































'Work-Life Management and CSR in the finance sector: a training path to incentivize the social dialogue at company and European level. Focus on Professionals and Managers' - VS/2016/0394









Premise: the general context

- 1- Work Life Management
- 2- Workers' protection against psychosocial risks and stress at work
- 3- The European legislative framework
- **4- The project objectives**
- 5- The project structure and timeline
- **6- The selected good practices**
- 7- The innovation in negotiation: the PDCA

10 steps to an innovative and effective collective agreement

Evaluation of organizational problems - the current situation

Evaluation of employees' needs and expectations – the project on-line survey: outcomes' analysis

8- The agreements on WLM & work-related stress - Guidelines for the future

Some example of BILATERALISM on WLM in the European banking sector

The Virtual Agora web site







Premise: the general context

The right balance between work and personal/family life is the foundation of a civil society as a whole and not only at the workplace.

Today the work, due to the spread of new technologies and digitalization, has invaded the privacy of people putting into risk family and social stability.

The challenge that the social partners have to face is to achieve a quality work environment and the growth of workers' well-being.

On this basis, there are **2 MAJOR ISSUES** related to the balance between family and professional life:

- 1. The promotion of workers' balance b/w work, life and family
 - 2. Workers' safety and health protection against psychosocial risks and stress at work

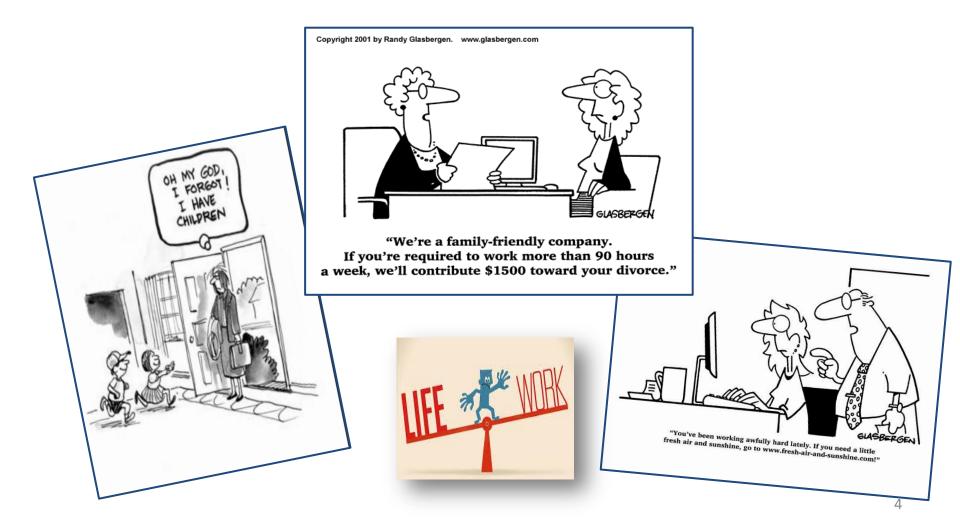






1- WORK LIFE MANAGEMENT

The promotion of workers' balance b/w work, life and family









1- WORK LIFE MANAGEMENT

The promotion of workers' balance b/w work, life and family

The expression "Work-life Management" explains better than Work Life Balance the active pursuit for reconciliation between paid work and private life.

It involves men and women, young and old people and concerns more fields: political, social, organizational and business, and also familiar.

- Speaking of WLM means also **balancing family working life through a fairer distribution of parental responsibility** which would enhance gender equality in the labor market.
- In Europe, women, despite higher qualifications in terms of levels of education than men (42.3% of women between 30 and 34 years with a bachelor's degree or specialist degree versus 33.6% of men) continue to be underrepresented in the labor market (75% the employment rate of men vs. 63.5% of women) and having children play negatively on the female employment rate.







1- WORK LIFE MANAGEMENT

The promotion of workers' balance b/w work, life and family

- According to the latest estimates by Eurofound (2016), the employment gender gap costs 370.000.000.000 € a year to the EU (2.8% of EU GDP); at an individual level, the cost of a woman's exclusion from employment throughout her working life is estimated at between €1.2 million and €2 million, depending on her educational level.
- The **gender gap** in employment rates **is highest in Greece, Italy and Malta**, while it remains low in northern countries such as Finland, Latvia, Lithuania and Sweden.
- The European Commission document of August 2015, defining a road map for a revision of the Maternity Directive, says: "In most countries, women's participation in the labour market remains below their potential because of the lack of opportunities to reconcile work and family responsibilities, including lack of affordable child care, rigid working arrangements, or lack of incentives for men to take more care responsibilities in their families."







2- Workers' protection against psychosocial risks and stress at work









2- Workers' protection against psychosocial risks and stress at work

The health and safety of workers in Europe are today threatened primarily by psychosocial risks and stress at work.

