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**ORGANISATION EUROPEENNE POUR LA RECHERCHE NUCLEAIRE**  
**CERN** EUROPEAN ORGANIZATION FOR NUCLEAR RESEARCH

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**FINANCE COMMITTEE**

Three-hundred-and-eleventh Meeting

Geneva - 21 June 2006

**COUNCIL**

Hundred-and-thirty-seventh Session

Geneva – 22 June 2006

**5-YEARLY REVIEW 2005**

PROPOSALS BY THE MANAGEMENT

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- Annex 1** – Fellows, Associates & Students (CERN/FC/5033, CERN/2659)
- Annex 2** – Staff Recruitment and Retention (CERN/TREF/264 & 264/ Add.)
- Annex 3** – Results of the Data Collection Enquiry – Salary Comparisons  
(CERN/TREF/276, 276/ Add & 276/ Add.2)
- Annex 4** – Report on Local Staff Employment Conditions within the 5YR 2005.  
This is a supplement to Annex 3.
- Annex 5** – Information on Career Structures and Advancement Systems
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(CERN/TREF/263)

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Action to be takenVoting Procedure

<p><b>1) For recommendation to Council:</b></p> <ol style="list-style-type: none"> <li>1. proposed changes to the financial and social conditions of the FAS Programme</li> <li>2. proposed changes to the Staff Rules</li> </ol> <p><b>2) For approval:</b> proposed changes to the Staff Regulations (subject to approval by Council of the proposed changes to the Staff Rules)</p>	<p style="text-align: center;"><b>FINANCE COMMITTEE</b>  310<sup>st</sup> Meeting  15 March 2006</p>	<p style="text-align: center;">2/3 majority of all the Member States + at least 51% of the contributions of all the Member States</p>
<p><b>For approval:</b></p> <ol style="list-style-type: none"> <li>1. proposed changes to the financial and social conditions of the FAS Programme</li> <li>2. proposed changes to the Staff Rules</li> </ol>	<p style="text-align: center;"><b>COUNCIL</b>  136<sup>th</sup> Session  16 March 2006</p>	<p style="text-align: center;">2/3 majority of all the Member States</p>

**Proposals for modifications to the financial  
and social conditions for Paid Associates,  
Fellows and Students**

## Proposals for modifications to the financial and social conditions for Paid Associates, Fellows and Students

Within the context of the five-yearly remuneration review, and following the periodic review of the Fellows, Associates and Students Programmes presented to the Scientific Policy Committee and Council in December 2005 (CERN/SPC/866, CERN 2652), the Management proposes a number of changes to the financial and social conditions of these categories of Members of the Personnel, in order to:

- 1) introduce a new payment scheme for the Paid Scientific Associates Programme;
- 2) reorganize the Fellowship Programme;
- 3) modify Student subsistence rates.

The above proposals aim at:

- 1) harmonizing CERN's payment levels with respect to other institutions;
- 2) providing a convenient framework for the recruitment of junior engineers and Marie Curie Early Stage Fellows;
- 3) optimizing the use of available financial resources as well as simplifying the administration of the programmes.

The present document sets out the changes in the financial and social conditions of Paid Scientific Associates, Fellows and Students required for the implementation of Management's proposals approved by the Council in December (CERN/SPC/866, CERN 2652). The modifications of the financial conditions contained in this document take due account of the relevant data collected in the 5-yearly review 2005.

The changes in the Staff Rules and Regulations required for the implementation of these proposals are presented in Annex, and are without prejudice to any further changes resulting from other elements under study in the 5-yearly review.

Following discussions at TREF in February 2006, the Management hereby submits the proposals for changes to the **financial and social conditions** of the FAS Programme as well as to the **Staff Rules** to the Finance Committee for **recommendation**, and to the Council for **approval**.

In addition, subject to Council approval of the changes to the Staff Rules, it submits the proposed changes to the **Staff Regulations** to the Finance Committee for **approval**.

The changes would take effect as from 1 July 2006 and would be applicable to all offers extended as of that date.

## **SECTION I**

### **PROPOSAL FOR A NEW PAID ASSOCIATE PAYMENT SCHEME**

#### **1— Introduction**

The Paid Scientific Associates (PDAS) Programme aims to provide scientists from all over the world with the opportunity to participate in challenging research and development and promote the exchange of knowledge in leading scientific and technological fields. The programme is open to scientists and engineers who wish to spend a period of up to one year at CERN and who are on leave of absence from their Home Institute, which, as their employer, remains responsible for their social security cover.

PDAS are expected to keep a significant fraction of their home salary, supplemented by CERN through the payment of an amount covering the additional expenses during their stay at the Laboratory. The CERN payment is currently determined by using staff salaries as a reference, (despite the fact that PDAS are not employed by the Organization) and then subtracting the net financial support from the home institution.

Despite the success of the programme, there are several weaknesses in the current payment scheme. In particular, its complex structure inevitably generates a heavy administrative load, as well as frequent debates with the Associates.

A proposal for a new payment scheme is put forward. The aim is to adopt a simple approach, within the current financial constraints, and to preserve fair treatment of Associates, while reinforcing the principle that CERN, not being their employer, does not grant benefits which constitute the employer's responsibilities.

#### **2— Present Payment Scheme**

The CERN Staff Rules and Regulations (Article R IV 1.03) stipulate:

*“The Director-General shall determine a basic payment for each paid associate, which shall not exceed the basic salary of staff members of equivalent qualifications and experience. The basic payment shall comprise:*

- a) *the sum of the remuneration and of the other financial benefits linked to his professional activity received by the paid associate from his employer or from another source outside the Organization; and*
- b) *a supplement paid by the Organization. ”*

As already mentioned, the PDAS payment scale has been correlated to the salaries of staff members in professional category 1 (Research Physicists) and category 2 (Applied Physicists and Engineers), according to age and qualification, while the CERN payment is reduced by the amount of the home support of the PDAS, defined as gross salary minus taxes. In addition, PDAS are entitled to non-resident, family and child allowances, as well as travel, removal (only for Member State Associates), installation and reimbursement of education fees, and they often choose to participate in the CERN Health Insurance Scheme (CHIS) on the same conditions as staff members.

