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# Trends Shaping the Future Of Work in CEE

Foresight Report by  
FutureStation.ro



# Foreword

How much will automation and digitalisation change our jobs in the following years, what skills do we need to develop to keep pace with a constantly changing world of work or how flexible and green employers need to be to attract employees, are some of the trends we are looking at in the “**Trends Shaping the Future of Work**”.

**History gives us a hint:** those who embrace rather than ignore the signs of change are the winners in a competitive world. WorkTransitionCEE project aims to underline how critical the following years will be for job transition in the new world of work and how important a strong European social dialogue is to better deal with digitalisation’ challenges and optimize its benefits. With the right strategies in place, digitalisation and automation can lead to thriving employers and employees.

**With this report we want to spark conversations and ideas about how we can ensure CEE is a winner and remains competitive through adaptation and experimentation.** We are not here to say this is going to be easy, many workers are still heading West while the population at home is ageing. Are robots enough to fill in the deficit or are we looking East for more human energy? How are we going to mitigate the risk of polarisation between a global tech elite and those whose skills will prove obsolete with significant social and economic implications. Out of pandemics, companies and employees alike have shifted perception about where and how we work. What makes the work and the workplace meaningful especially for those who can work from anywhere for everyone? These are just a couple of questions for reflection, more will come after reading this report.

We have reasons to be optimistic about the future, a future blending work and life, technology and human interaction, economy and society, but the positive scenarios where all these elements find a balance could be made possible through collaboration. As social partners we have the vocation of collaboration and by no means we shape the future of work in CEE.

**This report is developed under the umbrella of WorkTransitionCEE - a project co-financed by the European Union** that brings together six representative social partners from Romania, Hungary and Slovakia (employers and employee’s representatives alike) to better understand the Industry 4.0 risks, challenges and opportunities for job transition in Central and Eastern Europe.

## WorkTransitionCEE Consortium

- [Concordia Employers’ Confederation](#) (Romania) – Project Coordinator
- [The National Trade Union Block](#) (Romania)
- [BusinessHungary](#) (Hungary)
- [Hungarian Metalworkers’ Federation](#) (Hungary)
- [The National Union of Employers](#) (Slovakia)
- [Independent Christian Unions of Slovakia](#) (Slovakia)

Find out more about the WorkTransitionCEE project at [www.worktransition.eu](http://www.worktransition.eu)

# What will you read?



**Work** will never  
be the same **04**

**Foresight** & looking  
into the **Future** **05**

**Trends** shaping  
the **future of work** **06**

**Envisioning** possible  
**future scenarios** **34**

**Acknowledgments** **36**

# Work will never be the same

## The world is constantly evolving, and so is the work field.

What we know today and how we imagine "work" may differ from what it will look like in the future. Driven by economic, legislative and political factors, social and cultural changes, the advancement of technology and digitalisation or climate crisis, work, with everything from workspace to workforce, will become increasingly complex.

This increasing complexity creates new challenges for employees, as well as for employers. Employees will need to engage even more in Long Life Learning (LLL) - keeping up with labour changes and constantly updating their skills to stay relevant in the job market.

At the same time, employers will need to pay more attention to the needs of the people in the organization - both to the needs related to the successful fulfillment of their tasks, but also to their personal ones - in order to keep its workforce and increase its attractiveness towards new employees.

With all these changes, it is difficult to draw a certain direction to the horizon. The questions can be numerous. Will artificial intelligence and automation become more prevalent? Will this change lead to new jobs or new employment requirements? How will 4 generations work environment look like? We do not have answers yet to all these questions, however this report includes certain directions that could guide us in wayfinding.



## Looking into the future or doing foresight is something that all of us can do!

Modern neuroscience has taught us that for humans, thinking about the future is an outcome of evolution. Our brains can be seen as prediction engines, choosing when and how much to think about what's next, and how far ahead to anticipate. Whether we want to be or not, we humans are natural, automatic futurists.

**Foresight is a participatory process, involving horizon / trends scanning and strategy planning.** The discipline of foresight can be helpful in understanding how the world around us is changing, in managing uncertainties and catalyzing the identification of relevant opportunities. By using foresight, organizations can better cope with the unknown, anticipate change and prepare for the future.

**For the purpose of this material, we have been using foresight methodology and tools to scan and identify relevant trends and signals of change for the future of work.**



**“Our species is misnamed. Though homo sapiens defines human beings as wise, what humans do especially well is to prospect the future. We are homo prospectus.”**

**M. E. P. SELIGMAN**  
“Homo Prospectus”

# Foresight or how to look into the future



# Trends shaping the future of work

We see trends as pathways of development. They help us in making sense of the complexity of the surrounding world and provide a platform for acting and developing strategic responses.

Trend analysis is highly useful in the beginning of future-oriented processes because it provides a framework that organizations need to consider in their processes.

**We have chosen to further focus on 5 key trends that could drive change in the work field of the future in CEE.**

When “**reading**” these emerging trends, question yourself the following:

- 01. How does these trends impact how people think about the status quo?**
- 02. How will these trends affect your organization, now and in the future?**
- 03. How can you communicate the matter in such a way that people understand it is crucial to act upon these trends?**
- 04. What are your options for acting today on these trends?**





## Human-Machine collaboration



## DemograFREE



## Business of Purpose



## Decentralization



## Default to transparency



### How to navigate this next part:

Each trend comes with a **description** and relevant **data** that sustain the emergence of the change. Moreover, **quotes** from interviews with experts in the field have been considered.

For each trend we are illustrating certain **signals of change** - examples of concrete manifestations of such trend that we are already observing in Europe / Globally, but also in CEE - focus on Romania, Slovakia and Hungary.

In addition, we have analysed the potential implications of such trend for **WORKplace** and **WORKforce**.



**This trend is about the impact of robotization, automatization and digitalisation on the future of work, and the subsequent intertwining of human-machine collaboration.**

Digital transformation is a topic that is increasingly discussed in today's societies because its implications are not only found at the micro level, addressed only to certain areas such as education, work or health. But it is something that makes changes at the macro level. If technology is changing people need to be educated in order to be able to use it, whether we are talking about students, employees or retail customers. This involves new social policies and measures to prepare us for the more complex and technology-driven future.

And not only employees will have to change their way of working, but employers and work at a much higher level will have to adapt to the new changes produced by the digital transformation. That's if we want the transition to new complex technologies to be beneficial and to maximize the benefits of digitization.



