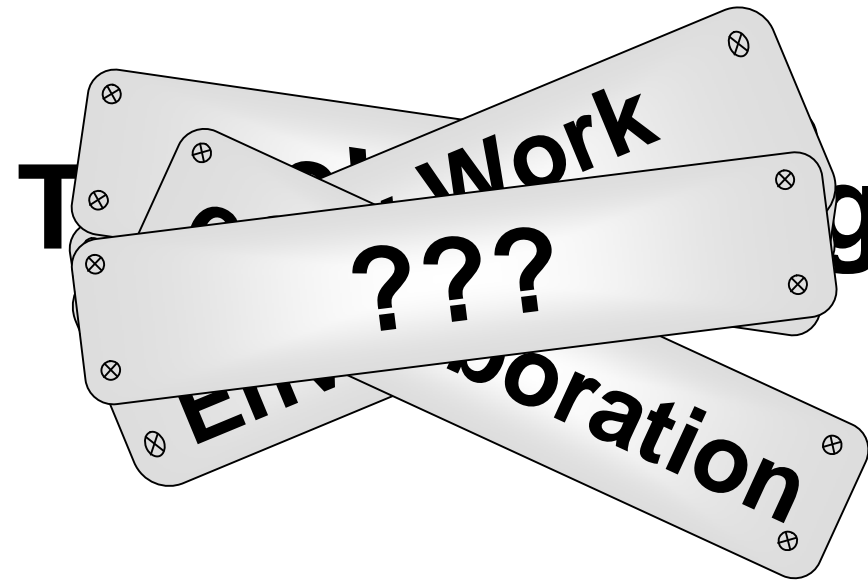


The State of eWork in Europe Today

*12th International Workshop on Telework
28-30 August 2007
Lillehammer, Norway*

Karsten Gareis
Project Manager
empirica, Bonn, Germany

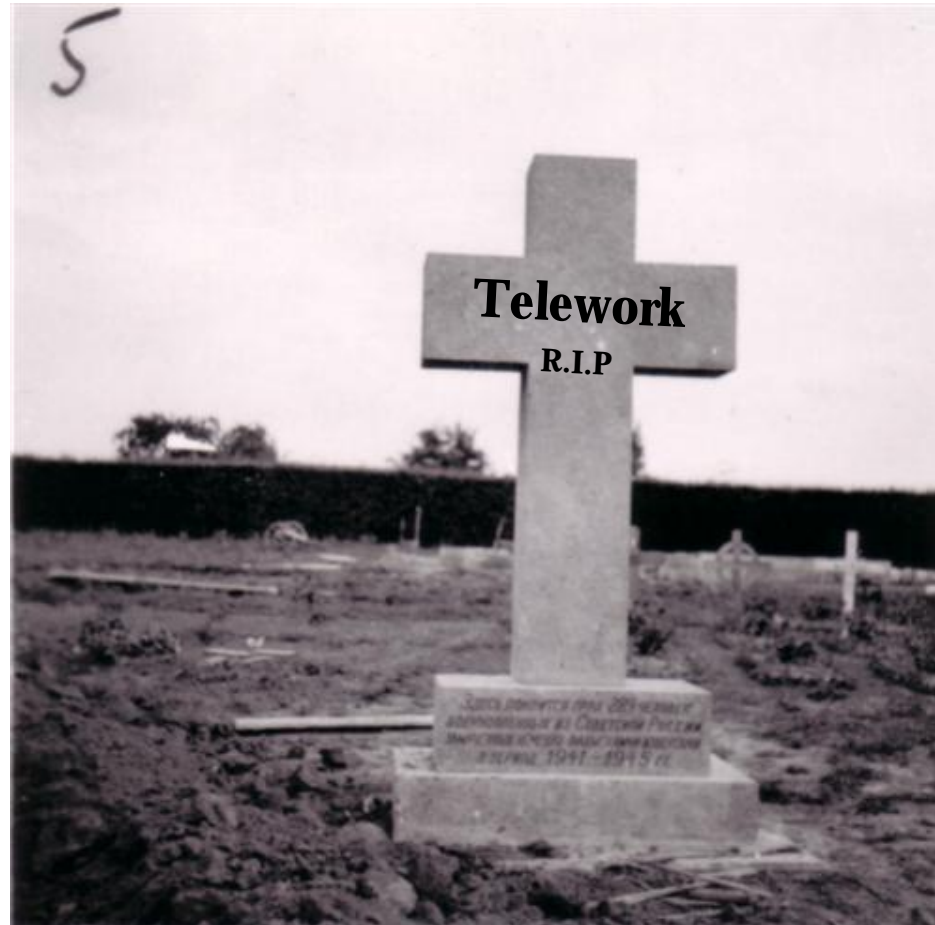
Whatever happened to...



