

FAIR WORKING TIME MATTERS

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1. INTRODUCTION

This report constitutes the final deliverable of Workstream 1 (Research) of the *Fair Working Time Matters* project (FATIMA), organised jointly by UNI Europa's Care, Commerce, Information and Communications Technology and Related Services (*hereinafter* ICTS), and Property Services sectors.

BACKGROUND OF THE STUDY

The debates on working time span a wide spectrum of themes, from proposals for working time reduction to improve work-life balance, to the difficulty of earning a living wage in atypical forms of employment. These emerging issues show the challenges of work organisation and raise concerns about the quality of work in contemporary workplaces. The FATIMA project aims to contribute to these ongoing debates on working time by establishing basic principles and a common understanding of what fair working time models could/should look like, how they can address the deterioration of working conditions and reduce the possible negative impact of the twin transition on workers. In particular, it intends to voice the concerns of workers in these debates, to provide trade unions with the necessary insights and guidance on this topic, and to build the capacity for future collective bargaining and social dialogue.

Focusing on four sectors – Care, Commerce, ICTS, and Property Services – we explore the underlying trends in working time evolution in the service sectors, examine the core risks for workers, and identify good practice examples of working time models and policy solutions that safeguard or improve working conditions at the sectoral level.



RESEARCH DESIGN AND METHODOLOGY

To aid the worker-focused debates on working time, this study focuses on the following areas and research questions:

Area I: Context

- RQ1: What are the key cross-sectoral **trends** pertinent to working time in the EU?
- RQ2: What are the main **drivers** behind the identified trends in working time?
- RQ3: How do (changes in) working time models impact **working conditions** (including work-life balance, decent wages, and job satisfaction)? What are the key challenges and risks for workers?

Area II: Sectoral analysis

- RQ4: How are these broad **trends** [taking shape] at the sectoral level in the four selected sectors?
- RQ5: What are the dominant **working time models** in each sector?
- RQ6: What is the impact of the identified working time models on **working conditions**?
- RQ7: From the workers' perspective, what are the **critical issues** (focus areas) pertinent to working time in each sector?
- RQ8: Which working time models can be considered best practices for promoting job quality?
- RQ9: What **good solutions** (including policy, regulation, case law, collective action, or others) exist, if any, that address some of these critical issues? What is the role of social partners in creating and implementing such solutions?
- RQ10: What are the key **policy needs** in each sector? What policy recommendations can be proposed at sectoral and cross-sectoral levels? What policy recommendations can be proposed at sectoral and cross-sectoral levels?

Area III: Conceptualisation

- RQ11: How can **fair working time** be conceptualised and defined?
- RQ12: Based on theoretical and empirical evidence, what **universal criteria** can be established for assessing the fairness of working time models?

These research areas and questions are grounded in the broader context of labour market evolution, including the following trends (which are not directly the research subject but must be considered as horizontal cross-cutting elements):

- **The twin** (digital and green) **transition**;
- **Atypical forms of work** (e.g. remote work) **and employment** (e.g. (bogus) **self-employment**);
- **Economic shocks and trends** (e.g. the cost of living crisis);
- **Decreasing trade union membership rates in many European Union (EU) Member States**; and
- **The EU's ambitions and policy priorities related to innovation and global competitiveness.**

To address the posed research questions, we employed the following data collection and analysis methods, structured around two main research streams:

STREAM 1: EXPLORATORY, CROSS-SECTORAL RESEARCH

The exploratory research aimed to lay the foundations of the project and provide a reference point for the sectoral analysis, contributing first insights into the conceptualisation of working time fairness. We deployed three key methods in this research stream:

- *Exploratory interviews* (5) were conducted with academic and applied researchers at the very start of the research, with the following three key objectives in mind: (1) validation of research questions; (2) identification of key trends and challenges; and (3) development of evaluation criteria for working time fairness. The interviews had a cross-sectoral focus to frame the research in a broader context.
- A *literature review* focused on cross-sectoral trends and conceptualisation of fair working time, relying predominantly on academic literature and applied research studies.
- *Analysis of existing survey data* aimed to quantify and showcase the identified trends in the EU context and across sectors, taking into account sources of survey data on working time trends, such as the European Working Conditions Survey and Eurostat's Labour Force Survey.

STREAM 2: SECTORAL ANALYSIS

Research in the four selected service sectors (Care, Commerce, ICTS, and Property Services) was then conducted to examine in detail the sector-specific trends, risks, challenges and solutions pertinent to working time evolution, and provide concrete pointers for the conceptualisation of working time fairness. This was done through the following three methods:

- *Sector-specific literature reviews and desk research* were conducted to explore in depth the key sectoral trends and challenges.
- *Sectoral interviews* (22) were carried out with worker representatives at the sectoral level to gather real-world sector-specific insights on working time models and related challenges in the four selected sectors, as well as to identify good practices in addressing the challenges related to working time.
- *Mapping of solutions* was done with the aim of compiling the good practice examples of working time models and policy actions (both legislative and collective) identified through literature review and desk research, as well as expert interviews.

THE STRUCTURE AND CONTENT OF THIS REPORT

The remainder of this report is structured as follows:

- *Chapter 2* summarises the results of the exploratory research and presents the 'big picture' of working time evolution across sectors in the EU.
- *Chapter 3* presents the key findings from sectoral analyses in the four selected service sectors (Care, Commerce, ICTS, and Property Services).
- *Chapter 4* concludes and proposes a conceptualisation of fair working time.

2. CONTEXT: CROSS-SECTORAL OVERVIEW OF WORKING TIME TRENDS

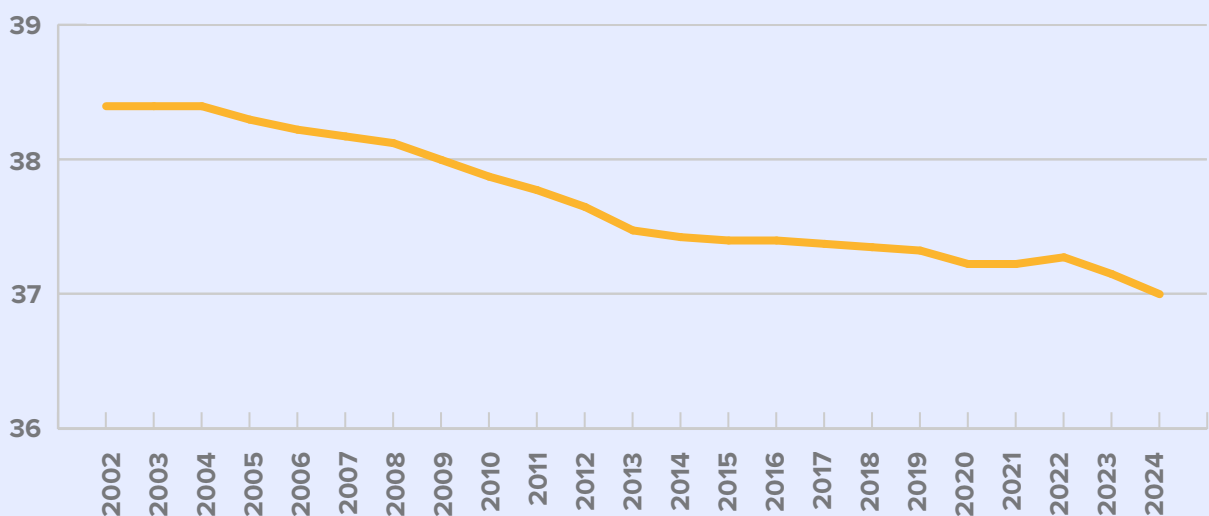
Currently, two main issues dominate the debate on the future of work and working hours. The first concerns the long-term trend of decreasing average working time, which has, however, slowed down in recent decades and remains unevenly distributed across the labour market. The second is the de-standardisation of working hours, driven by the rising prevalence of flexible working modes (including remote work, job sharing, flexible scheduling, etc.), fragmentation of employment, a shift towards non-standard employment, and the emergence of ‘always-on culture’ (Burchell et al., 2024; exploratory interviews, 2024). These two underlying trends are elaborated on below, including their evolution in time, main contributing drivers, and impacts on job quality and labour markets.

2.1 HOURS OF WORK: THE GRADUAL DECREASE IN AVERAGE WORKING TIME

TRENDS

Overall, average weekly working hours are tending to decline over the long term, albeit very gradually. Historically, working time trended downwards, but this trend has slowed, particularly since the 1980s (Anttila et al., 2021; exploratory interviews, 2024). As a result, a five-day working week remains the norm across most countries and industries in the EU, with the (near-) 40-hour week as the prevailing standard (see *Figure 1 below*).

Figure 1. Average number of usual weekly hours of work in main job (EU27)



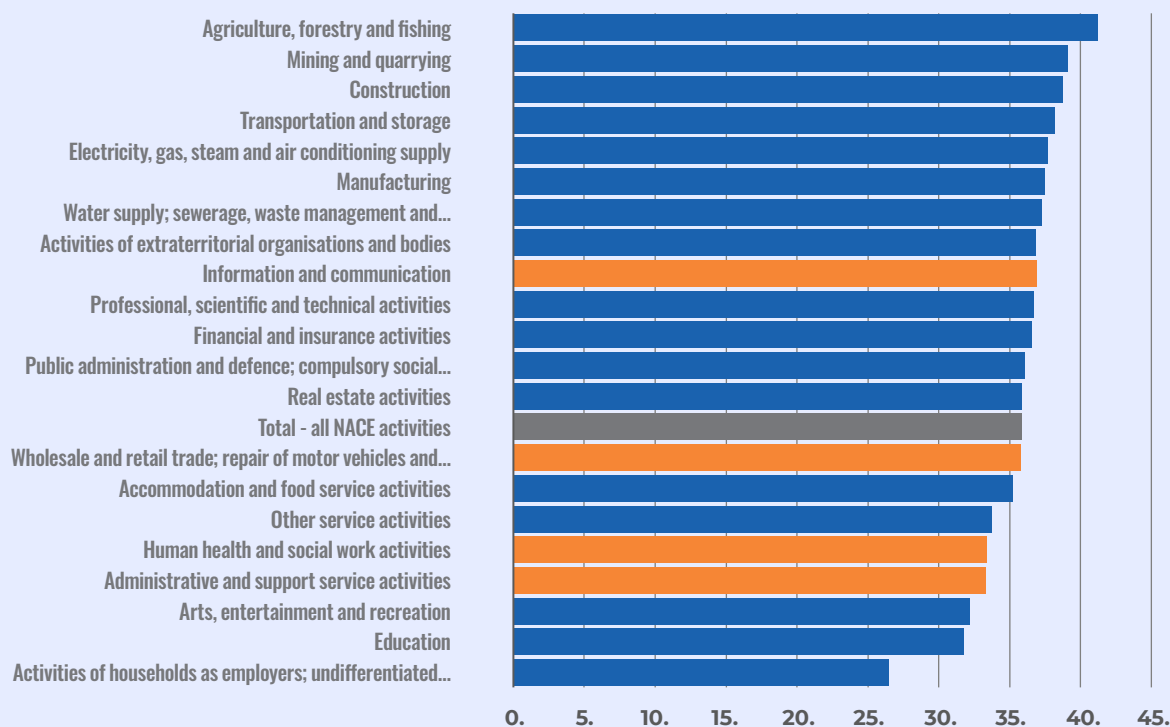
Source: Based on Eurostat data, indicator [lfsq_ewhuis¹].

1. See: https://ec.europa.eu/eurostat/web/products-datasets/-/lfsq_ewhuis

However, two caveats need to be mentioned. The first is the pervasive problem of overtime on the one hand and (involuntary) part-time work on the other. The average working time masks the distribution of those hours, with some groups working long or excessive hours and some working shorter hours (exploratory interviews, 2024). At the same time, people working long hours often wish to reduce them, while those with short hours generally prefer to work more, showing the common involuntariness of both over- and under-employment (Anttila et al., 2021). This heterogeneity is likely even greater among the self-employed, whereby some workers might fall into ‘self-exploitation’ patterns while others struggle to secure enough work and are at risk of poverty (exploratory interviews, 2024). Overall, the 2021 European Working Conditions Telephone Survey results indicate that 46% of EU workers prefer to work fewer hours, and 10% would rather work more.

The second is the sectoral variance in average working time, as shown in *Figure 2* below. While long working hours are concentrated in primary sectors (such as agriculture, industry, and construction), followed by high-skilled service sectors (e.g. ICTS, finance, real estate), most low- and mid-skilled service sectors are characterised by lower-than-average working time. Workers in these sectors are more likely to fall into the patterns of (involuntary) part-time work, as well as other precarity patterns related to working time (see *Chapters 3-4* for a more detailed analysis).

Figure 2. Average number of actual weekly hours of work in main job, by economic activity (NACE, EU27, 2023)



Source: Based on Eurostat data, indicator [lfsa_ewhan²].

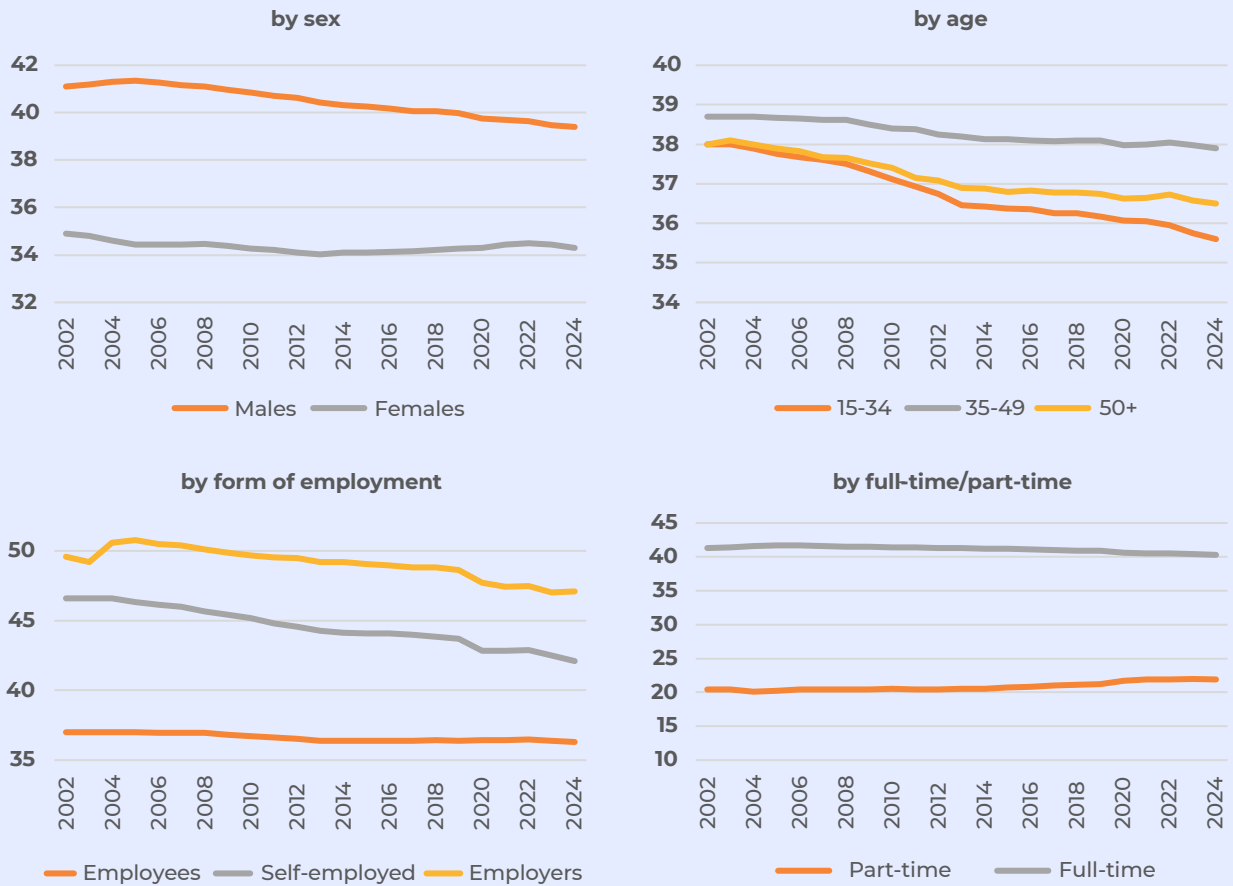
Note: Sectors in the scope of the following analysis are highlighted in orange.