## Human-Machine collaboration

**Unhuman** shift in working

**“3 years ago, Japanese employer association used industry 4.0. Now they use society 5.0, which indicates if we really would like to use efficiently this new technology, we have to change the work organization, employment structure.[...] We must be aware that new model of work is developing, not only the technology.”**

**MAKÓ CSABA**, Institute of the Information Society, University of Public Service, Budapest

**European Commission presented the next statistics:**

- **4 million industrial robots** are being expected to be in use around the world by 2022
- **AI has the potential to double the annual economic growth** rates by 2035
- **2 million new jobs have been created in the EU due to digitalisation** over the last decade and 1.75 million new jobs are expected in ICT by 2030



**Digital Challengers in CEE**  
research conducted by  
McKinsey conclude that:

**IN ROMANIA**

- **50-54% of working time** is spent on activities that could be **automated**
- **4.0 – 4.4 million jobs** could be **automated** by 2030 using current technology
- **Sectors which are at a medium level of digitization** (Digital followers): manufacturing, retail, finance and professional services
- **Sectors which are Digital novices** (the least presence of digitalisation): transportation, healthcare, education

**IN HUNGARY**

- **49% of working time** is spent on activities that could be **automated**
- **2.0 million jobs** could be **automated** by 2030 using current technology
- **Sectors which are Digital followers:** retail, finance, professional services, transportation
- **Sectors which are Digital novices:** healthcare, education, manufacturing

**IN SLOVAKIA**

- **48 – 53% of working time** is spent on activities that could be **automated**
- **1.2 million jobs** could be **automated** by 2030 using current technology
- **Sectors which are Digital followers:** finance, agriculture
- **Sectors which are Digital novices:** healthcare, education, manufacturing, retail, professional services, transportation

For the transition to be well-structured and thorough, it must be done gradually. Thus, the process is a long one, starting from the anticipation of the change and finding new working variants, to their implementation, their observation and evaluation. The European cross-sectoral social partners have wrote a framework agreement detailing these stages of the digital transition process. ([LINK](#))

**Robots are not going to take our jobs!**

This is an important aspect to reiterate. Automation has led to the disappearance of certain jobs, but at the same time it has created new ones. Looking forward, the World Economic Forum predicts that by 2025, 97 million new jobs will be created by technology, while 85 million jobs will be lost to automation ([LINK](#)). The challenge is that professionals / employees will have to constantly learn about tech innovations and be able to use digital tools.






## What we see already happening

The European Commission is committed to deliver a **Europe fit for the digital age** by empowering people, businesses and administrations with a new generation of technologies. ([LINK](#))

Moreover, below we are presenting **several signals of change and concrete manifestations of this trend** - namely initiatives of various companies from various industries, all from CEE:

- 

**Signals of change CEE**
- **Wiener Linien (AT)** has commissioned Siemens Mobility to supply 34 fully automated subway trains - a driverless subway project that will operate in Vienna. The Slovak team is in charge of configuring the AFF (Application Fahrren), the design and testing of software. ([LINK](#))
  - **UiPath (RO)** is a global software company that is developing a platform for RPA - robotic process automation ([LINK](#))
  - **Raiffeisen Bank (RO)** is piloting agencies without cashiers - July 2021 ([LINK](#))
  - **Happy Recruiter (RO)** has developed Dora, a recruitment robot, Dora is adapting to each interview, using artificial intelligence/intelligent automation and performing hundreds of interviews simultaneously ([LINK](#))
  - **Almotive (HU)** has an important portfolio of software, tools and hardware products complemented by proprietary data management tools, enabling customers to rapidly develop and deploy production automated driving features ([LINK](#))
  - **Photoneo (SK)** is involved in the development of 3D scanners and cameras for integration into industrial robots ([LINK](#))
  - **Robotec (SK)** offers complex solutions in all implementation phases of robotic and automation technologies into practice ([LINK](#))
  - **Slovenská sporiteľňa bank (SK)** welcomes Vesna, a 3D holographic banker who is helping clients by answering to their questions. ([LINK](#))
  - **Daimler (HU)** has invested in a highly robotized factory – Mercedes – in Kecskemét, where car parts are transported by robots from the logistics zone to the assembly lines ([LINK](#))

# WORKplace

Driven by technology, **the future workplace empowers and inspires people to do their best work** – to communicate, collaborate and solve problems. It deepens engagement, spurs productivity and creates efficiency.

We have illustrated below **some of the aspects we see emerging for a future of workplace** where we talk about robotization, automation or digitalisation:



## Flexible and connected workplace

In the era of hybrid working, a connected workplace is essential for a productive and successful business. A connected workplace integrates various technology tools so everyone can communicate and collaborate effectively: this shared system makes it far easier to manage a workforce that works both in and out of the workspace.

**INSPIRATION** Romanian startup, Octonius - a digital workplace & work management platform. ([LINK](#))



## Workplace community

Employers tend to compete for talent by highlighting employee engagement, the workplace experience and corporate culture as the bond between employee and employer has intensified during the last decade.

Many companies previously used the physical office to create a sense of community, offering attractive in-office perks. Now technology plays a bigger role in achieving that.

**INSPIRATION** TEEM – the app for collaborative communities ([LINK](#))



## Phygital collaboration

Traditional physical collaboration has seen in the last years a shift towards digital experiences, physical plus digital became “phygital”. The Covid-19 pandemic is ushering in a new digital-oriented way of engaging and collaborating. Collaborative human-machine or cobot, represent a new realm of the fast-growing industrial robotics market. Technological advancements have made the applications of collaborative robots (cobots or co-bots) a reality in many manufacturing factories and logistics centres.

With advantages of increasing flexibility, improving production efficiency and reducing operational cost, industrial robots have been deployed to assist human workforce and keeping manufacturers competitive in the global markets.

**INSPIRATION** Cobotware, first Romanian company specialised in collaborative robots ([LINK](#))

# WORKforce

With the advancement of technology, new professions and new ways of doing business appear. And with them, **new skills that will represent a differentiator among employees.**

Out of these, we have mentioned below 2 specific tech related skills that professionals, together with businesses and governments can – and must – work together to address this transition, the need for upskilling and consequently, embrace the positive societal benefits of human-machine collaboration. According to the Future of jobs Report 2020 by World Economic forum, 50% of all employees will need reskilling by 2025 ([LINK](#)).



## Befriend machines

All technological developments, access to data, digitalisation, produce changes at the level of interaction.

Looking into the future, workers will have to befriend the machines and get more familiar with digital tools and apps. With this help, employees can add more value to human side skills such as empathy, emotion, negotiation, that cannot be replaced by technology.