The Disappearance of Telework/eWork

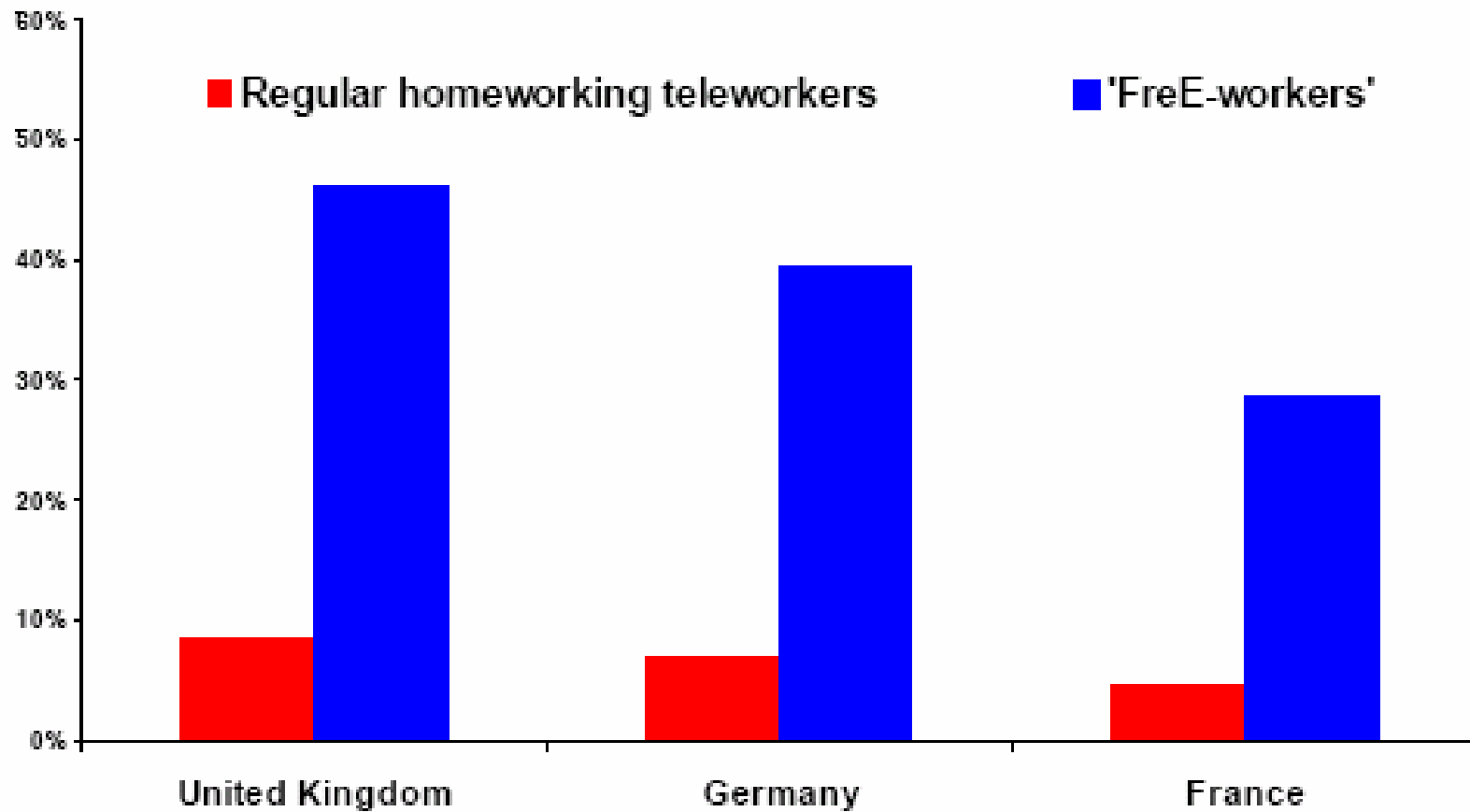
- **European Assembly on Telework**
 - Nine major conferences, discontinued after 2002
- **Annual Status Reports by European Commission**
 - "Status Report on European Telework" till 1999
 - "Status Report on eWork" 2000-2002
 - "Status Report on collaboration@work" 2003-2006
 - Discontinued in 2007
- **Directorate Generale "Information Society"**
 - Unit on "New Work Environments" until 2006
 - Dissolved at start of 2007
- **FP6 and FP7: Telework all but absent**
- **European Employment Strategy**
- **eEurope 2002 (1999), eEurope2005 (2002), i2010 (2005)**

The Disappearance of Telework???



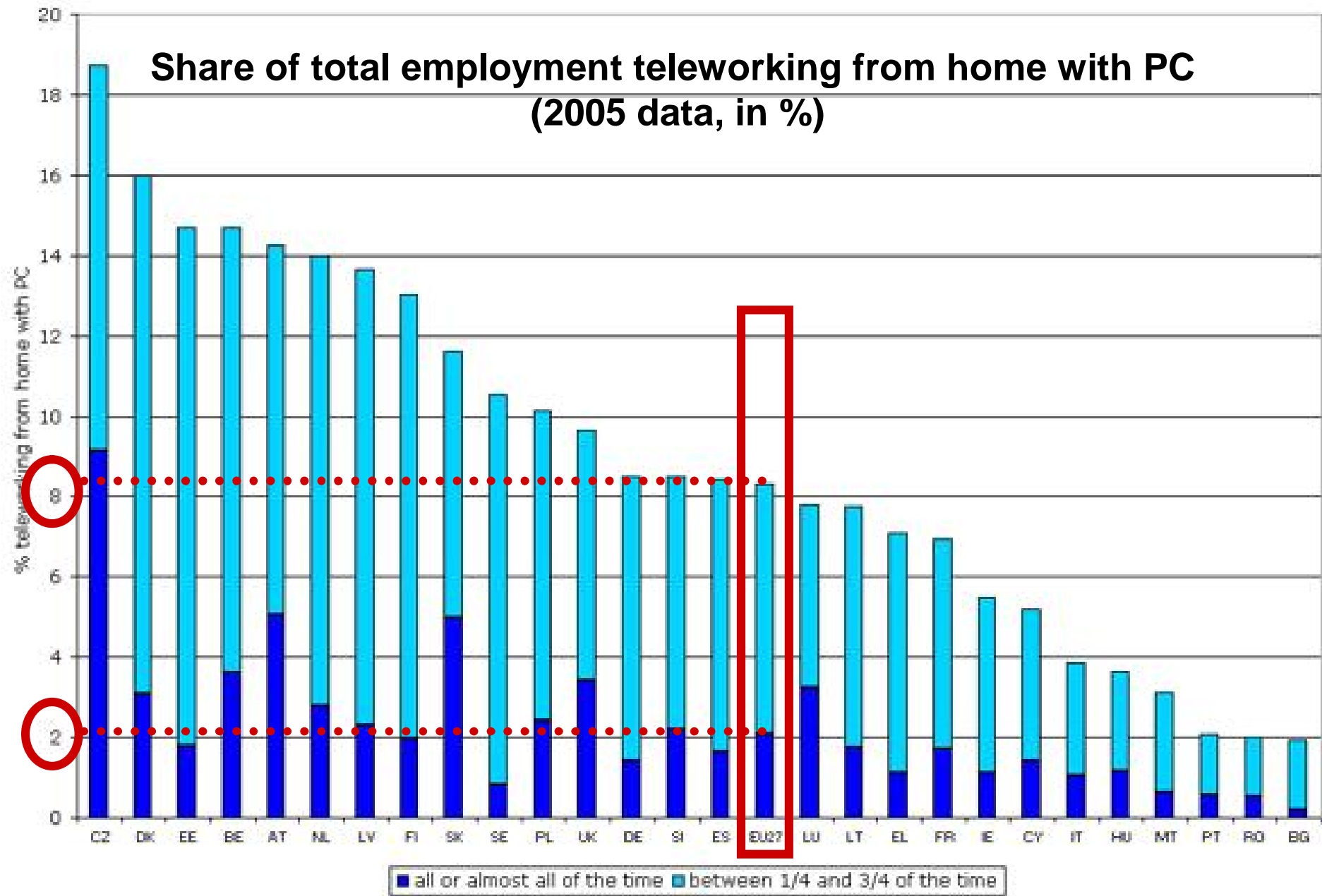
What the numbers say...