2. See: https://ec.europa.eu/eurostat/databrowser/view/lfsa_ewhan2/default/table?lang=en

The overall creeping trend of decreasing working time contains a high degree of heterogeneity. In particular (see also *Figure 3* and *Figure 4* below):

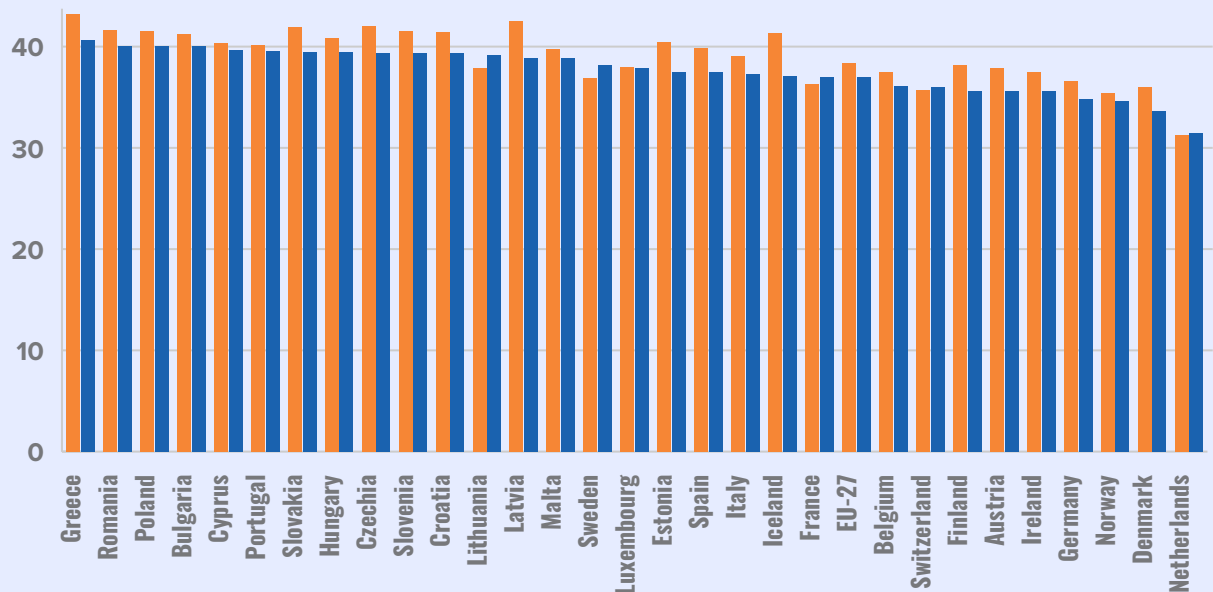
- **Gender differences persist.** On average, men work more hours and are more likely to work excessive hours than women. Women, on the other hand, are more likely to work part-time or have flexible working hours. In 2023, 27.9% of women in the EU worked part-time, compared to just 7.7% of men (Eurostat [lfsi_pt_a]). However, the gender working time gap is slowly closing – in 2002, women worked 6.4 fewer hours per week than men and in 2024, 5.1 fewer hours per week; the share of women working part-time has also decreased (by about 4 percentage points since 2014). It is also important to consider that women work more hours when both paid and unpaid work is considered (70 total hours compared to 63 hours for men; Eurofound, 2022a). This disparity in the total hours worked also exacerbates the gender pay gap (exploratory interviews, 2024), as the burden of unpaid work can limit women’s availability for paid employment, career advancement, or overtime opportunities.
- **There is a notable generational shift.** Nominal differences between age groups are expected and can be explained by different preferences depending on life stage (exploratory interviews, 2024). However, younger cohorts are diverging relatively rapidly from the average and noting significantly faster reductions in working time. This may represent the shifting preferences towards work-life balance and autonomy over higher pay and ‘careerism’ among younger generations (exploratory interviews, 2024). However, it is important to note that the share of employees in involuntary part-time work is significant (around 10% - see above), and it is also possible that younger workers are overrepresented in this sample.
- **Forms of employment matter.** People who are self-employed work more hours on average than employees, and employers work still more hours than the self-employed. Though this might be partially explained by preferences underlying the choice of employment arrangements, it might be concerning in some cases, considering the rise in (bogus) self-employment and the lack of (or limited) coverage of the self-employed by the labour law protections and provisions of collective agreements, including working time limits and safeguards (exploratory interviews, 2024).
- **Full-time and part-time work hours are converging.** The prevalence of excessive work hours (over 48 hours per week) has been declining in the EU (Anttila et al., 2021; Eurofound, 2022a). Overall, the number of people working long hours is decreasing, while the number of people working fewer hours is increasing (exploratory interviews, 2024). However, persisting gender, age, and sectoral differences remain an important nuance of this convergence (see above).
- **Country differences prevail.** The rate and even direction of working time trends vary across the EU. In general, Eastern and Southern Member States tend to exhibit higher average working time, though they are slowly converging with the West and North. These differences can be explained by different work cultures (e.g. normalisation of long working hours), coverage by collective bargaining agreements (which often secure working time reduction, impose limits on maximum hours, and/or guarantee more holidays), and the prevalence of part-time work (exploratory interviews, 2024).

Figure 3. Average number of usual weekly hours of work in main job by sex, age, form of employment, and full-time/part-time (EU27)



Source: Based on Eurostat data, indicator [lfsq_ewhuis].³

Figure 4. Average number of usual weekly hours by country



Source: Eurostat [lfsq_ewhuis].⁴

DRIVERS

Three categories of drivers of this overall trend of working time reduction can be distinguished:

- **Internal drivers (preferences).** A certain ‘duality’ of motivations can be identified at the individual level. On the one hand, working time reduction has entered the agenda of workers and unions in mostly high-skilled and high-paid occupations, encouraged by several well-publicised four-day week trials (exploratory interviews, 2024; Eurofound, 2024). On the other hand, while the higher-paid knowledge workers can ‘afford’ to push for working time reductions, workers in low-skilled, low-wage jobs (prevalent in most service sectors) are often forced into involuntary part-time work or extra shifts and second jobs to keep up with the rising cost of living while wages remain stagnant (Autor et al., 2023).
- **External drivers (megatrends).** Firstly, slow economic restructuring towards knowledge and creative sectors (fostered by digitalisation and automation) increases employment in jobs that are more prone to working time reduction. Secondly, the COVID-19 pandemic provided a shock and a ‘wake-up call’ that accelerated the demands for working time reduction and flexibility. On the other hand, the sudden shift to remote work resulted in a blurring of the boundaries between work and personal lives, potentially causing extended working time (that is not fully captured in statistics; exploratory interviews, 2024). In addition, the cost of living crisis and the spike in inflation since 2022 have made it more difficult for many workers to reduce their working hours, and in some cases have created pressure for them to work more, especially in lower-wage sectors (Burchell et al., 2024).
- **Policy shifts and collective movements.** Political and policy action can spur working time reduction (including, for example, the cutting of a working week in France or the pilot project of a compressed four-day week in the Belgian public sector). Furthermore, in countries with well-established collective bargaining cultures, collective agreements tend to enforce and institutionalise shorter working time (exploratory interviews, 2024). On the other hand, in countries where collective negotiations are less prevalent the unions are losing organisational strength, and – effectively – workers lack the power to realise reductions in the working week; thus, their ability to secure cuts in working time might be compromised (exploratory interviews, 2024). Conversely, in some cases, recent policy changes were passed which go against the workers’ interests, including increasing the working week to six days (Greece) and extending working time to 12 hours a day to counter labour shortages (Austria) (exploratory interviews, 2024).

3. See: https://ec.europa.eu/eurostat/web/products-datasets/-/lfsq_ewhuis

4. Ibid.

IMPACTS

The shortening of working time tends to improve job quality and employee well-being, although some suggest that working time is not as important as other markers of job quality (including job satisfaction, work intensity, physical environment, etc.; exploratory interviews, 2024). Working time reduction is not without risks, though. It may lead to work intensification ('squeezing in' more work in a shorter time), which can negatively impact well-being. If cutting working hours is accompanied by pay cuts (e.g. for workers paid by the hour), this can increase the risk of in-work poverty (exploratory interviews; 2024). Furthermore, involuntary part-time work can have a pervasive and profound impact on both employee well-being and wage levels. Particularly in service sectors, voluntary or involuntary cutting of hours is more likely to lead to proportionately lower wages and, in consequence, in-work poverty and/or inferior quality and availability of services (e.g. insufficient time and resources for care workers to care for their service users due to understaffing; exploratory interviews, 2024). Though the rights of part-time workers to adequate remuneration have been recognised in the recent ruling of the Court of Justice of the European Union (CJEU), the vulnerable position of part-time workers remains a major concern⁵: Overall, balanced working hours seem key for worker well-being – both excessively long hours and (unwillingly reduced) short hours can have very negative impacts on employees (Brauner et al., 2020).

At the broader societal level, the normalisation of reduced working hours can enhance a more egalitarian distribution of employment. Working time policies can play an important role in providing the necessary space for training to prevent (further) workforce polarisation (Müller, 2023). Shorter work hours can also help young adults enter the job market and allow older workers to stay employed longer. For individuals with disabilities or reduced work ability, reduced hours can help the return to work and boost participation (Anttila et al., 2021). However, the persistent heterogeneity (including the gender gap and the risks of excessive or insufficient hours) can undermine the principles of an equal and inclusive society (exploratory interviews, 2024).

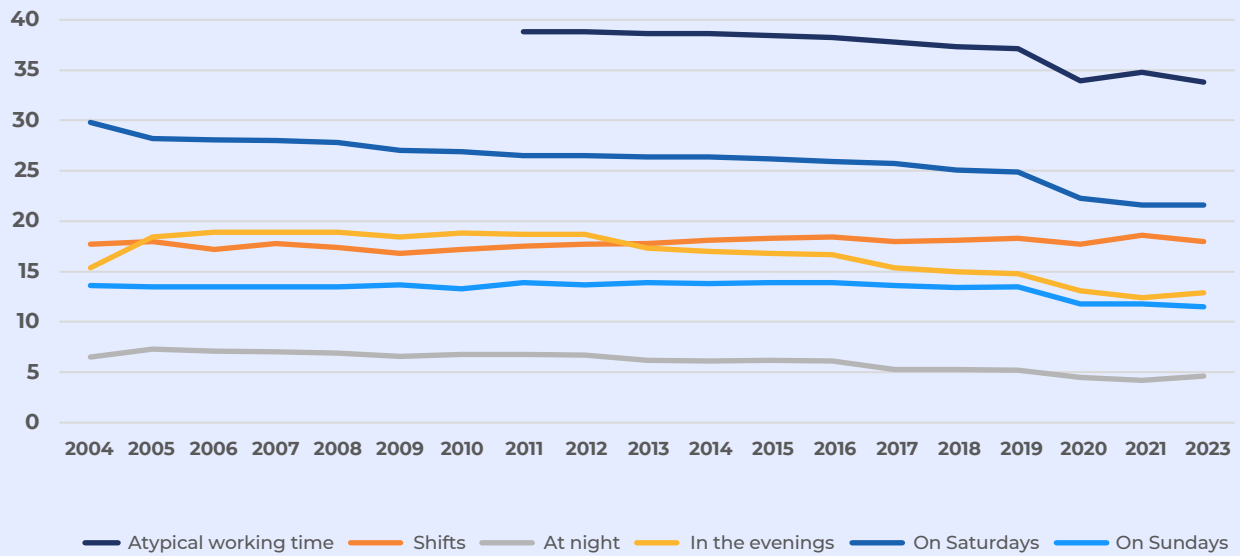
2.2 WORKING TIME ORGANISATION: TOWARDS DE-STANDARDISATION

TRENDS

Most 'conventional' measures of atypical working time (including the share of employees working at weekends, at night, and in the evenings) have been, on average, gradually decreasing over time (see *Figure 5* below). Employment with atypical working hours also declined sharply following the COVID-19 pandemic and has not since returned to pre-pandemic trends. One exception is the prevalence of shift work, which has stayed high (about 18% of workers in the EU work shifts) and has even increased slightly over the last decade (Anttila et al., 2021). The number of employees working at short notice is also relatively small (14% work at short notice at least several times a month), though quite a sizeable share work in their free time to meet work demands (almost a third do so at least several times a month; see *Figure 6* below).

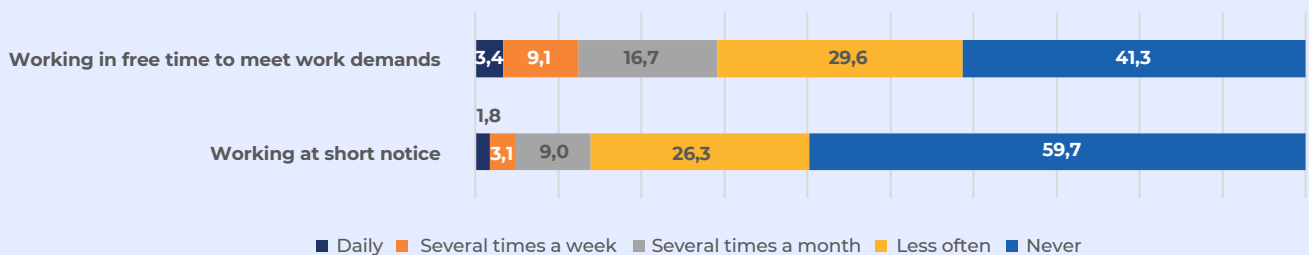
5. The CJEU ruled in 2024 that part-time workers are entitled to overtime compensation for hours worked beyond their contracted hours, even if those hours do not exceed the standard full-time schedule. The ruling explicitly prohibits less favourable treatment of part-time workers compared to full-time employees and highlights the potential for indirect gender discrimination, as part-time roles are often disproportionately held by women. See: European Court of Justice. (2024). Judgment of the Court (First Chamber) of 29 July 2024 on overtime pay for part-time workers. Joined Cases C184/22 and C185/22. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A62022CJ0184>.

Figure 5. Employment with atypical working time (% of total employment, EU27)



Source: Based on Eurostat data, indicators [lfsa_ewpshi⁶, lfsa_ewpnig⁷, lfsa_ewpeve⁸, lfsa_ewpsat⁹, lfsa_ewpsun¹⁰, lfsa_esegatyp¹¹].

Figure 6. Share of employees working at short notice and working in free time to meet work demands (% of respondents, EU27, 2021)



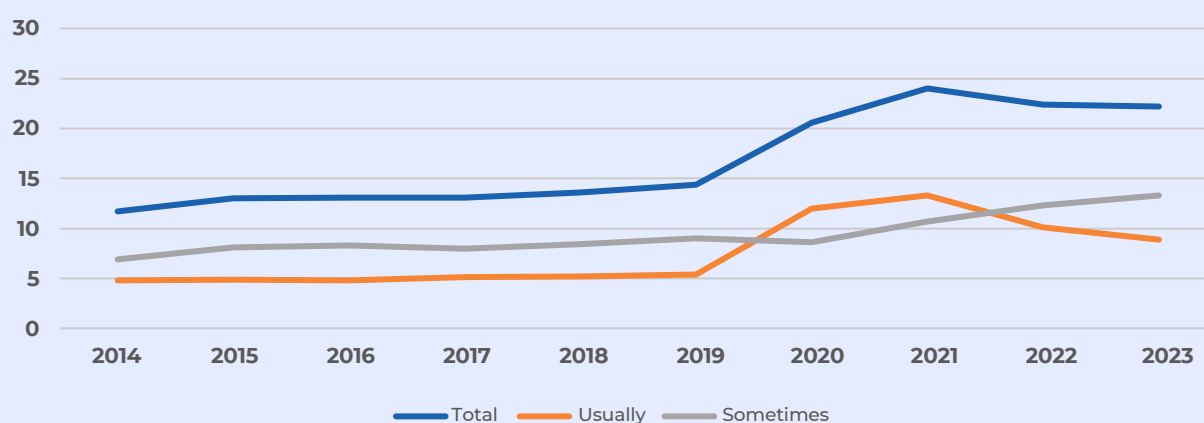
Source: Based on European Working Conditions Telephone Survey 2021 data.

There are two trends that have potentially contributed to the de-standardisation of working time and that may not be fully captured by the official statistics presented above.

6. See: https://ec.europa.eu/eurostat/databrowser/product/view/lfsa_ewpshi?lang=en
 7. See: https://ec.europa.eu/eurostat/databrowser/view/lfsa_ewpnig/default/table?lang=en
 8. See: https://ec.europa.eu/eurostat/databrowser/view/lfsa_ewpeve/default/table?lang=en
 9. See: https://ec.europa.eu/eurostat/databrowser/product/view/lfsa_ewpsat?lang=en
 10. See: https://ec.europa.eu/eurostat/databrowser/view/lfsa_ewpsun/default/table?lang=en
 11. See: https://ec.europa.eu/eurostat/databrowser/view/lfsa_esegatyp/default/table?lang=en

First, there has been a notable surge in remote work in the EU, largely in response to the COVID-induced lockdowns (see *Figure 7* below). Post-pandemic, remote or hybrid work seems to have become the ‘new normal’ (at least in the knowledge sectors)¹², and a significant share of workers continue to work from home for at least part of the time. Against this backdrop, research conducted by Eurofound (2022b) highlights a general trend towards remote work that is project-based, fragmented, on-demand, and performance-related (see also Abendroth & Reimann, 2018). Furthermore, the boundaries between work and personal life are often blurred for remote and hybrid workers (Leclerc et al., 2022). These working patterns combined may often result in the expectation of permanent reachability and availability and facilitate the ‘always-on’ culture (Messenger & Gschwind, 2016). For example, results of the 2021 European Working Conditions Telephone Survey indicate that 50% of workers who can perform all or most of their tasks remotely worked additional hours, which is much higher than workers who can perform some of their tasks (27%) or none of their tasks remotely (23%). Survey data from several Member States reaffirms the perceived expectation of availability and/or reported instances of work outside regular hours (see European Commission, 2024).

Figure 7. Employed persons working from home (% of total employment, EU27)



Source: Based on Eurostat data, indicator [lfsa_ehomp].¹³

The second trend that might have contributed to the somewhat ‘hidden’ de-standardisation of working time is the rise of non-standard forms of work and employment (exploratory interviews, 2024). These non-standard arrangements can include employee sharing, job sharing, voucher-based work, portfolio work, platform work, interim management, collaborative employment, casual work, and ICT-based mobile work (Eurofound, 2020a). These forms of work introduce new dynamics in working time management, offering variable degrees of autonomy and/or unpredictability depending on customer demand and the expectations set by algorithmic task assignment (Eurofound, 2020a). While many of these forms are considered marginal phenomena, they have gained prevalence across the EU in recent years (Eurofound, 2020a; Huws et al., 2018; Pesole et al., 2019). For instance, the European Commission estimates that in 2021, over 500 digital labour platforms were employing more than 28 million people.¹⁴

12. Eurofound (2020b) estimates that approximately 37% of employment in the EU was ‘teleworkable’ in 2020.

13. See: https://ec.europa.eu/eurostat/databrowser/product/view/lfsa_ehomp?lang=en

14. European Commission (2021). Executive summary of the impact assessment report accompanying the Proposal for a Directive of the European Parliament and of the Council on improving working conditions in platform work. SWD/2021/397 final. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A52021SC0397>.

DRIVERS

These trends in de-standardisation of working time are largely driven by the underlying (but not inevitable) patterns of economic restructuring towards service and creative sectors and economic or labour market dynamics that favour competitiveness (including through fragmentation of work). In particular, the amount of shift work has remained high due to the increasing role of the service sector – shift work is particularly common in the social and health care sector, hospitality, retail, cleaning, and security (Anttila et al., 2021). In recent decades, non-standard contracts have become increasingly common strategies used to address staff and workload shortages or to complement existing employment at different levels of intensity and frequency, especially at times of economic shocks or uncertainty (Huws et al., 2018; Pesole et al., 2019). Lastly, the pandemic-induced lockdowns resulted in a sharp increase in remote and hybrid work, altering work organisation practices and working conditions (e.g. Eurofound, 2022b).

