FINE TUNING THE SOLUTIONS AND MAKING THE COMMITMENT

Objective 1: The aim is to fine-tune the ideas and solutions proposed in the previous brainstorming session. That includes, by making other social partners' representatives, not directly involved in the brainstorming seminars (feedback group) to contribute to the solution design by feed-backing and evaluations.

Objective 2: Cooperatively outlining dissemination plan, i.e. messages regarding work adaptation and the social partners plan and commitment, to be disseminated on national and EU level.

- The aim is to fine tune the ideas and solutions in the same working group (but it could be also wider group similar to the very first seminar) with the aim of testing their potential for implementation.

- Feed backing and evaluating can be done either by orally briefing a sample group of members about the proposed solutions and asking for their feedback or by conducting an online poll where a larger group of members can evaluate which proposals, in their opinion, help promote the adaptation and adjustment of workplaces. Thus it is needed to systematize the discussion and drawing conclusions, asking feedback for the results from the partners. Making amendments based on feedback, getting partners confirmation.

- The step will be finished by a short seminar. The aim is to introduce to the wider audience of social partner's representatives, similarly to the opening seminar, the results of the process, i.e. what the social partners jointly produced and agreed to implement.
    - The closing seminar is held in short seminar format (a few hours) and:
    - Begins with the joint discussion of Trade Unions and Employers providing an overview of the results and envisioning future activities;
    - Seminar includes sharing notes, results, lessons learnt from other case studies.
    - Linking the project outcomes with topical themes to be disseminated to other stakeholders and public. It is important to provide PR support to the event in order to give greater attention to the problems and solutions developed by the social partners.

- After the seminars, it will be advisable to compile a short summary of the discussions to be disseminated among participants and wider circle of social partners. The idea is that it will help social partners to give feedback to the discussion and discussion summary, including developing the ideas further, and also help in preparing disseminating the results. Also, the summary will make preparations for the next seminar more effective and it will help in continuing the discussion where it was left.

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6- CLOSING SEMINAR

Objective 1: The aim is to disseminate the conclusions from the synthesis report and mutually learn from the experience of other countries

- We shall make efforts to include this section of sharing conclusions from horizontal analysis and lessons learnt from other case studies during the evaluation seminar discussed in the previous section. However, in case we will not be able to sync over seminars and will not be able to share notes on seminar outcomes and conclusions before the feed backing seminar, the social partners need to be informed about the results in separate seminar later on.

- Thus, in Autumn, after the finalisation of the synthesis report (around October), a closing seminar will be held for working group partners to discuss the main findings of the project results and also discuss with partners, what has happened after action research seminars and how they plan to proceed with the knowledge and set of measures they devised during these seminars.

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3.3. Action Research /Case study report

During the process, we would like you to clearly and concisely write the case study report. The report describes the discussions during the action research and outlines what is known about the topic and relevant in national context and the future steps. The report would consists the updated, finalised background paper that is described above, overview of industrial relations and work accommodation based on the discussions during the case study and methodological annex that overviews the case study methodology and process adapted to the country case study.

As the core of the report will be based on the seminar discussions, make sure that you are well prepared for documenting the discussions and reproducing the discussions. For instance, ask

someone to write sufficiently detailed memo during the seminars, make pictured of the posters/visualisations that will be drawn during the discussions, etc.

The report is for disseminating the results to:

- social partners and stakeholders both directly involved in the project and not directly involved in the seminars;

- give the in-depth input to the horizontal/comparative analysis that will be used for mutual learning and disseminating the result to both EU level social partners and stakeholders and general public.

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The report is expected to not only describe the seminars, discussions but also evaluate this information in the wider scope of information collected during finalising the background report. Clearly, the contingencies, opportunities and challenges will be different across countries and thus also the content of the report will have different focuses. However, we foresee and propose that the following questions and guidelines will be kept in mind to the extent relevant and possible:

- Employees and employers might have different values, assumptions, information, arguments. Let's try to outline both common and different understanding and point of views. Also, sometimes differences in opinions are not between employers and employees but across some other demarcation, e.g. private interest of single employer vs common good of all the employers. Including, in case the understandings and views have changed, developed (including approaching or moving away from shared understanding and views) during the seminars lets also resume the change.