Technological progress, characterized by **increasing digitization**, is fuelling a **'24 hours a day' work culture** and is leading to a blurring of boundaries between work and private life.

Among the psychosocial risks we find anxiety to achieve the objectives and exhaustion (burnout) caused by overwork.

These phenomena are particularly present in the **banking sector** where workers are facing also heavy **financial products' sales pressure**







2- Workers' protection against psychosocial risks and stress at work

In the recent EU-funded project made by Matrix for the European Agency for Safety and Health at Work EU-OSHA

the cost to Europe of the work-related depression was estimated

€ 617.000.000.000 per year

This total is made up of costs for employers arising from absenteeism and presentism (272 billion euro), from lost productivity (242 billion euro), the health care costs (63 billion euro) and social care costs represented from payments for disability benefits (39 billion euro).









http://apf.fiba.it/2016/home.nsf

www.europarl.europa.eu/charter/pdf/text_en.pdf

https://osha.europa.eu/en/legislation/directives/the -osh-framework-directive/1

https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52002DC0341

https://eur-lex.europa.eu/legalcontent/EN/TXT/?uri=celex:12012E/TXT





Every worker has the right to working conditions which respect his or her health, safety and dignity

(Article 31, the Charter of Fundamental Rights of the European Union)







The employer is responsible for ensuring the workers' safety and health in all aspects of their work, adapting work to man, as regards the choice of working and production methods, in particular to mitigate monotonous and repetitive work...

(Framework Directive 89/391)







Social dialogue

is the key instrument for promoting progress, as it enables existing legislation to be applied effectively and issues of promoting well-being in the workplace to be addressed

(<u>The European social dialogue, a force for innovation and change, EU Commission, 2002</u>)







The European Union has the competence to adopt directives in the field of health and safety at work.

The EU Directives set minimum safety and health requirements.

Member States are free to adopt stricter rules for the protection of workers when transposing EU directives into national law.

(Article 153 of the Treaty on the Functioning of the EU)







4- The project aims



To spread and strengthen the European Social dialogue principles in new member and candidate states

To develop and disseminate a bargaining method on WLM issues

To Compare and spread different cultures, experiences and practices on WLM

To expand knowledge on European Joint Declarations Directives and programs on WLM

To build a
network of
trade unionists
with knowledge,
skills and
sensitivity on
WLM issues

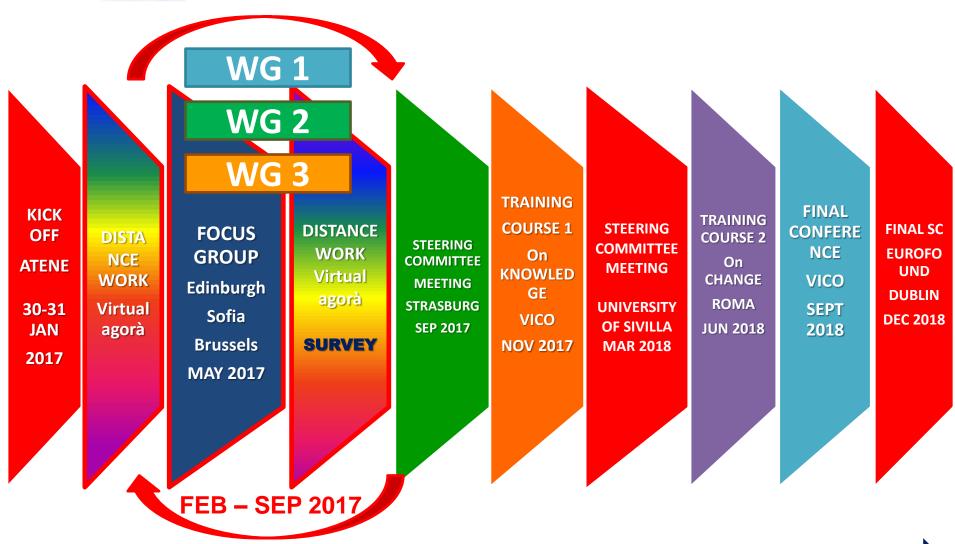
To provide
training activities
on KNOWLEDGE
and behaviour's
CHANGE on WLM





5- The project structure









6- The selected European good practices on WLM

Turkey - **National Law:** Part-time for both parents, days off for moving

UBIS (Romania) - Company Collective Agreement: 5 days father leave + 10 if he follows a training on baby caring

National Bank of Greece - T.Y.P.E.T. (Mutual Health Found): free summer camps for children.