The following elements are also taken into account in determining the CERN payment to PDAS:

- In 1996, the Management introduced a ceiling in the payment by CERN, requiring that the CERN basic payment should not exceed 75% of the equivalent CERN staff basic salary (this guideline has been introduced in order to smooth out the differences in the treatment of Associates and increase CERN's capacity to finance the PDAS programme).
- A minimum CERN payment, equivalent to the CERN basic subsistence allowance, currently 4000 CHF per month, has also been introduced.

### **3— Reasons for changing the current payment scheme**

#### **3.1 Issues of principle**

Given that CERN is not the employer of the PDAS, there is no compelling reason for the Organization to base the payment on staff salaries, or to provide employment-related benefits. The payment of a supplement (which can still be substantial, but independent of staff remunerations), like that provided by other Institutes for similar stays, is considered to be more appropriate. The large deviations in the CERN payment to Associates, including those of a similar seniority level (which start from 4000 CHF and may exceed 12000 CHF), are not consistent with the principle that CERN provides a supplementary payment, but not a salary, which is the responsibility of the employer.

### **3.2 Candidates with high home support cannot be attracted**

The payment offered by CERN to candidates having a high home support is modest (sometimes close to the minimum payment of 4000 CHF). As a result, this category of Associates cannot be attracted unless special arrangements are made.

### **3.3 Heavy administrative load**

There are many parameters in the payment determination, making administration heavy and leading to debates with the Associates and, in certain cases, with their Home Institutes (in addition to difficulties encountered in verifying detailed declarations concerning home support).

Frequent changes in circumstances of the PDAS (home support, family situation, percentage of presence at CERN, but also the income being taxed at a higher rate due to the CERN payment) often imply additional complications.

### **3.4 The current scheme is particularly inconvenient for appointments on external funds**

In order to compensate for the reductions in the Fellows and Associates budget in a period when the Laboratory needs resources for the construction of the LHC, a major effort has been invested in establishing collaboration agreements for appointments on external funds (such as the CARE project – Coordinated Accelerator Research in Europe). The funding institutes need to be able to easily calculate a priori the cost of PDAS appointments. However, under the present scheme, such a cost cannot even be estimated until a candidate is actually selected because the cost heavily depends on the personal financial situation of the candidate. In addition, the administrative and financial follow-up has to be facilitated as much as possible.

## **4— Proposal for a new Payment Scheme**

### **4.1 Basic principles**

A new payment scheme is put forward, based on the following principles:

- 1) The payment provided by CERN is **independent of the home support** of the Associate. It does not constitute a salary, but rather a supplement to the support provided by the Home Institute.
- 2) It must provide attractive financial conditions, compatible with the prestige of the programme.

- 3) The amount should be determined in the simplest possible way, while ensuring that a correct correspondence of the PDAS payment to his/her level of seniority is obtained, therefore reducing the need for special arrangements.
- 4) The payment scheme should allow for some degree of flexibility, including the possibility for the Director-General to authorize exceptional payments to outstanding individuals.

#### **4.2 Payment modalities**

- A basic payment to cover for the high cost of living in the Geneva area (standard subsistence allowance of 4000 CHF/month), increased by a seniority-based supplement, ranging from 2000 to 4500 CHF/month, aiming to make the programme attractive for senior scientists.
- If the PDAS is accompanied by at least one member of the family for at least six months, a family supplement of 1000 CHF/month is offered.
- Education fees will still be reimbursed at current rates, but only for those dependent children who accompany the associate for at least six months and attend educational establishments in the Geneva area.
- Travel support is maintained at the present rates.
- CERN, not having any employer responsibility, does not need to be concerned with the home support, whether salary, social security cover or other employment-related forms of support, including, in particular, non-resident allowance, installation grants, removal expenses and home leave.
- Associates are entitled to normal CERN leave conditions (annual leave, for contracts of at least six months, sick leave, special leave, maternity leave), while health insurance with the CHIS remains optional, but at the same cost to the PDAS as for other categories of Associates.

All payment levels (see the summary in the table below) would be subject to periodic review.

*Table 1 Seniority-based supplement for the Paid Associate Programme*

<b>Years of experience after first university degree</b>	<b>Seniority-based supplement on top of the basic payment (in CHF/month)</b>
<b>Up to 10</b>	2000
<b>11 – 15</b>	2500
<b>16 - 20</b>	3000
<b>21 – 25</b>	3500
<b>26 – 30</b>	4000
<b>30+</b>	4500

## **5— Concluding Remarks**

The above scheme amounts to a redistribution and optimization of the existing budget, ensuring that Associates at comparable seniority levels receive comparable payments from CERN.

The scheme will also simplify negotiations with Associates and Home Institutes. In particular, arrangements with external funding institutes (such as the ones for the CARE project) will be greatly facilitated.

## **SECTION II**

### **PROPOSAL FOR A REORGANIZATION OF THE FELLOWSHIP PROGRAMME**

#### **1— Introduction and motivation**

The Fellowship Programme offers young scientists and engineers (with qualifications ranging from post-graduate to post-doc) from Member State universities or equivalent institutions the opportunity to enhance their qualifications through participation in the work of the Organization. Unlike staff, all fellows are employed by the Organization for a limited period of time, typically two years. This appointment, which often constitutes a first employment opportunity, is considered as a great asset for pursuing a successful career in particle physics research or in applied science and engineering.

Given the prestige of CERN Fellowships in the Member States, every effort should be made to ensure that excellent candidates are given a fair chance to compete according to their qualifications and experience. Moreover, it is important to ensure that the work entrusted to them always contains a strong training element.

In the framework of the 5-yearly review of the financial conditions of members of the personnel, a review of payment rates is performed, aiming to harmonize CERN's payment levels when compared to other research establishments, as well as to optimize the use of available financial resources.