Regular homeworking teleworkers and “FreE-Workers” (2005 estimates in %)



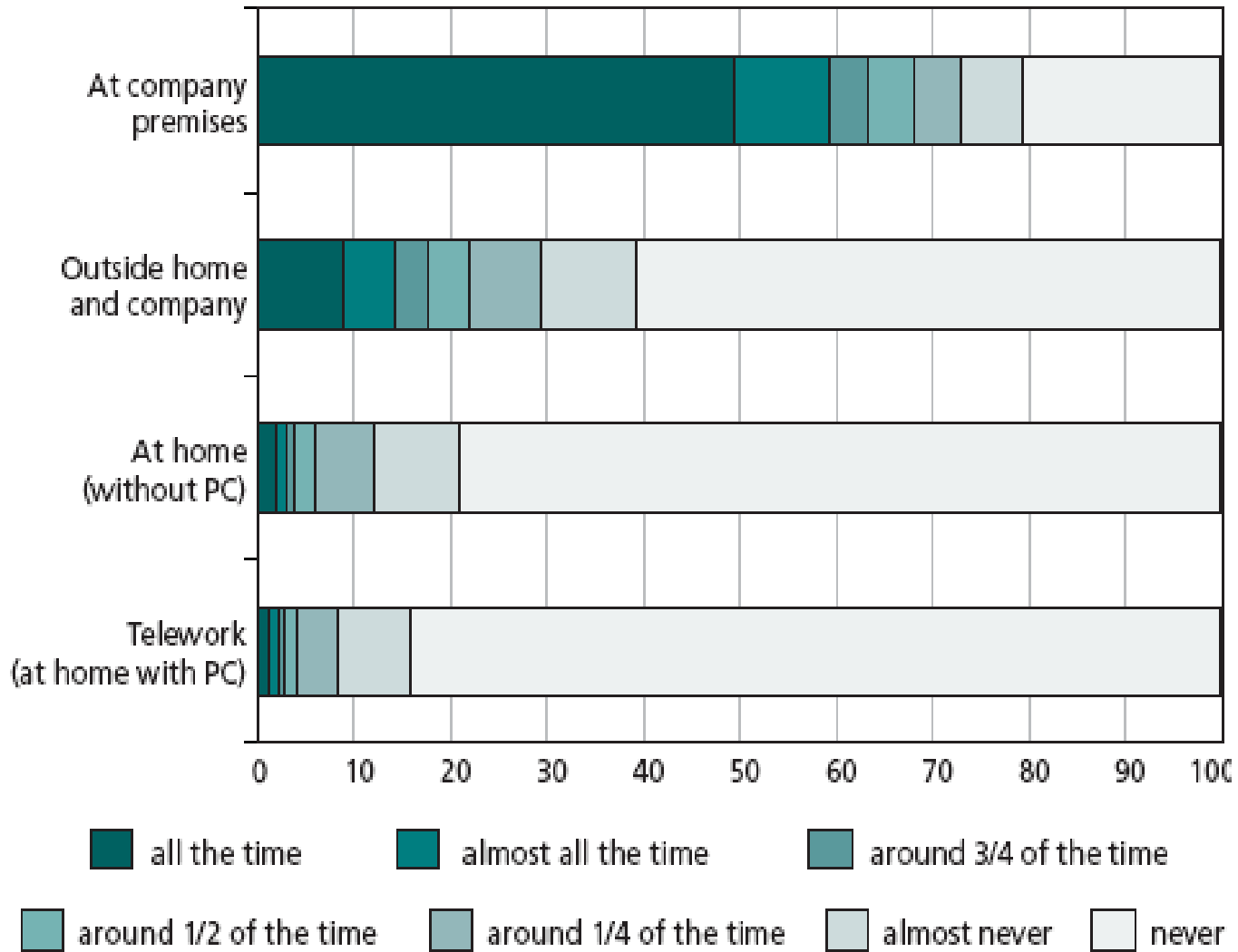
Source: Future Foundation (2005) “The Future of Teleworking - Maximising the potential benefits of teleworking to 2020”

Share of total employment teleworking from home with PC (2005 data, in %)



Source: European Foundation 2007

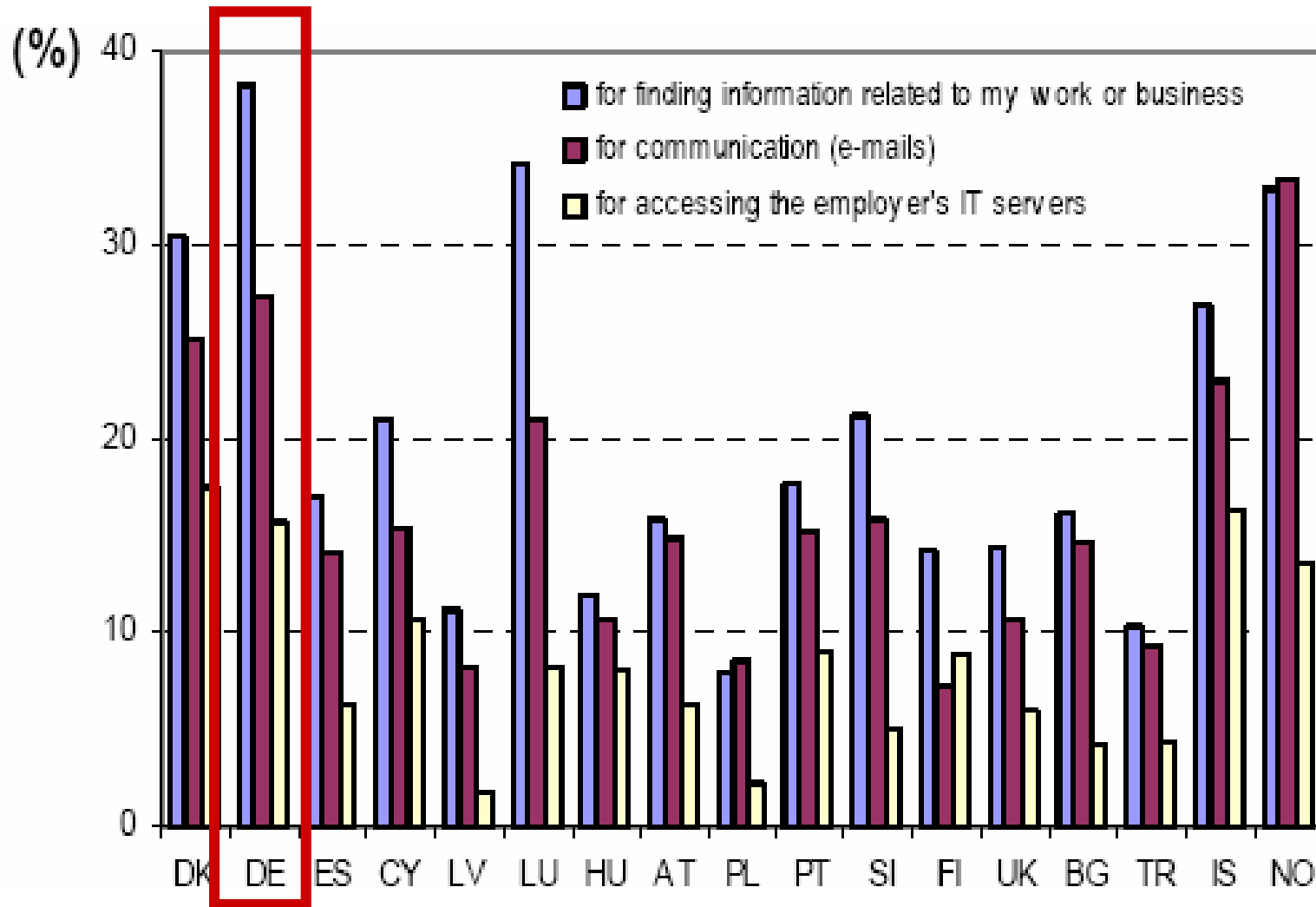
Place of work, shares of total employment (2005 data, EU27, in %)