Royal Bank of Scotland - Williams & Glyn Maternity Policy: sharing parental leave between mother and father







6- The selected European good practices on work-related stress

Finland - **National Law**: company obligation to prove no risk for the workers' H&S

UniCredit - Company Collective Agreement: Bilateral Committee and explicit link between work related stress and selling policies

Sweden - **National Law**: active collaboration between workers and management on H&S

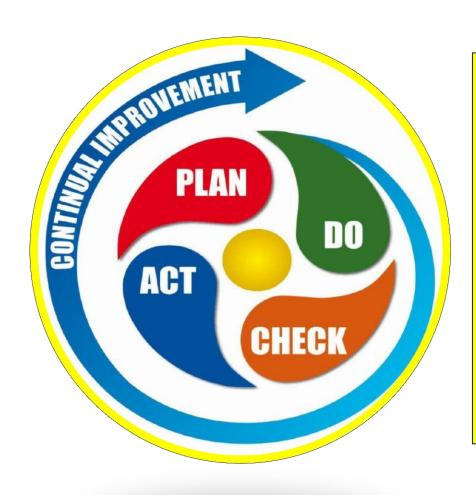
BNPP - European Collective Agreement: right to disconnect, help contact center to support workers







6 - THE INNOVATION IN NEGOTIATION the PDCA cycle



Plan.

Recognize an opportunity and plan a change

Do.

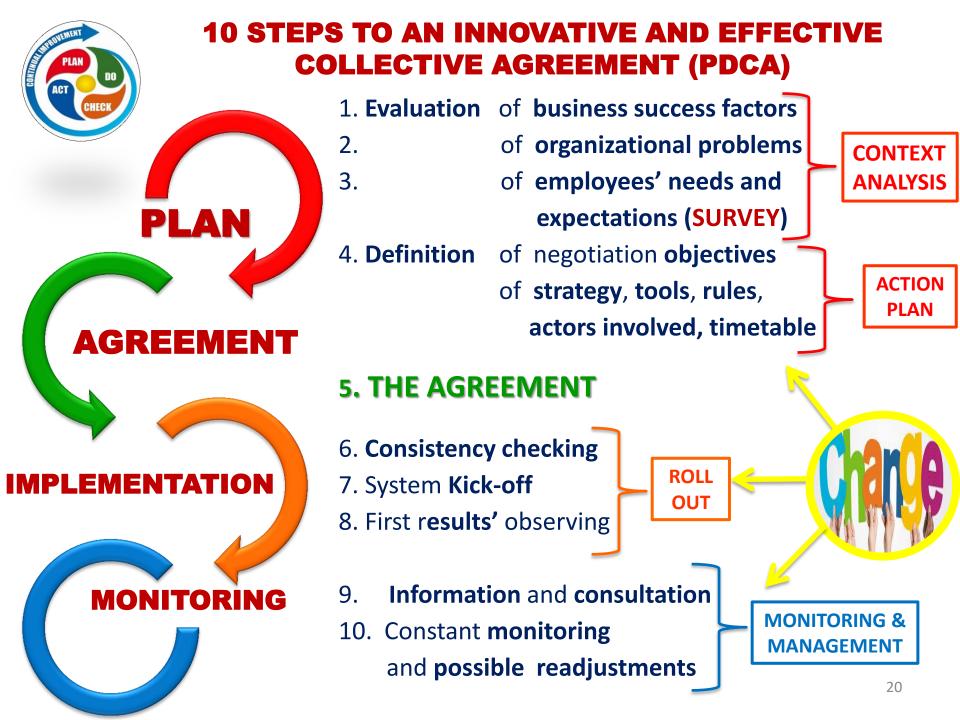
Implement the change

Check.

Launch the change plan

Act.

Monitor the results, plan new improvements, beginning the cycle again.









CONTEXT ANALYSIS

- 1. Evaluation of business success factors
- 2. evaluation of organizational problems
- 3. evaluation of **employees' needs and expectations (SURVEY)**











CONTEXT ANALYSIS

1. Evaluation of the company business

success factors











CONTEXT ANALYSIS

2. Evaluation of the company organizational

problems









Evaluation of organizational problems THE CURRENT SITUATION

 Loss of a overall strategic vision: each business area is compartmentalized	
 Centralization of decision-making centres	
 Loss of basic initiative and know-how	
Poor adaptability of services and products	
Depersonalization of relationships and loss of trust	





Evaluation of organizational problems THE CURRENT SITUATION

Collapse of the relational system in favor of e-mails, call-conference, FAD, company intranet	
Reduction of investments in workers' qualification (training, individual growth)	
Gender discrimination in professional development	
Staff demotivation, budget stress, disaffection / defection	
DETERIORATION OF THE CORPORATE CLIMATE	







CONTEXT ANALYSIS

3. Evaluation of employees' needs and expectations (SURVEY)









CONTEXT ANALYSIS

3. Evaluation of employees' needs and expectations







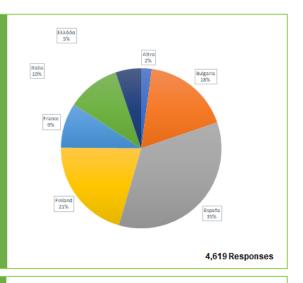
Evaluation of employees' needs and expectations