Furthermore, a reorganization of the programme is motivated by the need to provide a convenient and comprehensive framework for the recruitment of junior researchers and engineers. In fact, one can identify two relevant populations which, for different reasons, do not quite fit into the existing Fellowship Programme and for which it is difficult to find a convenient recruitment solution:

- Some departments have expressed a strong interest in junior researchers and engineers, from Technical Engineer level up to M.Sc. with no more than a few years of relevant experience. From the academic point of view, they are under-qualified as candidates for the current Fellowship Programme, which leads to low rankings whenever they apply for such a Programme. On the other hand, the competition for staff posts often comprises candidates with at least some work experience, which means that those with

little or no experience have limited chances of being selected. One objective of the present proposal is to open the Fellowship Programme to such profiles.

- Despite their high potential and the availability of external funding, EU-funded Marie Curie Early Stage Training (EST) researchers do not easily fit into any existing CERN framework. They come to CERN with up to 4 years experience after the M.Sc but no Ph.D. Currently, the funding provided by the EU does not match the level required to hire these people as fellows.

It is proposed to redefine the existing Fellowship Programme by creating two sub-programmes, catering for different populations in terms of qualifications and experience, with different selection criteria and separate rankings. This should minimize conflicts and difficulties at the selection stage while maintaining a strong training content and ensuring better matching of people to job profiles. People appointed under either scheme will have the status of Fellow.

## **2— Classification of Fellows**

It is proposed to move from an age-based to an experience-based classification and remuneration system. This classification reflects the EU guidelines for Marie Curie Researchers. For candidates who have obtained a diploma entitling them to commence doctoral studies in the country in which the diploma was obtained, experience is defined as the number of full years of research, starting from this degree and up to the date of the relevant selection committee.

The two following sub-programmes are defined:

- The Senior Fellowship Programme will be addressed to people with a Ph.D., or at least four years of experience after the degree which gives access to doctoral programmes. Aiming at the most senior among those participating in the existing Fellowship Programme, the recruitment criteria will be based on academic and research excellence. The candidates will be ranked according to such criteria.
- The Junior Fellowship Programme, for holders of at least a Technical Engineer degree (or equivalent) and at most a M.Sc. degree (or equivalent) with not more than 4 years of experience, will be characterized by project-oriented recruitment criteria, based on matching technical qualifications and skills with specific CERN projects. The programme will emphasize the concept of “on-the-job training”.

### 3— Senior Fellowship Programme

The Senior Fellowship Programme will be aimed at the most experienced segment in the Fellow population.

- **Eligibility:** researchers in possession of a doctoral degree (to be obtained at the latest six months after the relevant selection committee meeting) or a minimum of four years of research experience, up to a maximum of ten years, regardless of age. Applicants must be nationals of a CERN Member State, however, a very limited number of positions will continue to be available to young scientists from Non-Member States.
- **Status:** CERN employee.
- **Remuneration:** a monthly stipend, which is composed of a basic amount corresponding to Aa.0 in the staff scale (CHF 4118 in 2005), increased by a seniority-based supplement, as shown in Table 2. This stipend will not change during the appointment other than for cost-of-living adjustments.

The supplements have been set by taking into account the results of the analysis of external payment rates in the framework of the 5-yearly review, as discussed below. They should be indexed every year using as a guide the Geneva cost-of-living movement.

*Table 2 Seniority-based supplement for the Senior Fellowship Programme*

Seniority Level	Seniority-based supplement on top of the basic amount (in CHF/month)
Between 4 and 6 years of research experience - minimum level for PHD holders	2350
Between 6 and 8 years of research experience	2700
Between 8 and 10 years of research experience	3000
(Just) over 10 years of research experience	3300

The highest seniority level provides some flexibility for appointing outstanding individuals whose experience profile would exceed the standard 10-year limit. Providing flexibility is important given that one is moving from an age-based to an experience-based classification system.

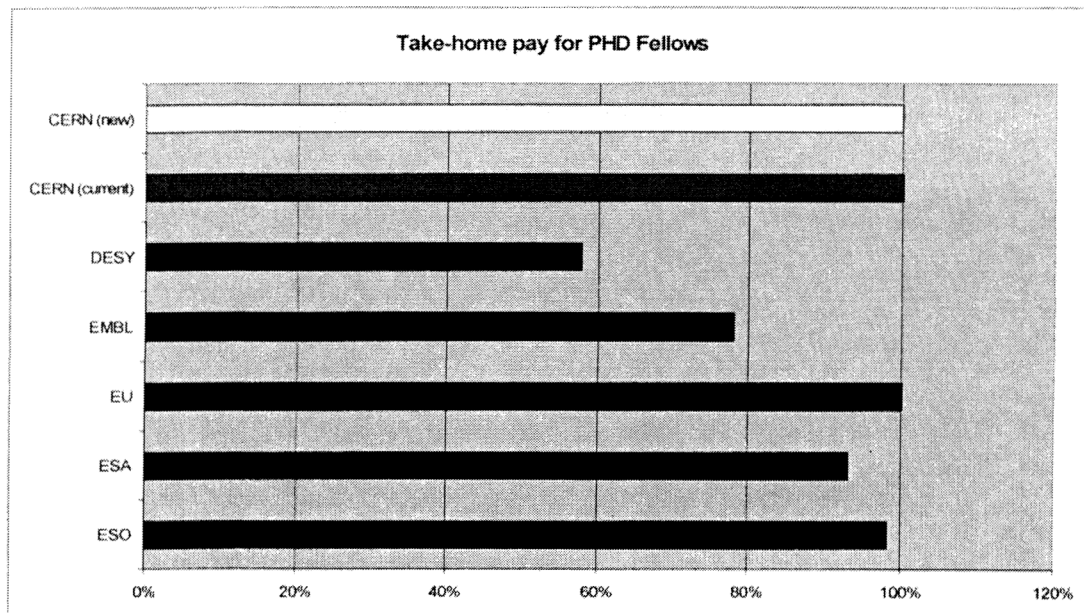
Other benefits:

- a) Pension entitlement and health cover. Pension contribution rates computed on the basic amount, health contributions on total stipend;
- b) family/children allowances;
- c) coverage of travel expenses when taking up and terminating the appointment;
- d) installation grant at two thirds of the rate for staff;
- e) education fees at current rates;
- f) traveling time for home leave.