## Data mastery

Data is more than just simple sets of numbers. Behind are hidden stories that can provide valuable insights. Thus, a very important skill in the future will be the ability to understand data and what can be done with it.

**INSPIRATION** Hungarian startup TrustChain developed a secure digital contracting platform, assisting companies with automated client identification, contract-making and trade financing, significantly reducing the time spent on administrative and daily legal activities ([LINK](#))

**INSPIRATION** Hungarian company Answer Miner is an exploratory and data visualization platform for marketing and business analysts to explore correlations, create dashboards and predictive analysis ([LINK](#))

**INSPIRATION** Babeş-Bolyai University (Romania) together with Banca Transilvania, launched the Data Science for Industry and Society master's degree program. Its purpose is to prepare students for the jobs of the future by giving them the opportunity to obtain technical certifications for jobs like Visual / Statistical Business Analyst, Machine Learning Specialist or Natural Language Processing. ([LINK](#))

# WORKforce

**The work is getting smarter so we have to keep up with it!**

Considering today's growth and change in the work environment, employees must also learn certain skills for being able to work with machines. Let's look over some data to see how's the situation in Romania, Hungary and Slovakia.

## According to DESI 2021...

### ROMANIA ranks

#### 27th out of the 27

EU member states and 26th in terms of human capital with a score below average for most indicators.

It is worth mentioning that Romania ranks **4th in the number of graduates in IT**, but the lack of specialists in this field limits the country's ability to innovate and maximize the benefits of digital transformation.

### HUNGARY ranks

#### 23rd out of the 27

EU member states and 22nd in terms of human capital with a score below average for most indicators.

Only **49% of Hungarians have at least basic digital skills**, which is significantly below the EU average of 56%. The level of digital skills is relatively low.

### SLOVAKIA ranks

#### 22nd out of the 27

EU member states. **54% of Slovaks have at least basic digital skills** and 27% have above-basic digital skills in comparison to 56% and 31% for the EU average.

# 6%

The number of enterprises providing ICT training in 2020 in Romania, which is 14 percentage points lower than the EU average of 20%

# 16%

The number of enterprises providing ICT training in 2020 in Hungary and Slovakia



Statistics show a low number of people with digital skills. Or, at this digital expansion stage, this are must have skills. At the same time, the support offered to employees for personal development is below the European average.

If we want the future not to take us by surprise and to continue to have a qualified workforce, an important step would be to invest in both programs aimed at improving practical skills and vocational training programs.

Vocational training programs are also necessary. For certain jobs it is not enough to master some skills but also to know how to apply them in practice.

Employees need support and investing in such programs can lead to the transformation of an employee with basic knowledge into a true professional which masters the job.



## Study case

**Transitions collectives, also called "Transco", is a new system co-constructed with the social partners as part of the France Relance plan.** It aims to promote professional mobility, in particular between sectors, and retraining at the scale of a territory. Also this program allows employees to access certifying training, or validation of acquired knowledge towards the promising profession of their choice before being recruited in a company in the territory, without going through a period of unemployment. During the training period, Transco ensures the remuneration of the employees.

**More details can be found [here](#).**

**"I believe that the real stake for the future of the European labour market and labour force is vocational training."**

**RADU COMSA**, Education & Training department coordinator  
BNS Romania

**By 2050, Europe could face a labour shortage of roughly 35 million workers, accounting for 15% of total demand (OECD).**

Furthermore, OECD refers to a "squeezed middle" phenomenon, which means that a significant reduction in the number of jobs in the mid-skilled labour group. Labour shortages and surpluses of this magnitude will inevitably have a negative impact on growth; when combined with the costs of public welfare associated with an aging population and brain drain, they appear to be a sure-fire formula for economic slowdown.

One of the popularized solutions for this is a more **diverse and inclusive labour market**. One that allows and encourages all persons of working age to engage in paid job while also providing a framework for their growth. Women, young people, senior workers, and low-skilled workers are currently underemployed in various industries and economies.



## DemograFREE

### Diverse shift in working

#### GENDER PAY GAP

- 2.4% Romania
- 15.8% Slovakia
- 17.2% Hungary

Statistics explained



#### DEMOGRAPHIC AGING

##### SILVER economy

Because the percentage of older populations is increasing, in the future we could see more senior people in the workforce in the next years

# 30%

of the total population of Romania will constitute of people 65+ by 2050 ([LINK](#))

# 29.4%

of Hungary's population will constitute of people 65+ by 2050 ([LINK](#))

# 1.6

of working age will be for every one person over the age of 64 in 2070 in Slovakia ([LINK](#))



## BRAIN DRAIN

# 40%

Romanians **with higher education** live abroad ([LINK](#))

# 50-70%

**of Hungarian emigrants are between the ages of 20-39 and highly educated.** Also, there are 18,000 unfilled private sector jobs in greater Budapest alone ([LINK](#))

# 15.000

**Slovaks leave the country annually since 2005.** Every 10th university graduate left Slovakia which represented cca. 12 – 14% of the graduates ([LINK](#))

**“The problem of IT with brain drain is that these people don’t have to physically leave the country. Those who leave the country do so for the healthcare and education systems. However, since remote work became the norm, people have realized that they can have a salary about the same as in a foreign country, but they stay at home, in Romania. And we start having migration from the local IT sector with people who remain in the country.”**

**ION MOLDOVEANU**, Member of the Board, Employers’ Association of the Software and Services Industry (ANIS)

**Signals show that in the coming decade people will continue to break free from demographic assumptions around race, gender, age and more.**

Thus, pushing the European labour market towards more diversity and inclusion. This could result in more inter-generational collaboration and exchange, but also a higher level of immigrants.

→ **6/10 Romanian entrepreneurs** surveyed said they are willing to hire workers from abroad ([LINK](#))

→ **100.000 new immigrants** expected to be admitted in 2022 on the Romanian labour market to cover the shortage in areas such as construction of buildings, roads, restaurants, road transport, hotels and bakery ([LINK](#)) Ukrainian refugees are not considered for this contingent.