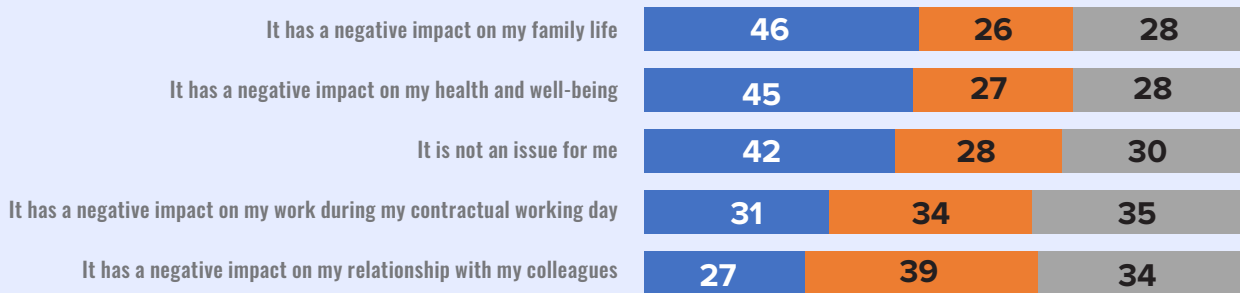
IMPACTS

The impacts of the de-standardisation of working time depend on the precise nature of work organisation. If flexibility implies autonomy that enables workers to adjust (to a degree) their working time to their life demands, this can lead to better work-life and work-family balance (exploratory interviews, 2024). For example, in 2021, 74% of workers found it very easy or fairly easy to arrange to take an hour or two off during working hours to take care of personal or family matters, compared to 66% of workers in 2015 (Eurofound, 2022a). A similar share of workers said they could fit working hours in with family and social commitments well (48%) or very well (34%) in 2021. Some studies have connected these improvements in work-life balance with the incidence of remote work (Makridis, 2023), though noting, once again, the structural imbalances: the benefits were concentrated among males, singles, and those without children.

Nevertheless, the notion of ‘working time flexibility’ can also create a false sense of autonomy for employees which masks employers’ control over working hours and their reliance on demand and short-notice scheduling (exploratory interviews, 2024). This ‘flexi-vulnerability’ can lead to workers being constantly on call, unpredictable schedules, overtime, and overall job precarity (López-Martínez, 2023). For example, seven in ten cleaners who work shifts other than the day shift do so because they have no choice (e.g. because they need the higher wages of non-day shifts to make ends meet, or because day shifts are unavailable to them). In turn, these shifts during unsocial hours conflict with their social and family lives as well as their mental and physical health (UNI Global & UNI Europa, 2023).

In either scenario, evidence suggests that employees can benefit more from working time flexibility when they control the time of work within a given time frame than from full working time autonomy with unconstrained work schedules (Lott, 2020; exploratory interviews, 2024). The latter can lead to over-connection and work intensification, especially considering the usually performance-oriented work culture in these settings. This can result in work overload, burnout, anxiety, and depression, which can have a negative impact on workers’ personal and family lives (EU-OSHA, 2022; see also Figure 8 below). Mazmanian et al. (2013) have coined the term ‘autonomy paradox’ to describe this phenomenon of permanent digital connectivity. Therefore, some degree of ‘boundary-setting’ might be beneficial in many cases to mitigate the risk of self-exploitation and ensure some predictability and regularity of working time (exploratory interviews, 2024).

Figure 8. Perceived impact of over-connection on health and well-being (% of respondents, 2022)



Source: Based on Right to Disconnect Survey 2022 data.

3. SECTORAL DEEP-DIVES: WORKING TIME IN THE SERVICE SECTORS

3.1 CARE

The Care sector is one of the largest sectors in Europe. Services in the sector encompass a wide range of tasks and interactions aimed at addressing the physical, mental, and emotional well-being of people of different ages and abilities (ILO, 2018). Care work is delivered in varying settings, both public and private, including health and residential care, home care, long-term care, and social care. Currently, approximately 3% of Europe’s workforce—equivalent to 6.2 million people—is employed in the Care sector. Notably, 88% of these workers are women (Cedefop, 2023a).

Care is essential for supporting the health of society. The importance of the Care sector was particularly recognised during the COVID-19 pandemic when care workers faced heightened health risks yet continued to serve the health needs of society. More broadly, the EU’s rapidly ageing population presents significant political and societal challenges in the coming years, with profound implications for the Care sector. Demographic changes are shrinking the pool of potential care workers while simultaneously increasing the demand for care services. It is projected that by 2035, over half of the current workforce will need to be replaced due to retirement (Cedefop, 2023a).

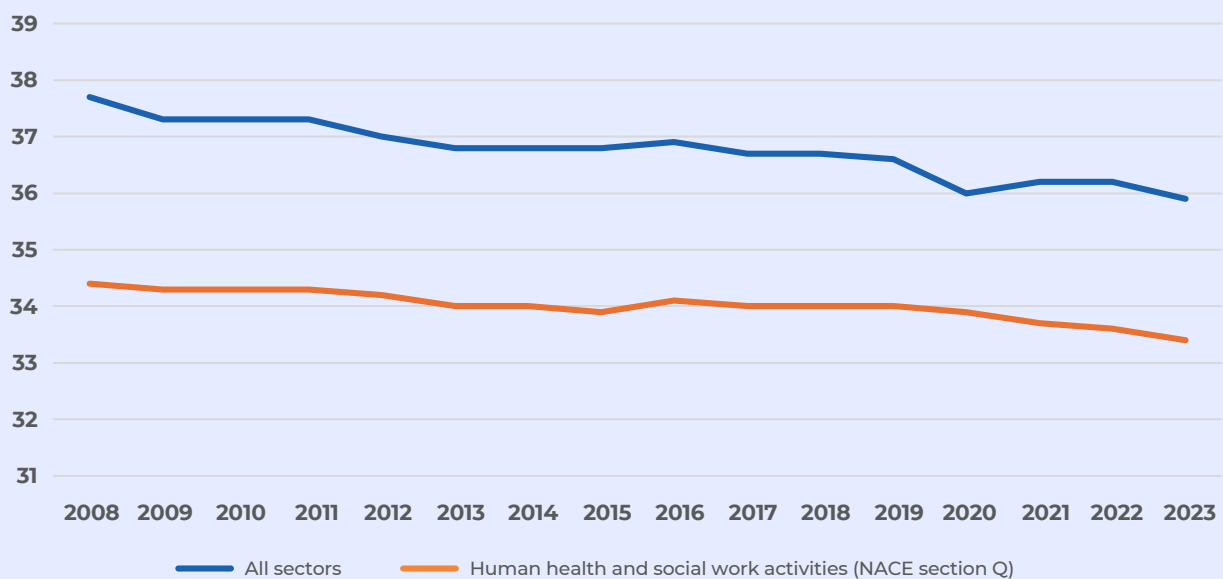


3.1.1. KEY TRENDS AND PREVAILING WORKING TIME MODELS

Workers in the Care sector have consistently worked fewer weekly hours than the cross-sectoral average. During the 2010s, this difference was nearly three hours per week, narrowing slightly to just over two hours in 2023, as illustrated in *Figure 9*. Several factors contribute to this trend of shortening working time. Care work is physically and emotionally demanding, and reductions in working time have historically been implemented, particularly for older workers, to mitigate the adverse effects of job-related stress (e.g. Simoens et al., 2005). Additionally, the sector has a high prevalence of part-time employment, resulting in lower average working hours.

Unlike other sectors, the COVID-19 pandemic and associated workplace closures did not decrease working hours in the Care sector. On the contrary, the role of care workers became even more critical during this period. As a result, working hours remained stable as care workers continued to perform their essential duties throughout the pandemic.

Figure 9. Average number of actual weekly hours of work in main job



Source: Based on Eurostat data, indicator [lfsa_ewhan2¹⁵].

15. See: https://ec.europa.eu/eurostat/databrowser/view/lfsa_ewhan2/default/table?lang=en

Despite persistent understaffing in many European countries, a substantial proportion of care workers are employed on **part-time contracts**. In the EU, as many as 40% of workers in the Care sector are working with either part-time or temporary work contracts, compared with the EU average of 19% (Milos & Bergfield, 2022). However, the distribution of work hours varies significantly across national Care sectors. For example, in Austria, 70–75% of care workers work part-time. According to an Austrian interviewee, “*Companies prefer the flexibility of part-time workers. They can be scheduled more easily than full-time workers*” (Interview 6, 2024). Similarly, in Spain, the Care sector is predominantly comprised of part-time jobs, a structure that poses challenges for workers. For instance, much of the work in Spain’s mobile Care sector is concentrated in the early part of the day, which limits opportunities for full-time employment (Interview 9, 2024). Part-time work is less prevalent in Belgium, at 46% (Interview 7, 2024). While part-time work can be a personal choice, some employers in Belgium also prefer this arrangement to simplify scheduling. As one interviewee explained, “*In elderly care, mornings are typically busy with activities like helping residents with breakfast. Having one worker cover four hours in the morning and another cover four hours in the evening is easier for employers than scheduling an eight-hour shift*” (Interview 7, 2024). Lastly, part-time work in Czechia’s Care sector is rare, driven largely by significant staff shortages that necessitate fewer workers working longer shifts (Interview 10, 2024).

Many parts of the Care sector operate on a 24/7 basis due to the varying and complex needs of the people being cared for. While workers are not always required to be physically present, they are frequently expected to remain available. Working around the clock is managed with various forms of **shift work**, which can be undertaken on both part-time and full-time contracts, including:

- **Split shift models** in which working shifts are interrupted by a period of unpaid time of varying duration, ranging from one hour to four hours or more. Such models are common in the home care and mobile care sectors (Sardadvar & Reiter, 2023). This type of scheduling is adapted to the needs of the people receiving care, which are typically concentrated in the mornings and evenings (Interview 7 & 9, 2024). This type of arrangement is usually preferred by the clients as it minimises the number of caregivers they interact with; for example, the same care worker who assists them in the morning will also provide care in the evening (Maurits, de Veer, & Francke, 2014).
- **Rotating shift patterns and compressed shifts**, which are often used in the Care sector: the shift schedule can vary in terms of the number of consecutive days worked, with an uneven distribution of working hours across a set period (Interviews 6-8 & 10, 2024). Shifts are usually 8-12 hours long. For example, in Czechia, unevenly distributed working hours are particularly prevalent in full-time contracts. Workers alternate between ‘long weeks,’ consisting of five working days followed by two days off, and ‘short weeks,’ comprising two working days and five days off (Interview 10, 2024). According to Czech regulations, care workers are allowed to refuse overtime during their ‘short week.’ However, as one interviewee noted, “*Either out of solidarity with their coworkers or because they feel a responsibility toward the clients, they very often agree to take on these extra shifts*” (Interview 10, 2024).

3.1.2. IMPACTS ON WORKING CONDITIONS AND GOOD PRACTICES

THE INTERPLAY OF PART-TIME WORK, LOW WAGES, AND OVERTIME

Part-time work is highly prevalent in the Care sector. While part-time roles can offer flexibility, they are largely involuntary in the Care sector, with many workers expressing the need to increase their working hours and highlighting difficulty in finding full-time employment. Involuntary part-time work is often associated with job insecurity, financial instability, and adverse health impacts (Merino-Llorente & Somarriba, 2020). This is especially true for women, who are more likely to work part-time than men (Eurostat, 2022). In the Care sector, these challenges are amplified by the persistent issue of low wages, often compelling care workers to juggle multiple jobs, extend their shifts, or take on overtime (Interviews 7, 8 & 10, 2024). In Eastern and Southern European regions, wages in the Care sector often fail to adequately reflect the nature of the work, making working time reduction a secondary concern for many care workers.

The interplay between low wages and the prevalence of part-time work represents a significant challenge in the Care sector, with the two issues reinforcing one another. Workers face financial instability due to insufficient earnings from part-time roles, while the sector's reliance on part-time contracts limits opportunities for full-time employment. For instance, in Spain, addressing this challenging dynamic has become a critical focus, with efforts aimed at encouraging employers to offer full-time positions as a standard practice. Although efforts to make this a compulsory provision through collective bargaining have not yet been successful, promoting full-time employment remains a key priority to improve both financial security for workers and operational stability within the sector (Interview 9, 2024).

While some workers face involuntary part-time work, high rates of overtime are common, too, driven by the need to earn a sufficient income—something that can be unattainable even with full-time hours. As one representative of the Care sector in Poland expressed, the priority is not to reduce working hours but to secure stable, full-time employment that provides a dignified standard of living: *“In the Care sector, we’re not thinking about reducing hours below the basic full-time workload. We would be glad just to work the standard full-time hours [...] without needing to take on a second job after work”* (Interview 8, 2024).

In some European countries, overtime hours in the sector are regulated through a system of balancing extra hours of workers over a specified period. There is a growing trend among employers towards minimising the costs of overtime by extending the period over which overtime is averaged and remunerated. For example, in Belgium, this system had previously required overtime to be paid within a three-month period. However, the regulation has since been extended to an annual framework. The impact of this provision is twofold. On the one hand, it allows employers to increase working hours over high-intensity periods while reducing hours over low-intensity periods. By averaging overtime over an extended annual timeframe, it helps them lower staffing costs by minimising the need for costly overtime payments. Workers, on the other hand, are frequently working overtime yet struggle to reclaim their extra hours (Interview 7, 2024).

Similarly, employers in the Care sector in Czechia rely on long balancing periods to manage overtime costs, which leads to significant challenges for workers (Interview 10, 2024). Under the Czech Labour Law, employers are required to pay a 25% surcharge on the hourly rate for overtime, making it rather costly. To avoid this expense, employers calculate average working hours over extended balancing periods, sometimes up to 50 or 56 weeks, which allows them to offset overtime hours during peak demand periods by reducing shifts later. Care workers typically plan their schedules and lives over the long term, but during critical times such as holidays or peak seasons, they are required to work significantly more hours. These extra shifts are not remunerated as overtime but instead balanced out by cutting hours in quieter periods. This results in fluctuating monthly incomes, making it difficult for workers to meet their financial needs, particularly in the context

of high inflation (Interview 10, 2024). Additionally, overtime frequently pushes workers' actual working hours far beyond the limit of officially contracted hours. Some care workers, including nurses, take on additional shifts to supplement low wages, often logging as many as 220 hours per month, placing them at serious risk of exhaustion and burnout (Interview 10, 2024).

Box 1. Good practices addressing low wages and working time unpredictability

Collective agreements:

- **Higher wages and better benefits (Luxembourg).** From January 2025, care workers in Luxembourg are to see an increase in wages, along with receiving a one-time bonus and a holiday bonus. Both bonuses will be adjusted proportionally based on the number of hours worked. This newly established collective bargaining agreement, effective for three years, aims to bring greater cohesion among employees in Luxembourg's Care sector. Previously, hospital nurses—represented by separate trade unions—earned salaries approximately 17% higher than their counterparts in the Care sector (Luxembourg Times, 2024).
- **Wage increases and flexibility bonus (Austria).** As of January 2025, minimum and actual salaries, along with allowances and supplements, in Austria's private health and social sector are to increase by 4%. Among the adjusted supplements, the flexibility surcharge—which compensates employees for stepping in at short notice—will have the most significant impact. The smaller flexibility surcharge will be set at €25, while the larger surcharge will rise to €50 (UNI Europa, 2024).
- **Automatic wage adjustment to account for inflation (Belgium).** The system automatically adjusts wages to reflect inflation, without requiring negotiation between employers and employees. In the Belgian Care sector, the adjustments occur swiftly; for example, if inflation increases by 2%, wages in the sector are typically adjusted by the same percentage in the following month. This ensures that care workers' wages remain aligned with living costs, offering them a level of financial stability that is less common in other European countries.

Collective agreements:

- **Ban on zero-hour contracts (Netherlands).** The legislation has been adapted to ensure that workers outside the traditional definition of part-time employment, such as workers on zero-hour contracts or minimum–maximum hour contracts, are adequately protected. Zero-hours contracts have been replaced by fixed basic contracts which are required to state explicitly a minimum number of working hours.

WORK INTENSITY

It is estimated that Europe faced a shortage of approximately 1.6 million health and social care workers in 2024, a figure projected to grow to 4 million by 2030, including 1.1 million social care workers and assistants (Zapata et al., 2024). Understaffing in the Care sector has far-reaching consequences, including increased overtime and workloads for care workers, significant physical and mental strain, and compromised patient safety. Caregivers consistently report that a realistic and balanced worker-to-service user ratio is essential to their perception of job quality (Interviews 9 & 10, 2024).

Staffing challenges impact care workers' working time and working conditions directly. For example, a critical issue noted in Czechia is the inadequacy of rest breaks during shifts. While workers are entitled to a 30-minute lunch break and two 15-minute breaks during a 12-hour shift, these breaks are frequently not taken due to high workloads and understaffing. Many workers report either skipping breaks or spending them in service-user areas, unable to fully disconnect from their duties (Interview 10, 2024). This failure to provide proper breaks not only violates labour laws, which stipulate that breaks should be free from work-related obligations, but also results in workers effectively providing unpaid labour during supposed rest periods. With insufficient personnel to cover shifts, opportunities for workers to recoup their additional hours are limited. This cyclical problem exacerbates workload pressures and undermines workers' financial stability, as their incomes fluctuate unpredictably (Interviews 7, 8 & 10, 2024).

There is a notable gap between regulatory staffing requirements and actual practices. For example, in the private Care sector in Poland, care institutions must meet specific requirements for staffing levels, qualifications and infrastructure in order to secure funding from the National Social Fund system. While companies adhere to such standards on paper, in practice, staffing levels are falling short, with an insufficient number of workers on shifts due to absences such as sickness, leaving significant gaps unaddressed by employers. This discrepancy is seldom identified during inspections, as institutions can present schedules and documentation that appear compliant, masking the reality of chronic understaffing (Interview 8, 2024). In such contexts, stricter regulations and the establishment of effective oversight mechanisms are needed to ensure that staffing requirements are both met and maintained in practice, not just in documentation.

Additionally, labour shortages are contributing to a concerning trend in the Care sector toward lowering qualifications (as a response to address workforce shortages), which risks undermining the quality of care. Employers can fill staffing gaps by hiring less-qualified workers or those on interim or flexi-job contracts for limited hours (Interview 7, 2024). While this approach can provide temporary relief, it can result in mistakes due to a lack of familiarity with patients' individual needs. Similarly, while self-employed care workers may have the required qualifications, their inconsistent contact with clients limits their ability to provide personalised, informed care. Regular staff, who develop ongoing relationships with clients, are better equipped to understand patients' histories and provide continuity in care – an essential factor in elder care, where patients may struggle to communicate their needs, and in childcare, where consistent relationships are critical for development.

Box 2. Good practices addressing understaffing

Projects and guidelines:

- **Generic compass: Working together on quality of life (Netherlands).** This initiative is the start of the reorganisation of home-based care in the Netherlands, aimed at preventing this sector from becoming overwhelmed by the rising demand for care in an ageing population. This approach places more emphasis on preventative measures, focusing on what individuals and communities can manage independently, and tailoring care to fit those capacities. By transferring more decision-making power to individuals, this strategy enhances their quality of life while aiming to ensure that available care resources are utilised as effectively as possible (Zorginstituut Nederland, 2024).
- **EMPROVE: EMpowering PROfessional RelatiVEs in Europe (EU).** The project seeks to address the ageing of European society and the growing demand for social services by supporting caring professions together with families caring for the elderly. Within this broad European scenario, the EMPROVE project is an innovative training path for people who would like to obtain the skills of a Geriatric Care Manager (also called a Professional Relative). In this role, professionals combine holistic competencies to help families efficiently navigate the ageing process of their loved ones, ensuring they can access the most appropriate resources available.
- **Employment model for family carers (Austria).** Since October 2019, Burgenland has developed a model which permits family carers to be hired as home carers. The carers must be physically, health-wise and personally suitable for the job. In addition, basic training with 100 theory units is mandatory, unless they have already completed training in the Care sector. The employment is organised by Pflegeservice Burgenland GmbH (PSB), a subsidiary of Soziale Dienste Burgenland, and enables relatives to care for their family members at home while being fully insured and supported by the province.