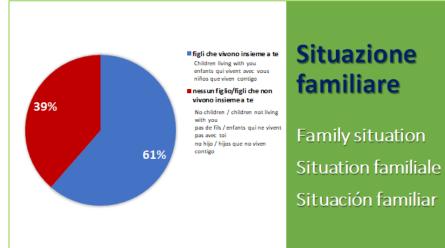


THE PROJECT ONLINE SURVEY THE RESPONDENTS' CHARACTERISTICS (4,619 RESPONSES)

Paese di provenienza

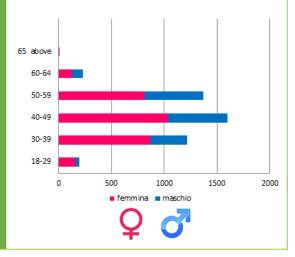
Country of origin Pays d'origine País de origen

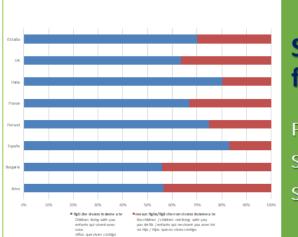




Età e genere

Age and gender Âge et genre Edad y sexo





Situazione familiare

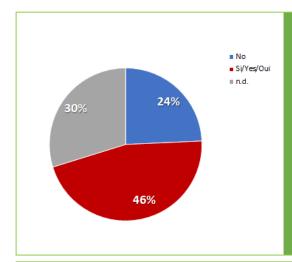
Family situation
Situation familiale
Situación familiar



Evaluation of employees' needs and expectations



THE PROJECT ONLINE SURVEY THE RESPONDENTS' CHARACTERISTICS (4,619 RESPONSES)



Care taking situation

Se hai figli che vivono con te, Hai qualcuno (partner, genitore/i, ecc.) che ti aiuta a prendersi cura di loro?

If you have children living with you, have you someone (partner, parents, etc.) to help you taking care of them?

Si vous avez des enfants qui vivent avec vous, avez-vous quelqu'un (partenaire, parent / s, etc.) qui vous aide à prendre soin d'eux?

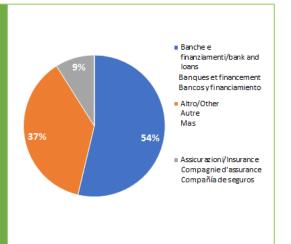
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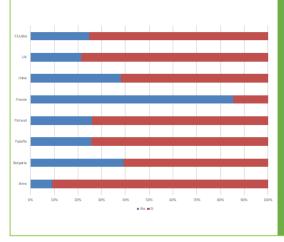


Company sector

Secteur d'activité du travail

sector empresarial





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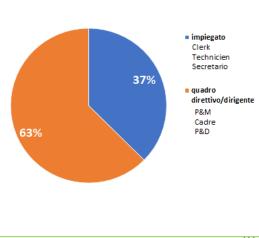
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Professional role

Rôle professionnel

Rol profesional







Evaluation of employees' needs and expectations



THE PROJECT ONLINE SURVEY THE SURVEY RESULTS

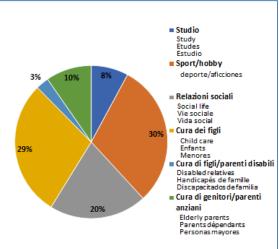
Question 1.

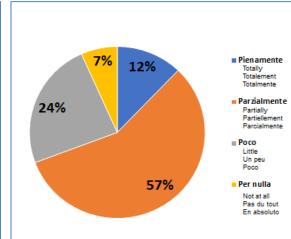
In questo momento della tua vita quali sono le principali esigenze personali che hai bisogno di conciliare con l'attività lavorativa?

What are the personal needs you have to balance with your working time at the moment?

Quel sont les besoins personnels que vous devez concilier avec votre temps de travail?

¿Cuáles son tus necesidades personales actuales para conciliar tu vida laboral y familiar?





Question 2.

Riesci a soddisfarle?

Do you manage to fulfill them?

Pouvez-vous les rencontrer?

¿Lo consigues?

