



Personal and household services (PHS) in Central and Eastern European Countries: Improving working conditions and services through industrial relations PERHOUSE

Kick-off meeting 6 October 2022, Bratislava



The project is funded by the European Union; Project No. 101052340

Agenda

9:00 – 9:30	Welcome (coffee) and consortium introduction Marta Kahancová, CELSI
9:30 – 10:30	Introduction of the project: research questions, aims, tasks and deliverables Barbora Holubová, CELSI
10:30 – 11:00	<i>Coffee break</i>
11:00 – 12:00	State of art of PHS at the national and EU levels A short round of observations from all partners at the national level and associated partners at the EU level. (Please provided 5-min reflection on the following questions): 1) What are the 2 key characteristics of PHS sectors in your country /at the EU level? 2) What are the 2 main challenges of the PHS sectors in terms of provision and working conditions in your country/at the EU level)?
12:00 – 13:30	<i>Lunch break</i>
13:30 – 14:30	WP2 – analytical framework, comparative data, surveys methodology (drafts and discussion) Barbora Holubová and Pavol Bors, CELSI
14:30 – 14:45	<i>Coffee break</i>
14:45 – 15:30	Project setup: timeline, deadlines, project meetings, division of tasks Barbora Holubová, CELSI
15:30 – 16:00	Administration and reporting Soňa Mikulíková, CELSI
16:00 – 16:15	Closing remarks and end of the meeting Marta Kahancová



Consortium



Project partners

1. Central European Labour Studies Institute (CELSI, Slovakia)
2. MK 2025 (MK 2025) (North Macedonia)
3. University of Ljubljana (UL, Slovenia)
4. University of Tartu (UT, Estonia)
5. Marie Curie Sklodowska University (UMCS, Poland)
6. Charles University (CU, Czechia)
7. European association of service providers for persons with disabilities (EASPD, EU level, Belgium)

Associated partners

1. UNI Europa (UNI)
2. European Federation of Services to Individuals (EFSI)
3. European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT)
4. European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT)
5. The European Federation for Family Employment and Homecare (EFFE)

External evaluator: Eleonore Kofman

(Social Policy Research Centre at Middlesex University)



Project No. 101052340



Introduction of the project

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Introduction of the project



The PERHOUSE seeks to improve working conditions and personal and household services through industrial relations in Central European countries.

The project was awarded within the call aimed at improving expertise in the field of **industrial relations**. The project strongly focuses on the social partners, possibilities to change-regulation the working conditions and address the challenges related to PHS.

Central European countries (geographical scope): the project will be carried out at the EU level and in 12 countries (**SK, CZ, SI, EE, PL, NM**, HU, BG, RO, HR, LT and LV)

Personal and household services = “broad range of activities that contribute to well-being at the home of families and individuals: child care, long-term care for the elderly and persons with disabilities, cleaning, remedial classes, home repairs, gardening, ICT support, etc.” (European Commission 2012).

Background



The PHS sector is perceived as an industry of **high importance** due to the following:

- Potential to saturate the unmet need for child and elder-care services due to public services shortage—mitigating the care crisis;
- Potential to create new jobs (for vulnerable groups – women, migrants, third-country nationals);
- Contributes to work-life balance and women's inclusion in the labour market.

Challenging working conditions: systemic labour rights violation, poor H&S and wages, the propensity to undeclared work, violence – abuse – labour exploitation.

The unfavourable working conditions **stem from the limited regulations and effective enforcement, interrelated to the representation gaps and lack of social dialogue in the sector.**

Focus on CEE countries:

- Social dialogue remains underdeveloped or non-existent;
- low level or inadequate regulatory framework, and less progressive policies hampering the sector's expansion towards regular jobs with quality working conditions;
- Underdeveloped sector, with employment below 3%;
- None ratified ILO Convention on Domestic Work No.189

(PHS-Quality Project, 2020; AD-PHS project; Decker, Lebrun, 2018; Martišková 2020; Sedláková 2020; EFFAT, 2015)

Objectives and aims

General objective: To explore industrial relations to improve the working conditions and services in the PHS sector of CEE countries.

Aims

- Address the challenges of working conditions and services in the PHS sector of CEE countries.
- Deepen the industrial relations (IR) analysis and the potential of social dialogue in the PHS of CEE countries.
- Provide a comparative analysis of national experiences in IR and working relations in PHS and explore the link to EU-level social dialogue structures.
- Promote awareness of the industrial relations practices related to the PHS sector.

Specific objectives

Address the challenges of working conditions

Conceptualisation

Scope, sub-sectors, size

Fill the gap in research.

Identify challenges

Analysis of industrial relations and the potential of social dialogue

Identify the social actors representing workers and employers

Explore the discourse on PHS

Identify the barriers of low representation + solutions

Compare national experiences in IR and working relations and link to EU-level social dialogue structures.

Explore the demand and EU stakeholders' views

IR links to EU SD and IR

EU employment policy and IR as a response (?)

Promote awareness

EU and national collaboration

Discussion on EU regulations

Increase of acknowledgement

Research questions

- RQ1)** What is the current state and structure of service provision of PHS in CEE and what are the working conditions in the PHS sector?*
- RQ2)** What is the role of social dialogue in regulating and improving the work patterns in the personal and household services (PHS) sector of domestic workers in Central and Eastern European countries (CEE)?*

Methodology



Combined data collection methods and data sources:

- **Desk research** on the available literature, legislative acts and proposals, collective agreements, media articles and other relevant documentation to frame the policy discourse in the improvement of the provision of PHS;
- **Statistical evidence** on the PHS sector and domestic work in CEE countries (e.g. structure of service provision and financing, working conditions, employment trends and structures);
Inspecting the available data at the European level and/or national data for its comparability;
- **Mapping relevant stakeholders in 12 CEE countries**, including social partners, create a database of contacts, roles and strategies;
- **Online survey among stakeholders** to uncover their views on the functioning of the sector, quality/extent of current legislation, and sources for further improvement in terms of policy making, policy implementation and the quality of provided services (at least 5 per country);

Methodology



(continue) Combined data collection methods and data sources:

- **An online survey targeting the general public to study the demand for PHS in 12 CEE countries** from the point of view of the type of services, providers and preferences for opting for formal or for undeclared service provision (at least 50 responses per country);
- **In-depth interviews with EU-level stakeholders** - to study the EU-wide priorities and challenges relevant to work and social dialogue in the PHS sector, as well as the matching between regional priorities in CEE with EU-level priorities, discourses and policies (10 interviews);
- **National-level focus groups** with domestic workers in 6 countries (CZ, SK, PL, SI, EE and North Macedonia);
- **National-level interviews** with national social partners and other relevant stakeholders, e.g., professional associations of care providers (10 interviews per each of the six countries: CZ, SK, PL, SI, EE, and North Macedonia).

Activities

WP1: Project management and coordination – we will agree on smooth managerial mechanisms, common communication and storage space, interim meetings and monitoring issues, and quality control (all, M24)

WP2: Analytical framework - literature and data review, conceptual and analytical framework and methodology tools (surveys, interview guide, focus groups, the outline of the case studies, briefs templates, (CELSI, M6)

WP3: Stakeholders views - EU level interviews in EU (CU, EASPD), Online survey among PHS stakeholders and online demand survey (CELSI) (M18)

Activities



WP4: National case studies - national-level interviews with national social partners, desk research, focus groups, + findings from surveys will result in six national case studies and policy briefs in national languages (all BEN, M18)

WP5: Comparative report (all, M20) - Preparation of comparative report summarising the evidence from the national reports and outcomes of EU-stakeholder views on industrial relations in the PHS sector and 12 countries + comparative policy brief (CELSI, M20)

WP6: Dissemination - Project website (CELSI), National policy workshops (all), Final online conference (EASPD), documentaries - national results (all BEN), documentary – comparative results (CELSI) (M24)

Deliverables



WP1:	Project management and coordination
	D1.1. Kick-off meeting (Bratislava, Slovakia)
	D.1.2 Interim meeting (online)
	D1.3. Feedback questionnaire
	D.1.4 Reports to the European Commission
WP2:	Analytical framework
	D2.1 Working paper on conceptualization of PHS sector in CEE
	D2.2 Methodological tools (survey, interviews, focus groups, outlines)
WP3	Stakeholders views
	D3.1 EU Stakeholder views study
	D3.2. Policy brief on stakeholder views
WP4	National case studies
	D4.1 National case studies in 6 CEE countries
	D4.2 Policy briefs in 6 CEE countries
WP5	Comparative report
	D5.1 Comparative report
	D5.2 Comparative policy brief
WP6	Dissemination
	D6.1 Project website
	D6.2 National policy workshops (6 countries)
	D6.3 Final online conference
	D6.4 Interactive video documentaries (6 countries, 1 comparative)
	D6.5 Country leaflets on PHS sector (in national language and EN; for 6 countries)

EU added value and expected impact

The project learns from previous actions, builds on identified promising practices, and innovatively uses them. **Contribute to the transnational knowledge sharing and information exchange about this vital sector and its workers.**

Expected to make a high societal impact: stakeholders are closely involved in planned online and offline dissemination events. In addition, EU- level organisations are included as associated partners in our consortium.

The project aims to trigger a change in the current situation to provide deep insight into CEE countries' sector and industrial relations. This is **grounded in the project's consortium's ability to generate novel empirical evidence on the current** working conditions and collate unique empirical data on the stakeholders' views on proceeding further and suggesting solutions.