WORKLOAD AND JOB DEMANDS

Care work has long been recognised as a physically, mentally, and emotionally demanding occupation, and job quality in the sector is increasingly perceived to be deteriorating, particularly for care workers burdened with overwhelming workloads and unsustainable schedules (Interviews 8-10, 2024). The challenges in the Care sector are closely linked to worker-to-service user ratios, which directly impact both service quality and working conditions. Insufficient ratios result in workers having too many clients to care for, leaving little time to provide proper attention and quality service (Interviews 9 & 10, 2024). For instance, in Czechia, employers often suggest an optimal ratio of 12 clients per caregiver, while the reality frequently exceeds 20 clients per caregiver, sometimes many more (Interview 10, 2024). This disparity is particularly problematic given the intensive nature of the work, as many clients require substantial physical and emotional support. Time pressure forces workers to rush through their tasks, further diminishing the standard of care. Compounding this issue are long waiting lists for access to services. To accommodate more users, the system often reduces the time allocated per individual, increasing the workload for staff while limiting the time they can spend with each user (Interview 9, 2024).

The mental health impact of such working conditions is particularly alarming, with significant proportions of Personal and Household Services (PHS) workers reporting stress, anxiety or burnout (PHS Social Partners, 2024; ILO, 2022). Notably, 50% of those working 40 hours or less per week attribute mental health issues to their jobs, rising to 65.8% among those exceeding 40 hours (PHS Social Partners, 2024). These pressures are further exacerbated by administrative burdens, chronic underfunding, and resource shortages—challenges that were intensified by the COVID-19 pandemic, which introduced additional workloads and responsibilities (Sigurdsson, 2021). Research indicates that women, younger workers, and parents of dependent children face heightened risks of psychological distress, a critical concern given that women comprise the vast majority of the European Care sector workforce and are predominantly in patient-facing roles (ILO, 2022). The disproportionately high prevalence of mental health issues among younger workers also raises questions about the sector's future resilience and sustainability, highlighting the urgent need for systemic changes to support the workforce and address these compounding challenges.

Box 3. Good practices addressing workload and job demands

Working time models:

- **The 7/7 work-time model (Germany).** The model allows nursing staff to work seven consecutive 10-12 hour shifts with extended breaks, followed by a full week off. This model reduces the frequency of shift changes, helps staff manage work-life balance, reduces absenteeism, and supports better continuity of care for patients. Due to its intense working schedule during the working week, it has some downsides for single-parent households. Still, the model is efficient in providing workers with more rest than the traditional 3-shift/day model that is often present in various Care jobs in Germany. Taking just one week of leave between the 'off' weeks gives the carer the option to benefit from a three-week break (Deutsches Pflegeportal, n.d.).

Collective agreements:

- **Additional personal days from the age of 35 (Belgium).** The age-based leave collective agreement in Belgium's Care sector acknowledges the increased physical and mental demands faced by older care workers and is aimed at reducing working time for older employees by providing additional rest days. From the age of 35, employees receive five extra days of annual leave, increasing to 12 days for those aged 45-49, 24 days for those aged 50-54, and 36 days for workers over 55 – equivalent to three additional days off per month (Interview 7, 2024; ACLVB, n.d.).

3.1.3. POLICY IMPLICATIONS

Summing up, the key challenges and priorities in the Care sector from the workers' perspective have been identified as follows:

- **Low wages and overtime.** The issue of working time in the Care sector cannot be viewed in isolation, as it is deeply interconnected with other labour challenges, particularly low wages. The two are intrinsically linked, as low pay often compels workers to extend their hours, take on overtime, or even take additional jobs, simply to earn a living wage. This reliance on overtime as a financial necessity underscores the broader systemic issues within the sector, where inadequate wages drive unsustainable working patterns and perpetuate workforce strain. Addressing these challenges requires an approach that simultaneously tackles wage inadequacy and workload pressures. Without systemic reforms, the sector will continue to face high rates of worker burnout and dissatisfaction, undermining its long-term sustainability.
- **Staff shortages and high workloads.** The shortage of workers in the Care sector across the EU presents a fundamental challenge that drives excessive workloads and contributes to additional physical and mental strain in an already high-intensity work environment. Staffing deficits directly impact the issue of working time, as existing regulations and collective agreements intended to ensure rest periods, both during and outside of work, are frequently undermined by inadequate staffing levels. Many workers in this sector are drawn to care work because of intrinsic qualities such as empathy and a commitment to supporting others that care work requires. Yet, despite the critical role they play in maintaining societal health and well-being, care work remains undervalued and underpaid in many European countries. Ensuring adequate staffing is essential for delivering the high-quality care that service users need and deserve, as well as for making a career in the Care sector sustainable and rewarding for those who dedicate themselves to this indispensable work.
- **Part-time work** can help workers balance professional obligations with family responsibilities, a need particularly evident among those with caregiving duties, of which a disproportionate number are women. However, the high prevalence of part-time work in the Care sector is not always the employee's choice. The impacts of involuntary part-time work are multifaceted and affect workers' financial security, career opportunities, work-life balance, and psychological and emotional well-being. Such dynamics can also reinforce structural inequalities in the labour market. Improving access to full-time positions while ensuring that part-time work is of high quality and equitable would allow for the reduction of the disparities in financial security, benefits and career progression between part-time and full-time workers. Normalising such standards can promote fairness and enhance the attractiveness of part-time roles within the workforce.

Overall, the challenges surrounding working time in the Care sector are deeply interconnected with broader systemic issues, including low wages, staff shortages, involuntary part-time work, and intrinsic emotional, psychological and physical work demands. These issues collectively perpetuate unsustainable working conditions, financial insecurity, and workforce dissatisfaction, undermining the sector's long-term sustainability. The ageing population across the EU poses a significant dual challenge for the Care sector. On one hand, the growing proportion of older individuals leads to an increasing demand for care services, as older populations typically have more complex and long-term needs. On the other hand, this demographic shift exacerbates existing labour shortages within the sector, as the current workforce struggles to keep pace with rising demand (Milos & Bergfeld, 2022). This imbalance between supply and demand in the Care workforce creates a vicious cycle: insufficient staffing levels lead to overburdened workers, higher rates of burnout, and increased turnover.

A systemic and holistic approach is needed to tackle these deeply entrenched and intertwined challenges. Fair wages, improved staffing levels, and equitable working conditions to create a sustainable and attractive Care sector must be prioritised. This includes ensuring the availability of full-time positions as well as part-time roles that are financially and professionally rewarding to mitigate work-related burnout and dissatisfaction. By truly valuing the critical contributions of care workers, the sector can better support its workforce and meet the growing demand for high-quality care, ultimately benefiting both workers and service users alike.

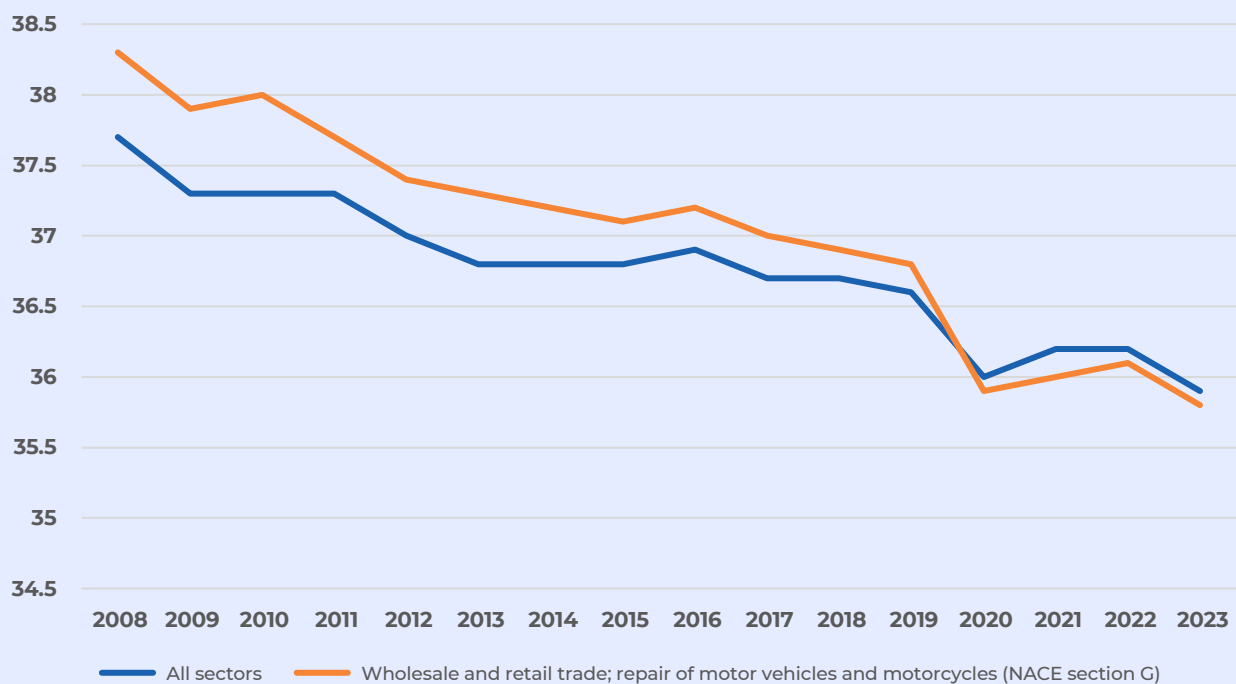
3.2 COMMERCE

The Commerce sector employs around 13.5% of the EU workforce¹⁶. It encompasses retail, wholesale, and e-commerce in workplaces such as supermarkets, warehouses, distribution centres, fast-fashion stores, and more. It includes roles such as sales assistants, cashiers, customer service representatives, logistics workers, inventory managers, and employees engaged in online retail operations. The sector is dynamic and demand-driven, with a significant portion of jobs being part-time, casual, or seasonal.

3.2.1. KEY TRENDS AND PREVAILING WORKING TIME MODELS

Working time in the Commerce sector has steadily declined over the past decade, as shown in *Figure 10* below. Historically, average working hours were slightly higher than the cross-sectoral average, though they were converging even before the COVID-19 pandemic. This pre-pandemic trend likely stemmed from structural changes in the sector, such as the increasing prevalence of part-time work due to the growing fragmentation of work to meet fluctuating consumer demand (Eurofound, 2014). Following COVID-19, the trend of decreasing average working hours accelerated, and working time in Commerce eventually fell slightly below the cross-sectoral average. The pandemic's impact on consumer behaviour and the rise of e-commerce might have further shifted work patterns in the sector, bringing the average working hours in Commerce closer to those in other industries.

Figure 10. Average number of actual weekly hours of work in main job



Source: Based on Eurostat data, indicator [lfsa_ewhan2¹⁷]

16. Source: Eurostat [lfsa_egan2]. https://doi.org/10.2908/LFSA_EGAN2

17. See: https://ec.europa.eu/eurostat/databrowser/view/lfsa_ewhan2/default/table?lang=en

The Commerce sector in the EU has undergone significant changes over recent decades, largely influenced by the emergence of new business models, regulatory shifts, and the growth of e-commerce. These trends have not only reshaped the structure of the sector but have also fundamentally influenced working time models.

A key driver of change has been the **adoption of new business models aimed at increasing efficiency and reducing costs**. Since the early 2000s, technological advancements, such as automated inventory management systems and self-service checkouts, have transformed retail operations and changed the scope and nature of tasks performed by staff in many workplaces. Technological advancements, combined with cost competition pressures and the consolidation of large-scale retailers, have also driven the adoption of efficiency-driven 'just-in-time' models. This approach integrates technology and streamlined logistics to align inventory and staffing with demand, minimising waste, maximising productivity, and relying on low-wage flexible labour (Bernhardt, 1999). Similarly, practices such as 'precision staffing', where workers are scheduled in alignment with demand predictions to minimise labour costs, have become a central focus for employers and are now actively utilised across the sector (Interview 12, 2024; Jany-Catrice & Lehndorff, 2002). Recently, with developments in AI, precision staffing has advanced further, enabling employers to tailor schedules more precisely to business needs and even assign specific tasks to workers in real time (Interview 15, 2024; World Economic Forum, 2023). While these models have improved operational efficiency for employers, they have also fragmented working time and increased scheduling unpredictability for employees (Mrozowicki et al., 2018; UKCES, 2015).

Regulatory changes, particularly **the liberalisation of shop opening hours**, have also fundamentally influenced the distribution of working time in the sector. Over the past two decades, laws permitting extended hours have gradually been introduced across Europe (Interviews 1-5, 2024). This trend accelerated after the 2008 economic crisis as a policy response to address rising unemployment and stimulate economic activity (Eurofound, 2012). These changes have significantly altered the nature of work in the sector, with employees now often required to cover longer operating hours, including evening shifts, night work, and Sunday work, placing additional demands on workers. In particular, the normalisation of Sunday work remains a contentious issue, as it prioritises consumer convenience and economic considerations over worker well-being and rest (Eurofound, 2014; Interviews 1-3 & 5, 2024).

Last but not least, the COVID-19 pandemic accelerated **the growth of e-commerce**, further transforming the sector (Ariker, 2021). Lockdowns and social distancing measures drove consumers to online platforms, resulting in the acceleration of the shift in shopping habits. Surveys indicate that many consumers who adopted online grocery shopping during the pandemic intended to continue using these services, reflecting the growing integration of e-commerce into daily life (Ariker, 2021). This shift has had mixed implications for the labour market. While e-commerce has created new roles in warehousing, logistics and delivery, it has also accelerated the decline of traditional in-store retail positions already affected by automation (Americo & Veronico, 2018; Airen, 2024). Although the emerging roles in e-commerce offer new opportunities, many workers lack the necessary skills to effectively fill these vacancies, resulting in a mismatch between workforce supply and industry demands (UKCES, 2015; Americo & Veronico, 2018). Additionally, e-commerce is reshaping working time patterns, for instance, increasing demand for night shifts to accommodate tasks such as overnight logistics and shop preparation (Interview 14, 2024).

Overall, stemming from these key developments, the Commerce sector currently relies on the following main working time models:

- **Dominance of in-person and shift-based work:** The Commerce sector remains heavily reliant on in-person and shift-based work, even as e-commerce grows. While COVID-19 highlighted the potential for remote work in some aspects of Commerce, over half of employees (52%) continued working exclusively at their employer's premises during the pandemic (Eurofound, 2022). Most roles require a physical presence to serve customers, manage inventory, and maintain operations, with shifts carefully aligned with business hours and consumer demand (Eurofound, 2012; Interview 15, 2024). Meanwhile, shift work has increased over time, with the highest prevalence among younger workers (Eurofound, 2012). Shifts frequently extend into evenings, weekends and public holidays, particularly during peak sales periods or holiday seasons, and sometimes can be split (Eurofound, 2012; Interview 15, 2024). In some cases, workers may also be scheduled for split shifts, which divide their working day into two separate periods with a significant break in between (Zeytinoglu et al., 2004).
- **Prevalence of part-time and casual work:** Part-time work is a defining feature of employment in the Commerce sector, particularly in retail, where it attracts groups such as caregivers, students, and those seeking flexible schedules or secondary income (Jany-Catrice & Lehndorff, 2002; Jany-Catrice & Lehndorff, 2005; Zeytinoglu et al., 2004; Brandi et al., 2023; Eurofound, 2012; Interviews 13 & 14, 2024). Involuntary part-time work is also widespread, especially among women, with many part-time employees seeking additional hours but unable to secure them (Jany-Catrice & Lehndorff, 2005; ETUC, n.d.; Interview 11, 2024). Employers often favour hiring additional part-time staff over extending existing contracts to maintain flexibility in meeting fluctuating demand (Jany-Catrice & Lehndorff, 2002; Interview 14, 2024). Compounding this issue is the prevalence of poor scheduling practices, where part-time workers are often called on to work more hours than are formally stated in their contracts. While employees may technically have the right to refuse these additional hours, they are frequently pressured to adapt to schedules that fail to realistically account for the actual hours needed from the start (Interview 12, 2024). Lastly, casual work, typically part-time and on-call, is also prevalent, allowing employers to address short-term needs, such as seasonal peaks or unexpected staffing gaps (Eurofound, 2012; Zeytinoglu et al., 2004; Interview 14, 2024).
- **Employer-controlled scheduling with limited worker autonomy:** In the Commerce sector, scheduling is predominantly determined by employers, with minimal input from workers. Hours are allocated based on business needs, leaving employees little say over their working time or even their designated days off (Interviews 1 & 5, 2024). Increasingly, these schedules are determined—entirely or partially—through algorithmic management tools. This only exacerbates the issue of workers not being able to contest their schedules with store managers, who no longer have decision-making authority in this process. For workers, this phenomenon is referred to as 'passive flexibility', where flexibility is primarily imposed on workers to meet fluctuating business needs (Jany-Catrice & Lehndorff, 2002). Related to the point above, employers increasingly rely on part-time contracts to cover fluctuating demand and extended hours (Jany-Catrice & Lehndorff, 2002; Interviews 1-5, 2024). Specifically, these contracts allow businesses to deploy workers, especially 'gap fillers' and 'time adjusters', who work irregular or on-call hours, for short shifts during peak times or seasonal periods, maximising employers' cost-efficiency while avoiding the costs of full-time employment (Eurofound, 2012; Jany-Catrice & Lehndorff, 2005).
- **Atypical (unsocial) hours:** Employees in the Commerce sector often work atypical hours, including evenings, weekends, and even nights, particularly in countries where regulations on shop hours have been liberalised (Eurofound, 2014; Eurofound, 2012). Sunday work is becoming increasingly common, with employers pushing for further liberalisation to remain competitive despite resistance from employees (Interviews 1, 3 & 5, 2024). Unsocial hours are particularly prevalent in retail and are disproportionately staffed by younger workers and women, who often take on these shifts due to part-time or casual contracts (Eurofound, 2014).