Companies offering remote access (2006 data, EU10)

	Companies with internet access		Companies with broadband internet access		Share of employees with internet access *		Remote access to company network	
	% of empl.	% of firms	% of empl.	% of firms	% of empl.	% of firms	% of empl.	% of firms
Total (EU-10)	95	93	76	69	n.a.	43	35	16
By firm size								
Micro (1-9 empl.)		89		62	n.a.	51		12
Small (10-49 empl.)		98		75	n.a.	29		22
Medium (50-249 empl.)		99		83	n.a.	33		43
Large (250+ empl.)		99		84	n.a.	44		60
By sector								
Food & beverages	95	88	72	64	n.a.	25	35	14
Footwear	96	89	75	62	n.a.	28	17	10
Pulp & paper	99	94	80	68	n.a.	40	56	21
ICT manufacturing	100	99	84	79	n.a.	74	69	35
Consumer electronics	98	97	87	74	n.a.	80	51	32
Shipbuilding & repair	100	100	87	86	n.a.	30	41	27
Construction	95	90	72	64	n.a.	47	25	13
Tourism	93	90	72	68	n.a.	53	38	13
Telecommunication	100	99	88	85	n.a.	90	74	46
Hospital activities	100	98	85	78	n.a.	41	39	34
Base (100%)	firms using computers		firms using computers		firms with internet access		firms using computers	
N (for total, EU-10)	7237		7237		6900		7237	
Questionnaire reference	A1		A3		A2		A5	
* Read: "In the companies surveyed, on average, 43% of employees have access to the internet at their workplace."								

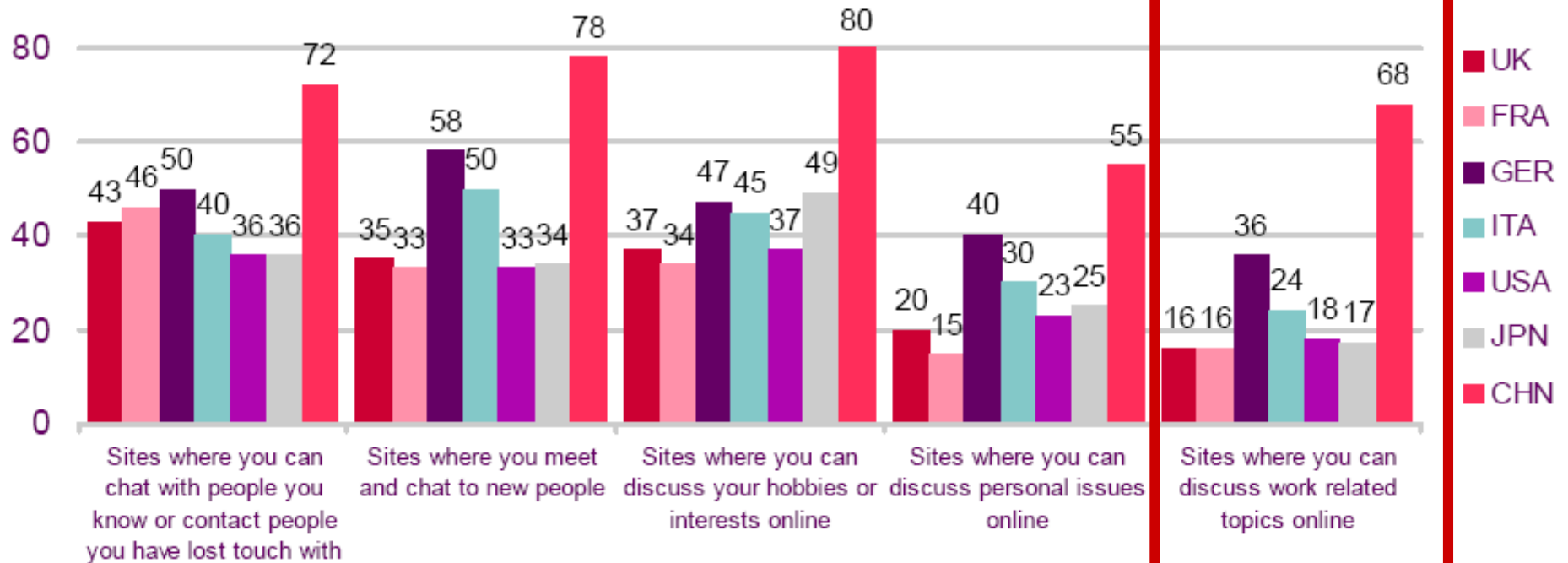
Internet users performing work activities outside the premises of their employer (2004)(in %)



Broadband users using social networking applications (2006)(in %)

Have you ever used the following types of websites?