The project will **connect the findings with the EU-level discourse and priorities** relevant to the PHS sector and create thus an opportunity for the CEE countries to benefit from the common actions and strivings of the EU-level social partners.

Contribute to gender equality - in the CEE region, the share of female workers in the PHS sector is above 80%. Women are thus the prominent participants in the PHS sector as employees and recipients of care, as they are more represented in older cohorts. The decent working conditions and formalisation of employment relations would decrease the gender pay gap in society.



Enjoy your coffee break

We'll be back in 30 minutes

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State of art of PHS at national and EU levels

Partners round table - observations from all partners at the national level and associated partners at the EU level (5-min reflection):

1. What are the two key characteristics of PHS sectors in your country /at the EU level?
2. What are the two main challenges of the PHS sectors regarding provision and working conditions in your country/at the EU level?



Lunch Break

See you in 1.5 hour

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WP2

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WP2 – analytical framework, comparative data

data collection tools



2.1. Literature review

Review the previous studies on the industrial relations in the PHS sector in the 12 countries and identify who are the social actors representing workers and employers, including state)

2.2. Comparable data

Explore the scope, subsectors (care and non-care) and estimate the size of the PHS sector in the 12 countries based on the EU comparable and national data

2.3. Conceptual and analytical framework

Prepare all the tools for data collection: survey questionnaire on demand in 12 countries, survey questionnaire among stakeholders for 12 countries, interviews guide on stakeholders' views (EU and national levels) and guide for the focus groups, the structure of the national case studies. All partners will be involved in this task and comment on the analytical tools.

WP2 – Deliverables and responsibilities

D2.1. Working paper on conceptualisation of the PHS sector in CEE - M6 (1/23)

The paper is based on the literature review and will encompass all the main findings and set the PHS sector's central concept and future analysis. The working paper aims to provide a comprehensive framework for the upcoming research activities of the consortium. The format is electronic, English language).

D2.2. Methodological tools (survey, interviews, focus groups, outlines) - M6 (1/23)

This deliverable contains all data collection tools for the tasks in WP3 and WP4:

- Online survey for social partners and stakeholders in 12 CEE;
- Online survey to study the demand for PHS in 12 CEE;
- Interview guide for EU-level stakeholders;
- Three focus groups interview guides with domestic workers (child care, LTC, non-care services);
- Interview guide for national-level stakeholders;
- Structure of the national case studies

Responsible: **CELSI (lead) in cooperation with all beneficiaries:** UT, CU,UL,UMCS, MK2025, EASPD

WP2 – A2.1. Literature review



An extensive literature review (desk research)

- Focus on the CEE region (SK, PL, HU, HR, SI, BG, LT, LV, RO, CZ, EE, and North Macedonia);
- Subsectors, workers and service receivers' profiles, policies and regulations, stakeholders, including social partners;
- Representations, social dialogue and other aspects of industrial relations in the sector
- Legislative acts and proposals, collective agreements, media articles, and other relevant documentation frame the policy discourse in improving the provision of PHS.

The literature review will serve as the base for further analytical activities.

That mapping of relevant stakeholders in 12 CEE countries, including social partners, creates a database of contacts for disseminating the survey on stakeholders in 12 CEE countries.

WP2 – A2.1 Literature review - sources



Previous projects outputs:

- PHS-Quality Project, 2020; <https://aias-hsi.uva.nl/en/projects-a-z/phs-quality/country-reports/country-reports.html> (country reports: CZ, SK)
- AD-PHS project - <https://ad-phs.eu/> (country reports: CZ, SK, PL, SI, EE, RO, BG)

Academic studies

Policy and evaluation studies

- Decker, Aurélie/Lebrun, Jean-François (2018): PHS Industry Monitor: Statistical overview of the personal and household services sector in the European Union. European Federation of Services to Individuals (EFSI). URL: [http://www.efsi-europe.eu/fileadmin/MEDIA/publications/2018/PHS Industry monitor April 2018.pdf](http://www.efsi-europe.eu/fileadmin/MEDIA/publications/2018/PHS_Industry_monitor_April_2018.pdf)
- European Association of Service Providers for Persons with Disabilities (EASPD) (2019): How to Fund Quality Care and Support Services: 7 Key Elements. EASPD Conference Report 2019. URL: https://www.easpd.eu/sites/default/files/sites/default/files/bucharest_2019_conference_report_2.pdf
- Guzi, Holubová, Kahancová, Kahanec, Martišková, Radvanský, Bors, Schonenberg (2022) Tackling undeclared work in the personal and household services sector. ELA. At: [https://www.ela.europa.eu/sites/default/files/2022-03/UDW Study report on PHS 2022.pdf](https://www.ela.europa.eu/sites/default/files/2022-03/UDW_Study_report_on_PHS_2022.pdf)

Scope/definitions of the PHS sector

The European Commission (2012) defines PHS as ‘a broad range of activities that contribute to wellbeing at home of families and individuals: childcare, long-term care (LTC) for the elderly and persons with disabilities, cleaning, remedial classes, home repairs, gardening, ICT support, etc.’

The European Federation for Services to Individuals, an organisation representing federations and companies of personal services in Europe, clusters these activities based on two sub-sectors. It defines personal and household services (PHS) as:

“activities carried out mainly in users’ homes relating to personal assistance services (early childhood, child care, dependence, disability, invalidity, etc.) summarised under the term “**care-related services**” and to services of daily living (cleaning, ironing, gardening, small DIY, maintenance, remedial classes, etc.) united under the term “**household support**”.” (Decker and Lebrun 2018).

“**Domestic work**” describes **all work performed in or for a household(s)**, following the ILO’s Domestic Workers Convention no.189/2011.

Scope/definition of PHS sector(s)



Definition for statistical purposes:

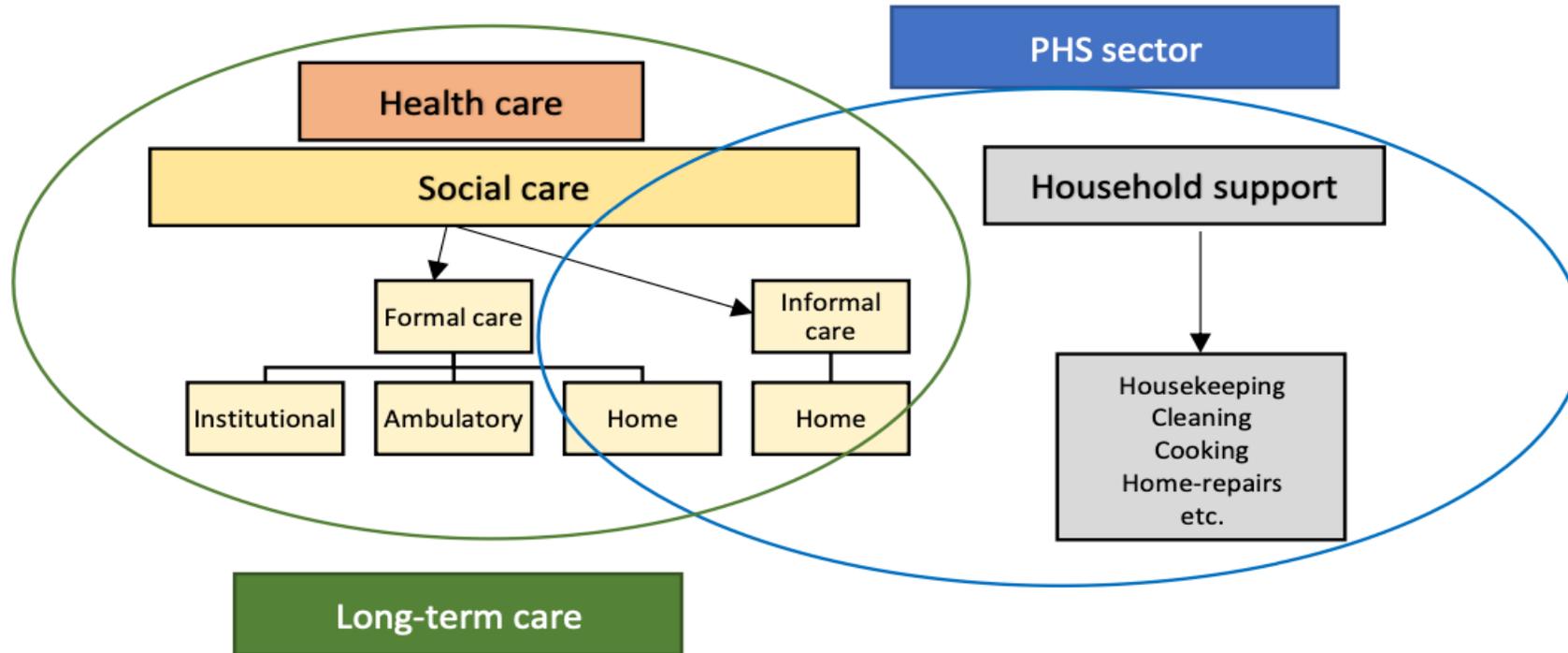
Care activities in the PHS sector are defined within two categories in NACE: Q88 – Social work without accommodation mostly related to non-residential (long-term) care activities for dependent, disabled or elderly individuals and children (including nurseries); and partially (around a quarter) in T97 – Activities of households as employers of household personnel (e.g., cleaning, gardening, health-related personal care, child care etc.).