### **Stipend Comparison**

In order to draw a comparison between CERN stipends and those offered by comparator organizations, a data collection enquiry was undertaken in the framework of the 5-yearly review. Data collected through the enquiry as well as from external sources are summarized in Figure 1, where typical take-home pay levels for a CERN fellow with a Ph.D. but no further experience, in the existing and in the new scheme, are compared to the corresponding values offered by post-doctoral programmes in some European institutions. As far as pension benefits are concerned, these are provided by CERN, DESY, the EU and ESO. For ESO, fellows are not members of the staff pension fund and must join another appropriate old-age insurance scheme.

**Figure 1** - Comparison between the typical take-home pay for post-doctoral CERN fellows at entry level (single, non-resident, with no children) and corresponding payments from some comparator institutions, after exchange rate and purchasing power parity (PPP) adjustments for Switzerland. In the case of the EU, the take-home pay depends on where the Fellow is hosted. For comparison purposes, it is assumed here that the fellow is employed by CERN, thus paying social contributions at CERN rates.



The above comparison indicates that the conditions offered at CERN to an inexperienced post-doctoral fellow are attractive, both in cash terms and from the point of view of the social benefits provided.

#### 4— Junior Fellowship Programme

This scheme aims to provide a coherent framework for hiring junior researchers and engineers, funded by CERN or external sources, optimizing the use of available resources whilst offering attractive conditions. The new framework is defined through the following criteria:

- **Eligibility:** Holders of at least a Technical Engineer degree (or equivalent) and at most a M.Sc. degree (or equivalent) with not more than 4 years of experience. Applicants must be nationals of a CERN Member State.
- **Status and other benefits:** as for Senior Fellows.
- **Remuneration:** same principles as for Senior Fellows, with the same basic amount and a seniority-based supplement as defined in Table 3.

*Table 3 Seniority-based supplement for the Junior Fellowship Programme*

Degree	Seniority-based supplement on top of the basic amount (in CHF/month)
Technical Engineer (or equivalent)	950
M. Sc. (or equivalent)	1980

The amounts for the seniority-based supplements are based on the following considerations:

1. The Technical Engineer supplement applies to personnel who, if hired as CERN staff (with no work experience), would be placed at Da.f0 in the staff scale. This supplement is such that the resulting take-home pay corresponds to a typical take-home pay for staff at Da.f0, after applying a reduction factor of ~20%. This value for the reduction factor corresponds to the typical ratio between current pay levels for fellows (including those with a Ph.D.) and staff with equivalent qualifications.
2. The value of the supplement for junior researchers ensures that the average take-home pay level is essentially unchanged when computed on a reference population of existing fellows with a M.Sc. degree.

## 5— Financial Summary

A cost projection was performed by identifying a sample of potential applicants for the new programme inside the population of the existing fellows during the period 2002-2004. The projection indicates that the savings achieved by the introduction of the new scheme will enable CERN to host ~17 additional fellows per year within the existing budget. Also, it is worth noting that the budget allocated by the EU for the remuneration of an Early-Stage Training (EST) researcher fits into the remuneration range of the new Junior Fellowship scheme. This would enable CERN to hire EST researchers as Junior Fellows.

## **6— Concluding Remarks**

In the framework of the 5-yearly review of the financial conditions of members of the personnel, a reorganization of the Fellowship Programme is proposed, as well as a review of payment rates, aiming to harmonize CERN's payment levels when compared to other research establishments, as well as optimizing the use of available financial resources. This new scheme also provides a convenient and comprehensive framework for the recruitment of junior researchers and engineers.

## **SECTION III**

### **PROPOSAL FOR MODIFIED STUDENT SUBSISTENCE RATES**

#### **1— Introduction**

Student Programmes are a key element of CERN strategy for training junior researchers and introducing them to the global research community. They also provide valuable human resources contributing to the advancement of all major research projects. The official CERN student programmes comprise:

- The **Summer Student Programme**, designed for undergraduates in physics and in engineering, coming to CERN during the summer months for periods from 8 to 13 weeks.
- The **Administrative Student Programme**, offering a limited number of positions to students in the fields of international management, finance and personnel administration. These students spend at CERN periods from 6 to 14 weeks.
- The **Technical Student Programme**, aimed at undergraduate students in technical fields, whose educational establishments require them to spend a training period of several months (typically 12) in industry or in a research establishment.
- The **Doctoral Student Programme**, aimed at postgraduate students who wish to prepare a doctoral thesis in a technical field. They usually spend 2.5 years at the Laboratory.

CERN provides financial support to students, based on subsistence rates. These are currently related to a reference staff salary through coefficients which depend on the level of seniority of the student (undergraduate/postgraduate) as well as on the cost of living in connection with the duration of the stay.

A review of student subsistence rates was performed in 2005. This analysis indicates that a harmonization of CERN's payment levels as compared to other research and educational establishments can be achieved through a revised set of subsistence rates. Such rates would allow supporting a higher number of students within the current budget while remaining attractive to top-level potential candidates.