- Based on the literature review, there are number of topics that could be crucial in your study and report and could be used to structure the discussion. These topics include but are not limited to the following topics: (1) definition of disability, stigma related to disability and ageing, (2) awareness and understanding different types of accommodations; (3) work accommodation as employment relations process, (4) including disclosure of disability and accommodation needs, (4) factors that influence demand and supply, take-up, request of work accommodation, (5) negotiating work accommodations, (6) employee representation, industrial relations and work accommodation, including agendas, representation, mechanisms and effect; (7) employee, workplace and society level outcomes of work accommodation etc. Thus please also familiarize yourself while drafting the report.

- We would appreciate as systematic and comprehensive evaluation as possible. Different analytical models (i.e. program evaluation, policy analysis) could be used to summarize, structure, and evaluate the collected evidence and opinions. Intervention logic, program theory of the measures and agendas (i.e. outcome, output, costs, positive effects like efficiency of matching, negative effects like displacement effect, deadweight loss, negative stigmatization and signalling, locking in effect, discrimination), analysis of major elements of program, measures and suggestions, are at least some keywords that could be used to outline applicable analytical framework for your report.

- The analysis focus on the role of industrial relations and social dialogue. We would appreciate your grounded evaluations of the subject matter and results of the hands on action research in the wider institutional context of your country, including industrial relations, employment

relations system (and human resource management system and practices), welfare state with its employment and social protection policies, business and economic environment, equal opportunities and treatment.

- The analysis focuses on representatives of employees and employers and we have not planned direct involvement of other representative and advocacy groups, e.g. representative organization of persons with disabilities. However, there might be some contact with these representatives, for instance dissemination of the preliminary results could result with some dialogue with them. Overview of their stance on representing disabled or older people in employment relations and negotiating suitable terms of employment and working conditions would be also valuable.

- The main focus of the study is industrial relations and not EU and member states employment policy. However, clearly the employment policy measures create incentives or disincentives for both work accommodation and collective employment relations. During the action research it is more than likely that fingers point to contingencies of employment policy that makes work accommodation or industrial relations on work accommodation challenging and changes in policy rules will be proposed. Overview of these discussions is also welcomed in the report.

- We would like our study be comprehensive, however not every single question will be answered and not every knowledge gap filled. Thus also please outline things that would need further discussion and research in the future. We could use this to plan follow up projects and proposals.

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Style, formatting, editing. In general, the indirect speech is preferable in writing the reports.

We do not specify style guide. However, the report is a stand-alone document and we expect that the country reports and the report are intended for publication. Thus please pay attention to editing, proof-reading, visual look and take into account the best practice of your organisation publishing guidelines. Also, references to (1) EU funding and (2) copyright.

The length of the report is about 25 pages.

The proposed structure of the background paper is the following:
1. **Executive summary** (no more than 1 page). Please summarise concisely the descriptive analysis and main conclusions presented in the report, including issues meriting further attention by researchers or stakeholders.
2. **Contextual aspects and Background (**about 10 pages**).** I.e. also based on background report and new emerged and collected information
3. **Overview of industrial relations, social dialogue and work accommodation (**about 15 pages**).**
4. **Summary and Conclusion.** The summary restates all of the points that have been made thus far and thus reminds readers what has been covered and clarify the main points. Also the section presents main conclusion of the report, including issues meriting further attention by researchers or stakeholders; all of the points that have been made so far are combined to create an overarching opinions or ideas.
5. **References/Bibliography.** The report shall accurately reference to administrative documents and literature used in the report. We would prefer that all the citations and references in Chicago style. However, more important than that is that one style is used in your report.

6. **Annex**: **Methodology.** Please also clearly and concisely describe the process and methodology of the action research, and if applicable lessons learnt regarding the methodology, process.

4. Reviewing overview report

The objective is to horizontally and comparatively analyse countries. The outcome of the horizontal and comparative analysis is the overview report that grounded to the conceptual framework and the case study reports answers to the research questions. The report outlines what is known about the topic and relevant in the three national contexts. The report will:

- Overview of the situation of older people and disabled people in labour market, including their terms of employment, working conditions, extent and obstacles of participation in the labour market.