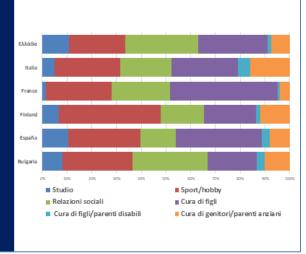
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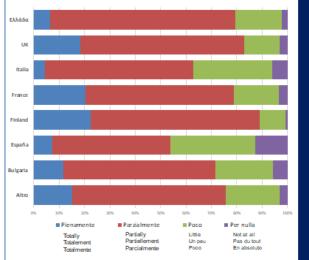
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FEDERAZIONE ITALIANA RETI DEI SERVIZI DEL TERZIARIO

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BANCHE - ASSICURAZIONI - RISCOSSIONI - ALITHORITIES

Evaluation of employees' needs and expectations

THE PROJECT ONLINE SURVEY THE SURVEY RESULTS

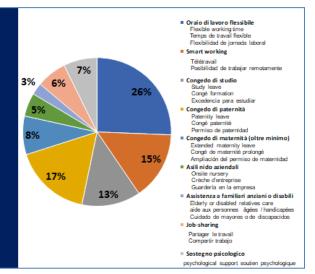
Question 3.

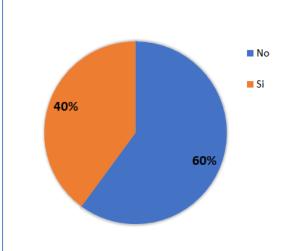
Quali tipi di iniziative di gestione vita-lavoro mette a disposizione la tua azienda?

What types of work-life initiatives does your company currently provide?

Quelles initiatives de qualité de vie au travail sont proposés par votre employeur

¿Qué tipo de iniciativas de conciliación de la vida laboral y familiar te ofrece actualmente tu empresa?





Question 4.

Stai attualmente utilizzando una delle iniziative di gestione vitalavoro fornite dalla tua azienda?

Are you currently using or will you use in the near future any of the work-life initiatives provided by your employer?

Utilisez-vous ou comptez-vous utiliser les dispositifs de qualité de vie au travail proposés par votre employeur?

¿ Estás utilizando o utilizarás en un futuro cercano alguna iniciativa de conciliación de la vida laboral y familiar que ofrezca tu empresa?

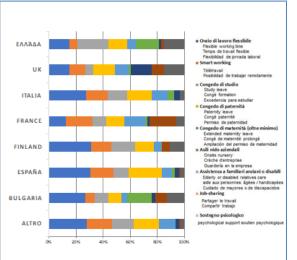


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Evaluation of employees' needs and expectations

THE PROJECT ONLINE SURVEY

THE SURVEY RESULTS

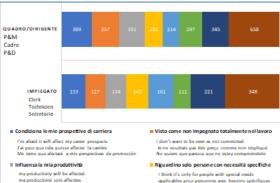
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Se no, perché?

If the answer is no, why?

Si votre réponse est non. pourquoi?

Si la respuesta es no, ¿porqué?



mi productividad se verá afectada Il mio capo non mi incoraggia a usarle ■ Poche persone nella mia azienda le usano Very few people in my company has taken up them My boss does not encourage me to take them

Mon chef ne m'encourage pas à profiter de ces offres

I don't need to use them Je n'en ai pas besoin No necesito utilizar

applicables pour personnes avec besoins spécifiques solo para personas con necesidades especiales

Tels, nou de collègues ont utilisé ces senices Muy poca gente de mi empresa se ha acogido

No useful for improving my work-life management Aucune des initiatives proposées n'est utile pour moi Ninguna de las iniciativas es útil para mejorar la conciliación

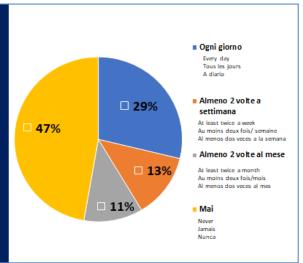
Question 5.

Usi le tecnologie o i dispositivi mobili per lavorare dopo l'orario d'ufficio o all'esterno dell'ufficio?

Do you use technology or mobile devices for work after office hours or outside of the office?

Est-ce que vous utilisez les TIC ou votre téléphone mobile pour travailler après les horaires de bureau?

¿Utilizas tecnología o aparatos móviles para trabajar después de tu jornada laboral o fuera de la oficina?



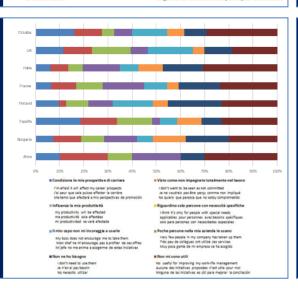
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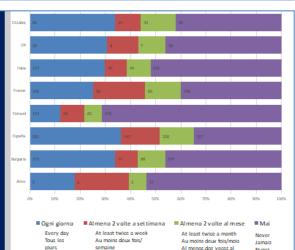
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Al menos dos veces a la

Nunca





FEDERAZIONE ITALIANA RETI DEI SERVIZI DEL TERZIARIO

EL FIR S

BANCHE - ASSICURAZIONI - RISCOSSIONI - AUTHORITIES

Evaluation of employees' needs and expectations

THE PROJECT ONLINE SURVEY THE SURVEY RESULTS

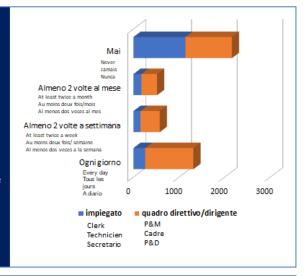
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Pensi che l'utilizzo di dispositivi mobili per il lavoro fuori dall'ufficio abbia un effetto positivo, negativo o neutrale sulla tua gestione vitalavoro?