→ **NGO program “Come Home Young Person”**, was a program run by the Országos Foglalkoztatási Közhasznú Non-profit KFT – OFA (National Employment Foundation). It targeted young Hungarian professionals living in the United Kingdom. ([LINK](#))

→ **LEAF platform Slovak Global Network** which aims to further advance and actively address the topic of slovakian “brain drain”. The platform also aims to map the community of Slovaks abroad and give them the opportunity to actively participate in the formation of their home country ([LINK](#))

→ **LoginRO** is an IT job marketplace and portal for “promoting Romania as a resource of talent and great opportunities” for this professional category. The platform aims to connect employers and IT talents and create “a relevant and functional network for the local technology industry.”([LINK](#))

# WORKforce


## People will continue to live free from demographics so the workplace teams will be much more diverse.

Fact which brings benefits. For example, a multigenerational team can bring you 2 elements simultaneously: innovation and experience. The younger generations use their creativity and come up with new ideas after analyzing current trends while the older generations with more extensive work experience come up with more valuable knowledge and insights.

A study conducted by Randstad Workmonitor ranks Romania on first place in terms of appreciating the fact that belonging to a multigenerational team drives them to contribute with innovative ideas and solutions. The percentage is 91% compared to the global average of 85%. At the same time, Romanian employees notice an ease of communicating with their colleagues regardless of the generation they belong to.

→ [More details can be found in the report.](#)

## What we see already happening

- 
- **An initiative which encourages intergenerational cooperation for the renewal of urban society in Kazincbarcika. (HU)** The older generation offers volunteer in education of disadvantaged children who need more care than the average. The elderly pass on cultural values to children but also strengthen their self-confidence. ([LINK](#))
  - **Starbucks (MEX)** opens cafe operated entirely by seniors ([LINK](#))
  - **AGE Platform Europe** is a European network of non-profit organisations of and for people aged 50+, which aims to voice and promote the interests of the 200 million citizens aged 50+ in the European Union ([LINK](#))
  - **Women Business Angels (SK)** – female angel investors, who are interested in investing their expertise, time and money into (fe)male startups ([LINK](#))
  - **The Diversity Charter (EU)** is a voluntary initiative of companies and organizations to promote inclusion and diversity in the workplace ([LINK](#))
  - **Vacancies positions in Slovak companies** will be available to Ukrainian refugees ([LINK](#))
  - **University of Siegen (DE)**, has develop e-VITA Project a virtual coach for smart aging ([LINK](#))
  - **University for Seniors (RO)** is a pioneer project in Romania which focuses its actions on the senior citizens. ([LINK](#))
  - **Angajez 45+ report** (Romania, 2021) stipulates that 2020 has experienced the most significant cultural change (in terms of diversity and inclusion) in recent years ([LINK](#))

**We are witnessing a transition from "Business as usual" to "Business of Purpose". This trend emerges around the belief that purpose and profits can co-exist.**

Even before the pandemic, organizations were at inflection point regarding their role in the society, facing pressure to consider moving further from shareholder capitalism. While it is still unclear how fast this destination will be reached, we can already witness changes in the attitude of organizations towards environmental, social, and governance issues. **The ESG (Environmental, Social, Governance) framework gains momentum!**

Defining and integrating corporate purpose and ESG objectives will require companies to evaluate a wide range of decisions through a multistakeholder lens, leading corporations to prioritize groups that were once considered nontraditional or secondary stakeholders: employees, customers, suppliers, communities, and other affiliations, in addition to increasing demands from primary stakeholders.

For example, employees are beginning to pay more attention to their feelings and wellbeing in work environments. Thus, the issue of employee mental health is gaining recognition in today's society; thus, forcing organizations to change their approach in order to create a friendlier work environment, a place where workers can feel safe and maintain a positive mindset.

Moreover, this transition also implies structures and processes that are designed to ensure accountability and transparency.



# Business of Purpose

**Meaningful shift in working**



## 3 factors that have contributed to this transition are:

### Generational change



Each generation comes with its own set of values and beliefs. Specific for the new generations is deemed to be the desire to better protect the environment in which they live. Why? Because only in a pleasant and healthy environment you can develop as a human being and grow beautifully. For example, in Slovakia, 57% of young Slovaks consider climate change when looking for a job.

**1 in 2 Romanians consider companies** the “responsible” for the good of the planet and people

→ [Ambasada sustenabilitatii in Romania, 2021](#)

According to an EY Romania study, **45% of respondents consider that their employer should develop support programs** for the physical and mental health of employees

→ [More info](#)



### Covid-19 pandemic

During the pandemic work began to take new forms, from a hybrid model to a fully remote one. This change has led to the emergence of new requirements from employees who, once discovering how is it to work from home, started to pay more attention to this new way of doing tasks. That's because it can be more suitable for them by helping to keep a work-private life balance.

**Romanians were the most stressed and fearful employees in the region** during the pandemic, but only 4% of them turned to a psychologist

→ [Employee Wellbeing, Unde lucram survey](#)



### Rise of climate awareness

According to the Eurobarometer survey (2020), 94% of citizens in all EU Member States declare that the protection of the environment is important for them. Also, 83% of respondents consider European legislation necessary to take care of the environment.

→ [More info](#)

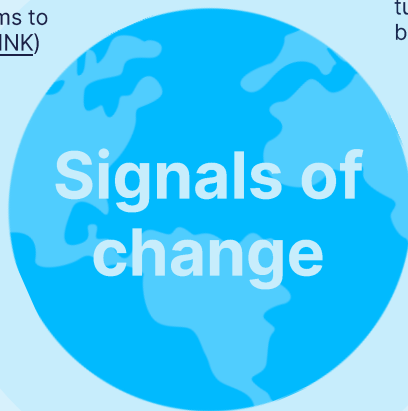
According to a survey undertaken by the Hungarian energy group Alteo, **80% of Hungarians** surveyed agree that environmental protection is a shared responsibility of society as a whole

→ [More info](#)



## What we see already happening

- **Slovak daily Denník N** helps schools, publishes manuals, handbooks and distributes them to schools ([LINK](#))
- **Slovak startup Fuergy** developed its own hardware device and AI-powered software called 'brAln', which aims to optimize energy consumption ([LINK](#))
- **O2 #DátujemeZodpovedne (SK)** supports a long-term nationwide campaign against hoaxes and misinformation on internet ([LINK](#))
- **Romanian entrepreneur Autonom** launched the first ever Sustainability-link bonds on Romanian Stock exchange ([LINK](#))
- **Hungarian oil and gas company MOL** published its long-term 2030+ strategy "Shape Tomorrow". Their commitment is to transform traditional fossil-fuel-based operations into a low-carbon, sustainable business model. ([LINK](#))
- **Long Term Stock Exchange (US)** is meant to be an alternative stock exchange focused on long term value creation. It was launched by Eric Reis, author of The Lean Startup (US) ([LINK](#))
- **Via Bona Slovakia** is a unique award for companies for inspiring examples in the field of responsible business and corporate philanthropy. ([LINK](#))
- **WASE (UK)** helps manufacturers to turn their unavoidable waste into bioenergy ([LINK](#))
- **EBRD** backs first green bond issued by Raiffeisen Bank Romania ([LINK](#))
- **Bitpanda (RO)** offers its employees unlimited, fully paid rest leave, two collective recreation breaks / year and the opportunity to work from a location of their choice ([LINK](#))
- **ING Bank (RO)** implements a pilot program through which employees can opt for 2 new ways of working: 9 hours of work per day for half a day off per week or a full day off once every two weeks. ([LINK](#))
- **Envisia** is the First Business School in Romania for Board Directors and for Responsible Corporate Governance ([LINK](#))



# WORKplace

**Organizations are starting to create their own city inside the buildings.** In addition to the classic office spaces, rooms designed to relax employees such as cafes, libraries or green outdoor terraces are beginning to appear.