- Overview of member state policy on disability management and ageing management with the focus on work adaptation and working conditions adaptation.

- Overview of industrial relations, social dialogue in the country with the focus on social partners' involvement in encouraging and enabling employment of disabled people and older people. A special attention is on their involvement in work and working conditions adaptations that is discussed during the case study action research.

We foresee that writing the (comparative) case study overview report is iterative process and requires that revisions to both the overview report and case study reports will be made. **Praxis** analyses cases comparatively and composes the 1st draft of overview report. We would like you to review the overview report before we finalise the report. The reviewing of the overview report is expected to give suggestions for improving comparative report. Also, it could be foreseen that reviewing the overview report would nudge you to want revise some sections in the case country descriptions for more objective and info-rich comparisons and synthesis in the overview report. Thus the outcome of the stage is also the finalised case study reports.

During the horizontal and comparative analysis, wherever possible, use will be made of comparative tables or info graphs, which country researchers will be asked to review as part of the reporting process.

In sum, we plan to make great efforts to finalize the overview report based on your insightful, articulated review. Some guidelines for reviewing the report:

- Due to limited space, the interpretations and explanations in the report are mostly very concise. Please point out and describe information about countries that due to, for instance, concise interpretation or misunderstanding is biased, misleading, or wrong. In case it is about your country explain what should be corrected or revised in the overview-report or how to make it more clearly in the country report.

- Please point out explanations and conclusions that are contradictory or not substantiated. In case it concerns your country please provide information about for more adequate interpretation or conclusion. Also, while reviewing the report keep in mind the question whether there is explanation about changes or status quo in your country that could be substantiated, or states, employers, employees argued consent or dis-consent with the situation.

- Reading about other countries might be insightful in learning something about your country. Thus, please point out and describe crucial new things about your country that you found similar or different while studying the other countries.

- While writing the first draft of the overview report we have had to filter the extensive information about your country in the case study report. Please point out and describe whether there is some crucial information, conclusion that from your expert point of view shall be presented in the overview report.

5. Dissemination at national level

We would also need your contribution to disseminate the crucial results at national level and EU level. The intention is to tailor messages in every country to every possible recipient based on the country specific results. We expect you will do the dissemination activities on its county considering the local environment. Thus we do not foresee very specific guidelines for you. However, any time you would like to consult, Praxis communication expert – **Eneli Mikko** – will help you designing and executing dissemination activities.

Also, as already discussed above, we plan to disseminate the results of the project based on the overview report. Thus let's see the country report you write and the overview report that is based on the country reports as the channel to indicate crucial messages to be disseminated at nation level. This would be your main contribution to the EU level communication work.

While designing the dissemination at national level, the following starting points are crucial:

I WHO ARE THE AUDIENCE OF THE MESSAGE?

- **Social partners.** Clearly, the main audience is the **employees' and employers' representative organisations**. We are going to create and disseminate the messages during the seminars. However, not all the representative organisations are present. Thus it is worth thinking how to disseminate the results to other representative organisations.

- **Disabled or older people.** During the dissemination, it might be indispensable to think about whether there is need, also need arising from the research ethic to disseminate the results and information to **disabled or ageing people or their representative organisations**.

- **Policy makers and implementers.** Although the study first and foremost focuses on collective employment relations, the work accommodation and collective employment relations are also conditioned by EU and member states employment policy. Thus in case outcome of the research are also policy recommendations, the policy makers and implementers are the audience.

II WHAT WOULD BE THE BEST CHANNEL FOR DISSEMINATING THE RIGHT MESSAGE TO RIGHT AUDIENCE?

- The three audiences are rather institutionalized thus usually they have their own communication channels. It might be the most effective to use the existing communicative environment and channels they use. For instance, social partners usually have their own internal newsletters and their own websites, also advocacy groups have usually thematic groups in social media etc. might be used to bring attention to the key messages.