3.2.2. IMPACTS ON WORKING CONDITIONS AND GOOD PRACTICES

WORK-LIFE BALANCE: UNPREDICTABILITY OF WORK

The dominance of employer-oriented flexibility in the Commerce sector has severely disrupted employees' work-life balance by creating **unstable and unpredictable schedules** (termed 'flexi-vulnerability' – see *Chapter 2*). For example, in Hungary, the Labour Code explicitly allows employers to determine schedules, often providing as little as 24 hours' notice for changes, leaving workers unable to plan their personal lives (Interview 11, 2024). In Finland, part-time employees frequently face last-minute shift offers communicated through messaging apps such as WhatsApp, creating pressure to remain available during their free time (Interview 14, 2024). Casual work adds another layer of unpredictability, as workers on on-call contracts are often allocated shifts with only a few hours' notice. This unpredictability makes it challenging for workers to plan their daily routines or commitments, further straining their ability to balance work with personal and family responsibilities (Interview 14, 2024; ETUC, n.d.). Moreover, the irregular and temporary nature of casual contracts leaves workers uncertain about their weekly hours, disrupting their social lives and adding to feelings of instability (Mrozowicki et al., 2018). All these practices contribute to fatigue, strained social relationships, and heightened stress, with workers describing an inability to maintain healthy family dynamics or participate in community activities (Interviews 11 & 15, 2024; ETUC, n.d.).



Box 4. Best practices addressing work-life balance issues due to unpredictable schedules

Collective agreements:

- **Advance scheduling and clear notice periods to support predictability (Sweden, Finland, and Belgium).** To address unpredictability in working hours and improve work-life balance, several EU countries have enforced the use of advanced scheduling practices and clear notice period requirements through laws and collective agreements. In Sweden, collective agreements mandate one month's notice for schedule changes, reduced to 14 days by law in the absence of such agreements (Interview 12, 2024). In Finland, sectoral collective agreements have extended the notice requirement in the Working Time Act for providing schedules from one week in advance to two weeks (Interview 14, 2024). In Belgium, notice periods vary by shop size and collective agreement coverage: one week for smaller shops (by law) and three weeks for larger retailers (under collective agreements), complemented by legal requirements for time-tracking systems to ensure overtime is remunerated (Interview 15, 2024). These measures offer greater predictability, allowing workers to balance personal and professional obligations better while enhancing job stability.

Company practices:

- **Systems for employee scheduling preferences (Sweden, Belgium, Germany and Finland).** In companies across several countries, systems allowing employees to indicate preferred working hours and days are being piloted to enhance work-life balance and job satisfaction. For example, in some companies in Sweden, employees can submit their preferred working days, allowing employers to consider these preferences when creating schedules, though these systems are not yet mandated by collective agreements in Commerce (Interview 12, 2024). In Finland, it is common for employees to submit shift preferences, and while many employers accommodate these requests, the level of flexibility varies between workplaces. Some companies provide significant scheduling flexibility, whereas others expect workers to accept assigned shifts without input (Interview 14, 2024). Similarly, in Belgium, some retailers have experimented with systems that let employees choose their shifts (Interview 15, 2024). However, these initiatives face practical challenges in implementation, such as balancing employee preferences with scheduling requirements and maintaining fairness. Past experiences in large-scale retailers in Sweden and Germany highlight that while employees appreciated aligning their hours with personal needs, these advantages were often undermined by reduced staffing levels and increased workloads. This created a dynamic of self-managed intensification, where employees gained scheduling autonomy but faced insufficient resources to handle their responsibilities effectively (Jany-Catrice & Lehdorff, 2005). Despite these obstacles, such systems remain a promising approach if supported by robust staffing and practical management strategies.

WORK-LIFE BALANCE: ATYPICAL WORKING TIME

The liberalisation of shop opening hours has further exacerbated the strain on workers' work-life balance, particularly through the normalisation of Sunday work and extended hours into evenings and public holidays. These changes have intensified **the demand for unsocial hours**, leaving employees with limited time for rest or family life (Eurofound, 2012; Interview 12, 2024). Sunday work, in particular, remains highly unpopular among workers (though some workers might be pressured to cover these shifts if they offer higher pay – see section on financial (in)stability below). For example, a recent survey conducted by ACV-Puls among retail employees in Belgium revealed strong opposition to Sunday work, where 80% of respondents expressed that they are against its introduction in their workplace, with only 13% willing to work on Sundays and 23% conditionally open to it depending on the terms offered. Concerns about work-life balance were significant, with 80% of workers stating that Sunday work would negatively impact their personal lives¹⁸. Moreover, Sunday work disproportionately affects women and younger workers employed on part-time or casual contracts, further straining their already precarious work-life balance (Eurofound, 2014; Jany-Catrice & Lehndorff, 2002).

Box 5. Best practice addressing work-life balance issues due to the necessity to work on Sunday

Collective agreements:

■ Ensuring regular weekends off for Commerce workers (Spain, Sweden, Finland and Belgium).

Negotiated measures across several European countries aim to mitigate the impact of Sunday work on retail employees. In Spain, unions have secured agreements with employers to grant periodical weekends off, offering some relief in regions with extended store hours (Interview 13, 2024). In Sweden, collective agreements guarantee retail workers a minimum of 16 weekends off annually, while in Finland, the collective agreements ensure 17 weekends and 22 Sundays off, offering a structured framework to support work-life balance (Interview 12, 2024). In Belgium, sectoral agreements include provisions for four to eight additional weekends off annually, supplementing their standard weekends and holidays. This ensures workers have extra opportunities for rest even within highly flexible schedules (Interview 15, 2024). These practices demonstrate how negotiated solutions can alleviate the challenges of unsocial hours while accommodating the sector's demands.

18. Survey conducted by ACV-Puls among retail workers, 2024, Belgium

FINANCIAL (IN)STABILITY

Low wages remain a pervasive issue across the Commerce sector, undermining financial stability for both full-time and part-time workers. Salaries in the sector typically fall 10–30% below the average earnings in the private services industry, with many roles providing only a modest living (Bernhardt, 1999; Jany-Catrice & Lehndorff, 2002). This challenge is particularly pronounced in retail, where women and young workers dominate employment but frequently occupy the lowest-paid roles, such as sales assistants and cashiers (Mrozowicki et al., 2018; Interview 15, 2024).

The Commerce sector's **reliance on part-time and casual work** has intensified financial instability for its workforce, compounding an already challenging situation where even full-time roles often fail to guarantee economic security (Eurofound, 2014). While part-time work offers employers flexibility to adjust staffing to fluctuating demand, it frequently leaves workers with insufficient and unpredictable incomes, making it difficult for them to cover basic needs. Involuntary part-time work further exacerbates the issue, with many employees across the EU desiring full-time hours but being constrained by labour demand and employer practices (Jany-Catrice & Lehndorff, 2002; Interview 14, 2024). Furthermore, the combination of involuntary part-time employment, imposed flexibility, and unpredictable scheduling leaves workers with few options to secure a second job, further hindering their ability to earn a living wage. This situation may drive individuals to seek precarious, atypical, or even undeclared work, perpetuating a vicious cycle of precarity, informal economy, and in-work poverty for both workers and society as a whole (Interview 14, 2024).

Faced with such precarity, workers tend to resort to taking **additional shifts during unsocial hours** to make ends meet, sacrificing personal and family time in the process (Jany-Catrice & Lehndorff, 2002; Jany-Catrice & Lehndorff, 2005; Mrozowicki et al., 2018). For example, interviewees from Hungary, Sweden and Spain reported that retail workers rely heavily on Sunday shifts to secure sufficient income, with some employees needing to take on multiple jobs to achieve financial stability (Interviews 11-13, 2024). In Finland, Sunday work is also highly sought after by some workers due to the legally enforced double pay. Workers struggling with income often covet these shifts despite the negative impacts on work-life balance, which has also led to tensions among employees competing for higher-paying hours (Interview 14, 2024). However, as a recent survey of retail workers in Belgium revealed, while 19% of respondents cited increased income as a benefit, 72% reported no tangible advantages to Sunday work, indicating that additional pay does not offset the perceived negative impacts on work-life balance. The survey also showed that 62% of respondents preferred double pay for Sunday shifts, and 41% suggested an extra day off during the week as a suitable alternative¹⁹.

19. Survey conducted by ACV-Puls among retail workers, 2024, Belgium

Box 6. Best practices addressing financial instability

Collective agreements:

- **Flexible full-time work (Finland).** In Finland, the ‘flexible full-time work’ system was introduced in the Commerce sector collective agreement to increase the availability of full-time work while providing greater financial stability for part-time employees. Under this arrangement, workers with contracts for fewer than 37.5 hours per week receive a full monthly salary in exchange for accepting additional ‘flexible hours’ beyond their pre-scheduled shifts (a minimum of 22.5 hours weekly). These additional shifts, which align the total working hours with full-time employment, must be offered with at least 24 hours’ notice. Employees retain the right to refuse shifts under specific conditions, such as insufficient rest periods or prior commitments. Designed to complement rather than replace traditional full-time roles, this system ensures stable income for workers while preserving flexibility for employers through locally negotiated agreements¹⁹.
- **Averaging working hours model (Finland).** In Finland, the ‘averaging working hours’ model allows employees’ weekly hours to vary while remaining balanced over a six-month period. For instance, workers might put in extra hours during busier weeks and fewer during quieter ones, as long as the total hours align with their contract by the end of the period, while getting paid the same amount every month. This ensures steady income while providing flexibility to handle fluctuating workloads (Interview 14, 2024). When properly implemented, the model benefits both employers and employees, offering more hours when demand is high and lighter schedules during slower periods.
- **Proposed working time reduction (Spain, proposal).** In Spain, a proposed reduction of the standard working week to 37 hours aims to improve job quality by addressing income stability and work-life balance for both full-time and part-time employees. Under this model, part-time workers would benefit from higher hourly wages, while full-time workers would see reduced hours without any loss of income. This initiative seeks to create fairer conditions that enhance financial security and promote better work-life balance for employees (Interview 13, 2024).

Policy and legislation:

- **Prioritising part-time workers for extra hours (Finland).** In Finland, a national law ensures that employers must offer additional hours to part-time employees when they become available, rather than hire new workers²⁰. This measure aims to provide part-time workers with opportunities to increase their income and reduce financial instability (Interview 14, 2024). A similar approach exists in Spain through sectoral collective agreements, emphasising the importance of giving existing staff the chance to work more hours, thereby addressing the challenges of underemployment and involuntary part-time work (Interview 12, 2024).

Company practices:

- **Higher pay for part-time workers (Hungary).** In response to the financial instability stemming from low wages in the Commerce sector, a drugstore chain in Hungary has implemented a model offering nearly full-time wages for part-time roles. This approach helps mitigate the income challenges faced by part-time employees, who often struggle to earn a stable living. By prioritising worker well-being over maximising profit, the company supports its staff while enhancing its reputation as ‘employee-friendly’ among both employees and customers (Interview 11, 2024).

19. Input from PAM representative [Section of the Commerce CBA], 2024, Finland

20. Chapter 2, Section 5 of the Employment Contracts Act (2001). Available at: <https://www.finlex.fi/api/media/statute-foreign-language-translation/220146/mainPdf/main.pdf?timestamp=2001-01-26T00%3A00%3A00.000Z>

WORK INTENSITY, FATIGUE, AND STRESS

Workers in the Commerce sector face growing **health and well-being challenges** stemming from the interplay of work intensification, unpredictable schedules, economic insecurity associated with part-time and casual employment, and extended working hours. First of all, the merging of different job positions into one (as a result of automation, digitalisation, and the changing nature of tasks involved) has increased individual stress levels as workers are now required to handle multiple tasks previously assigned to separate staff members (Interview 11, 2024). Similarly, due to the precision staffing practices, low staffing levels have left employees overburdened and struggling to meet high work demands (Interview 12, 2024), further intensifying workloads and creating additional health risks by increasing the pace and repetitiveness of tasks (Eurofound, 2012). Such environments, characterised by high work intensity and low autonomy, are linked to higher rates of stress-related illnesses, including cardiovascular disease and mental health disorders (Eurofound, 2014). Moreover, extended working hours, with shops closing late in the evening or very early in the morning, might pose security risks for staff (particularly for women), especially in areas with higher crime rates (ETUI, 2024).

This work intensification, combined with irregular and unpredictable work schedules, contributes to **fatigue and mental health challenges**. Workers frequently report being tired due to inconsistent hours, which disrupt their ability to maintain social relationships and family commitments (Interviews 11 & 15, 2024). Many also experience stress from the fragmented nature of their schedules, including short shifts or split shifts that break their day into non-contiguous blocks of work, further complicating the balance between professional and personal responsibilities (Zeytinoglu et al., 2004). A study by the Finnish Institute of Occupational Health found that one third of retail employees frequently experienced tiredness, with stress reported by 21% and social well-being negatively affected in 25% of cases (Eurofound, 2012). The negative psychosocial effects of these working conditions are further exacerbated by exposure to customer misbehaviour, including verbal abuse and, in some cases, violence (Eurofound, 2012). Last but not least, the reliance on part-time and casual work in the sector introduces additional stressors for workers. Economic insecurity resulting from insufficient or irregular hours forces many to juggle multiple jobs or accept unsocial hours to make ends meet. This significantly affects mental health, particularly for women and workers with families who must balance caregiving responsibilities with unstable schedules (Zeytinoglu et al., 2004).

Box 7. Best practices addressing workers' well-being

National legislation:

- **Protections for rest periods (Spain, Belgium and Sweden).** In Spain, national legislation requires at least 12 hours of rest after a late shift and a minimum of 56 consecutive hours off per week, helping to prevent overly condensed schedules (Interview 13, 2024). Similarly, Belgium and Sweden enforce an 11-hour rest period between shifts through national law (Interview 15, 2024). In Finland, collective agreements include provisions for rest periods (including rest periods during the work shift), which have become increasingly important since the 2016 legislation permitting shops to remain open 24/7. These agreements are currently being updated to address the challenges posed by extended operating hours, ensuring that rest periods are upheld (Interview 14, 2024).
- **Prohibition of split shifts (Belgium).** In Belgium, national law prohibits the use of split shifts, ensuring that employees complete their working hours in one continuous block rather than being required to return to work after a break during the same day. This regulation enhances workers' well-being by reducing the strain of fragmented schedules and supports better work-life balance by providing uninterrupted personal time after shifts (Interview 15, 2024).

3.2.3. POLICY IMPLICATIONS

To summarise the key trends and their impacts on workers, the key priority areas requiring attention to improve working conditions of Commerce sector workers include:

- **Unpredictable and irregular schedules:** Workers in the Commerce sector often deal with last-minute schedule changes and limited control over their working hours. These practices disrupt work-life balance and contribute to stress and dissatisfaction. Policies to improve schedule predictability, including mandatory notice periods and systems for integrating employee preferences, are essential to foster stability and fairness in working arrangements.
- **Low wages and insufficient hours:** The reliance on part-time and casual work, combined with low wages, leaves many workers struggling to achieve financial stability. Involuntary part-time work exacerbates this issue, as employees often desire more hours but cannot secure them. Policies to raise baseline wages, prioritise part-time workers for additional hours, increase the availability of full-time positions and promote full-time employment as the norm—reserving part-time work as a possibility—are critical to addressing economic insecurity.
- **Sunday work and unsocial hours:** The liberalisation of shop opening hours has intensified the demand for Sunday work and unsocial shifts, posing challenges to work-life balance. While some employees appreciate the extra income from these shifts, many stress the need for regular weekends off and restrictions on Sunday work. Beyond ‘living wages’, the concept of ‘living hours’ is critical—workers need schedules that allow them to lead normal lives, with time to rest, spend quality time with their families, and participate in weekend and afternoon activities, especially with their children. Hence, ensuring fair schedules that prioritise workers’ ability to maintain a healthy and fulfilling personal life, alongside meeting business needs, is essential for fostering long-term well-being.
- **Health and well-being concerns:** Workers frequently report high levels of stress, fatigue, and mental health challenges, driven by irregular schedules, intense workloads, and exposure to customer misbehaviour. Ensuring adequate rest periods between shifts, prohibiting split shifts, and promoting ergonomic scheduling patterns are necessary steps to support workers’ well-being and productivity.

While immediate challenges such as low wages, irregular schedules and job precarity dominate the concerns of Commerce sector workers, a critical underlying issue is **the long-term sustainability and attractiveness of employment in the sector**. The rapid rise of e-commerce, accelerated by the COVID-19 pandemic, and the adoption of new technologies are reshaping working models in Commerce. Automation, AI and digitalisation have created new roles while reducing the demand for traditional in-store positions. However, this shift has exposed significant skills mismatches, with many workers lacking the training needed to adapt to emerging roles (UNI Europa, 2024). The lack of robust career pathways, low pay, and limited upskilling opportunities make the sector less appealing to potential employees, exacerbating existing labour shortages. The reliance on low-wage, part-time and casual contracts further undermines efforts to retain skilled workers, who often leave for industries offering better wages and working conditions. Ensuring that Commerce can compete for talent requires a comprehensive approach to improving conditions, investing in workers, and addressing systemic barriers to progress.

Collective bargaining and social dialogue remain critical mechanisms for addressing all these challenges. Sectoral collective bargaining, in particular, stands out as a key mechanism since it improves standards across the entire industry while maintaining fair competition. By setting uniform rules, sectoral agreements create a level playing field and prevent companies from cost competition at the expense of the worker. This creates a fair and balanced environment for businesses and workers alike. Countries with strong collective bargaining systems have shown how these agreements can lead to tangible improvements in working conditions, whereas weak unionisation and fragmented bargaining structures in other regions limit progress. Strengthening collective bargaining is essential not only to address immediate worker concerns but also to shape long-term strategies for sectoral transformation. By combining improved working conditions with skills development and technological adaptation, the Commerce sector can become more attractive to current and future workers. This requires prioritising the needs of employees over cost-cutting measures, ensuring that the sector evolves in a way that benefits both workers and businesses.