Do you think the use of mobile devices for work outside the office has a positive, negative or neutral effect on your work-life management?

Pensez-vous que l'utilisation d'internet/portable/téléphone ont une incidence positive/négative ou neutre sur vot re équilibre travail/vie personnelle?

¿ Crees que el uso de aparatos móviles para trabajar fuera de la oficina tiene un efecto positivo, negativo o neutro en tu concilación de la vida laboral y familiar?



 Positivo, perché posso lavorare in maniera più flessibile

Positive, because I can work more flexibly Positive car je peux travailler defaçon plusflexible Positivo, porque puedo trabajar con flexibilidad

» Negativo, perché l'azienda si a spetta che risponda in ogni momento della giornata negative, because i'm espected to respond any time négative, cur l'entrepris e s'attend risponde à truct moment negativo, porque la compañía espera que responda en

 Negativo, perché non posso staccare mai dal lavoro

Negative, because I can never switch off Negatif car je ne peux pas me déconnecter Negativo, porque nunca puedo desconectar

Neutral Pas d'incidence

Pas d'incidence Neutro

Non uso mai dispositivi mobili per lavorare fuori dall'ufficio
I rever use mobile devices to work outside the effice.

I never use mobile devices to work outside the office ie n'utilise jamais d'appareits mobiles pour travailler à l'extérieur du bureau/ Nunca uso dispositivos móviles para trabajar fuera de la oficina Non so/l don't know

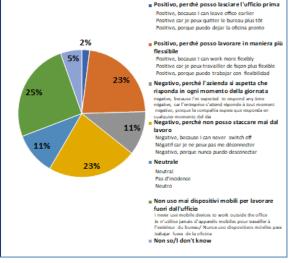
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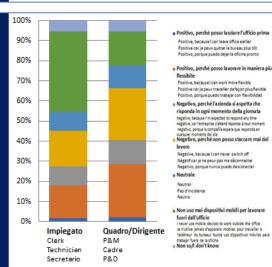
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THE PROJECT ONLINE SURVEY THE SURVEY RESULTS

SOME SIGNIFICANT OUTCOMES FROM THE SURVEY RESULTS' ANALYSIS:

- WLM issue is affecting women more than men, in all age groups. From 40 to 60 years it gets more important for men too
- P&Ms responded to the questionnaire in greater numbers (63%)
- Family support is very important (46% has support), and should be considered. 24% have no support from the family
- For 50% of the respondents WLM is felt necessary to devote oneself to hobbies and social life
- 31% has significant problems of work-life balance. Bulgaria, Italy and Spain are the countries in which WLM policies take less place
- WLM initiatives are not used by 60% of respondents. Men use them relatively less than women
- The initiatives offered by companies are mainly smart working (15%) and flexibility (26%), but they are not useful for everyone
- P%Ms show more worries in using conciliation and use more of technology outside the working hours
- 25% think that the use of mobile devices outside work is positive, while 34% think it is negative. Finland, the UK and Greece are the countries in which the devices are less used outside of work







ACTION PLAN

4. Definition of negotiation objectives, strategy, tools, rules, actors involved, timetable

TRADE UNIONS'
NEGOTIATION
PLATFORM











5. THE SOCIAL DIALOGUE AGREEMENT









THE 10 STEPS OF AN INNOVATIVE AND EFFECTIVE COLLECTIVE AGREEMENT (PDCA)

5. THE SOCIAL DIALOGUE AGREEMENT

THE ROLE OF TRADE UNIONS

Remember:

"Social dialogue is the key instrument for promoting progress, as it enables existing legislation to be applied effectively and issues of promoting well-being in the workplace to be addressed" (EU Commission, 2002)

This means that trade unions are entitled to negotiate on the organization of work at all levels:

EWC (European Work Council)

National Collective Bargaining Agreement Groups and Company Collective Agreements



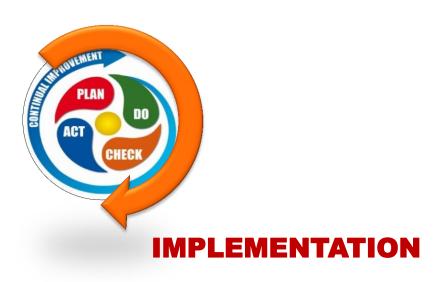




THE 10 STEPS OF AN INNOVATIVE AND EFFECTIVE COLLECTIVE AGREEMENT (PDCA)