The household activities in T97 include direct household employment, while social care activities in Q88 cover both household employment and the provision of non-residential care by care institutions and organisations. Additionally, care activities in Q88 can be subdivided into supporting and long-term care activities.

Three NACE subsectors define the non-care activities in the PHS sector: S95 – Repair of computers and personal and household goods; S96 – Other personal service activities (e.g., hairdressers, nail bars).

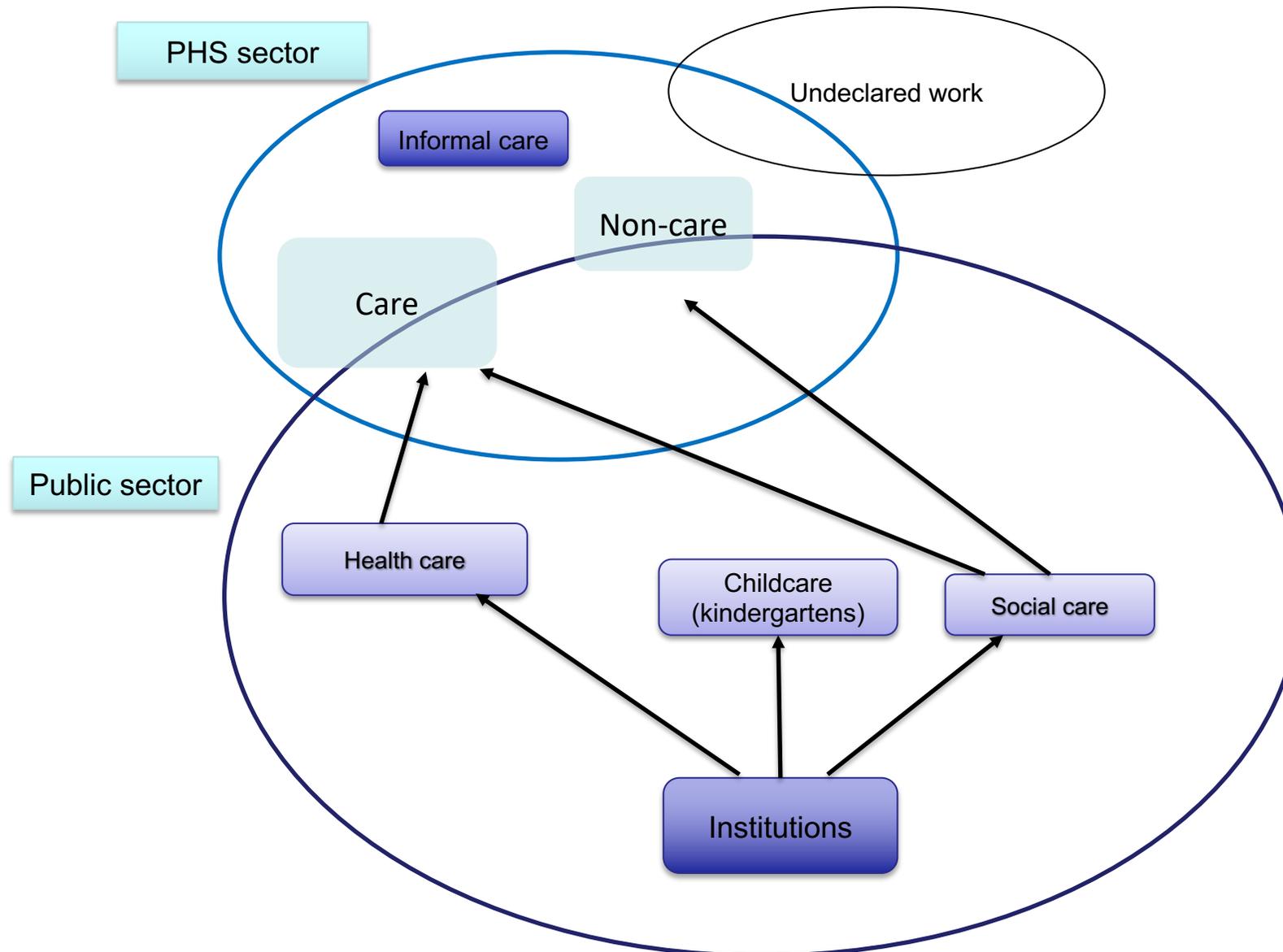
WP2 – Scope of the PHS sector

The intersection of long-term care (LTC) and personal and household services (PHS) sector (in Slovakia)



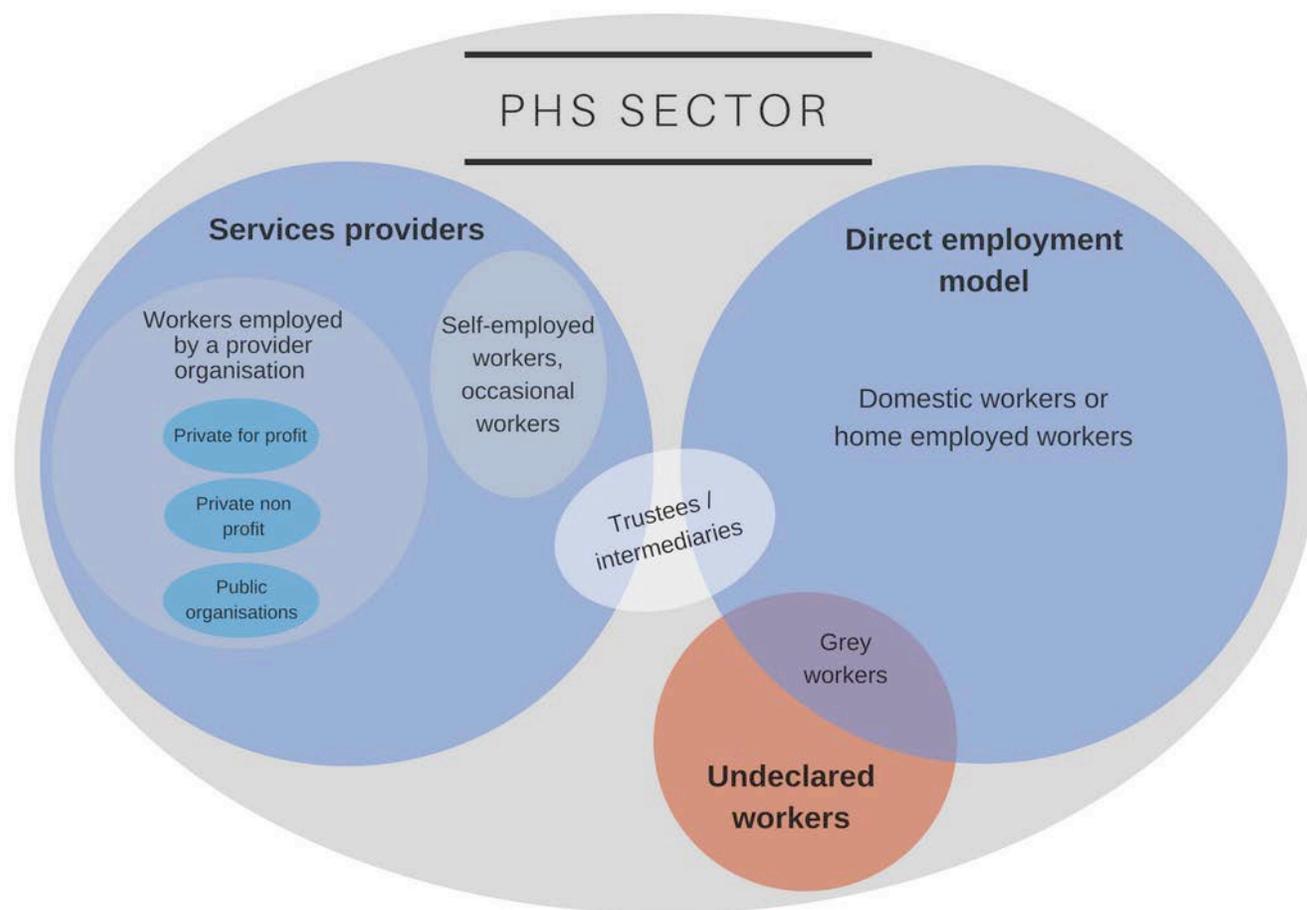
Note: LTC system (green). Healthcare sector (orange). Social care services (yellow). Childcare services -part of social care - (yellow). Household activities (grey). PHS sector (blue).