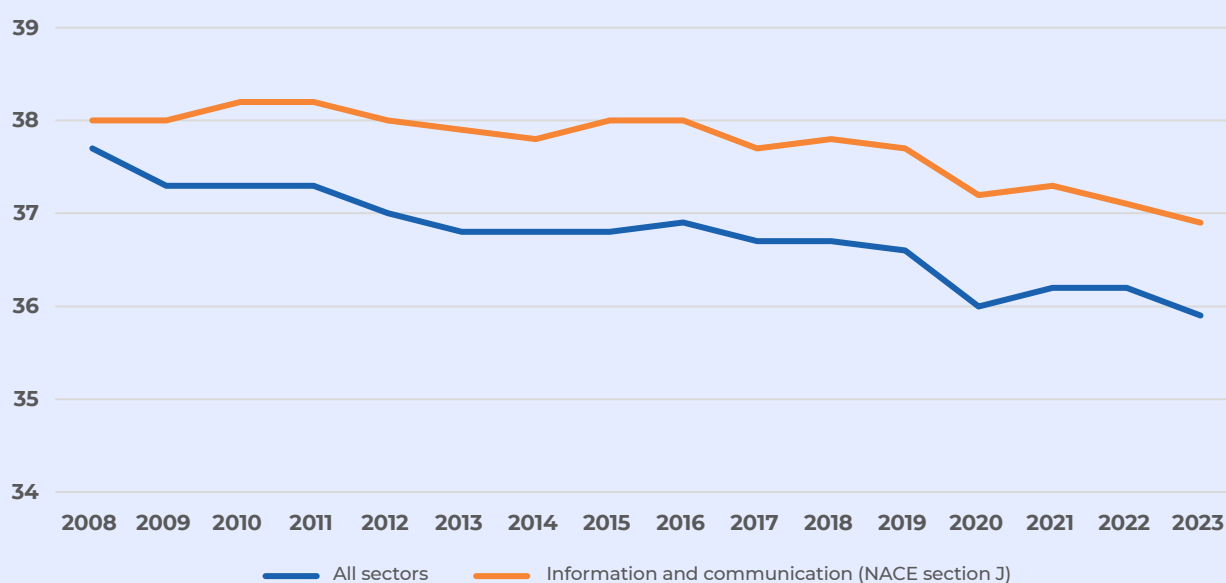
3.3 INFORMATION AND COMMUNICATIONS TECHNOLOGY AND RELATED SERVICES

The Information and Communications Technology and Related Services (ICTS) sector employs around 4% of the EU workforce²¹. It encompasses several industries, professions and activities, including contact centres and business services, telecommunications, and technology and games²². Beyond ‘traditional’ IT roles such as software developers, network administrators and data analysts, the sector also includes contact centre workers, technical support staff, telecommunications technicians, and those involved in building and maintaining physical and digital networks (Interviews 16-21, 2024). Furthermore, the ICTS sector extends into related industries such as finance and media, which increasingly rely on digital infrastructure and services (Interviews 18 & 19, 2024). This inherent diversity means that different roles and subsectors within the ICTS sector are shaped by distinct trends and working time models, leading to varying impacts on working conditions.

3.3.1. KEY TRENDS AND PREVAILING WORKING TIME MODELS

The ICTS sector has consistently reported **higher average working hours** compared to the cross-sectoral average. For example, a Eurofound report (2022a) indicates that in the Netherlands, the ICTS sector has the highest proportion of workers who occasionally work overtime, reflecting a notable trend of extended working hours within the sector. According to interviewees, a 5-day working week remains the standard in the ICTS sector, with working hours close to 40 hours per week (Interviews 16-21, 2024)²³. At the EU level, while average working hours in the ICTS sector have gradually declined over the past decade, they consistently remain above the EU average and are further diverging, as shown in *Figure 11* below.

Figure 11. Average number of actual weekly hours of work in main job



Source: Based on Eurostat data, indicator [lfsa_ewhan2²⁴].

21. Source: Eurostat [lfsa_egan2]. https://doi.org/10.2908/LFSA_EGAN2

22. UNI Europa (2024). Sectors: ICT & Related Services. Available at: <https://www.uni-europa.org/sectors/ict-related-services/>.

23. With some exceptions mentioned by the Croatian interviewees, where some of the lowest-paid employees, such as field technicians and customer care agents, work six days a week with only one day off, but they still get the same wages (Interview 17, 2024).

24 See: https://ec.europa.eu/eurostat/databrowser/view/lfsa_ewhan2/default/table?lang=en

Employees in the ICTS sector have historically had **substantial flexibility in organising their work**. Over the long term, this has been driven by the nature of the tasks involved and the progression of digitalisation, including technology advancements such as broadband access, mobile devices and cloud platforms, which allow collaborative asynchronous work (Ágota-Aliz, 2021; Interview 16, 2024). In recent years, the COVID-19 pandemic has further accelerated these developments, solidifying flexible working arrangements as standard within the sector (Sostero et al., 2020; Ágota-Aliz, 2021; Eurofound, 2020; European Commission, 2024; Interview 21, 2024).

Remote and hybrid work, in particular, have become a foundational aspect of the ICTS sector, with many companies adopting these models as a default, especially for roles that allow for independent, task-based work (Interview 21, 2024). In Germany, for example, as much as 70-80% of employees working in ICTS companies now operate remotely, a trend accelerated by the pandemic but deeply rooted in industry practices (Interviews 16 & 18, 2024). Other companies, looking to balance remote working flexibility with in-person collaboration, are favouring hybrid work models that blend remote and in-office days (Eurofound, 2022b). In Switzerland, for example, employees typically work two to four days from home and attend the office on other days to enhance team cohesion and engage in in-person meetings (Interview 16, 2024). Similarly, in Belgium, while nearly 100% remote setups remain common, recent trends indicate a growing preference for hybrid structures (Interview 19, 2024).

This uptake of remote and hybrid work has further facilitated the flexibilisation of working time. As one interviewee noted, *“People can now work from almost anywhere. This has changed how we use our working time.”* (Interview 16, 2024). Driven by sectoral specificities as well as the surge in remote and hybrid work, the following features of working time models are prevalent in the ICTS sector:

■ *Flexible working schedules*. Flexitime, where employees can control their work hours within certain parameters, is widely applied in the sector (Chung & van der Lippe, 2020). Most interviewees confirmed that employees in the ICTS sector generally can choose their working hours (Interviews 16 & 20-21, 2024). However, while some companies permit high flexibility, allowing employees to set their own schedules almost entirely, others operate within set ranges to balance individual flexibility and organisational needs (Interview 19, 2024).

■ *Results-oriented models*. These models prioritise outcomes over schedules, allowing employees to manage their time based on deliverables rather than traditional work hours (Interview 18, 2024; Katsabian, 2020). As a result, as employees gain more autonomy over their schedules, time tracking becomes less important. As an extreme of the results-oriented approach, freelancing has also become more common, attracting professionals who seek independence and project-based work arrangements (Interview 19, 2024).

It is important to note that although these trends are prevalent among most knowledge workers in the ICTS sector, a smaller share of clerical workers are experiencing completely different dynamics. Customer support and contact centre roles, for instance, still require **fixed schedules and shift work**, including in the evenings, at weekends, and during holidays, to maintain consistent service, thus operating under more structured time models (Interviews 16-17, 19 & 21, 2024). While this structure provides clearer boundaries between working and private time and is less prone to overtime, it can be challenging for work-life balance, particularly due to irregular shifts (Interview 19, 2024). Moreover, employees in these roles may also have the option to work from home, which became more common among clerical support workers during the pandemic (Interview 19, 2024). These groups, typically younger with shorter lengths of service, were previously less likely to have been granted the benefit of remote working (Eurofound, 2022b).

Furthermore, **the extent of flexible working models' adoption and enforcement** varies significantly. In Northern and Western Europe, where social dialogue and collective bargaining frameworks are typically stronger, remote and hybrid models are more formalised through collective agreements, though national regulation remains limited (Interviews 16, 18-19 & 21, 2024; Eurofound, 2020). In contrast, in regions such as Southern and Eastern Europe, collective bargaining frameworks are generally weaker, and regulation is often the primary means of managing flexible work arrangements. This variation often reflects a broader north-south and east-west divide in Europe, where factors such as technological infrastructure, economic conditions and the strength of collective bargaining frameworks influence the uniformity and accessibility of flexible working models (Eurofound, 2020; Eurofound, 2022b).

3.3.2. IMPACTS ON WORKING CONDITIONS AND GOOD PRACTICES

WORK-LIFE BALANCE VS RISKS OF HYPERCONNECTIVITY AND ISOLATION

On the one hand, **place and time flexibility** have improved work-life balance for many employees by allowing them to reduce commuting times by working remotely, take breaks to handle personal matters, adjust their start and finish times to align with personal needs (e.g. school schedules), and attend necessary appointments without needing formal all-day leave, thus reducing stress and enhancing overall well-being (Interview 19, 2024; Wöhrmann et al., 2020; Chung & van der Lippe, 2020; Ágota-Aliz, 2021; European Commission, 2024; Eurofound, 2022b; Helmerich, 2024).

On the other hand, remote work often blurs boundaries between personal and professional time, especially for those balancing childcare or other family duties (Ágota-Aliz, 2021; Abendroth & Reimann, 2018; Eurofound, 2020; Eurofound, 2022b; European Commission, 2024; Interview 17, 2024). Additionally, 'working anytime, anywhere' can easily turn into '**working all the time, everywhere**' (Dagnino, 2020, p. 2; Mazmanian et al., 2013). Hence, remote workers often struggle to 'switch off' (also due to the lack of time-tracking systems), leading to longer hours and increased stress (Dagnino, 2020; Ágota-Aliz, 2021; European Commission, 2024; Interviews 19 & 21, 2024). Furthermore, place and time flexibility can also result in **social isolation and weakened team cohesion** at the workplace (European Commission, 2024; Eurofound, 2022b; Helmerich, 2024). For example, an interviewee from Portugal noted that digital communication tools, though efficient, have reduced informal interactions among colleagues, weakening team bonds (Interview 20, 2024). In this context, hybrid work structures, which blend in-office and remote days, may reduce some of these adverse effects by offering the benefits of both flexibility and in-person interaction, helping maintain social bonds while reducing the strain of a daily commute (Interview 19, 2024; Beauregard et al., 2019; Contreras et al., 2020).

Box 8. Best practices facilitating work-life balance: Time-tracking and boundary-setting mechanisms

Collective agreements:

- **Working time accounts (Germany).** Employees can accumulate overtime hours into a ‘time bank’ to be used for personal needs or take time off later. This arrangement enables short-term flexibility (usually up to one year), compensates for extra working time, and improves overall work-life balance, aligning with company and individual needs (Interview 18, 2024).
- **Annualised working hours (Switzerland).** Designed to accommodate fluctuating work demands, this model enables employees to work longer hours during peak times and fewer hours during slower periods. This approach aligns with industry cycles and can reduce stress during high-demand periods by allowing work distribution across the year (Interview 16, 2024).
- **Possibility of flexible reduction in working hours (Switzerland).** In Switzerland, collective agreements enable employees to temporarily reduce their working hours to 80%, 60%, or even 50%, with an option to return to full-time employment later. This flexibility supports work-life balance by allowing employees to align their working patterns with personal or family needs, fostering improved well-being and adaptability (Interview 16, 2024).

Policy and legislation:

- **Mandatory time-tracking systems (Denmark).** To ensure compliance with the rules on daily and weekly rest periods, Denmark has enacted an amendment to the Working Time Act mandating employers to implement time-tracking systems, which took effect on July 1, 2024. It requires employers to establish an ‘objective, reliable, and accessible’ system to record each employee’s daily working hours (Interview 21, 2024; Deloitte, 2024). The initiative aligns with the 2019 European Court of Justice (ECJ) judgement *C-55/18*²⁵, which mandated EU Member States to implement systems for recording working hours to ensure compliance with the Working Time Directive²⁶. By clearly defining working and resting times, this system supports a healthier work-life balance and enhances the enforcement of labour regulations.
- **Rest rule enforcement (Denmark).** All employees are entitled to a daily rest period of 11 consecutive hours, meaning that employees must have 11 uninterrupted hours of rest between the end of one working day and the start of the next. Additionally, every employee is entitled to at least one day off per week. While this weekly day off can be scheduled on any day, it must be combined with the 11-hour rest period, resulting in a minimum rest period of 35 consecutive hours²⁷. This is supposed to help employees maintain essential rest periods and promote better recovery from work demands (Interview 21, 2024).

Company practices:

- **Pilot policy on after-hours communication (Croatia).** A Croatian telecom company piloted a policy that limited email communication outside of working hours. The initiative, though temporary, demonstrated reduced burnout and improved productivity, showcasing the potential benefits of setting clear work-life boundaries (Interview 17, 2024).

25. European Court of Justice. (2019). *Federación de Servicios de Comisiones Obreras (CCOO) v Deutsche Bank SAE (C-55/18)*.

Available at: <https://op.europa.eu/en/publication-detail/-/publication/5ba8c611-b1cd-11e9-9d01-01aa75ed71a1/language-en>

26. Directive 2003/88/EC of the European Parliament and of the Council of 4 November 2003 concerning certain aspects of the organisation of working time. Official Journal of the European Union, L299, 9–19. Available at: <https://eur-lex.europa.eu>

27. Working Environment Act. (2021). Available at: <https://at.dk/en/regulations/working-environment-act/>

PRODUCTIVITY GAINS VS WORK INTENSIFICATION

Results-oriented working arrangements have potentially contributed to **improved productivity**. As they allow workers greater autonomy in organising their work, they can foster efficiency by enabling employees to structure tasks in ways that best suit their preferences and schedules (Eurofound, 2020; Interview 18, 2024); for example, they can choose to work when they are most productive. However, the pressures associated with the results-oriented models can contribute to **work intensification** and an expectation of constant availability, often described as the ‘always-on’ culture (European Commission, 2024; Abendroth & Reimann, 2018; Eurofound, 2022b). This phenomenon reflects what is commonly referred to as the ‘autonomy paradox’ when employees with greater control over their work schedules often end up working longer hours and experiencing increased stress due to self-imposed pressures and the demands of highly competitive environments (Chung, 2022; Bloom et al., 2015; Felstead & Hensecke, 2017; Biron & Veldhoven, 2016; Eurofound, 2020; Mazmanian et al., 2013). This dynamic, exacerbated by pervasive digital connectivity, may potentially lead to job strain and burnout (Glowacka, 2020; Dagnino, 2020; Interviews 18 & 19, 2024). At the same time, while job intensity increases, overtime often remains unpaid (due to limited time tracking), and salary levels do not always reflect the workload increases in general, leading to dissatisfaction among workers (Interview 18, 2024).

Box 9. Best practices addressing work intensification: Overtime compensation and working time reduction

Collective agreements:

- **Proposals for working time reductions (Germany, Switzerland).** Efforts in Switzerland and Germany have centred on negotiating a reduced working week to reduce job intensity. For example, in Germany, the unions are advocating for ‘Digitalisierungsrendite’ (digitalisation yield), where the gains from digitalisation, such as increased productivity, should lead to a shorter, four-day working week (Interview 18, 2024). In Switzerland, negotiations with Swisscom outlined three scenarios: to cut the working week from 40 to 35 hours, to allocate time for reskilling or special projects, or to expand leave options or holidays. Despite facing resistance, progress was made with increased holidays and expanded parental leave, reflecting ongoing efforts to improve work-life balance (Interview 16, 2024).
- **Incorporating reskilling time into working hours (Switzerland).** In Switzerland, collective agreements in the ICTS sector have secured a provision allowing employees to dedicate two hours per week within regular working hours to education and reskilling (Interview 16, 2024). This supports continuous learning through three key channels: (1) mandatory certifications required by the company or employees; (2) formal qualifications such as MBAs or degrees, which are subject to approval based on business needs; and (3) voluntary internal learning opportunities using company-provided tools. While formal training is planned and documented in development discussions between employees and managers, voluntary learning is self-managed, with no obligation to report participation. In all three cases, the time spent on reskilling is fully included in regular working hours.
- **Compensation for unpaid overtime (Portugal).** Through successful collective bargaining, a union agreement with Altice Portugal secured €3.3 million in compensation for over 1,600 workers for decades of unpaid overtime. Currently, two similar situations are being pursued for INCM (Imprensa Nacional Casa da Moeda) and ANACOM (Autoridade Nacional de Comunicações). SINTTAV is negotiating the Collective Agreements with these entities for 2025, intending to conclude the overall negotiations before addressing these specific compensation issues, with potential court action if no agreement is reached. This demonstrates how collective action can effectively address pay disparities and ensure fair treatment (Interview 20, 2024).

AUTONOMY VS SECURITY

First, freelancing has become increasingly prevalent in the ICTS sector. It attracts professionals seeking flexibility and control over their work (Interview 19, 2024). However, while freelancing provides some independence, it also introduces inherent **job insecurity and limited access to social benefits** such as health insurance and retirement plans, making it a more precarious option compared to traditional employment (Glowacka, 2020, p.121; López-Martínez et al., 2023; Interview 19, 2024).

Some interviewees also highlighted the critical need for **stronger protections for part-time workers**, over-represented by women (Interview 16, 2024). Many part-time workers face the risk of having their working hours arbitrarily increased or changed without valid justification, creating instability and potentially compromising their work-life balance. Furthermore, many part-time workers seek greater flexibility in transitioning between part-time and full-time roles without facing negative consequences or barriers to career progression (Interview 16, 2024). Similarly, there is a growing need for **enhanced protection and support for older workers**. Interviewees emphasised the importance of measures that support older workers' work-life balance, such as options to reduce working hours without financial penalties, enabling them to dedicate more time to personal priorities, such as caring for their grandchildren (Interview 21, 2024).

Box 10. Best practices addressing job insecurity: safeguards for part-time workers

Collective agreements:

- **Protections for part-time workers to prevent exploitation (Switzerland).** Collective agreements in Switzerland provide robust protections for part-time workers, particularly women, ensuring that their working hours cannot be increased or decreased unreasonably without valid justification. These agreements also grant workers the right to request changes to their hours, reducing the risk of exploitation and promoting greater job security and flexibility (Interview 16, 2024).
- **Lifetime working time accounts (Germany).** This innovative model allows employees to save overtime hours, unused leave days, or a portion of their salary into their account throughout their career. Then the credits saved in these accounts can be used for a variety of purposes that fit employees' life stages, such as caregiving, further education, or phased retirement. It contrasts with shorter-term arrangements by providing a solution tailored to different life stages, ensuring greater flexibility and adaptability over time (Interview 18, 2024). For older employees, this model allows the possibility to reduce work hours or retire earlier without compromising financial stability, but it also benefits employees at other stages, such as during intensive caregiving periods or educational pursuits.
- **Flexible leave and holiday provisions (Denmark).** Danish collective agreements offer generous provisions for work-life balance and for workers with families, including five weeks of annual leave and extensive parental leave. Employees are also granted five special days off per year for personal emergencies, such as accompanying a family member to hospital. Furthermore, collective agreements allow parents to take two paid days off each time their child is sick without a limit on the number of occurrences per year, demonstrating strong support for flexible and family-friendly work conditions (Interview 21, 2024).

UNEQUAL ACCESS TO FLEXIBLE WORKING MODELS

The expansion of remote work has brought significant flexibility to many workplaces, but it has also exposed potential risks related to **unequal treatment and discrimination** (Helmerich, 2024). According to a European Commission survey (2024), nearly a quarter of organisations using remote work arrangements rely solely on informal agreements between supervisors and workers, while around 20% depend on informal arrangements to implement the right to disconnect. Such informal practices can lead to bias and unequal treatment when compared to formal company policies or collective agreements with workers' representatives. This lack of standardisation raises concerns among both employers and employees, with 25% of employers and 29% of employees identifying protection against discriminatory treatment in remote work as a key area for improvement (European Commission, 2024). This sentiment is echoed, for example, by a Croatian interviewee: *“While the official policy of the company allows for 12 days of remote work [per month], in reality, some employees work from home for the whole month. There’s flexibility for some but not for others. It depends on your relationship with management”* (Interview 17, 2024).