THE ROLL OUT

- 6. Consistency checking
- 7. System Kick-off
- 8. First results' observing











THE 10 STEPS OF AN INNOVATIVE AND EFFECTIVE COLLECTIVE **AGREEMENT (PDCA)**

MONITORING & MANAGEMENT

- Information and consultation
- 10. Constant monitoring and possible readjustments





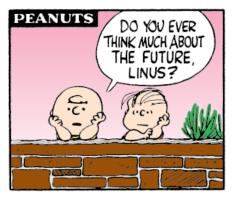








7- Guidelines for the future





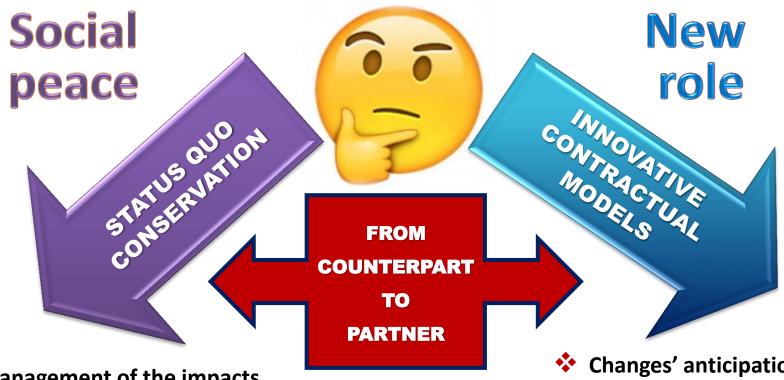




Guidelines for the future



TRADE UNIONS' DILEMMA



- Management of the impacts on employment
- Representation of few subordinate jobs
- Defence of the contractual area
- **ANTAGONIST/CLAIMING ROLE**

- Changes' anticipation
- Flexibility
- Full representation of all activities
- Participation
- Transnational agreements
- **WIN-WIN ROLE**

Guidelines for the future







We need to build a new model of company organization **COMPETITIVE, SUSTAINABLE AND ETHICALLY RESPONSIBLE**

WORKERS' WELL-BEING CANNOT BE TRADED OFF IN A TRADITIONAL NEGOTIATION

That's way we need to open new frontiers:

- imagining new forms of NEGOTIATION PROTOCOLS
- defining new concrete objectives
- identifying consistent negotiation strategies, tools, partners
- enhancing BILATERALISM (which is both an objective and a tool)

It is therefore necessary:

- to reform the enterprise as a "social" one, by means of a broader negotiation of governance IN A PARTICIPATORY KEY
- to exercise and disseminate A NEW TRADE UNION CULTURE based on participation

Guidelines for the future







TOWARDS PARTICIPATIVE ORGANIZATIONS

WE NEED TO RE-ESTABLISH CENTRALITY TO THE WORKERS

who are equipped with **independent cognitive processes** not reducible to production systems and organization's know-how

We need to SHORTEN THE DISTANCES BETWEEN WORKERS AND TRADE UNIONS

Traditional participation tools, such as assemblies, may not be enough: they are useful to verify and validate consent, less to detect the needs on which to build the claims

SURVEYS guarantee anonymity, reduce company self-reference, create spaces of awareness, sharing and co-responsibility in the working community

Guidelines for the future







TOWARDS PARTICIPATIVE ORGANIZATIONS

The work group must become central compared to the individual worker

- the internal self-regulation of the working group prevails over the external regulation of the hierarchy
- **skill redundancy** is preferable to specializations
- the individual controls the process and the technology and is responsible of the results
- freedom of choice takes over the prescriptiveness
- work variety and role flexibility win out over monotony

Guidelines for the future







TOWARDS PARTICIPATIVE ORGANIZATIONS

A new model of participatory work organization

where 2 parts are always PRESENT and COMPLEMENTARY



Guidelines for the future







TOWARDS PARTICIPATIVE ORGANIZATIONS



CORPORATE CLIMATE AGREEMENT

To regulate the organizational features that influence workers' performance and well-being

COEXISTENT & COMPLEMENTARY

BILATERAL COMMITTEE

To constantly monitor/check verify/adjust the company application of the agreement



Guidelines for the future







CORPORATE CLIMATE ISSUES

Innovation & Flexibility Workers' involvement and empowerment **Appreciation and recognition Employees well-being Learning and development Quality performance & Leadership** Citizenship, values and ethics