Interaction and interdependence between the public sector and PHS



Guzi, Holubová, Kahancová, Kahanec, Martišková, Radvanský, Bors, Schonenberg (2022) Tackling undeclared work in the personal and household services sector. ELA. At: https://www.ela.europa.eu/sites/default/files/2022-03/UDW_Study_report_on_PHS_2022.pdf

Challenges in PHS



Definition (subsectors and type of activities)

Employment relations

- Type of employers
- Typical employment forms

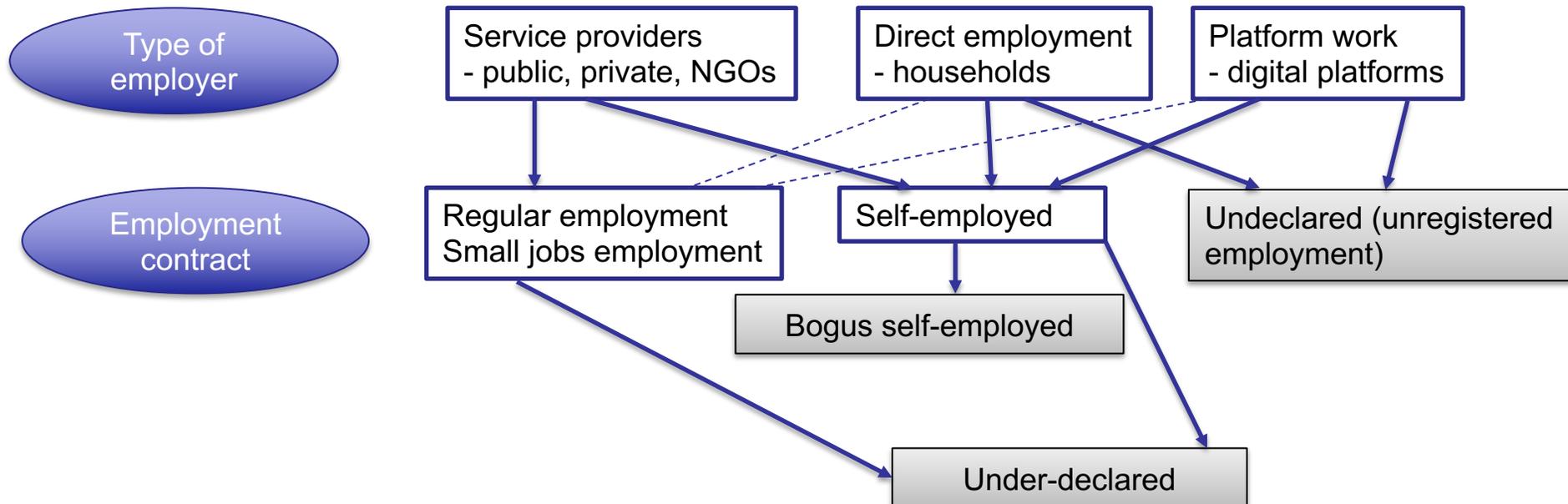
The most frequent type of undeclared work
+ who undertakes undeclared work?

Drivers into undeclared work

- Size of the public sector services

Employment relations in the PHS sector

Arrows depict possible interactions between employers and the type of contract leading to some form of undeclared work. Solid arrows suggest a more common combination of employer and employment contract, while dashed arrows identify possible but uncommon combinations.



Employment relations

Who works in the sector

- Low-skilled individuals
- Women
- Migrants
- Long-term unemployed individuals
- Professionals (healthcare, social care and housecare-related professional services)

Employers:

Direct employment relationships typical for Cyprus, France, Greece, Italy, Portugal, Spain and Romania

Much more typical is thus the **provider model** (based on NACE 88)

- Better corresponds to the employer-employee relationship; the PHS worker is a salaried employee, a triangular form of employment.
- But at the same time, this type might be used to cover also self-employed – agency intermediates work in the households but do not employ the self-employed. This would be typical for digital platforms -> a source of undeclared work if employees via the platform do not have self-employed status.

PHS Data sources

- EU-LFS, 2008-2019
Formal PHS sector, NACE-1D x ISCO-3D
- EWCS (European Working Conditions Surveys), 2015
Formal PHS sector, NACE 2D x ISCO 2D
- Eurobarometer 92.1, 2019 - Undeclared PHS sector
- EHIS (European Health Interview Survey), 2014-2016
Undeclared PHS sector

Martin Kahanec, Martin Guzi, Barbora Holubová, Marta Kahancová
(Monika Martišková, Marek Radvanský, Lisa Schoenenberg) (2021). Tackling
undeclared work in the personal and household services sector

WP2 – A2.2. Comparable data

Statistical evidence on the PHS sector and domestic work in CEE countries (e.g. structure of service provision and financing, working conditions, employment trends and structures); Inspecting the available data at the European level and/or national data for its comparability;

The narrow PHS definition includes NACE subsectors Q88 – Social work activities without accommodation and household employment defined as T97 – Activities of households as employers of domestic personnel.

The broad PHS definition includes, in addition to the above, the S95 – Repair of computers and personal and household goods and S96 – Other personal service activities.

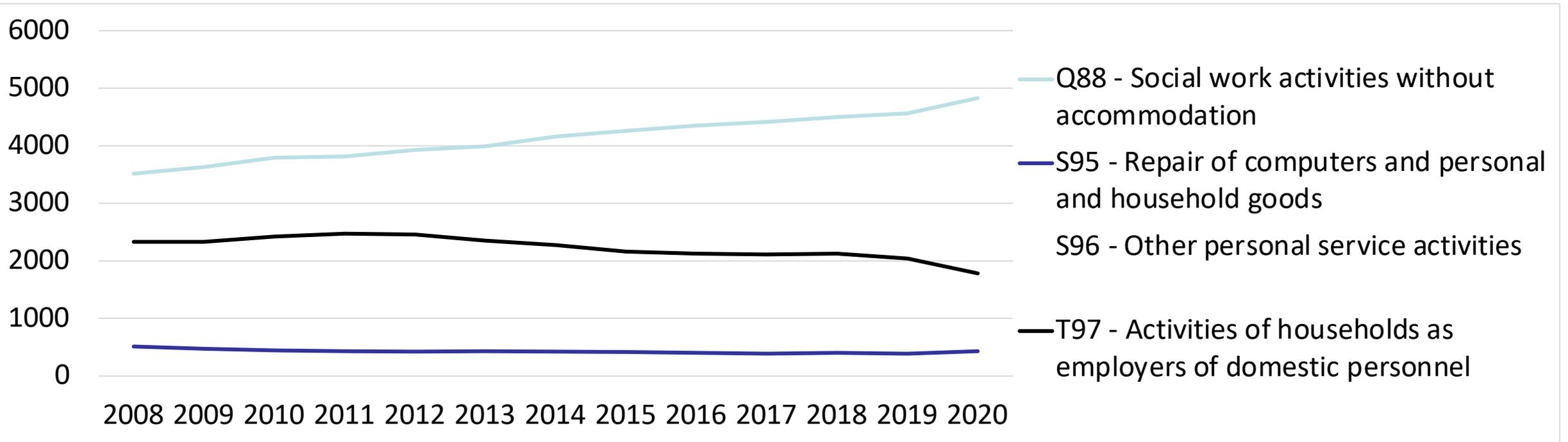


- Guzi, Holubová, Kahancová, Kahanec, Martišková, Radvanský, Bors, Schonenberg (2022) Tackling undeclared work in the personal and household services sector. ELA. At: https://www.ela.europa.eu/sites/default/files/2022-03/UDW_Study_report_on_PHS_2022.pdf

Size of formal PHS sector



Employment in PHS subsectors (EU27-2020, thousand persons)

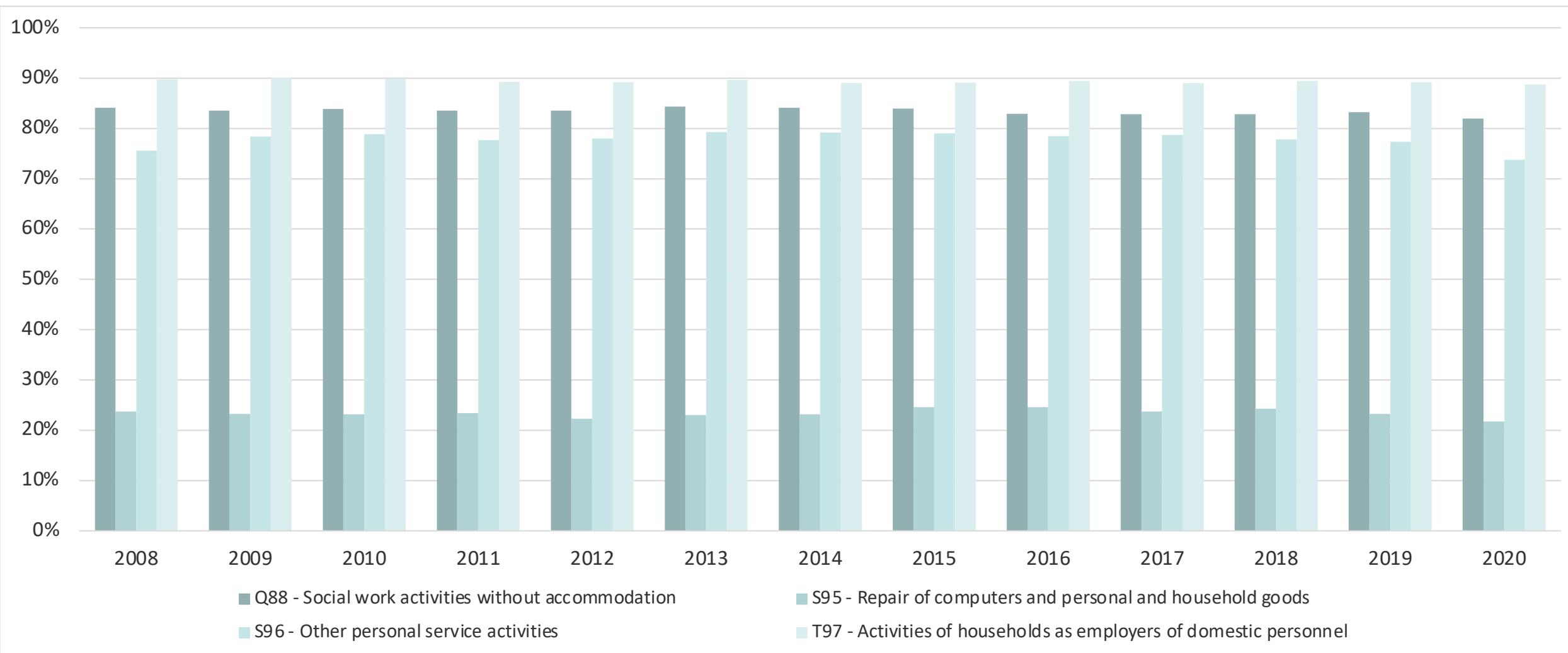


Source: CELSI 2021, based on the EU LFS data (variable lfsq_egan22d).