**A friendly environment where workers can feel like home.**



**TBC Bank** located in Tbilisi, Georgia, spans four floors and has 11 different zones, each with a different purpose and environment, including a library with learning materials, a café, coworking spaces, personal banking, and exhibition halls. The space is designed to be collaborative, welcoming, and educational, but also suitable for solo workers. ([LINK](#))



**CTP**, the largest owner and developer of industrial and logistics space in Central and East Europe, has from 2021, in Romania the second highest concentration of green buildings (73 green buildings, area of 1.5mln. sqm, 22% of the total green buildings, from CTP portfolio. In 2021, CTP was the largest issuer of ESG-certified debt in the European real estate sector ([LINK](#))



**Einpark office building Slovakia** was awarded in 2020 as the first administrative building in Slovakia with LEED Platinum certification. It is one of the top 1% of the most sustainable buildings in the world. ([LINK](#))



**Green Court Bucharest** is a space that aims to help employees reach their full potential at work. It offers a friendly and comfortable workspace with plenty of green spaces and a relaxing courtyard, plus changing rooms equipped with showers and a bicycle parking lot. ([LINK](#))

# WORKforce

**Wellbeing is a key factor when it comes to employee productivity.** An employee who feels safe at work may be more focused on what he or she must do and more motivated to complete tasks successfully. Therefore, mental health should be considered and protected.

**At the CEE level, over 40%** of respondents believe that working from home has a positive effect on their mental health

→ Skanska CEE survey Dec 2021



**Over 40% of workers** globally are considering leaving their job

→ Eurofound (2018), Burnout in the workplace: A review of data and policy responses in the EU, Publications Office of the European Union, Luxembourg

**“As the skilled labour is more and more scarce, each employee is becoming more important to the business. At the same time, as they acknowledge their own power to choose, we see they are much more focused on the social side of the business and to draw a meaning from it. To become meaningful, the company should explain well what its goals are. Which means that you**

**hire someone having in mind the development of the company to bring benefits to society. You must tell a story. Why people should come to you and not going to someone else.”**

**EDUARD FLORIA**, TF Leader  
Employment & Social Dialogue,  
Concordia

**Some initiatives in this direction are:**

→ **Mindgram**, a science-based mobile app for complete mental wellness, is aiming to solve the productivity crisis and employee wellness issues ([LINK](#))

→ **Atlas App (RO)** is a platform that offers access to specialists in physical, mental and emotional health. Their services are offered by companies as benefits to their employees ([LINK](#))

→ **Hungarian platform Salarify** allows employees to get access to their earned, but unpaid, wages instantly in order to ease their financial stress so they can be more focused on work, productive and loyal ([LINK](#))



**36 mil**

estimated EU workers  
have participated in gig-  
work

→ [More info](#)

## Decentralization

### Decentralized shift in working

A visible phenomenon is the tendency of the labour market towards decentralization, which means that hierarchical structures take on much more flexible forms. In such businesses, there is no longer a single boss who has full decision-making power. The emphasis is on collaboration and the idea that all members of the organization form a team and must work together to do the best job possible.

Emerging technologies, such as blockchain, are favorizing the emergence of decentralization structures.

→ **e.g. DAOs - Decentralized Autonomous Organizations.**

But in addition to the decentralization of the internal organization, decentralization is also noticed in relation with the labour market. Thus, catalyzing the gig / on-demand work. Meaning, more companies are searching help from external professionals - independent workers - to perform specific tasks. And Covid19 pandemic has accelerated this shift - transfer of decision-making power to an outsider, making organizations more open to decentralization.

The so-called "gig workers" are a type of worker contracted usually on a short-term basis to do a one-off job. Thus, there is a transitional process in work relations - from the traditional one carried out in a full-time regime and into an office to a flexible and on-demand work.

**From the total number of gig / platform workers from Europe**

→ **14.2% are in Romania** → **8.9% are in Hungary** → **8.5% are in Slovakia**



**Gig economy often involves the use of digital platforms as intermediaries that allow independent workers to have a flexible lifestyle.**

The Hungarian initiative **Crowd Work** is making efforts in this respect. They are analysing strategies of alternative unions or movements and trade unions aiming to represent digital workers in Europe. According to Crowd Works' Hungarian national report on gig work *"platformization of economies has accelerated as the digitalisation of the world increases. At the end of the 20th century, the aggregated number of platforms (both online web-based, location-based platforms and their combined/hybrid versions) was less than 50 but within two decades their number has increased more than 15 times to 772."* ([LINK](#))

**"Labour regulation is a key in terms of the digitalisation of the labour market. As an employers' and business membership organisation, we think that the biggest challenge in the near future is to involve the companies of the platform economy in our membership and in the coverage of collective bargaining."**

**ADRIENN BALINT**, Director Of Social Affairs, Confederation of Hungarian Employers and Industrialists (BUSINESS HUNGARY)



## Study case

### To gig or not to gig in CEE

**Gig economy is a relatively new concept, sometimes seen as a controversial one.** This is because it came with a new way of working that at the beginning, it is unfamiliar to people and might not be in line with the traditional culture and values of work.

Let's look at the Uber case in CEE, starting with Hungary and Slovakia. In principle, Uber is challenged for failing to comply with strict environmental regulations and it didn't pay a mandatory deposit to the public passenger transport regulator as other taxi companies do. At the same time, Uber drivers did not take the same annual tests as taxi drivers do, who are part of a conventional passenger company. Also, their cars were much easier to maintain because they did not have to perform an annual technical inspection.