Guidelines for the future







COMPANY AGREEMENTS' THEMATIC AREAS

CORPORATE CLIMATE

STAFF RIGHTS AND DUTIES

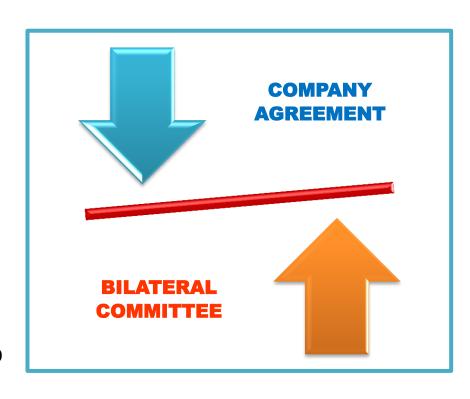
WORK ORGANIZATION AND IT

ORGANIZATION FLEXIBILITY

HEALTH & SAFETY AT WORKPLACE

LEGAL CO-RESPONSIBILITY (IN A BROAD SENSE)

ORGANIZATION OF WORK IN MULTINATIONAL COMPANIES



Guidelines for the future







Towards the future Some example of BILATERALISM on WLM in the European banking sector





http://apf.fiba.it/2016/home.nsf

Guidelines for the future







Some example of BILATERALISM on WLM in the European banking sector

TITLE: NATIONAL AGREEMENT ON TRADE POLICIES AND WORK ORGANIZATION

TYPE OF DOCUMENT: BANKING SECTOR NATIONAL AGREEMENT

COUNTRY: ITALY DATE: 08/02/2017

CONTENT (KEY ELEMENTS)

- An important step to foster the development of **responsible and sustainable trade policies**, consistent with professional ethics, human dignity and the customers needs and centrality.
- The agreement provides for an <u>obligation clause</u> for all ABI-affiliated companies, to which they will have to comply within 90 days from the date of negotiation, in order to define agreements and adjustments on the issues concerned.
- A Bilateral National Commission is set up (October 2017) b/w ABI (Italian Banking Association)and Trade Unions with the aim of addressing, promoting and monitoring the coherent implementation of the provisions of the Agreement, to acquire information, disseminate good practices and implement initiatives on trade policies, information, training, and incentive systems.

Guidelines for the future







Some example of BILATERALISM on WLM in the European banking sector

TITLE: JOINT DECLARATION ON "WORK-LIFE BALANCE"

TYPE OF DOCUMENT: TRANSNATIONAL AGREEMENT

COMPANY: UNICREDIT GROUP EWC COUNTRY: EUROPE DATE: 28/11/2017

CONTENT (KEY ELEMENTS)

- to improve the employees' balance b/w professional and private life, to have a **common general approach** and to set **target standards** in all the countries and Legal Entities of the Group, **5 main macro-areas** of interest are identified: **digitalization**, **space and time flexibility**, **time management at work**, **wellbeing**, **cultural change**.
- the Joint Declaration will be submitted to the attention of the Group's management of all companies and countries where the Group is present, with a view to informing and raising awareness of its underlying principles, stimulating discussions with social partners at national level
- it will be monitored jointly, at a central level, by the EWC Select Committee and by the Central Management.

LINKED AGREEMENT: UniCredit Bank Protocol on well-being at workplaces and trade policies (22/4/2016)

Guidelines for the future







Some example of BILATERALISM on WLM in the European banking sector

TITLE: "WORK-LIFE BALANCE" AGREEMENT

TYPE OF DOCUMENT: NATIONAL COMPANY AGREEMENT

COMPANY: BANCA INTESA S. PAOLO COUNTRY: ITALY DATE: 07/10/2015

CONTENT (KEY ELEMENTS)

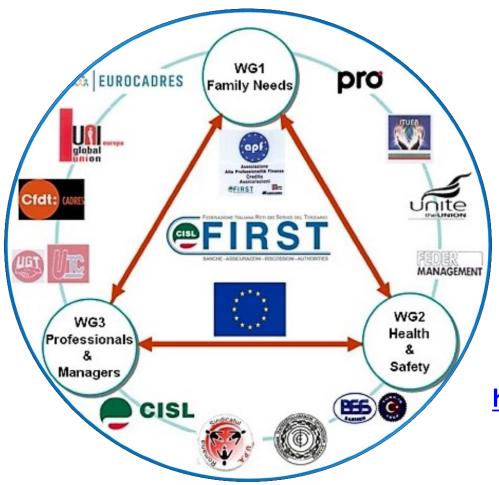
- In 2014, a Welfare Committee was set up, a bilateral body to introduce new conciliation tools, seeking balance between professional life and the privacy of employees, with the aim of improving the well-being of families and the use of time at their disposal.
- After various sessions, the bilateral Committee identified initiatives of social utility and reconciliation of working and living time and introduced the "Bank of Time", a number of hours of paid absence, in addition to ordinary and individual leave, for employees who, in order to cope with serious and determined personal and / or family situations, need additional permissions.







On the Virtual Agora web site



it is possible to find all the project documents, agreements and expert presentations and elaborations

http://apf.fiba.it/2016/home.nsf