## 2—Payment Rates

### 2.1 Current rates

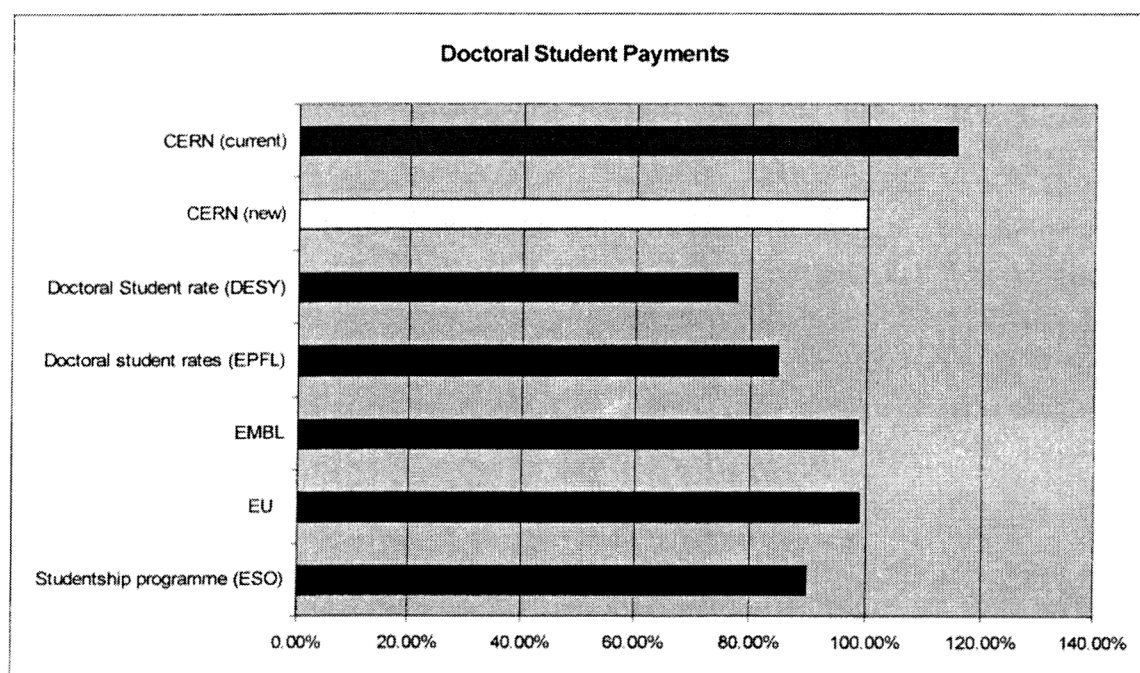
The subsistence allowance rate for the various categories of students is defined in the Staff Rules & Regulations (R IV 1.05, R A3.01) as a percentage “k” of the basic salary corresponding to salary band Ca, step 0 (CHF 5343/month in 2005), where:

- k= 50% for summer & administrative students (2672 CHF/month in 2005);
- k= 60% for technical students (3206 CHF/month in 2005);
- k= 75% for doctoral students (4007 CHF/month in 2005).

### 2.2 Proposed rates

In order to draw a comparison between CERN subsistence rates and those offered by comparator organizations, a data collection enquiry was undertaken. The analysis and its outcome are summarized in Figure 2, which compares current and suggested new rates for CERN doctoral students to payments offered by doctoral programmes in some European institutions.

*Figure 2 - Comparison between CERN doctoral rates (new CERN=1) and typical net European rates, after exchange rate and purchasing power parity (PPP) adjustments for Switzerland (source: OECD).*



The analysis of such data, as well as the need of internal harmonization, lead to the following set of revised rates (expressed in 2005 prices and no longer linked to staff salaries):

- 2672 CHF/month for summer & administrative students (basic rate, unchanged);
- plus 16% for technical students (3099 CHF/month);
- plus 30% for doctoral students (3473 CHF/month).

These rates could be indexed using as a guide the Geneva cost-of-living movement.

### **2.3 Considerations on the Proposed Rates**

The basic rate appears adequate when compared to the cost of living based on short-term accommodation in the CERN hostel, while the higher rate for technical students is justified by the higher living costs related to a long stay.

The rate for doctoral students can be regarded as resulting from the addition of a seniority-related supplement to the payment for technical students. Figure 2 indicates that such a rate remains highly attractive when compared to the remuneration from similar programmes in Europe.

In order to provide further help to technical and doctoral students when dealing with installation costs in the Geneva region, CERN may offer to them advances on subsistence payments (as stipulated by R IV 1.54 in the Staff Rules and Regulations). It is proposed that students be allowed to repay advances over a period of up to 12 months (depending on the duration of their appointment).

## **3— Financial Summary**

An analysis of the financial impact of the modified rates on the 2005 student population and budget indicates that the application of the new rates yields additional financial resources of approximately CHF 450,000/year (~8% of the current budget). These resources will be used by hiring additional students.

## **4— Concluding Remarks**

In the proposed scheme the amounts are set in such a way that all students will be receiving an attractive payment, as shown by our comparison with other organizations. Moreover, a harmonization of CERN's payment levels is achieved, resulting in an optimized use of available financial resources.

## **PROPOSED AMENDMENTS TO THE TENTH EDITION OF THE STAFF RULES AND REGULATIONS**

### **Amendments to the Financial Conditions of Fellows, Paid Associates and Students**

#### **1— INTRODUCTION**

As stated in this document, the Management wishes to make a number of changes to the employment conditions of Fellows and to the conditions of association of Paid Associates and Students. These changes require amendments to the Staff Rules and Regulations, which are set out in this Annex. In accordance with Articles VII 1.07 and 1.08 of the Staff Rules, they were subject to the discussion procedure at the meetings of the Standing Concertation Committee on 9 December 2005 and 25 January 2006.

## PROPOSED AMENDMENTS TO THE TENTH EDITION OF THE STAFF RULES AND REGULATIONS

### 2— PROPOSED AMENDMENTS TO THE STAFF RULES

**Proposal 1:** Article II 4.07 – Home Leave

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
Members of the personnel shall be entitled to home leave under the conditions laid down by the Staff Regulations.	MPE	<b>International staff members and fellows</b> shall be entitled to home leave under the conditions laid down by the Staff Regulations.	<b>Tsi-Fb</b>

**Proposal 2:** Article IV 1.01 – **Determination of financial conditions**

*(This Article is now split into two: Article IV 1.01 defines the financial conditions, while the new Article IV 1.02 lays down how they are determined and reviewed)*

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
The term “financial conditions” shall cover remunerations (basic salary, stipend), payments (basic payment, subsistence allowance, daily allowance), as well as allowances, indemnities, grants, premiums and reimbursements paid by the Organization on the basis of the Staff Rules and Regulations.	MP	The term “financial conditions” shall cover remunerations ( <b>basic salary for staff members, stipend for fellows</b> ), payments ( <b>subsistence allowance for associated members of the personnel</b> ), as well as allowances, indemnities, grants, premiums and reimbursements paid by the Organization on the basis of the Staff Rules and Regulations.	MP

**Proposal 3:**

**Article IV 1.02 – Periodic reviews and determination of financial conditions** *(New Article reproducing, with some amendments, the second part of the current Article IV 1.01)*