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Q88 - Social work activities without accommodation	3 544.2	3 663.7	3 829.7	3 856.6	3 978.3	4 050.2	4 219.6	4 331.4	4 423.2	4 491.2	4 585.3	4 655.5	4 943.0
S95 - Repair of computers and personal and household goods	527.0	488.2	460.7	449.6	441.8	451.5	441.4	431.7	422.8	407.5	421.9	406.0	454.4
S96 - Other personal service activities	2 729.5	2 572.6	2 568.4	2 515.3	2 530.2	2 509.6	2 466.9	2 511.8	2 567.8	2 642.6	2 688.0	2 743.7	2 985.9
T97 - Activities of households as employers of domestic personnel	2 375.7	2 379.6	2 470.5	2 525.3	2 514.7	2 417.3	2 344.8	2 235.9	2 212.2	2 207.2	2 227.3	2 156.4	1 890.9
Total PHS	9 176.4	9 104.2	9 329.2	9 346.6	9 465.0	9 428.6	9 472.6	9 510.7	9 625.9	9 748.5	9 922.5	9 961.5	10 274.1

Source: EU-LFS

Share of women employed in PHS sectors

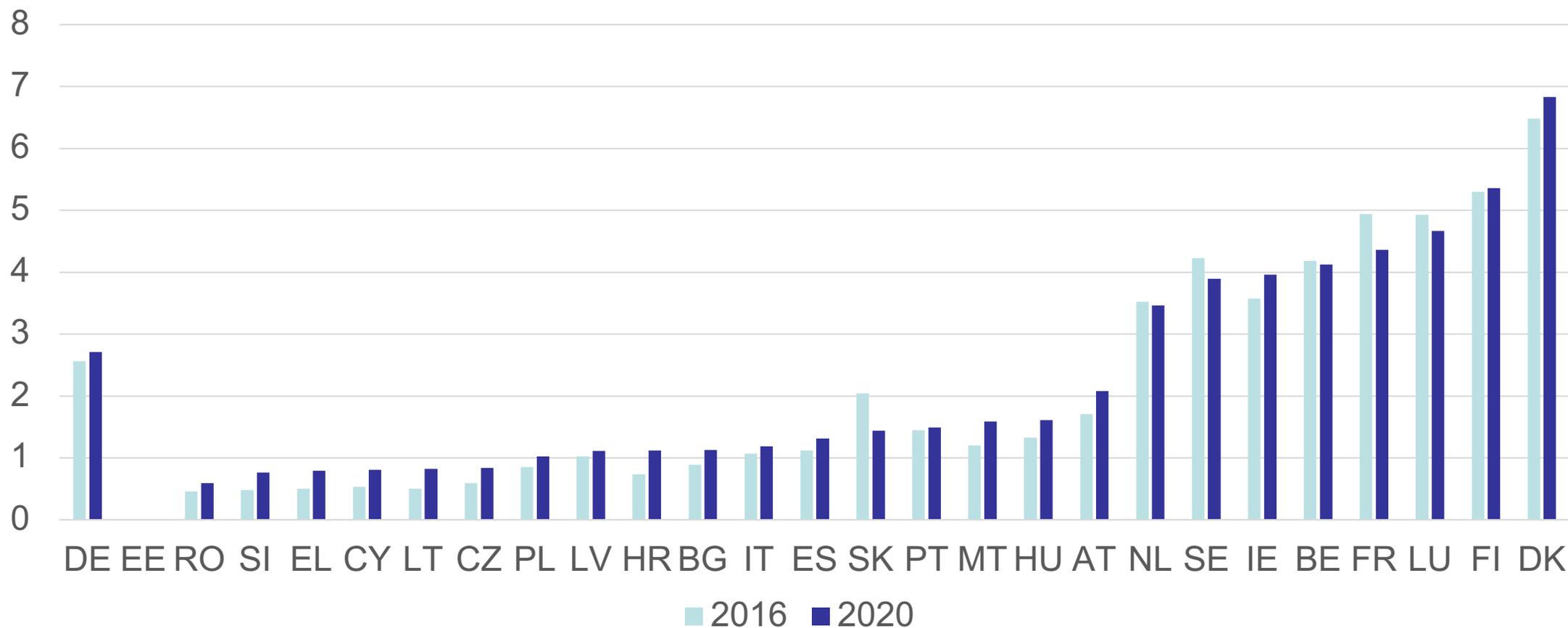


Source: EU-LFS

Employment (thousand persons)



NACE Q88 – social work without accommodation

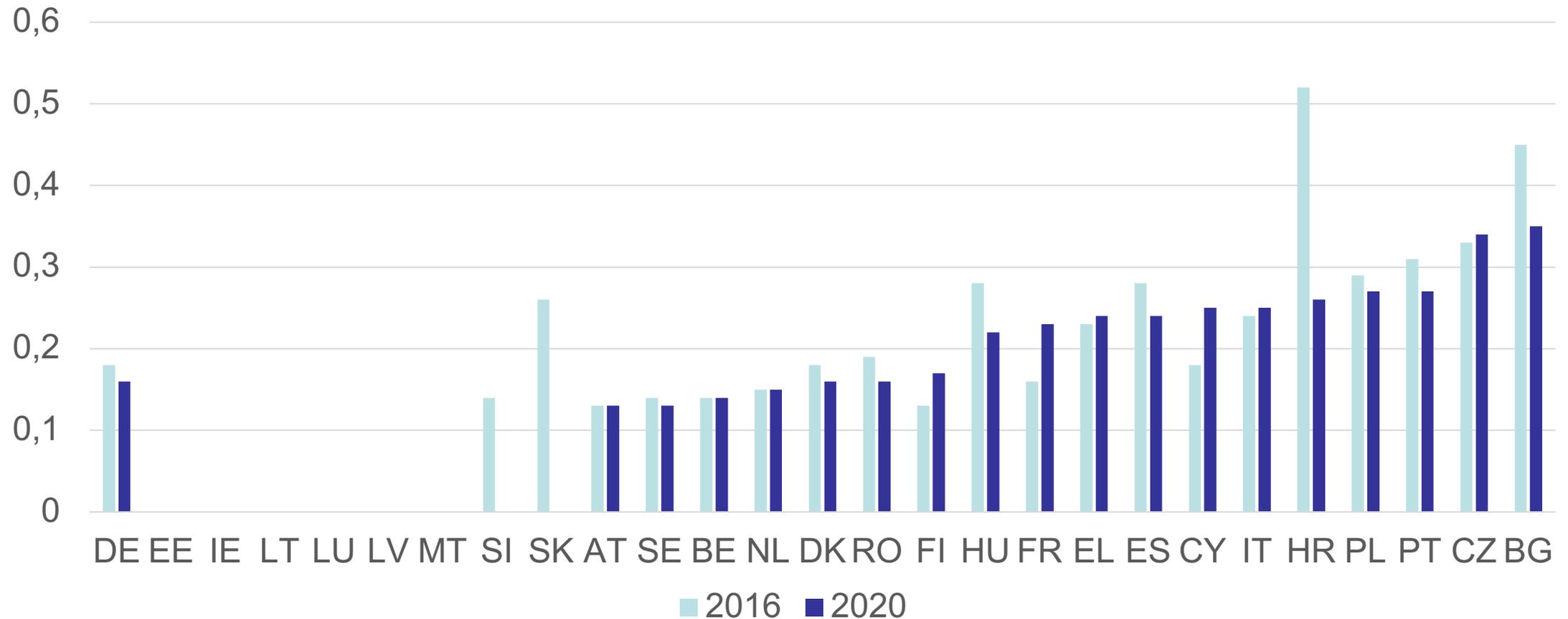


Source: EU-LFS

Employment (thousand persons)