3.3.3. POLICY IMPLICATIONS

Summing up, the key challenges and priorities in the ICTS sector from the workers' perspective have been identified as follows:

- **Overwork and unpaid overtime.** Working time reduction is a high priority for many workers, including proposals for a 35-hour working week or compressed four-day working weeks. The primary motivation for these changes is to provide more time for rest and recovery, addressing the high work intensity and stress inherent in the sector. Additionally, with increased productivity driven by digitalisation, many workers believe they deserve more time to rest, making these initiatives both a practical and fair approach to improved job quality and well-being.
- **Hyperconnectivity and blurred work-life boundaries.** Maintaining a clear divide between work and personal life is crucial for a healthy work-life balance. Tools such as working time tracking systems, which are a way to ensure all work time is accurately counted and remunerated, play a vital role in reducing the unpaid labour often associated with flexible work (see Chung and van der Lippe, 2020). Integrating these tracking mechanisms, combined with differentiated pay for work performed outside standard hours, helps protect worker well-being by encouraging employers to respect personal time (see Katsabian, 2020). The right to disconnect further complements these mechanisms by protecting workers from constant digital connectivity outside their regular hours (see Dagnino, 2020). Together, these approaches establish a framework for maintaining clear boundaries and reducing overwork risks.
- **Unequal access to flexible working models.** Flexible work arrangements hold great value, but there is a pressing need to ensure that they are available to everyone who can benefit from them. Workers, particularly from Southern and Eastern European regions, have highlighted that flexibility should not depend solely on managerial discretion or be tied to performance bonuses. Ensuring fair and equitable access to flexible options is key to avoiding discrimination and fostering a more inclusive work environment.
- **Psychological and digital stress, coupled with social isolation and loss of team spirit.** High stress and feelings of isolation are common issues in the ICTS sector. Workers are calling for better support for mental health, including programmes that reduce stress and help create a healthy balance between work and life. This is seen as essential for their overall well-being and productivity. One of the solutions could be hybrid working models, as opposed to fully remote work, which have been proven to reduce feelings of isolation and improve work-life balance.

■ **Insufficient protection for vulnerable groups.** Workers have highlighted the need for more protection for specific groups, namely older workers, part-time workers and freelancers. Older workers want more flexible options to suit their needs as they age. Part-time workers, especially women, need fair treatment and protection for their career growth. Freelancers are also seeking more stability and security in their work conditions. Meeting these needs would make the sector more inclusive and adaptable, addressing the unique challenges faced by these often-overlooked demographics.

Lastly, regarding *how* progress can be achieved towards these priorities, a key takeaway from the analysis is the critical role that **collective bargaining** plays in improving working conditions and addressing challenges in the ICTS sector (Helmerich, 2024; Dedden et al., 2023). Most of the best practices identified above stem from collective agreements. While some successful practices have been implemented, their wider impact often depends on effective collective bargaining and active involvement from social partners. There has been a consensus among interviewees on the importance of collective bargaining as a key mechanism for achieving fairer working time arrangements and ensuring worker protection. Where collective bargaining is relatively strong, we see good practices emerging, making it the primary mechanism for addressing sector-specific issues faced by ICTS workers. However, collective bargaining coverage and unionisation rates in the ICTS sector have been relatively low, with notable differences across regions, making it harder to achieve widespread progress. Therefore, by focusing on strengthening collective bargaining, the sector can better adapt to new work models, create fairer conditions, and make sure workers' voices are heard in important decisions.



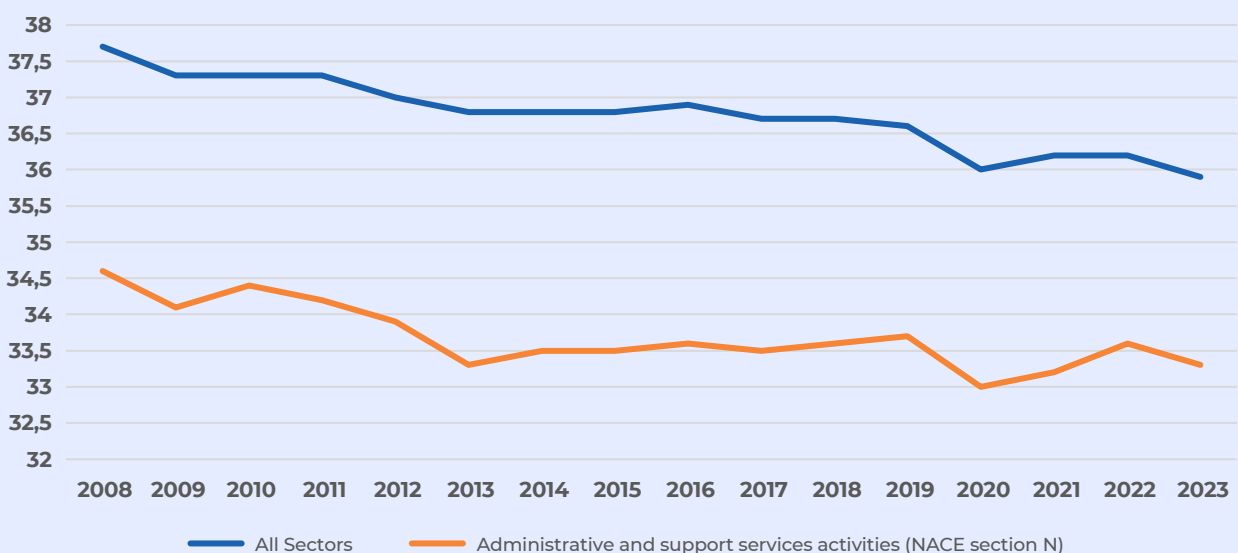
3.4 PROPERTY SERVICES

The Property Services sector is dedicated to the upkeep and maintenance of physical spaces, including security, cleaning, repairs and other services for both residential and commercial properties. This chapter examines two sub-sectors of Property Services: private security and cleaning. Private security involves ensuring the safety of public and private places, including buildings and people. Notably, it is among the fastest-growing sectors in Europe, with the number of private security personnel across Europe now nearly matching that of public police forces (Krahmann, 2018; Pavlovaite et al., 2022). Cleaning ensures that the crucial infrastructure of society remains functional and accessible. Cleaners provide indispensable services across various sectors, maintaining spaces such as hospitals, hotels, schools, airports and office spaces (Jarrow Insights, 2023).

3.4.1 KEY TRENDS AND PREVAILING WORKING TIME MODELS

Workers in the Property Services sector work, on average, fewer hours per week compared to the cross-sectoral average. *Figure 12* below demonstrates the broader trend of a gradual decline in working hours that has characterised the past decade. During the COVID-19 pandemic, **Property Services experienced a further marked reduction in working hours** and bounced back more slowly thereafter than the cross-sectoral average. The delayed recovery in 2021 was mainly driven by the continued closure of offices, event venues and other public spaces, significantly affecting both cleaning and private security services (UNI Europa, 2021). The sector has since recovered; however, it continues to reflect the slow reduction of working time.

Figure 12. Average number of actual weekly hours of work in main job



Source: Based on Eurostat data, indicator [lfsa_ewhan2²⁸].

28 See: https://ec.europa.eu/eurostat/databrowser/view/lfsa_ewhan2/default/table?lang=en

Client-driven flexibility is a defining characteristic of the Property Services sector. In both the private security and cleaning sub-sectors, working time arrangements are predominantly dictated by the requirements and demands of the client (Interviews 22-24 & 26-27, 2024). These services are largely procured through competitive tendering processes, reflecting a broader trend of companies increasingly prioritising client needs while striving to remain competitive by offering lower prices. This dynamic, however, imposes greater pressures to complete work within increasingly constrained and unconventional timeframes, resulting in overloaded schedules, heightened workloads, and intensified cost-cutting measures.

Workers in the Property Services sector tend to work **atypical working hours**, since clients prefer services to be carried out during the times when premises are unoccupied. In the cleaning sector, the preference for evening, night, and early morning shifts underscore the ‘invisibility’ of their work, which is generally expected to be performed discreetly, so as not to disrupt the client’s primary activities (Recio et al., 2015; Bergfeld & Milos, 2022; UNI Global Union, 2023; MacQuarie & Bergfeld, 2022). A global survey conducted by UNI Global reported that only 30.3% of surveyed cleaners worked exclusively during the day (UNI Global, 2023). The invisible nature of cleaning services presents additional challenges, particularly for migrant workers, who are overrepresented in the cleaning sector and would benefit from integration into workplace environments with colleagues and the possibility of social interactions. It also exacerbates the vulnerabilities that workers in precarious situations face, both professionally and personally (UNI Europa, 2024b; UNI Global Union, 2023). The invisibility of cleaners can more easily facilitate the replacement of full-time positions with part-time roles and incremental reductions in paid working hours, contributing further to job insecurity (Recio, Moreno-Colom & Godino, 2015).

Private security, on the other hand, **operates around the clock, necessitating atypical working hours** to meet work demands by providing services during the day, at night, at weekends and during holidays (Interviews 23, 25 & 26, 2024). Security personnel are expected to accommodate last-minute changes to their work schedules and to be available for **on-call periods** (Interviews 22 & 26, 2024; Bergfeld & Milos, 2022). This client-oriented flexibility, coupled with intense price competition among companies, has introduced significant challenges to the Property Services workforce stability. The sector increasingly relies on a hyper-flexible workforce, willing to work irregular hours for comparatively low wages (Interview 23, 2024; Milos & Bergfeld, 2022; Ilsøe et al., 2017).

Involuntary part-time work is more prevalent in cleaning than in private security. There are approximately 4 million workers in the cleaning industry in Europe, of which 66% are part-time with an average of 23 working hours a week (MacQuarie et al., 2022). Many workers in the cleaning sector express a growing need for additional working hours, as part-time employment fails to guarantee a living wage. Worryingly, this is increasingly the case for full-time positions in the sector as well (Interviews 6 & 24; UNI Global Union, 2024). Cleaners frequently resort to seeking employment with several organisations simultaneously, sometimes managing four to five jobs to make ends meet (UNI Europa, 2022; Interview 24, 2024), or they remain online for additional shifts during their free time to pick up additional hours. Disconnecting from work is made impossible by the involuntary part-time work imposed on many cleaners (Interview 27, 2025).

Somewhat paradoxically, the cleaning sector in many countries is suffering from staff shortages, and yet, involuntary part-time work is highly prevalent. The structural invisibility of the cleaning sector and the necessity for work during atypical hours have led employers to favour part-time arrangements when planning employees’ working time. Not only is the prevalence of part-time employment high, but the sector also remains highly gendered, with approximately 72% of employees being women (Eurofound, 2019), who are more likely than their male counterparts to be employed under part-time contracts rather than in full-time specialist positions (Maestriperi, 2023).

Various forms of planned **shift work** are common in the Property Services sector. In private security, work is typically organised into fixed shifts (e.g. exclusively either day or night shifts) or rotating shifts (alternating between day and night shifts). In countries such as Ireland, Belgium, Portugal and Sweden, private security workers usually work long, compressed shifts of 12 hours or sometimes more (Interviews 22-23 & 25-26,

2024). This working time model allows for extended daily working hours within structured patterns, commonly five consecutive workdays followed by two days off, then two workdays followed by five days off (Interviews 25-26, 2025). Workers generally express a preference for these longer shifts, as they reduce the total number of workdays and increase work-life balance by allowing “*greater recuperation times and the ability to plan personal time off*” (Interviews 25 & 26, 2024).

In contrast, some cleaners work **split shifts**. UNI Global Union reports that approximately 7% of the global survey respondents indicated that they *always* work a split shift, either morning and afternoon or morning and evening. However, another 17.9% report working other combinations of shifts that may include morning, day, afternoon, or night shifts, depending on the availability of shifts (UNI Global Union, 2023). Split shifts divide the work schedule into two or more segments with a significant unpaid break in between, allowing multiple work sessions during a single working day. Employers primarily implement split shifts to avoid paying employees during periods of low work activity (Sardadvar & Reiter, 2023). A Belgian interviewee from the cleaning sector noted that split shifts are a common practice: “*Workers might be asked to work one or two hours and then stop*” (Interview 23, 2024). While the time in between shifts is technically free time, the reality of the experience of fragmented working time is that it is neither leisure nor working time and has been linked to considerable dissatisfaction among workers (Sardadvar & Reiter, 2023).

3.4.2. IMPACTS & POTENTIAL SOLUTIONS

WORK-LIFE BALANCE: WORKING TIME PREDICTABILITY

Predictability of working time significantly influences both the ease of balancing private life with work and income stability. Regular and predictable work schedules ensure that employees can anticipate their earnings and budget accordingly. In the Property Services sector, working time is largely shaped by the fluctuating and sometimes unpredictable needs of the clients. This dynamic can result in significant uncertainty surrounding work schedules, including work hours, shift length, location and, ultimately, income (Interviews 22 & 24, 2024). This is particularly problematic in situations where hyper-flexibility is imposed, requiring workers to remain constantly adaptable to clients’ ad hoc needs. Work plans can change at short notice, requiring some workers to stay on call, putting a strain on their ability to plan both their working and personal time effectively (Interview 23, 2024). Moreover, due to the relatively low wage bracket of the cleaning sector, and to some extent private security, workers are often not in a position to refuse last-minute work, since it is an opportunity to supplement their income and because if they do so, they risk being passed over by their employer for jobs in the future. Companies are compelled to adjust workforce deployment in ways that prioritise cost efficiency, at times at the expense of stable, predictable schedules for workers (Interviews 22 & 27, 2024).

From a legal and regulatory standpoint, the unpredictability of working hours poses challenges in ensuring compliance with EU labour laws (Directive 2003/88/EC). The widespread use of non-standard employment contracts such as zero-hours agreements and temporary agency work in the Property Services sector, especially prevalent in the cleaning sector, complicates enforcement efforts. Employees in such arrangements often face difficulties in securing consistent working hours and a stable income, heightening their exposure to job insecurity and financial vulnerability (Broughton et al., 2016; Interview 27, 2025).

Box 11. Best practices addressing working time unpredictability

Collective agreements:

- **Guaranteed minimum monthly working time (Belgium).** Since 2012, a collective bargaining agreement has ensured that security workers in Belgium are guaranteed a minimum number of working hours per month, based on their contract. This agreement also specifies maximum allowable working hours per shift, day, week, month and year, alongside regulations for minimum break durations, the number of breaks, and overtime remuneration (Collective arbeidsovereenkomst van 15 maart 2012). For example, under this system, a five-day working schedule guarantees a minimum of 140 hours and 36 minutes of work in November. Workers are paid for this minimum, even if they do not work all these hours. However, any deficit in hours for one month must be made up in the following month, offering a degree of flexibility (Interview 23, 2024).
- **Compensation for schedule changes (Belgium).** To address the frequency of shift changes in the private security sector, employees will receive additional pay for any changes made to their schedule. Starting from January 1, 2024, workers are entitled to €0.5707 extra per hour for shifts affected by the fourth or subsequent schedule change (Interview 23, 2024; ABVV Bewaking, 2024).

Policy and legislation

- **Advance scheduling (Ireland).** The Employment Regulation Order (2023) states that all hours of work for a minimum period of one week will be made available to workers in writing, a minimum of 3 days in advance. However, these rosters are subject to flexibility relating to operational and business needs (Interview 25, 2024).
- **Protection against short-notice changes (Austria).** Article 19c of the Austrian Working Time law (AZG) allows deviations from the agreed working time allocation only if there are objective reasons, with at least two weeks' notice and provided that no legitimate employee interests are adversely affected. Moreover, Austrian law explicitly prohibits zero-hours contracts or work-on-demand employment

PART-TIME WORK AND INEQUALITY

Part-time work, especially **involuntary part-time work**, impacts workers' financial stability, access to social benefits, and overall employment conditions. This type of non-standard work contract is particularly prevalent in the cleaning sector. In Finland, the trend towards part-time hiring is worryingly increasing (Interview 24, 2024; Interview 27, 2025), while in Germany and Denmark, many cleaners work fewer than 15 hours per week, with a substantial proportion doing so involuntarily (Larsen et al., 2019). In involuntary part-time cleaning roles, it is common for workers to remain on standby for additional shifts, which are commonly allocated via mobile applications. When new shifts appear, employees must respond immediately to secure them, which compels them to check their devices even during personal time. While the principle of a 'right to disconnect' is widely recognised, the reality is that involuntary part-time work, combined with the ongoing need to secure more hours, forces cleaners to stay online and available nearly all the time (Interview 27, 2025).

Low hours contracts can prevent workers from earning a **living wage** and restrict their access to full social security benefits. In Germany, the ‘mini-job’ scheme exemplifies these challenges, allowing employers to reduce costs through tax advantages and flexible labour practices, often at the expense of fair pay and conditions. Similarly, Danish employers exploit regulatory loopholes to minimise overtime and travel compensation costs (Larsen et al., 2019). The average hour system in Finland gives rise to similar exploitation as it “allows them [employers] to make holiday days unpaid by placing a day off on that day and shifting the work to another day within the balancing period” (Interview 27, 2025). These arrangements, while beneficial for employers in terms of flexibility and efficiency, exacerbate income inequality, limit workers’ rights, and undermine collective labour standards.

Box 12. Best practices for reducing the negative impact of part-time work

Policy and legislation:

■ **Non-discrimination of part-time workers (Austria, Ireland).** In Austria, part-time work is defined as an agreed average weekly working schedule that falls below the legally stipulated 40-hour working week, or the shorter regular working hours set by a collective agreement. In accordance with fair employment practices, part-time employees must not be disadvantaged in comparison to full-time employees, including in areas such as special bonus payments. Consequently, salaries or wages for part-time employees are calculated on a pro rata basis, using the full-time salary as a reference. Ireland’s approach to part-time work, under the Protection of Employees (Part-Time Work) Act 2001, aims to ensure that part-time employees receive the same contractual terms and conditions as their full-time counterparts. The Act stipulates that part-time employees must not be treated less favourably unless such treatment can be objectively justified, and that benefits are allocated on a pro rata basis. While it does not establish a statutory right to part-time work, the Act promotes greater access by empowering the Labour Relations Commission to identify industry-specific barriers and develop a Code of Practice in consultation with social partners. This Code, aligned with the principles of the Employment Equality Acts 1998–2004, aims to eliminate indirect discrimination, address obstacles, and encourage broader workforce participation.