% of adults with broadband at home



Source: Ofcom research, fieldwork by Synovate in October 2006

8 Observations

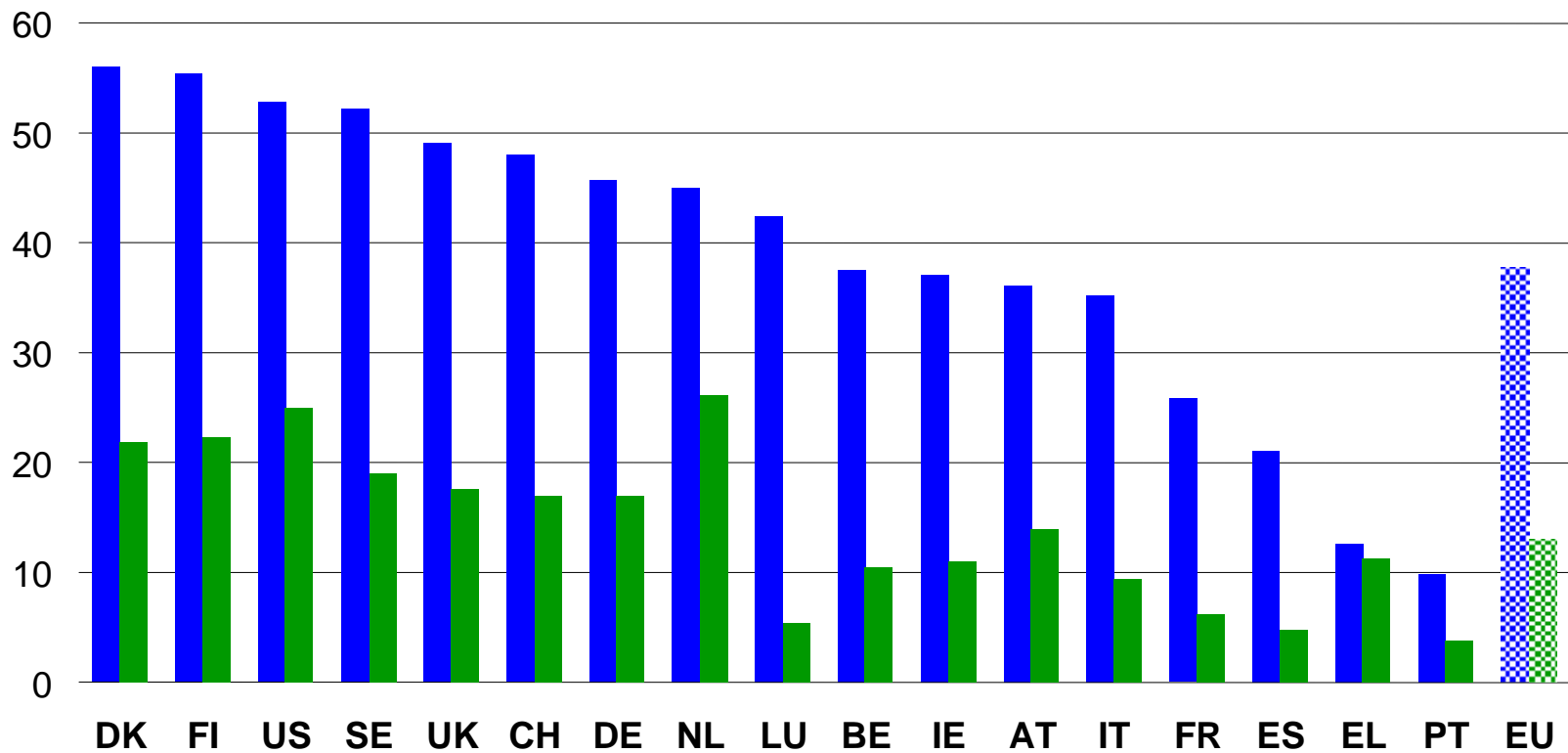
⊕ Work relocation to home environments? Övery little!



Office-based tele-cooperation vs telework

Telework and Tele-cooperation (in %)

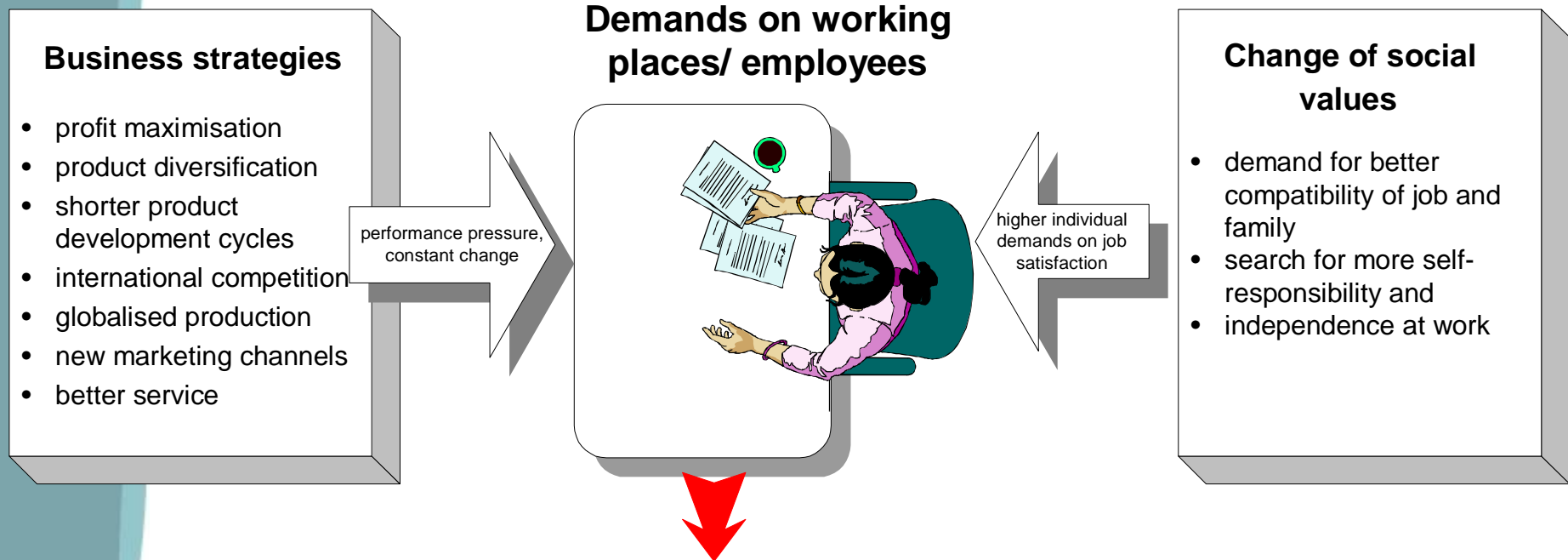
Base: Total employment



- **Worker-oriented flexibility?**

Øyes, but very selectively!