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The financial conditions of the members of the personnel shall be determined and periodically reviewed by the Council. These periodic reviews shall consist of a five-yearly general review and an annual review of the scale of basic salaries applicable to staff members and of the amounts of the family and child allowances.</p> <p>For the five-yearly review, the Council shall use the principles and procedures laid down in Annex A 1.</p> <p>For the annual review of the scale of basic salaries applicable to staff members, the Council shall use as a guide an index, the composition and method of calculation of which are laid down in Annex A 1.</p> <p>For the annual review of the amounts of the family and child allowances, the Council shall use as a guide the data specified in Annex A 1.</p>	MPE	<p>The financial conditions of the members of the personnel shall be determined and periodically reviewed by the Council. These periodic reviews shall consist of:</p> <ul style="list-style-type: none"> <li>- a five-yearly general review of <b>financial conditions</b>;</li> <li>- <b>an annual review of remunerations and payments and of the amounts of the family and child allowances.</b></li> </ul> <p>For the five-yearly <b>general</b> review, the Council shall use the principles and procedures laid down in § I A) of Annex A 1.</p> <p>For the annual review of <b>remunerations</b>, the Council shall use as a guide an index, the composition and method of calculation of which are laid down in § II A) of Annex A 1.</p> <p>For the annual review of <b>payments and of the amounts of the family and child allowances</b>, the Council shall use as a guide the data specified in § II B) of Annex A 1.</p>	MP

**3— PROPOSED AMENDMENTS TO THE STAFF REGULATIONS**

**Proposal 1:** Article R I 2.03 – Members of the personnel holding an employment contract

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>Staff members and assimilated members of the personnel shall hold an employment contract with the Organization:</p> <p>a) Staff members shall be defined as such by the Director-General in their contract and a distinction shall be made between:</p> <ul style="list-style-type: none"> <li>– international staff members;</li> <li>– local staff members.</li> </ul> <p>b) Fellows shall be young graduates with a higher education degree to whom the Organization shall offer a fellowship contract so that they may take part in the Organization's activities.</p>	MPE	<p>Staff members and assimilated members of the personnel shall hold an employment contract with the Organization:</p> <p>a) Staff members shall be defined as such by the Director-General in their contract and a distinction shall be made between:</p> <ul style="list-style-type: none"> <li>– international staff members;</li> <li>– local staff members.</li> </ul> <p>b) Fellows shall be <b>graduates</b> with a higher education degree to whom the Organization shall offer a fellowship contract so that they may take part in the Organization's activities <b>and thus continue their training.</b></p>	MPE

**Proposal 2:** Article R II 1.08 – Employment contract

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The appointment of a staff member or assimilated member of the personnel shall be recorded in a contract signed by the Director-General and the member of the personnel. The contract shall lay down:</p> <ul style="list-style-type: none"> <li>a) the category of member of the personnel to which the person belongs (international staff member, local staff member, fellows);</li> <li>b) the date of commencement and the duration of the appointment;</li> <li>c) the duty station;</li> <li>d) the basic remuneration, family and other allowances paid regularly;</li> <li>e) the residential category and, for international staff members and fellows, the home station;</li> <li>f) the actual duration of the working week, wherever different from the basic working week (Article III 1.01 of the Rules);</li> <li>g) the obligation to comply with the provisions of Article R II 1.11;</li> <li>h) any special conditions.</li> </ul> <p>For staff members, the contract shall also include the job title attributed to the initial functions as well as the classification in a career path, salary band and step. This initial classification shall depend on the qualifications and relevant professional experience of the staff member concerned.</p>	MPE	<p>The appointment of a staff member or assimilated member of the personnel shall be recorded in a contract signed by the Director-General and the member of the personnel. The contract shall lay down:</p> <ul style="list-style-type: none"> <li>a) the category of member of the personnel to which the person belongs (international staff member, local staff member, fellows);</li> <li>b) the date of commencement and the duration of the appointment;</li> <li>c) the duty station;</li> <li>d) the <b>remuneration</b> and family and other allowances paid regularly;</li> <li>e) <b>where applicable</b>, the residential category and/or the home station;</li> <li>f) the actual duration of the working week, wherever different from the basic working week (Article III 1.01 of the Rules);</li> <li>g) the obligation to comply with the provisions of Article R II 1.11;</li> <li>h) any special conditions.</li> </ul> <p>For staff members, the contract shall also include the job title attributed to the initial functions as well as the classification in a career path, salary band and step. This initial classification shall depend on the qualifications and relevant professional experience of the staff member concerned.</p>	MPE

**Proposal 3:** Article R II 1.09 – Association contract

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The conditions of association with the Organization shall be recorded in a contract signed by the Director-General and the member of the personnel. The contract shall lay down:</p> <p>a) the category of member of the personnel to which the person belongs;</p> <p>b) the date of commencement and the duration of the association;</p> <p>c) the duty station;</p> <p>d) whenever applicable, the financial conditions granted on a regular basis for the total duration of the contract;</p> <p>e) whenever applicable, the percentage of annual working hours within the Organization, if it is below 100%;</p> <p>f) the obligation to comply with the provisions of Article R II 1.11;</p> <p>g) any special conditions.</p> <p>For paid associates, the contract shall also indicate the home station and the residential category.</p>	MPA	<p>The conditions of association with the Organization shall be recorded in a contract signed by the Director-General and the member of the personnel. The contract shall lay down:</p> <p>a) the category of member of the personnel to which the person belongs (<i>associates, users, students</i>);</p> <p>b) the date of commencement and the duration of the association;</p> <p>c) the duty station;</p> <p>d) whenever applicable, the financial conditions granted on a regular basis for the total duration of the contract;</p> <p>e) whenever applicable, the percentage of annual working hours within the Organization, if it is below 100%;</p> <p>f) the obligation to comply with the provisions of Article R II 1.11;</p> <p>g) <b>any special conditions.</b></p>	MPA