**More info:**

- **Emerging Platform Work** in the Context of the Regulatory Loophole (The Uber Fiasco in Hungary) ([LINK](#))
- **Slovakia: Is UBER an employer?** ([LINK](#))

## The Gig Economy in Romania

Romania, with high internet speed, is a good place for the gig economy to flourish. However, there is something that stands in its way, namely the lack of proper legislation.

There are two types of gig workers: those who work online (and can choose to either register as an authorized person or can follow the path of a limited liability company) and those who work offline. The latter category encounters several problems.

Until now, only the workers who carry out their activity in the field of transports are covered by the Romanian legislation in force. However, this legislation only covers the obligations of the workers, but not their rights.

It should be noted that gig workers do not have a safety net and it is difficult to distinguish between those who work full time on platforms (and could be assimilated to employees) and those who work on platforms to supplement their income. It is also difficult to regulate the flexibility part of the work schedule in relation to the classic working time provisions.

Some can enjoy the protection offered by an employment contract, only if they choose to work with a fleet, but then the popular benefits of gig economy would diminish. Because there are additional fees - commissions - and limitations of flexibility.

**More info:**

- **Regulating the Romanian Gig Economy** ([LINK](#))



## What we see already happening



### Decentralized organizational structures:

- **Valve Software (US)** - boss-free organization since 1996 ([LINK](#))

- **King Studio (RO)** works with small teams where members are responsible for their part of the project and have the freedom to work at their own pace ([LINK](#))

- **How DAOs could change the way we work** – Harvard Business Review article on Decentralized Autonomous Organizations and the future of work ([LINK](#))



**Some examples of gig apps** are Uber, Glovo, TaskRabbit, Upwork or DoorDash. Expectations are that the on-demand approach will continue to extend to ever more highly-skilled professionals, such as:

- **GIGNow (US)** is a on-demand work platform launched by EY - including coverage of Romania ([LINK](#))

- **Catalant (US)** is a on-demand work platform for consultants - market research, corporate strategy, project management, supply chain, digital transformation and more ([LINK](#))

- **Jaspravím (SK)** is a platform on which suppliers offer their services (foreign language translations, tutoring, web design) ([LINK](#))

- **HOPIN mobile app (SK)** - become a driver, order a taxi, drive with comfort limousine or find your right public transport line. ([LINK](#))

# WORKplace

Decentralization turns office work into "work from anywhere". So, what remains to be done is to choose the ideal workspace.



You can stay home or...

- **You can choose a Nooka** - first network of smart proximity office spaces designed for people who work remotely
- **You may prefer a cargo bike** which can be converted into a tiny office to enable work on-the-go

According to a **BestJobs** survey conducted in Romania in March 2022

# 46%

of white-collar employees work exclusively from home, while only

# 32%

employees share their work between home and company headquarters.

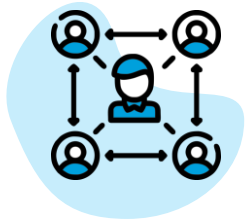
According to the same survey, companies want to bring their employees back to the office, but they still prefer **flexibility**:



**7 out of 10 employees** opt for a hybrid way of working



**1 out of 4 employees** would resign if the employer required them to return full time to the office



## WORKforce

### What gig workers should do in order to keep up with job market?

Gig economy sounds convenient and flexible, and for sure it is. But we should also bear in mind that this kind of work comes with some downsides as well! For example, in order for gig workers to remain relevant in the labour market, they must have a mindset of continuous learning. Work is in a constant change, so they need to access or rent what is needed rather than own it entirely.

This continuous learning is facilitated today by the phenomenon of network society and implicitly, the access to mentorship. With the help of networks, it is easier to make connections and exchange information with other people who work or have worked on the labour market. It is a way to better understand the present by knowing and analyzing the experiences of expert employees.

One example of such an online community is **Leapers** which encourages its members - freelancers, remote workers, self-employed individuals - to share advice on anything related to non-traditional work and celebrate their 'Little Wins' with the community.

→ [More information](#)

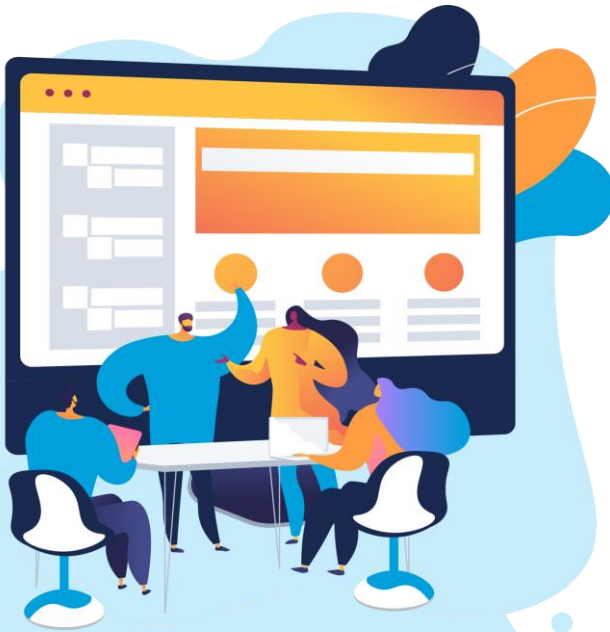
### What companies should do in order to attract workforce?

A recent survey conducted by BestJobs recruitment platform shows how employees' perceptions of the way they work have changed after the experience during the Covid19 pandemic. If during the restrictions period most employees preferred to return to the office, currently 67% would prefer a hybrid way of working, which would allow them a balance between private and professional life. Moreover, 26% of respondents said they would resign and look for a more flexible job if their employer required them to return to office full time.

Why are employees more eager for a flexible schedule? Such a style of work allows them to spend more time with their family but also to organize their daily activities in a much easier way. Time is very precious and now people tend to take more care of it. That's why 64% of respondents said they don't want to go back to work because of the time they spend going from home to work and back.

**So, it seems that flexible work is what will attract the most labour force in the future.**

→ [More data on this study.](#)



## Default to transparency

Translucid shift in working

### **This trend is about transparency and how is that reshaping the expectations.**

In the past, organizations were more like a black box whose inside you couldn't see. Looking into the present, we can observe a transition from a black box to a transparent box.

Transparency is the new gold standard in an increasingly linked society. Rising companies are more and more shifting towards transparency, e.g. by disclosing everything, from how much money their CEOs make to how diverse their workforce is, all the way down to where and how they get their materials.