■ **Prioritisation of part-time workers (Finland).** The Employment Contracts Act requires employers to prioritise offering extra hours to existing part-time employees before hiring new staff (PAM, 2024).

INCOME INSTABILITY

Employees earning low wages are often compelled to extend their working hours or seek **additional employment** to meet basic financial needs. Many workers remain on call or are constantly online to check for overtime or additional shifts to supplement their earnings, contributing to unpredictable schedules and limiting their ability to plan their personal time (Interview 24, 2024; Interview 27, 2025). Importantly, when there is a constant need to maximise earnings through additional work, it undermines long-term well-being, contributing to stress, burnout, and diminished quality of life (Spiegelaere & Piasna, 2017).

The Property Services sector is characterised by **low wages**. In European OECD countries, the median income for cleaners ranks within the lowest 10 to 20% of the overall earnings distribution, whereas security guards typically earn at levels closer to the middle, ranging between 40 and 50% (Milos & Belgfeld, 2022). It was noted in the cleaning sector in Finland that “even for full-time workers, wages are very low. As far as we know from our members and workers, they still have to rely on government benefits to survive” (Interview 27, 2025). Wages in cleaning are notably lower than those in other parts of the Property Services sector and have significant implications for worker morale and retention.

Similar challenges are evident in other countries. The private security sector in Portugal pays wages that are just a little over the minimum wage, while working time in the sector requires working days, nights, weekends and holidays (Interview 22, 2024). Employers sometimes exploit **loopholes or ambiguities to reduce costs** without overtly violating labour laws. One such practice was described in private security in Portugal, referred to as ‘the package’, which involves employers offering a lump sum salary paid over 12 months, ostensibly covering all wages, overtime, meal allowances, and holiday subsidies. While the monthly figure may appear higher, this approach consolidates payments that should be itemised, effectively reducing the total annual remuneration and diminishing workers’ financial security (Interview 22, 2024).

Box 13. Best practices addressing low wages

Collective agreements:

■ **More benefits and daytime cleaning (Netherlands).** In 2024, it was agreed that wages in the cleaning sector should be increased by at least 7%. Workers in the lowest pay scales were to gain more, and if applicable, cleaners were to receive a loyalty bonus from their employer. Other benefits include a travel allowance between work and home starting at a distance of 10km. It was also agreed that daytime cleaning would become the norm (de Vries, 2024).

National legislation:

■ **The Payment of Wages Act (Ireland).** The Act ensures proper payment of wages without deductions. *“It’s a legal document that states companies cannot deduct any money from your wages without written permission. So, in Ireland, companies can’t charge for uniforms or deduct money for any reason other than taxes. That protects our wages from bad management. If we work an hour, we have to be paid for that hour, regardless. When it comes to overtime, companies have to pay us overtime.”* (Interview 4, 2024)

WORKLOAD AND WELL-BEING

The **intensity of work** in the Property Services sector has increased, driven in part by significant labour shortages and heightened expectations regarding the volume of tasks that can be completed within a given timeframe. A trend of reduced working hours in the cleaning sector has been observed in Belgium and Finland, where employers allocate fewer hours for tasks that must still be completed to the same high standard as before (Interviews 23 & 24, 2024; Interview 27, 2025). This phenomenon is closely linked to the competitive tendering process, which increasingly prioritises cost over quality. To secure contracts, companies bid with lower prices for a higher amount of work, a practice that directly impacts employee workloads. (Interviews 23-24, 2024; Interview 27, 2025; UNI Global Union, 2023). Consequently, cleaners must meet tight and often impossible deadlines to meet clients’ demands, who still expect high-quality cleaning despite the reduced time to achieve it. For example, in Finland, workers report significant pressure from employers to clean specific areas within insufficient timeframes. One interviewee explained: *“The company that wins the client is usually the one that offers the lowest price. For example, in office cleaning, they might assign only one cleaner for a few hours to cover a huge space. That’s basically impossible to complete in such a short time.”* (Interview 27, 2025).

Workers in the Property Services sector face not only high workloads but also significant risks to their **physical and mental health**. In the cleaning sector, the nature of the work is frequently described as ‘backbreaking’, ‘painful’, and even ‘inhumane’, particularly concerning heavy workloads and shift work (Hooker, 2023). Chronic physical strain is common, often leading to long-term health problems such as musculoskeletal disorders (MSDs). Some workers are inclined to skip breaks, and are unable to eat properly due to time constraints, while others highlight the negative effects of poor treatment on their mental health and self-esteem (Interview 23, 2024; Hooker, 2023). Migrant workers and women working night shifts are at higher risk of being harassed and even physically or sexually assaulted (MacQuarie et al., 2022). Additionally, women are also 30% more likely to get breast cancer, one of the many possible physical consequences of a regularly disrupted circadian rhythm (Bergfeld, 2024; Colao, 2024). Private security workers face similarly challenging conditions, marked by high-intensity work and significant safety risks. Discrimination, harassment and violence are pervasive issues within the sector. A recent report by UNI Global Union highlighted that one in five security workers feel unsafe in their jobs, and nearly half have experienced at least one form of harassment or discrimination at work. Women are disproportionately affected, facing higher rates of harassment compared to their male counterparts (UNI Global Union, 2024).

Box 14. Best practices addressing work intensity

Collective agreements:

- **Entitlement to free weekends (Belgium).** Between 2019 and 2022, collective bargaining agreements in the Belgian private security sector introduced significant improvements in workers’ rights to weekend time off. These agreements provided all workers with 22 free weekends annually, with additional weekends off allocated to older age groups. Workers were also granted the right to decline weekend shifts after working a certain number of consecutive weekends (Interview 2, 2024).
- **Weekly free time (Finland).** A sectoral collective agreement in Finland requires working time to be arranged in such a way that the employee has an uninterrupted rest period of at least 35 hours (preferably including a Sunday) once a week. This weekly free time may be arranged through a system of averages, and exceptions may be made in accordance with the Act on Working Hours (Interview 3, 2024; PAM, 2023).

3.4.3. POLICY IMPLICATIONS

Employees in the Property Services sector, specifically cleaning and private security, face significant working time challenges that highlight key priorities from the workers' perspective, namely:

- **Unpredictability of working time.** Workers in the Property Services sector contend with irregular schedules, short-notice changes, and on-call expectations driven by client demands and cost-efficiency strategies. The widespread use of non-standard contracts, including part-time work and zero-hours agreements, particularly in the cleaning sector, exacerbates financial and social vulnerability and complicates compliance with EU and national labour laws.
- **Low wages and part-time work.** The prevalence of involuntary part-time work undermines workers' financial stability, access to social benefits, and employment conditions. Workers rely on overtime or additional shifts to boost their income, further disrupting work schedules that hinder the planning of personal time. This need to maximise earnings can negatively impact long-term well-being, leading to increased stress, burnout, and a reduced quality of life.
- **Work intensity.** Work intensity in the Property Services sector is increasing, driven by a combination of interconnected factors including staff shortages, low wages, the prevalence of part-time work, and heightened client demands. This trend often manifests as growing expectations for workers to complete the same volume of tasks within increasingly reduced timeframes imposed by employers. The pressure to meet unrealistic productivity standards can lead to physical exhaustion and chronic health issues, experiences of stress and frustration, as well as feeling that their efforts are undervalued and that working conditions are not sustainable.

The key issues identified through interviews with Property Services representatives highlight significant and persistent challenges contributing to the sector's **vicious cycle of lack of attractiveness and labour shortages**. Low wages, poor working conditions, unpredictable working time, and societal undervaluation of Property Services jobs make it difficult to attract and retain workers. Consequently, existing workers face increased workloads, physical and mental strain, and job dissatisfaction. Breaking this cycle requires a multi-faceted approach, including raising wages, improving working conditions, and ensuring fair and more predictable working time arrangements.

The good practices highlighted in this chapter demonstrate the critical role of collective bargaining agreements in addressing the challenges and improving working conditions in the Property Services sector. However, the extent of collective bargaining coverage varies significantly across EU Member States, ranging from nearly 90% in Northern Europe to just below 15% in Central and Eastern Europe (UNI Europa, 2020). This disparity affects the effectiveness of such agreements, particularly in countries with recently adopted frameworks, which may need time to align with the well-established practices of regions with bargaining traditions. Even in countries with high collective bargaining coverage, challenges persist, including limited worker awareness of their rights and instances of employer non-compliance. The enforcement mechanisms must be strengthened in order to address issues facing the Property Service sector, and increasing the visibility and accessibility of collective bargaining agreements must be prioritised. Doing so will ensure that their potential to improve working conditions is fully realised across this sector.

4. CONCLUSIONS

4.1 KEY TAKEAWAYS FROM THE SECTORAL ANALYSES

At least three key horizontal themes emerge from the above analysis:

- Working time trends and patterns are heterogeneous, and broad trends can ‘hide’ significant sectoral variance.
- Issues of working time cannot be detached from other aspects of working conditions (such as remuneration, work intensity, and OSH).
- The importance of collective bargaining and employee voice in negotiating fair working time arrangements cannot be overstated.

HETEROGENEOUS WORKING TIME TRENDS

The cross-sectoral overview (see *Chapter 2*) introduced two overarching trends in working time evolution in the EU: the gradual decrease in average working time and the de-standardisation of working time arrangements. Both of these trends have also materialised in the four service sectors studied (Care, Commerce, ICTS and Property Services), though with important nuances. Working time reduction in ICTS has occurred more slowly than the EU average, and the long-standing issues of excessive hours and pervasive overtime have persisted. On the other hand, working time declines in the Care, Commerce and Property Services sectors have pushed them further below the EU average, exacerbating the pre-existing challenges of (involuntary) part-time work.

Likewise, the de-standardisation of working time has followed different pathways. In ICTS, flexible schedules (facilitated by the rise of remote work) empowered employees to take charge of their daily schedules and often improved their work-life balance, though also creating new risks of over-connection and boundary-blurring. In service sectors that rely on physical presence, de-standardisation has followed a different trajectory, including an increasing reliance on casual work, algorithmic scheduling, an on-demand workforce, and the persistence of shift work, often at ‘atypical’ times (such as nights and weekends).

WORKING TIME AND WORKING CONDITIONS

The selected key impacts of working time trends on working conditions are summarised in *Table 1* below. They exhibit two overarching concerns:

- As a result of the diverging trends described above, the key challenges for working conditions follow a similar divide between lower-skilled, shift-based jobs (the Care, Commerce and Property Services sectors, as well as contact centre workers in the ICTS sector) and high-skilled, teleworkable occupations (concentrated in the ICTS sector).
- Issues of working time cannot be considered in isolation from other key dimensions of working conditions, such as pay, work intensity, and occupational safety and health (OSH). As such, efforts to improve working time arrangements must be situated within a broader framework aimed at enhancing overall job quality and safeguarding workers’ well-being.

Table 1. Key working time challenges across sectors

LOW- AND MID-SKILLED IN-PERSON JOBS	HIGH-SKILLED REMOTE OR HYBRID POSITIONS
<ul style="list-style-type: none"> ■ ‘Flexi-vulnerability’. Across Commerce, Care, Property Services, and ICTS contact centres, working hours are largely shaped by employer needs, resulting in unstable schedules, on-call work, short-notice scheduling, and split shifts. ■ Financial precarity and involuntary part-time work. Pervasive low wages, restricted working hours, and the prevalence of casual and part-time contracts make it difficult for many workers to secure a stable and sufficient income, often forcing them to take on extra shifts or multiple jobs. ■ Work intensity and exhaustion. Labour shortages and understaffing, as well as cost pressures from employers, contribute to rising work intensity, physical strain, and mental fatigue. 	<ul style="list-style-type: none"> ■ Overwork and hyperconnectivity. Excessive working time and flexible working hours often lead to overwork and blurred work-life boundaries. Often, the lack of clear working time boundaries combined with high performance expectations contributes to an ‘always-on’ culture, where workers feel pressure to stay available beyond standard hours. ■ Work intensity and cognitive strain. Workers face mental strain and burnout due to constant digital connectivity and high productivity expectations. ■ Unequal access to flexible work arrangements. While many professionals benefit from remote work and flexible schedules, this is not universally available across the sector, posing issues of equality.

Source: Authors’ own elaboration.

THE ROLE OF COLLECTIVE BARGAINING IN FACILITATING CHANGE

Collective bargaining and employee voice play critical roles in shaping fair working time arrangements, as is visible at both macro and meso levels. At the macro level, in countries with well-established collective bargaining cultures, collective agreements tend to enforce and institutionalise shorter working times while maintaining far-reaching provisions that secure other aspects of working conditions (see *Chapter 2*). At the meso level, many of the best practice solutions identified across service sectors (see *Chapter 3*) result from collective agreements negotiated at the company or (more often) sectoral level. These agreements either guarantee minimum decent working conditions thus reducing key risks for workers (e.g. non-use of zero-hour contracts), ‘upgrade’ existing provisions secured by national legislation, providing enhanced protections and safeguards for workers covered by the agreements (e.g. guaranteed rest and advance scheduling), and/or institute new innovative ways of improving fairness and accountability (e.g. annual working time accounts).

4.2. GUIDING PRINCIPLES FOR WORKING TIME FAIRNESS

Building on the ILO’s conceptualisation of ‘decent working time’ (ILO, 2007)³⁰ and the body of evidence presented in this Report, we attempt to reconstruct the key principles or criteria for ‘working time fairness’ in *Table 2* below. While acknowledging the diversity of challenges across sectors, these criteria aim to provide a broad, universal set of principles that can be used and followed by worker representatives and policymakers in campaigning for better, more equitable working time rules.

Table 2. ‘Working time fairness’ criteria

CRITERION	DESIRED IMPACT	NECESSARY PROVISIONS
INDIVIDUAL LEVEL	WORKERS SHOULD HAVE THE RIGHT TO:	WORKING TIME ARRANGEMENTS SHOULD:
Duration of work	work a ‘reasonable’ number of hours.	prevent (sustained) excessive working hours on the one hand and involuntary part-time work on the other.
Time of work	maintain a healthy work-life and work-family balance.	minimise work during unsocial hours (e.g. evening, night, and weekend work) as much as possible and ensure fair allocation and remuneration of that work.
Security and wages	secure a decent wage.	allow for adequate income considering working time vis-à-vis wages, including guaranteeing minimum hours.
Health and safety	minimise the burden on their (physical and mental) health.	promote the health and safety of workers, including avoiding excessively long shifts, ensuring rest, disconnection, etc.
Health and safety	minimise the burden on their (physical and mental) health.	promote the health and safety of workers, including avoiding excessively long shifts, ensuring rest, disconnection, etc.
Predictability	have predictable schedules.	ensure long-term planning of shifts and allow workers to refuse to work at short notice.
Work intensity	manage workloads that are not harmful to their productivity and health.	ensure working time and workloads are well-balanced, for example, by avoiding compressing working time with no change in the scope of work.

Source: Authors’ own elaboration.

30. ILO has identified the following five significant conditions that ‘decent working time’ should meet: (1) promote health and safety; (2) be ‘family-friendly’; (3) promote gender equality; (4) advance the productivity and competitiveness of enterprises; and (5) facilitate worker choice and influence over their hours of work.

Table 2. ‘Working time fairness’ criteria (continued)

CRITERION	DESIRED IMPACT	NECESSARY PROVISIONS
INDIVIDUAL LEVEL	WORKERS SHOULD HAVE THE RIGHT TO:	WORKING TIME ARRANGEMENTS SHOULD:
Flexibility and control	have a degree of autonomy to decide the time of work.	give the workers a degree of choice regarding, for example, shift scheduling or working time boundaries in remote settings.
Time off	access paid sick and holiday leave.	ensure fair leave and holiday provisions, regardless of contract type.
Adjustability	adjust their working time to life events.	allow, to a degree, for workers to switch between full-time and part-time depending on their life cycle, for example, to account for studying, caring obligations, or limiting hours for older workers.
Workers’ voice	voice their positions and influence the setting of policy and working time arrangements.	be agreed based on a consensus between workers and employers, including/preferably through collective bargaining.
SOCIETAL LEVEL	CITIZENS SHOULD HAVE THE RIGHT TO:	POLICY FRAMEWORKS SHOULD:
Service quality	access high-quality services.	ensure that working time models, while safeguarding workers’ rights, do not significantly limit access of service-receivers to the services they need, particularly in essential services such as healthcare and social care.
Polarisation	enjoy a balanced distribution of employment across sectors and occupations.	aim to facilitate the matching of demand and supply of work, for example, through up- and re-skilling initiatives.
Gender equality	access the same jobs and working conditions regardless of gender.	facilitate a fair distribution of paid and unpaid working time, including through childcare support, parental leave policies, etc.

Source: Authors’ own elaboration.

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	INTERVIEWEE	COUNTRY	ORGANISATION	DATE
EXPLORATORY INTERVIEWS				
1	Academic researcher	UK	University of Cambridge	15/07/2024
2	Academic researcher	France	Paris Dauphine University	16/07/2024
3	Academic researcher	UK	King's College London	17/07/2024
4	Applied researcher	EU	ETUI	17/07/2024
5	Applied researcher	EU	Eurofound	23/07/2024
CARE				
6	Trade union representative	Austria	Gewerkschaft GPA	31/10/2024
7	Trade union representative	Belgium	BBTK Federaal	14/11/2024
8	Trade union representative	Poland	COZZ-UNI	27/11/2024
9	Trade union representative	Spain	CCOO Habitat	04/12/2024
10	Trade union representative	Czechia	COZZ	04/12/2024
COMMERCE				
11	Trade union representative	Hungary	KASZ	29/10/2024
12	Trade union representative	Sweden	Handels	30/10/2024
13	Trade union representative	Spain	CCOO Servicios	31/10/2024
14	Trade union representative	Finland	PAM	05/11/2024
15	Trade union representative	Belgium	ACV-Puls	19/11/2024
ICTS				
16	Trade union representative	Switzerland	Syndicom	16/10/2024
17	Works council representative	Croatia	HST	18/10/2024
18	Trade union representative	Germany	Ver.di	23/10/2024
19	Trade union representative	Belgium	ACV-Puls	25/10/2024
20	Trade union representative	Portugal	Sinttav	25/10/2024 (written response)
21	Trade union representative	Denmark	HK Privat	04/11/2024
PROPERTY SERVICES				
22	Trade union representative	Portugal	SITese	16/10/2024
23	Trade union representative	Belgium	ACCG	24/10/2024
24	Trade union representative	Finland	ISS	28/10/2024
25	Trade union representative	Ireland	G4S Ireland	30/10/2024
26	Trade union representative	Sweden	Securitas	09/12/2024
27	Trade union representative	Finland	PAM	29/01/2025

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