- Also, the three groups are oftentimes entitled, subscribed to other information channels relevant to this topic. For instance, IRSHARE, Eurofound, Tooeluportaal etc. could be utilized to communicate the results to wider scope of organisations than directly involved in the action.
  We would encourage thinking about these specific channels as they might be more effective and accessible than mass media.

III WHAT IS THE MESSAGE AND WHAT IMPACT WE WOULD LIKE TO HAVE VIA DISSEMINATION?

- The right audience and the right channel need the right message – there might be different messages to different stakeholders disseminated via different channels. For instance, (a) the

message to the other representative organisations might be the very outcome of the seminars, i.e. how the social partners who participated in the seminars would influence demand and supply of work accommodation, (b) the message to the advocacy groups of disabled people might be that they need to inform and consult disabled people in asking and bargaining work accommodations, (c) the message to the parliament and government might be why and how the employment policy shall be amended to facilitate work accommodation and industrial relations.

■ In the research project, there might be some truth in saying – "A picture is worth a thousand words". This does not only mean that infographics might be more effective for communicating the message, but also that message in words could be chopped for different channels, e.g. clear and concise message in the social media accompanied with a link to more info rich and argumentative text on the website.

IV WHEN TO DISSEMINATE?

■ The first and foremost, the purpose is to disseminate the results of the research thus it can be done after the seminars and after the analysis. However, it is also crucial to share information at the start of and during the project to key stakeholders to raise their awareness and nudge their participation in the seminar or provide input to the seminars. Thus, for instance, it is advisable to have the basic project information available in your language at your website at the beginning of the project, and share information about the events and steps during the project via channels of main partners, e.g. newsletters, social media groups.

6. Annex: Information sheet and guidelines for Social Partners

The annex aims to outline the key messages that the expert could use while discussing the cooperation with social partners.

6.1. Purpose of Discussions

Labour market participation of persons with reduced work capacity, including some disabled and ageing persons, are influenced by the access to accommodated work and working conditions. As a result, employees might have not equal opportunities to participate in employment and employers might have not the best matching employees for the jobs available.

The purpose of the joint seminars is to discuss what social partners could do to nudge and promote work accommodation. We aim to help you to find and elaborate workable and easily implemented practices/measures that could be used to support your own activities that encourage and enable employment of older and disabled people through adaptation of works and working conditions.

6.2. Discussion Questions

During the seminars, the following questions are discussed systematically and answers elaborated:

- What is the current situation of industrial relations and disability management, age management and work accommodation in particular? Do what extent this issue is considered industrial relations focus of practice? What is currently done via industrial relations to nudge supply for and demand of work accommodation?

- What would be the next step of influencing work accommodation via industrial relations? What would be workable and applicable practices, measures that social partners could design and implement to foster labour market participation of people with reduced work capacity?

- Which of these possible measures are the most plausible? What would be the design and implementation strategy of these measures? In other words, what are the building blocks, intervention logic, steps required for implementation of the possible future practices?

6.3. Roles

In principle, we see ourselves as facilitators of your discussions. We will share the information we have been able to collect from the literature, documents, and statistics in the seminars that would lay foundation for the discussions. We will also organise the seminars, including making necessary arrangements for the seminars, helping to moderate the discussions, and annotating and disseminating the results and ideas of the seminars

In addition to active and thoughtful participation in the seminar, in cooperation we would be delighted to use your help in the following steps:

- Helping in selecting representatives to the seminars, that would be committed to the purpose and/or sharing their collective employment relations level and workplace level experience and motivating their participation;

- Participating actively, resourcefully and constructively in the seminars to brainstorm ideas and design solutions.

- Disseminating relevant background information and information of the seminars in your own networks (material/relevant links to be provided by national experts, including a short overview of results based on the national background paper, links/information to register to the seminar);

- Helping in sharing the ideas that emerge during the seminars to the wider scope of social partners, representatives and ask and collect their feedback, ideas.

- Helping in making the difference by disseminating the ideas collected during the seminars, and helping in planning and implementing future steps.

The necessary materials and more detailed guidelines will be provided by the national experts during the course of the project.

6.4. Contacts

For questions relating to the general project, please turn to the central project manager, Märt Masso

For questions relating to organisation of the national seminars and other national details, please turn to your national expert.

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