# 94%

of consumers prefer brands that practice transparency

→ [Label Insight survey](#)

# 87%

of workers said they hoped their next job would be transparent

→ [Slack survey](#)



### **People are starting to care more about transparency!**

They want to know the values and missions of the company. A business that keeps all its secrets of success can risk having the opposite effect to the desired one, namely discouraging employee involvement or breaking the affinity that consumers have for that brand.

When information is not enough, people look elsewhere for answers. Why shouldn't the organization tell its own story and let someone else formulate it for them? Thus, the future of work is one that is based on visibility of the inner world of the organization.



- **Fund for a Transparent Slovakia (SK)**, was established on the initiative of seven member companies in 2012. Its main objective is to improve transparency and promote a healthy business environment ([LINK](#))
- **Rijksmuseum (NL)** in Amsterdam began live-streaming the process of restoring Rembrandt's iconic painting The Night Watch ([LINK](#))
- **OMV Group** has a new transparency policy called "The Remuneration Policy" through which the salaries and benefits of Board members are made public. Since April 2022, the policy is applicable in Romania as well. ([LINK](#))
- **Neticle (HU)** changed their payment system. Now salaries and payment formulas are public within the team. The main purpose of this change was to lay the groundwork for an open and motivating corporate culture ([LINK](#))
- **BITDEFENDER (RO)** - Employees as superheroes campaign. The company tells its story through its own employees ([LINK](#))
- **Transparent bank accounts (SK)** Will set up anyone who voluntarily or through a legal obligation to disclose information about transactions in their account, such as: individuals, political parties, foundations, civic associations, cities and municipalities ([LINK](#))



## What we see already happening

Though full transparency in company procedures, vision, purpose, supply chains, and other areas may be impossible to achieve, we have observed initiatives in which organizations are making efforts in creating more transparent environments.

**Organizations that open up their internal culture – that demonstrate growth and admit mistakes – will fare better than those that strive to maintain a "closed doors" strategy.**

**"I believe the pandemics reconfirmed what is known to be the foundation of trust: transparency. As much as there is visibility over where the company stands, there will be acceptance from employees on tough decisions an employer might need to take in a crisis or in transition."**

**Adelina Dabu**, Head of Public Affairs,  
Concordia Employers Confederation



## WORKplace

**This trend is also noticeable in the workplace.**

Employees are banding together on themes like salary and gender discrimination, and then airing their problems in public, thanks to social media and digital communication tools. Internal scandals that reverberate far beyond the office boundaries, as well as the disintegration of top-down work cultures are some of the implications.

**Amazon employees from several European countries, including Slovakia, are demanding more data transparency.** In cooperation between the worker's union "UNI Global" and privacy NGO "noyb.eu", Amazon warehouse workers filed in March 2022 access requests under Article 15 GDPR. The goal is to find out how Amazon treats workers' personal data under the EU's GDPR. ([LINK](#))

Think of the **2017 UBER scandal** that emerged following a blog post of an employee describing the "toxic bro-culture" ([LINK](#)). As a consequence, both the founder / CEO and a Board Member had to leave the company.



# WORKforce



## Transparency contributes to the well-being of employees and implicitly strengthens a relationship based on trust between them and the employer.

Employees are more motivated and eager to work when they know their role in the company. They know the purpose for which they work and fulfill the tasks to achieve the mission of the organization. At the same time, giving them access to information and business insights is an important step toward gaining trust and consolidating a sharing culture.

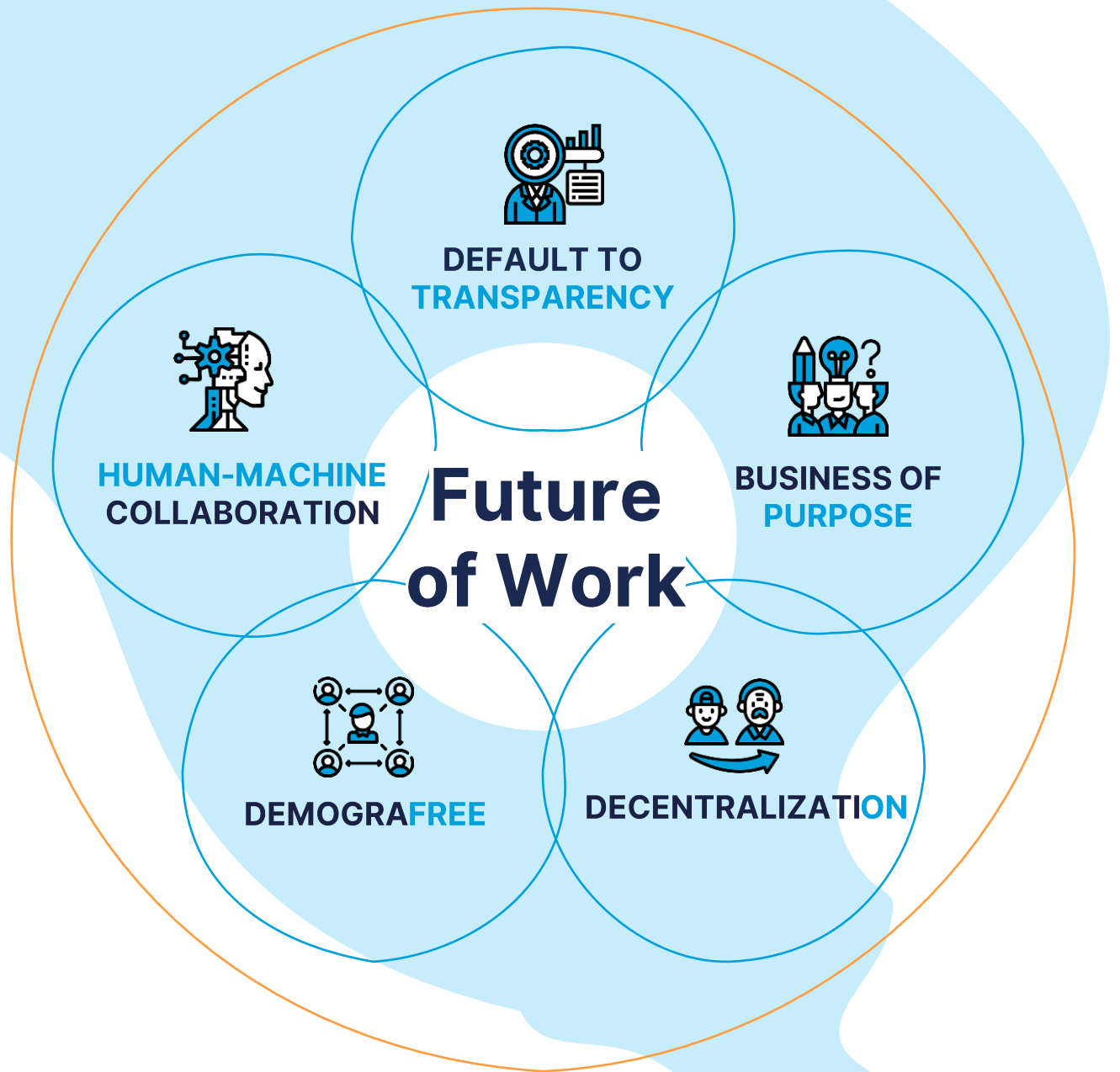
In general - especially in the case of a large organization - employees are closer to work with more frequent contact with customers. So, they can figure out which aspects are good and which ones the company would have to work on to improve. Their observations can be valuable and by working together beautiful things can be achieved.