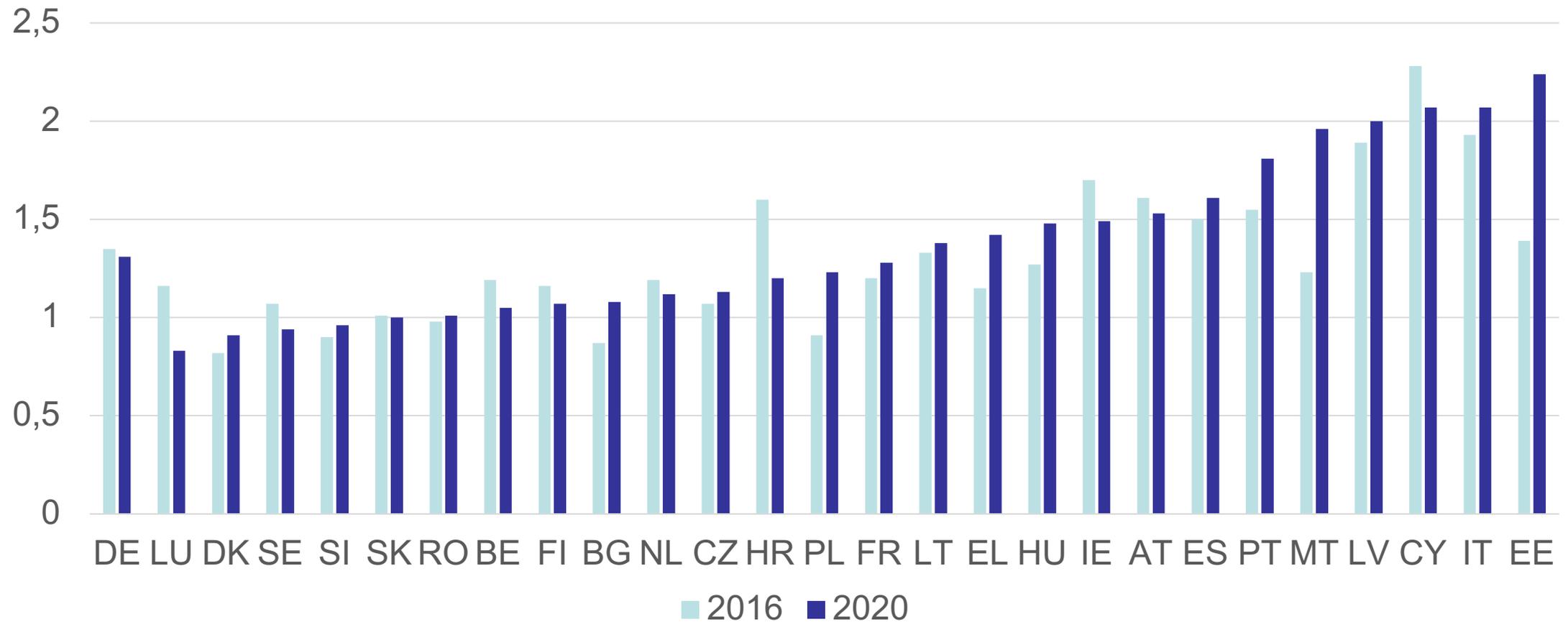


NACE S95 – repair of computers and personal household goods



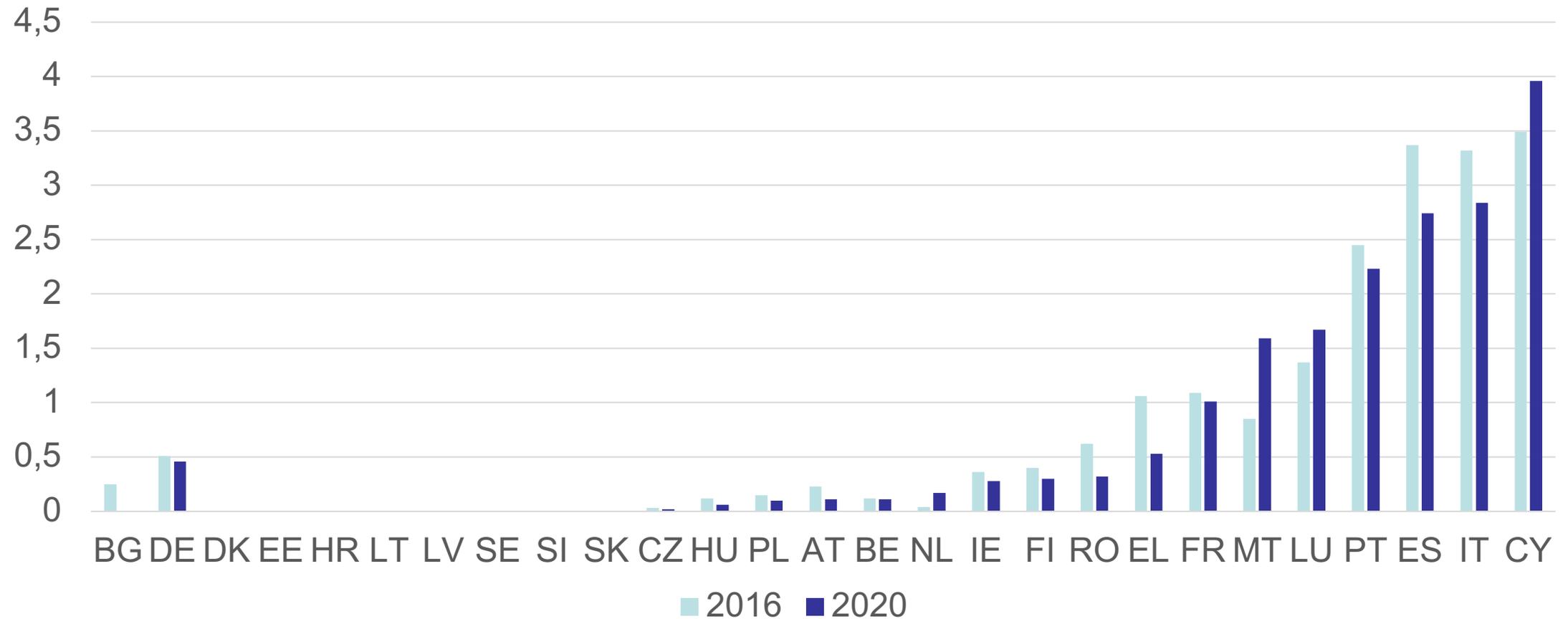
Source: EU-LFS

Employment (thousand persons) NACE S96 – other personal service activities



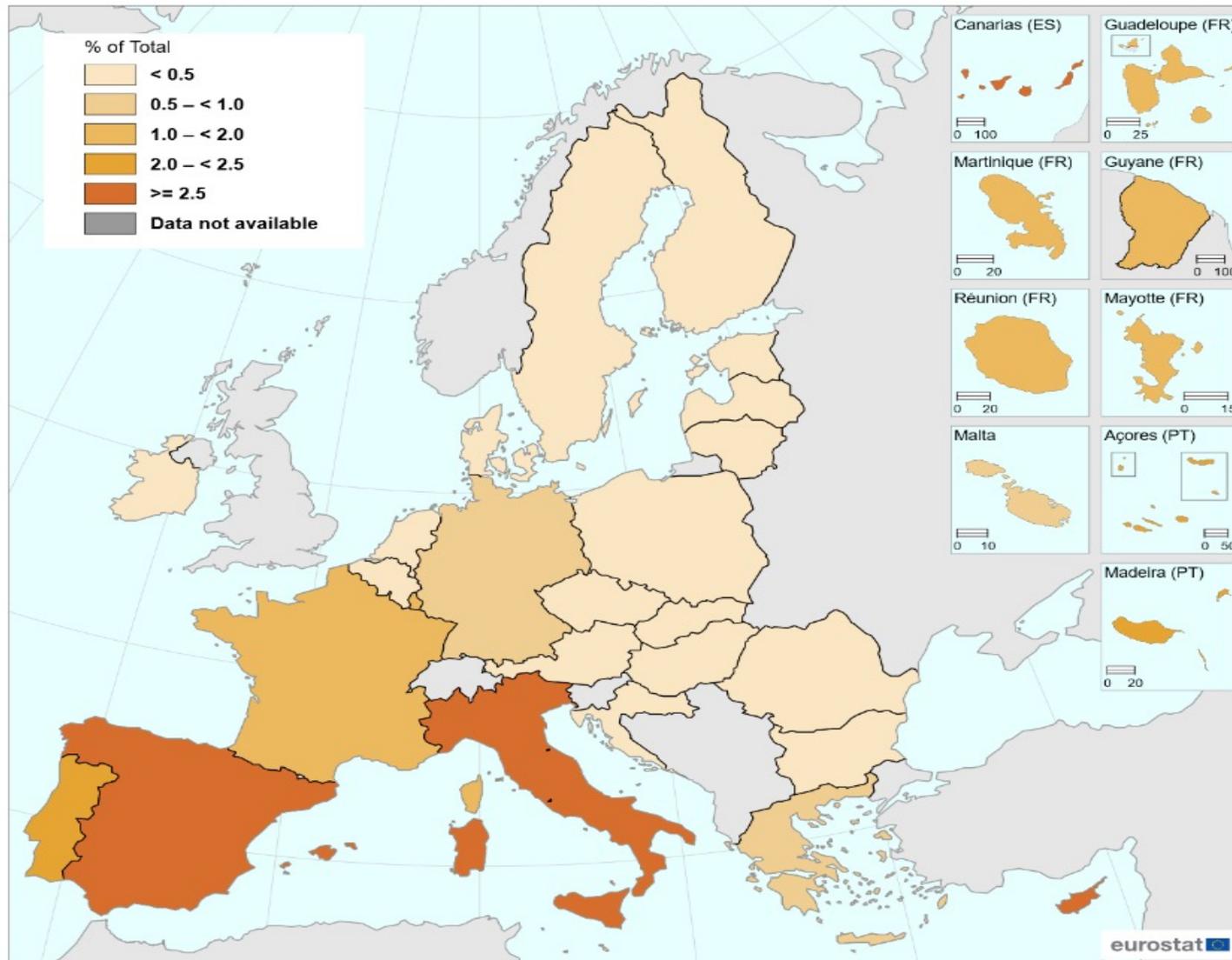
Source: EU-LFS

Employment (thousand persons) NACE T97 – domestic personnel



Source: EU-LFS

Geography of employment in household activities (T97), 2019



In 2019, the share of PHS workers in subsector T97 was at least five times higher in some Southern European EU Member States (CY, ES, IT) than in Eastern and Central European and Northern European EU Member States.

Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
Cartography: Eurostat – IMAGE, 06/2021

Source: CELSI 2021, based on EU-LFS 2019.

WP2 – Surveys, interviews, focus groups

- Mapping relevant stakeholders in 12 CEE countries (SK, CZ, SI, EE, PL, NM, HU, BG, RO, HR, LT and LV), including social partners, create a database of contacts, roles and strategies;
- Online survey among stakeholders (SK, CZ, SI, EE, PL, NM, HU, BG, RO, HR, LT and LV) to uncover their views on the functioning of the sector, quality/extent of current legislation, and sources for further improvement in terms of policy making, policy implementation and the quality of provided services (at least 5 per country); translation in national languages.
- Online survey targeting the general public to study the demand for PHS in 12 CEE (SK, CZ, SI, EE, PL, NM, HU, BG, RO, HR, LT and LV) countries from the point of view of the type of services, providers and preferences for opting for formal or for undeclared service provision (at least 50 responses per country); translation in national languages.

WP2 – Survey, interviews, focus groups

- **In-depth interviews with EU level stakeholders** - to study the EU-wide priorities and challenges relevant for work and social dialogue in the PHS sector, as well as the matching between regional priorities in CEE with EU-level priorities, discourses and policies (10 interviews);
- **National-level focus groups** with domestic workers in 6 countries (CZ, SK, PL, SI, EE and North Macedonia);
- **National level interviews** with national social partners and other relevant stakeholders, e.g., professional associations of care providers (10 interviews per each of the 6 countries: CZ, SK, PL, SI, EE, and North Macedonia).

WP2 – Outline of the national report

- Introduction
- Structure of the PHS sector
 - Care services (Child care, Elderly care, etc.)
 - Non-care services
- Size of PHS sectors and employment
- Policy/regulations/governance
- Working conditions in the PHS sector (type of contracts, wages, working time, social security, H&S, UDW)
- Industrial relations
 - Representation/social partners/actors
 - Role of social dialogue
- Challenges
-



Enjoy your coffee break

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Project set up

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Project set up

- Timeline
- Work packages and deliverables
- Deadlines
- Coordination and division of tasks
- Communications
- Project meetings
- Data collection – ethical issues
- Other

Implementation period: 24 month; 08/2022 – 07/2024

Work packages I.

	TASK NAME	START MONTH	END MONTH	DURATION (MONTHS)
WP1:	Project management and coordination			
	A1.1 Management and communication	1	24	24
	A1.2 Kick-off meeting (Slovakia)	3	3	1
	A1.3 Interim project meeting (online)	10	10	1
	A1.4 Online progress meetings	3	22	19
	A1.5 Quality control and reporting	1	24	24
WP2:	Analytical framework			
	A2.1 Literature review	1	6	6
	A2.2 Comparative data evidence	1	6	6
	A2.3 Conceptual and analytical framework	1	6	6
WP3	Stakeholders views			
	A3.1 EU level interviews	7	12	5
	A3.2 Online demand survey	8	14	6
	A3.3 Online survey among PHS stakeholders	8	14	6
WP4	National case studies			
	A4.1 Preparation of case studies	6	14	8
	A4.2 Preparation of national policy briefs	8	18	10
	A4.3 Focus groups	6	14	8
WP5	Comparative report			
	A5.1 Comparative report	15	19	4
	A5.2 Comparative policy brief	15	19	4
WP6	Dissemination			
	A6.1 Project website	1	3	2
	A6.2 National policy workshops	16	19	3
	A6.3 Final conference	22	23	2
	A6.4 Documentaries – national results	20	22	3
	A6.5 Documentary – comparative results	21	22	2
	A6.6 Country leaflets	20	21	2



	TASK NAME	START CALENDAR MONTH	END CALENDAR MONTH
WP1:	Project management and coordination		
	A1.1 Management and communication	8/22	07/24
	A1.2 Kick-off meeting (Slovakia)	10/22	10/22
	A1.3 Interim project meeting (online)	5/23	5/23
	A1.4 Online progress meetings	10/22	6/24
	A1.5 Quality control and reporting	8/22	7/24
WP2:	Analytical framework		
	A2.1 Literature review	8/22	1/23
	A2.2 Comparative data evidence	8/22	1/23
	A2.3 Conceptual and analytical framework	8/22	1/23
WP3	Stakeholders views		
	A3.1 EU level interviews	2/23	7/23
	A3.2 Online demand survey	3/23	9/23
	A3.3 Online survey among PHS stakeholders	3/23	10/23
WP4	National case studies		
	A4.1 Preparation of case studies	1/23	9/23
	A4.2 Preparation of national policy briefs	4/23	1/24
	A4.3 Focus groups	1/23	9/23
WP5	Comparative report		
	A5.1 Comparative report	10/23	2/24
	A5.2 Comparative policy brief	10/23	2/24
WP6	Dissemination		
	A6.1 Project website	8/22	10/22
	A6.2 National policy workshops	11/23	2/24
	A6.3 Final conference	5/24	6/24
	A6.4 Documentaries – national results	3/24	5/24
	A6.5 Documentary – comparative results	5/24	6/24
	A6.6 Country leaflets	3/24	4/24

DELIVERABLES AND DEADLINES



	NAME OF THE DELIVERABLE	Project month	Calendar month
WP1:	Project management and coordination		
	D1.1. Kick-off meeting (Bratislava, Slovakia)	M1 (M3)	10/22
	D.1.2. Interim meeting (online)	M10	5/23
	D1.3. Feedback questionnaire	M24	7/24
	D.1.4. Reports to the European Commission	M12, M24	7/23, 7/24
WP2:	Analytical framework		
	D2.1. Working paper on conceptualization of PHS sector in CEE	M6	1/23
	D2.2. Methodological tools (survey, interviews, focus groups, outlines)	M6	1/23
WP3	Stakeholders views		
	D3.1 EU Stakeholder views study	M18	1/24
	D3.2. Policy brief on stakeholder views	M18	1/24
WP4	National case studies		
	D4.1 National case studies in 6 CEE countries	M18	1/24
	D4.2 Policy briefs in 6 CEE countries	M18	1/24
WP5	Comparative report		
	D5.1 Comparative report	M20	3/24
	D5.2 Comparative policy brief	M20	3/24
WP6	Dissemination		
	D6.1 Project website	M24	7/24
	D6.2 National policy workshops (6 countries)	M16	11/23
	D6.3 Final online conference	M23	6/24
	D6.4 Interactive video documentaries (6 countries, 1 comparative)	M23	6/24
	D6.5 Country leaflets on PHS sector (in national language and EN; for 6 countries)	M17	12/23

Work packages and deliverables III.

Quality control

The task involves quality control, and alignment of the project aims with relevant EU-level discourse in PHS and social dialogue structures by the EU-level partners EASPD, EFSI, UNI EU and other associated partners.

The quality control mechanisms will be agreed upon with associated partners at the start of the project to ensure a smooth application.

Prof. Eleonore Kofman, co-director of the Social Policy Research Centre at Middlesex University, will serve as the external quality assurance advisor.

The ways and timeline to provide feedback on the processes and outputs will be agreed upon in advance.

The monitoring and reporting to the European Commission are also included in these tasks, and the timeline will be set in advance.

Feedback questionnaires for the participants of the final conference in M23 will be part of the quality control mechanism.

Coordination - Division of tasks



	TASK NAME	Coordination and involvement
WP1:	Project management and coordination	
	A1.1 Management and communication	CELSI, all BEN
	A1.2 Kick-off meeting (Slovakia)	CELSI, all BEN
	A1.3 Interim project meeting (online)	MK2025, all BEN
	A1.4 Online progress meetings	CELSI, all BEN
	A1.5 Quality control and reporting	CELSI, all BEN and AP
WP2:	Analytical framework	
	A2.1 Literature review	CELSI, all BEN
	A2.2 Comparative data evidence	CELSI, all BEN
	A2.3 Conceptual and analytical framework	CELSI, all BEN
WP3	Stakeholders views	
	A3.1 EU level interviews	CU, EASPD
	A3.2 Online demand survey	CELSI, all BEN
	A3.3 Online survey among PHS stakeholders	CELSI, all BEN
WP4	National case studies	
	A4.1 Preparation of case studies	CELSI, all BEN
	A4.2 Preparation of national policy briefs	CELSI, all BEN
	A4.3 Focus groups	CELSI, all BEN
WP5	Comparative report	
	A5.1 Comparative report	CELSI, all BEN
	A5.2 Comparative policy brief	CELSI
WP6	Dissemination	
	A6.1 Project website	CELSI
	A6.2 National policy workshops	CELSI, all BEN
	A6.3 Final conference	EASPD, all BEN and all AP
	A6.4 Documentaries – national results	CELSI, all BEN
	A6.5 Documentary – comparative results	CELSI
	A6.6 Country leaflets	CELSI, all BEN

Coordination/ BEN- beneficiaries/AP – associated partners

Project meetings

Timetable of the projects meetings

Type of meeting	Date	Responsibility
Kick-off meeting (Bratislava, Slovakia)	6/10/22 (M3)	CELSI (evidence - invitation, agenda, minutes, list of participants, screen shots)
Interim project meeting (online)	(?)May 2023 (M10) to discuss WP3	MK2025 (invitation, agenda, minutes, list of participants, screen shots)
Monthly working project meetings (progress and/or trouble shooting meetings)	Every month (to discuss the work progress on the deliverables, urgent issues, or coordinate the data collection and deliverables). Not all partners – upon need. To set a preliminary regular date/doodle?	CELSI/partner (notes - minutes)

Communication

Dropbox (?) – common PERHOUSE folder accessible for all partners, online storage for common files:

- Project management
- Meetings
- WPs
- Etc.