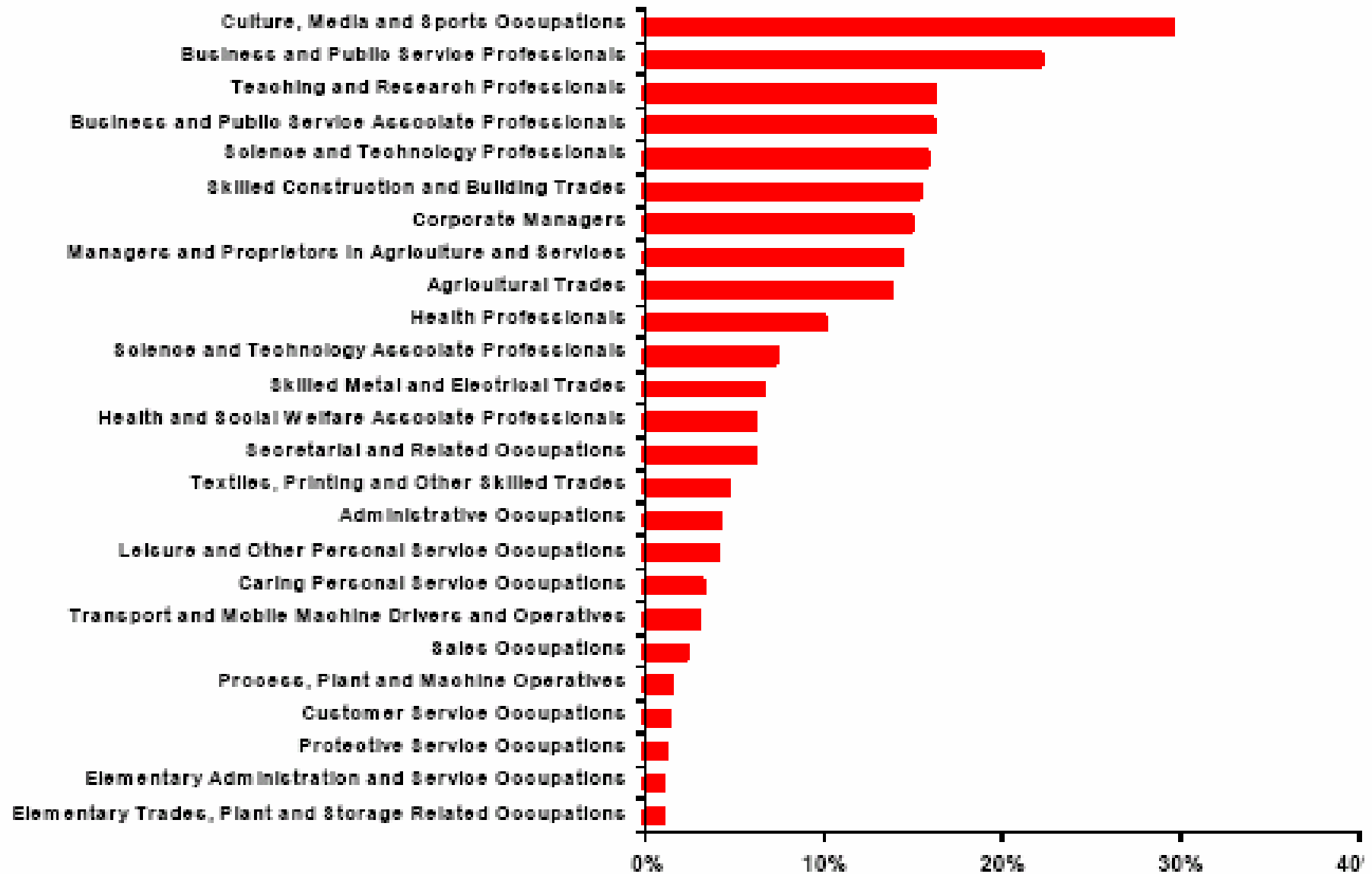
The logic



Outcome dependent on:
 § **Bargaining power of worker**
 § **Principal-agent relationship**

Option for worker-oriented flexibility: home-based telework

Regular homeworking teleworkers by occupational group (UK, 2005, in %)



Source: Future Foundation (2005) , UK Labour Force Survey data

Ž Regulated improvement of working conditions? Ø hardly relevant

EU level regulation

- **European Framework Agreement on Telework,**
 - Signed by European social partners in 2002
 - Non-binding list of recommendations about how telework should be organised at the enterprise level
- **Little interest in most EU member states.**
- **Was due for review in 2006**
 - “outcomes of which will determine whether the Commission will see the need for further action, i.e. issue a directive on regulation of eWork”
 - Nothing happened.
- **Formalised telework arrangements of little importance**

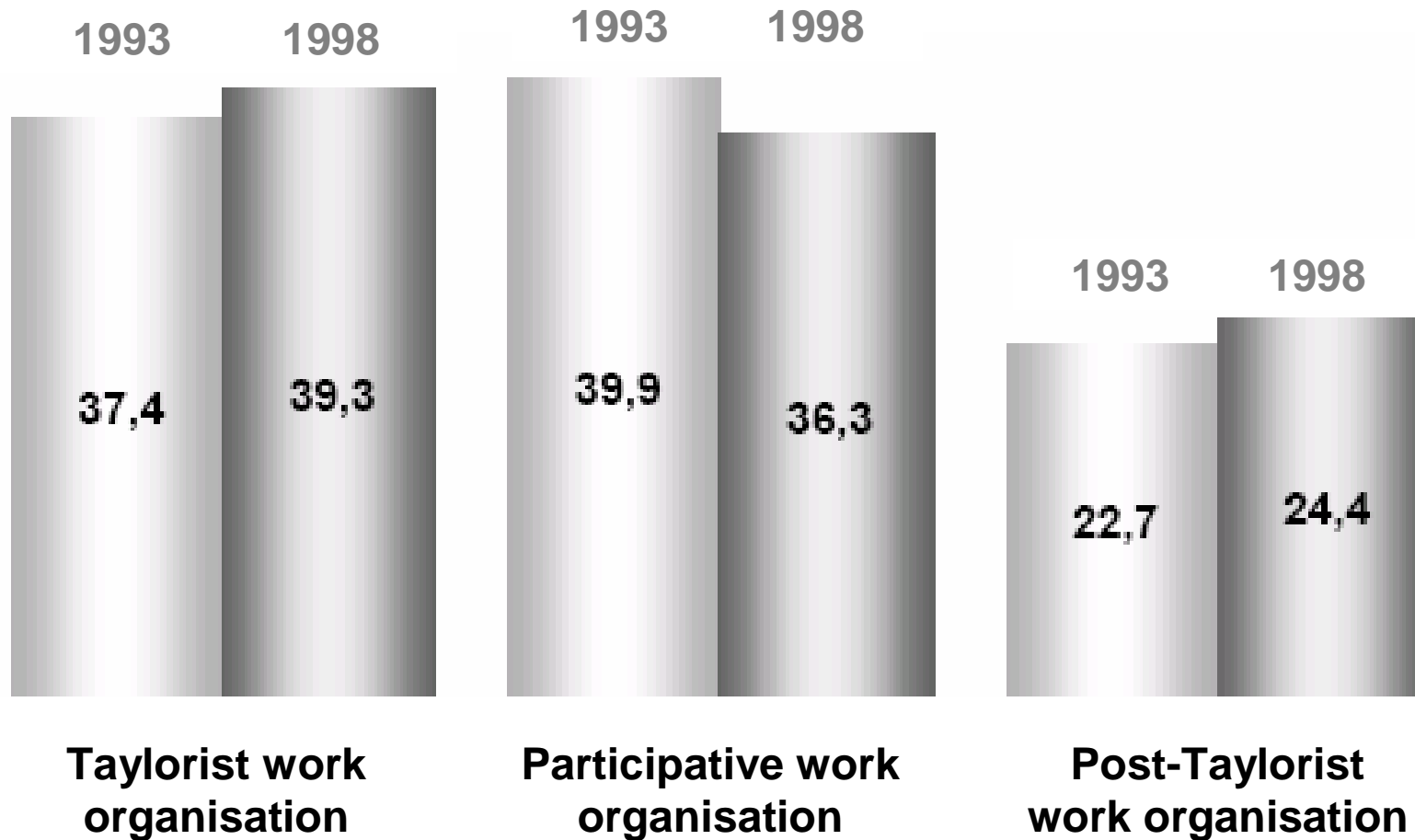
- **Taylorism is dead?**

ÖNo!!!