**After all, transparency is only the beginning; in order to deliver on it, accountability is required.**

Today's workforce, which is more mobile than ever before, wants to work for organizations that are ethical.

**Transparency has never been a more significant asset in the attraction and retention of employees.**

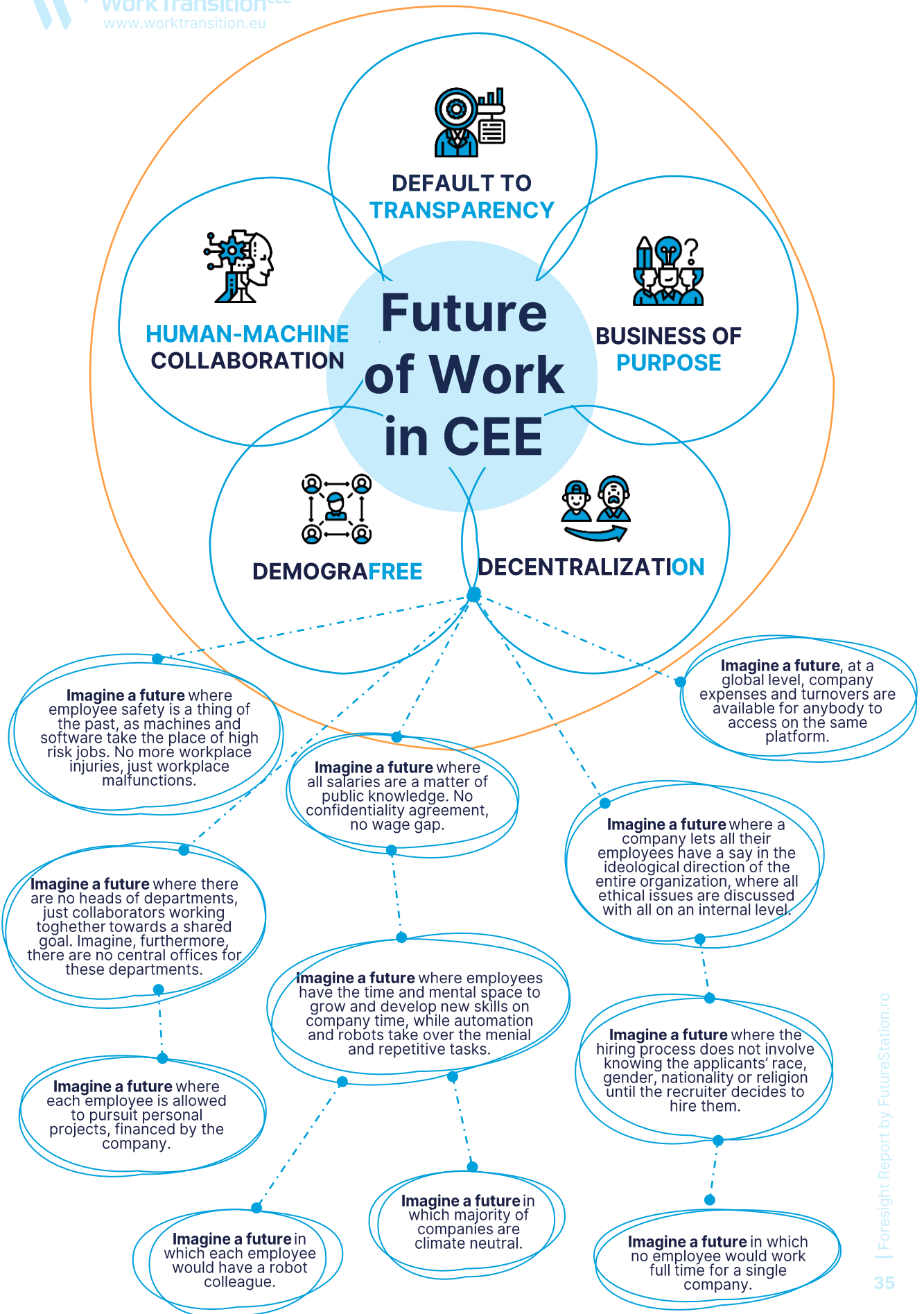
After surveying more than **40,000 workers TINYpulse** found that transparency was the number one factor contributing to their overall happiness ([LINK](#))



# Envisioning possible future scenarios

**Future scenarios are not predictions, but rather narratives about things that could happen.**

They are a way of understanding the dynamics that shape the future. In the next page, we have illustrated certain hypotheses about the future of work with the aim of opening the conversation about how we can prepare for such futures, both as an organization and as professionals / employees.



This trends report is developed under the project “**Renewed social dialogue for the new world of work. Job transitions & digitalisation in two industrial sectors in CEE countries –Romania, Hungary, Slovakia. WorkTransitionCEE**” umbrella, project co-funded by the **European Union**.

By engaging RO, HU and SK employers and employees’ representatives alike, WorkTransitionCEE aims to underline how critical the following years will be for job transition in the new world of work. Specifically, the project highlights the importance of a strong European social dialogue and the need to implement the Autonomous Framework Agreement on Digitalisation to optimise the benefits and better deal with the challenges of digitalisation. ([www.worktransition.eu](http://www.worktransition.eu))

# Acknowledgements

## ABOUT THE AUTHOR

**Future Station undertook the trends scanning and analysis, the experts' interviews and subsequently, the writing of this report.**

**Future Station** is a foresight consultancy practice which engages in activities such as strategic planning (trend scanning and scenario planning) or training teams for future realities. Clients served range from industries such as retail to telecom, financial services to FMCG, energy and healthcare, plus NGOs and public institutions.

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