**Proposal 4:** Article R II 1.32 – Determination of home station

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The home station of international staff members, fellows and paid associates shall be determined, at the time the contract is drawn up, by the Director-General taking account of the place of residence, and the family, professional and civic ties of the person concerned.</p> <p>a) For a national of a Member State, the home station shall be deemed to be on the European territory of that State, save where the above considerations are such as to determine the home station on the European territory of another Member State;</p> <p>b) For other members of the personnel, the home station shall be determined on the European territory of the Member States according to the criteria set out above, the personal situation of the person concerned and taking due account of the interest of the Organization.</p>	Tsi-Fb-Atp	<p>The home station of <b>international staff members and fellows</b> shall be determined, at the time the contract is drawn up, by the Director-General taking account of the place of residence, and the family, professional and civic ties of the person concerned.</p> <p>a) For a national of a Member State, the home station shall be deemed to be on the European territory of that State, save where the above considerations are such as to determine the home station on the European territory of another Member State;</p> <p>b) For other members of the personnel, the home station shall be determined on the European territory of the Member States according to the criteria set out above, the personal situation of the person concerned and taking due account of the interest of the Organization.</p>	<b>Tsi-Fb</b>

**Proposal 5:** Article R II 1.33 – Change of home station

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
At the request of the member of the personnel concerned, the home station may be changed, at the discretion of the Director-General, without affecting his residential category.	Tsi-Fb-Atp	<i>Text not amended</i>	<b>Tsi-Fb</b>

**Proposal 6:** Article R II 1.34 – Residential category and local zone

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The residential category of a member of the personnel shall be determined by reference to his home station and his place of residence at the time his contract is drawn up.</p> <p>The local zone is situated within a circle of 100 km radius, extended to 150 km in the Host States, with its centre at the duty station.</p>	Tsi-Fb-Atp	<i>Text not amended</i>	<b>Tsi</b>

**Proposal 7:** Article R II 1.35 – Non-residents

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>Non-resident members of the personnel shall be international staff members, fellows and paid associates whose home station is outside the local zone and who, at the time their contract is drawn up, were resident outside the local zone or had been residing within it for less than five years.</p> <p>When the member of the personnel is resident in the local zone as a member of the personnel of an international organization at the time his contract is drawn up, his residential category shall be determined according to the prevailing situation at the time of his appointment to that organization.</p>	Tsi-Fb-Atp	<p>Non-resident members of the personnel shall be <b>international staff members</b> whose home station is outside the local zone and who, at the time their contract is drawn up, were resident outside the local zone or had been residing within it for less than five years.</p> <p>When the <b>international staff member</b> is resident in the local zone as a member of the personnel of an international organization at the time his contract is drawn up, his residential category shall be determined according to the prevailing situation at the time of his appointment to that organization.</p>	<b>Tsi</b>

**Proposal 8:** Article R II 1.36 – Residents

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
Resident members of the personnel shall be local staff members, as well as international staff members, fellows and paid associates who do not fulfil the conditions required to qualify as non-residents as laid down in Article R II 1.35.	MPE-Atp	Resident members of the personnel shall be local staff members, as well as <b>international staff members</b> who do not fulfil the conditions required to qualify as non-residents as laid down in Article R II 1.35.	<b>Ts</b>

**Proposal 9:** Article R II 4.26 – Special leave for first removal

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
One working day of special remunerated or paid leave shall be granted to the member of the personnel on taking up appointment for the first removal paid for or reimbursed by the Organization.	MPE-Atp	One working day of special <b>remunerated</b> leave shall be granted to the member of the personnel on taking up appointment for the first removal paid for or reimbursed by the Organization.	<b>Ts</b>

**Proposal 10:** Article R II 4.31 – Home leave

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
Home leave shall be granted to non-resident members of the personnel as defined in Article R II 1.35 whose contract of employment or association runs for at least two years. It shall be spent in the state of their home station. It shall last at least five calendar days, excluding travelling time (a maximum of eight days) and shall be deducted from annual leave or special saved leave. The entitlement to home leave shall not be cumulative for both spouses, whoever their employers may be. Separate journeys are authorised for the members of the family (R IV 1.16) of the member of the personnel concerned.	Tsi-Fb-Atp	Home leave shall be granted to non-resident <b>international staff members</b> as defined in Article R II 1.35 <b>and to fellows</b> provided that the contract of <b>employment</b> runs for at least two years. It shall be spent in the state of their home station. It shall last at least five calendar days, excluding travelling time (a maximum of eight days) and shall be deducted from annual leave or special saved leave. The entitlement to home leave shall not be cumulative for both spouses, whoever their employers may be. Separate journeys are authorised for the members of the family (R IV 1.16) of the member of the personnel concerned.	<b>Tsi-Fb</b>

**Proposal 11:** Article R II 4.32 – Procedures

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
The first period of home leave shall be granted during the 12 months' period commencing with the first day of the second year of service, and subsequently once per period of 24 months, the first of these commencing with the first day of the third year of service.	Tsi-Fb-Atp	<b><i>Text not amended</i></b>	<b>Tsi-Fb</b>

**Proposal 12: Article R IV 1.03 – Subsistence allowances paid to Students, Project Associates and Paid Associates**

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The Director-General shall determine a basic payment for each paid associate which shall not exceed the basic salary of staff members of equivalent qualifications and experience.</p> <p>The basic payment shall comprise:</p> <p>a) the sum of the remuneration and of the other financial benefits linked to his professional activity received by the paid associate from his employer or from another source outside the Organization; and</p> <p>b) a supplement paid by the Organization.</p>	Atp	<p><b>Students, project associates and paid associates shall receive a subsistence allowance from the Organization under conditions laid down by the Director-General.</b></p>	St-Pj-Atp

**Proposal 13: Articles R IV 1.04 to R IV 1.06 deleted**

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The Director-General shall review the stipend paid to fellows and the basic payment granted to paid associates at the end of each year of service.</p>	Fb-Atp	<i>(Article deleted)</i>	

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The Director-General shall determine the subsistence allowances paid to students within the limits and conditions set out in Annex R A 3, taking account of financial benefits which they may receive from an authority external to the Organization.</p>	St	<i>(Article deleted)</i>	

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The Director-General shall determine the subsistence allowance paid to project associates taking account in particular of the salary and other financial benefits received from their employer.</p>	Pj	<i>(Article deleted)</i>	