- **Frederick W. Taylor**



Types of work organisation in Germany, 1993-1998 (% of total employment)



■ 1993 ■ 1998

Call Centre work as Neo-Taylorist Work



Call Centre developments

- **ExampleUK**
- **Call centre employment has grown by 250% since 1995**
- **1 million by end of 2007**
- **Source: Department of Trade and Industry 2007**

- **Less control?**

Ø No! Key importance in times of volatility

' Diminishing boundaries between work and life?

Indeed!

... but not (often) as expected



The biggest boundary-eaters



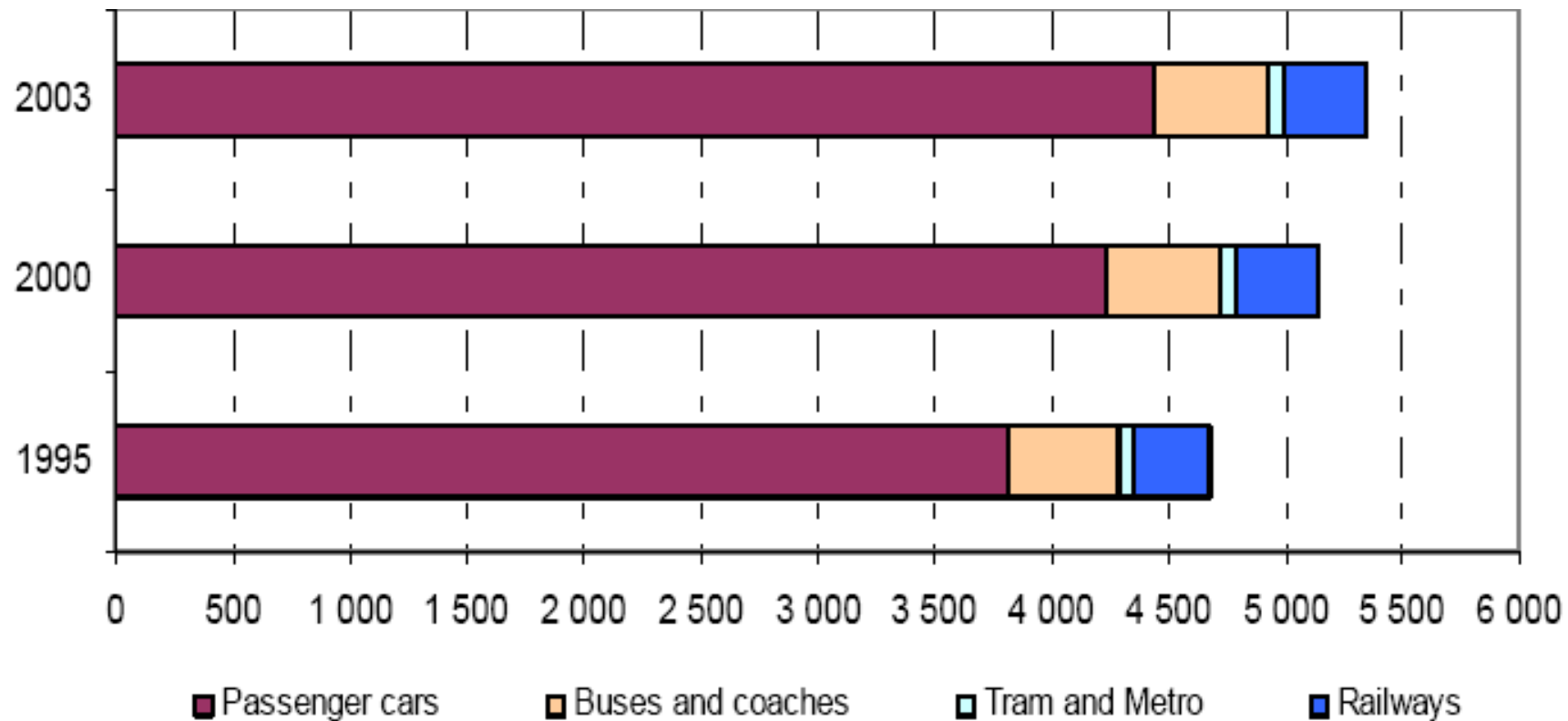
' Telework substituting for transport?

Ø Only when looking at it
in isolation

Conclusion of evidence so far

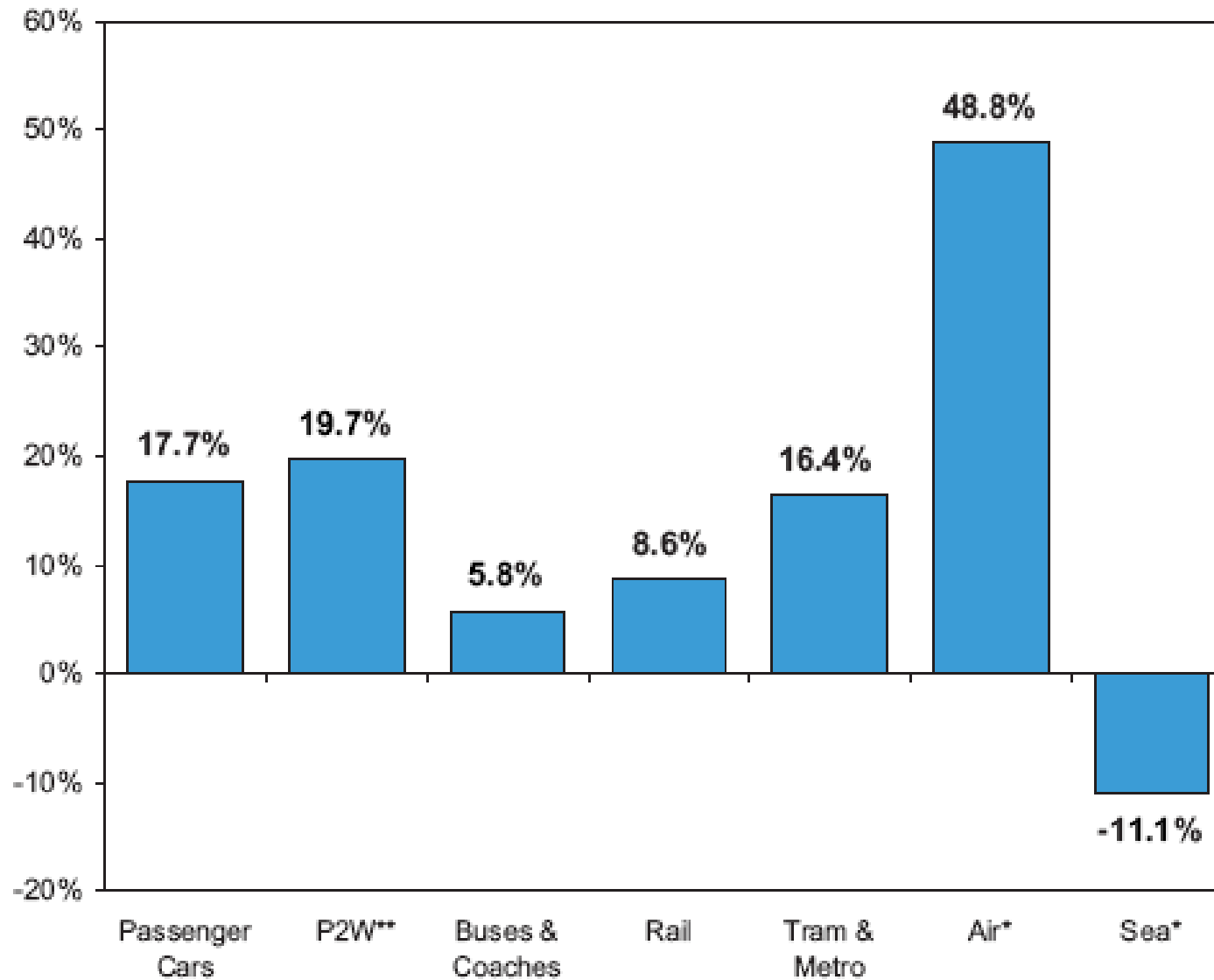
- Patricia L. Mokhtarian (University of California, Davis)
- *Home-based telework has net beneficial impact on travel (slight reduction in aggregate). Residential relocation seems to be not an issue.*
- *BUT, when turning to the impact of ICT on work more broadly, the impacts on travel are unequivocally to generate more.*
- **ICT is used complimentarily to physical transport.**
- **Rebound effect: More virtual communication leads to more physical meetings.**