Website:

CELSI web-page: general objectives, aims, research questions and tasks + deliverables:
hyperlinks to partners websites

Visibility of the EU and funding in all official communication, reports and deliverables:



The project is funded by the European Union; Project No. 101052340

Ethical issues - data protection



Commitments, ethical committees, requirements

Data collected, processed and stored:

- Online surveys (compliance with GDPR)
 - Interviews
 - Focus groups
 - Stakeholders' database (contact details)
-
- Informed consent form (CELSI template) – to be translated (signed and store for evidence), including with the consent to record
 - Recordings of the interviews/fucus groups only for internal usage – then delete (?)

National/institutional requirements (?) – e.g. ethical committees, approvals, what is the process

Questions – discussion



Administration, reporting and financial guidelines

Soňa Mikulíková, contact: sona.mikulikova@celsi.sk

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Budget

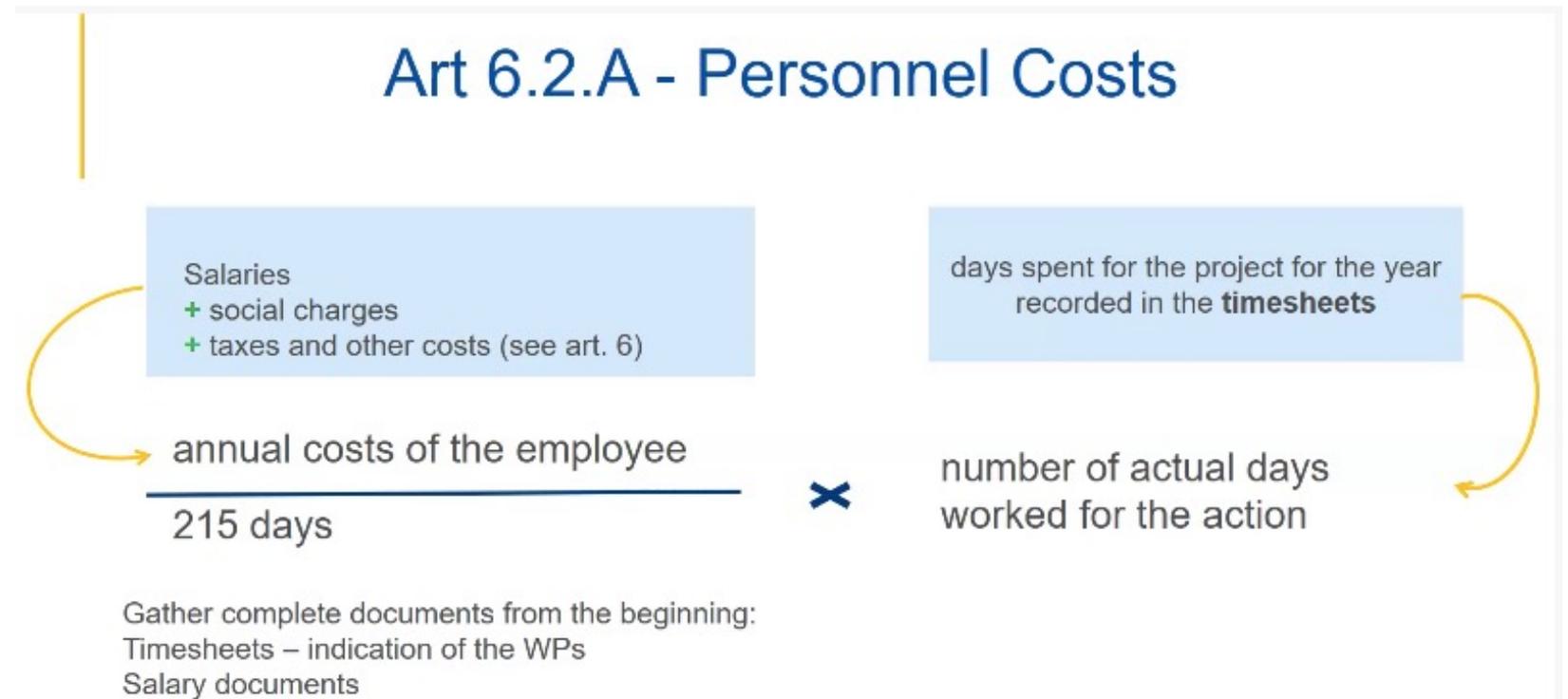


Beneficiary	Employees	Travel	Accomodation	Subsistence	Equipment	Goods	Indirect costs	Total costs	Maximum EU contribution
CELSI	60,756.00	400.00	406.00	276.00		11,770.00	5,152.56	78,760.56	70,884.50 €
MK2025	18,236.00	938.00	295.00	164.00		4,340.00	1,678.11	25,651.11	23,086.00 €
UL	18,820.00	776.00	331.00	232.00		4,340.00	1,714.93	26,213.93	23,592.54 €
UT	34,836.00	876.00	319.00	224.00		7,340.00	3,051.65	46,646.65	41,981.99 €
UMCS	22,025.00	912.00	584.00	265.00		4,340.00	1,968.82	30,094.82	27,085.34 €
EASPD	23,850.00	460.00	105.00	64.00		19,100.00	0.00	43,579.00	39,221.10 €
CU	28,792.00	1,868.00	561.00	370.00		4,340.00	2,515.17	38,446.17	34,601.55 €

- direct costs + 7% overheads from direct costs (indirect costs)
- 10% co-financing
- Access to Funding and Tenders portal

Budget

- 1st, 2nd pre-financing and balance payment at the end
- Eligible costs- report only eligible costs, during project duration, identifiable and verifiable, proof of costs, must comply with national law and financial management
- Staff costs - person-months



Reporting

- Travel and subsistence costs – not unit/actual costs, but flat rates, EC might review unit costs

If costs are $\leq 15\%$ of the personnel costs, you do not need to detail them

If costs are $> 15\%$ of the personnel costs, you must detail major cost items apart from those 15%

The system calculates and displays the amount to be justified

- Proof of costs - to be collected for midterm and final reporting (EC may check supporting documents)
- Audit - up to 5 years after balance payment
- Budget transfers – allowed between categories and beneficiaries

Reporting

- Reporting Periods: midterm, final
- Continuous reporting (throughout the project duration)
- Periodic reporting (progress reporting midterm / after 12 months & final)
- Timesheets (per project not per WP)

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents>

https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/om_en.pdf

Amendments

Latest 45 days before the end of project

When is an amendment necessary?

Article 39.1 GA → Conditions: The Agreement may be amended, **unless** the amendment entails changes which would call into question the decision awarding the grant or breach the principle of equal treatment of applicants;

<p>Withdrawal/termination, addition, replacement of a beneficiary (or COO)</p>	<p>Change in work packages and deliverables*</p>	<p>Change of bank account</p>
<p>Change to budget categories with lump sum (travel and subsistence)</p>	<p>Extension of action's duration</p> <p>! The AMD should be signed before the actual end date</p>	<p>Additional substantial subcontracting</p> <p>See also GA art 6.2 B</p>

* Any ongoing AMD provides the opportunity to check and update the dissemination level of deliverables (from PU to CO, etc.)

Amendments

When is an amendment **NOT** necessary?

Change of address of a beneficiary

Change in the name of the bank or in the address of the branch where the coordinator has an account

Change of VAT number

Delays of 1-3 M in submission of deliverables

Changes in the core staff mentioned in Annex 1/Part B (notify PO instead)

Most frequent errors

- Staff costs / effort wrongly calculated
- Lack of supporting documents (e.g. timesheets, contracts)
- Claimed costs do not match supporting documents
- Claimed costs are not incurred by the beneficiaries and cannot be traced in their accounting records
- Cost incurred by a third party to the GA
- Costs claimed for activities outside eligibility period
- Costs claimed for activities carried out in non-eligible countries
- Costs claimed are not linked to the project's activities
- Costs already covered by indirect costs (e.g. general running costs)
- No mentioning of EU emblem
- Cost not recorded in the official accounts

Discussion and next steps

- Next meeting – 29 November, 10:00 CET (for beneficiaries), Zoom link and agenda will be sent.
- Within one month – the first draft versions of the lit. review and analytical framework (CELSI with partners)
- Ethical issues and data collection regulations valid at the project partners' institutions (all partners)
- Dropbox set up and link to be sent to the project partners
- Set up of Perhouse web page (CELSI)
- Sharing the presentation and compiling detailed minutes of the kick-off meeting (CELSI)
- Creating a project-specific group e-mail (CELSI)



Closing remarks

Marta Kahancová

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**THANK YOU FOR YOUR
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