Passenger journeys by mode of transport, in billion pkm (EU25, 1995-2003)



Source: Eurostat 2006

Change in passenger transport (pkm) 1995-2004 (EU25)

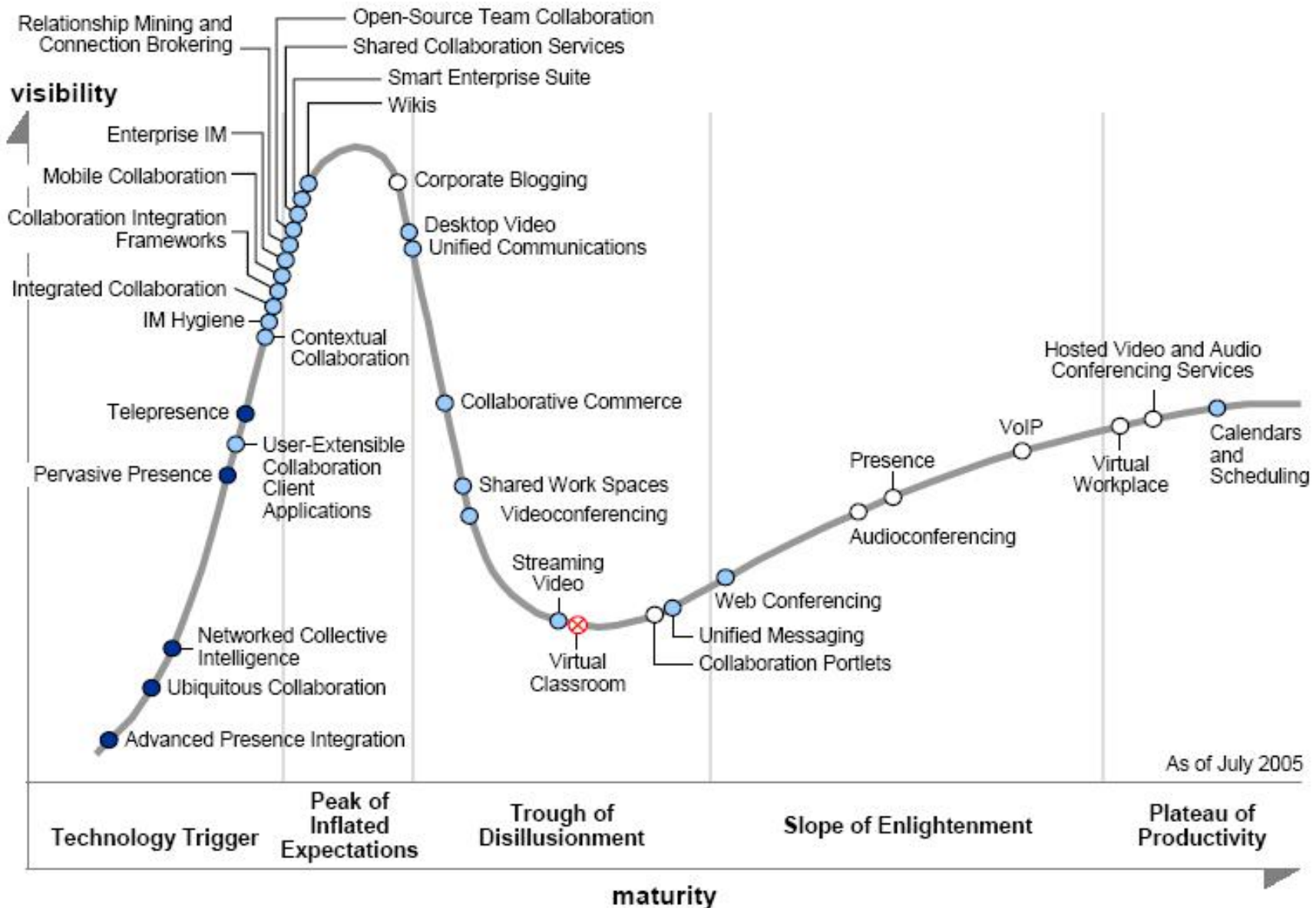


Source: Eurostat (2007) 'Panorama of Transport', Luxembourg. Office for Official Publications of the European Communities, p. 5 .

**“ Technology not an
issue anymore?**

Ø Not so sure!

Collaboration support hype cycle (Gartner)



Plateau will be reached in:

- less than 2 years
- 2 to 5 years
- 5 to 10 years
- ▲ more than 10 years
- ⊗ obsolete before plateau

Tele-Presence



Source: **Tandberg**



Source: **Cisco**

What role for research?

The role of research

- **More focus needed!**
- **Home-based telework as incentive for knowledge-workers well established**
 - Work/life balance
 - Control vs. self-responsibility
- **Virtual collaboration techniques and practices not sufficient**
 - Join different research strands
- **Re-focus on tele-commuting?**
 - Response to challenge of climate change
 - What kind of incentives and regulation needed?
- **Re-focus on outcomes rather than tools**
 - Pro-active work organisation

Thank you for your attention!

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