**Proposal 14:** Article R IV 1.07 – Subsistence allowances of unpaid associates and users

CURRENT TEXT	Applicable to	PROPOSED AMENDMENT	Applicable to
Unpaid associates and users shall receive no basic payment from the Organization. The Director-General may, however, at his discretion, authorise the payment of a daily allowance to unpaid associates and users.	Atn-Us	The Director-General may, <b>under conditions he shall define</b> , authorise the payment of a <b>subsistence</b> allowance to unpaid associates and users.	Atn-Us

**Proposal 15:** Article R IV 1.14 – Family allowance

CURRENT TEXT	Applicable to	PROPOSED AMENDMENT	Applicable to
A member of the personnel who has a family (Article R IV 1.16) shall receive a family allowance, the amount of which is shown in Annex R A 4. If the contract stipulates a working week of less than 40 hours, this allowance shall be reduced accordingly. In the event of divorce, this allowance shall be paid only if a child allowance is also payable.	MPE-Atp	<b>A staff member or assimilated member of the personnel</b> who has a family (Article R IV 1.16) shall receive a family allowance, the amount of which is shown in Annex R A 4. If the contract stipulates a working week of less than 40 hours, this allowance shall be reduced accordingly. In the event of divorce, this allowance shall be paid only if a child allowance is also payable.	<b>MPE</b>

**Proposal 16:** Article R IV 1.15 – Child allowance

CURRENT TEXT	Applicable to	PROPOSED AMENDMENT	Applicable to
A member of the personnel shall for each dependent child other than those specified in Article R IV 1.16 b) 3. receive a child allowance, the amount of which is given in Annex R A 4. If the contract stipulates a working week of less than 40 hours, this allowance shall be reduced accordingly. In the event of divorce, the child allowance shall not exceed the allowance which the member of the personnel has to pay for the maintenance of any child not in his legal custody. Payment of the child allowance shall be suspended during the child's period of military service.	MPE-Atp	<b>A staff member or assimilated member of the personnel</b> shall for each dependent child other than those specified in Article R IV 1.16 b) 3. receive a child allowance, the amount of which is given in Annex R A 4. If the contract stipulates a working week of less than 40 hours, this allowance shall be reduced accordingly. In the event of divorce, the child allowance shall not exceed the allowance which the member of the personnel has to pay for the maintenance of any child not in his legal custody. Payment of the child allowance shall be suspended during the child's period of military service.	<b>MPE</b>

**Proposal 17:** Article R IV 1.18 – Non concurrence of benefits

CURRENT TEXT	Applicable to	PROPOSED AMENDMENT	Applicable to
If two spouses are both members of the personnel, they shall receive only one family allowance and one child allowance per child.	MPE-Atp	<b>Text not amended</b>	<b>MPE</b>

**Proposal 18:** Article R IV 1.21 – Non-resident allowance

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
A non-resident member of the personnel (Article R II 1.35) shall be paid a non-resident allowance at the rates laid down in Annex R A 5.	Tsi-Fb-Atp	A non-resident <b>international staff member</b> (Article R II 1.35) shall be paid a non-resident allowance at the rates laid down in Annex R A 5.	<b>Tsi</b>

**Proposal 19:** Article R IV 1.23 – Apprenticeship and vocational training

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
In the conditions defined in Article R IV 1.22, periods of apprenticeship or vocational training of a dependent child shall entitle the member of the personnel concerned to the reimbursement of expenses incurred.	MPE-Atp	<b>Text not amended</b>	<b>MPE</b>

**Proposal 20:** Article R IV 1.24 – Journey expenses

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
Three times per period of two years the Organization shall reimburse the journey expenses in respect of each child covered by the provisions of Article R A 8.01 a) for the return trip between the duty station of the member of the personnel and the educational establishment. The conditions governing the application of this provision shall be laid down by the Director-General.	MPE-Atp	Three times per period of two years the Organization shall reimburse the journey expenses in respect of each child <b>meeting the criteria laid down in Article R A 8.01 a)</b> for the return trip between the duty station of the member of the personnel and the educational establishment. The conditions governing the application of this provision shall be laid down by the Director-General.	<b>MPE</b>

**Proposal 21:** Article R IV 1.30 – Travelling expenses (Taking up appointment)

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
Under the conditions laid down by the Director-General, the Organization shall pay or reimburse the travelling expenses to the member of the personnel on taking up an appointment, if his place of residence is outside a circle with a radius of 20 km with its centre at the duty station and provided that the distance measured in a direct line between his previous and new place of residence is not less than 20 km. Such travelling expenses may be paid or reimbursed to project associates, unpaid associates and users at the discretion of the Director-General.	Tsi-Fb-MPA	Under the conditions laid down by the Director-General, the Organization shall pay or reimburse the travelling expenses of <b>international staff members, fellows and students</b> on taking up an appointment, if <b>their</b> place of residence is outside a circle with a radius of 20 km with its centre at the duty station and provided that the distance measured in a direct line between <b>their</b> previous and new place of residence is not less than 20 km.  <b>The Director-General may, under conditions he shall define, authorise such travelling expenses to be paid or reimbursed to associates and users.</b>	<b>Tsi-Fb-St</b>  <b>At-Us</b>

**Proposal 22:** Article R IV 1.31 – Travelling expenses (Termination of contract)

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
Under the conditions laid down by the Director-General, the Organization shall pay or reimburse the travelling expenses to the member of the personnel upon termination of his contract, if his home station is outside a circle with a radius of 20 km with its centre at the duty station, and if the journey is made within two years following the termination of contract. The distance measured in a direct line between the previous and new place of residence shall not be less than 20 km. Such travelling expenses may be paid or reimbursed to project associates, unpaid associates and users at the discretion of the Director-General.	Tsi-Fb-MPA	Under the conditions laid down by the Director-General, the Organization shall pay or reimburse the travelling expenses of <b>international staff members, fellows and students</b> upon termination of <b>their</b> contract, if <b>their</b> home station is outside a circle with a radius of 20 km with its centre at the duty station, and if the journey is made within two years following the termination of contract. The distance measured in a direct line between the previous and new place of residence shall not be less than 20 km.  <b>The Director-General may, under conditions he shall define, authorise similar travelling expenses to be paid or reimbursed to associates and users.</b>	<b>Tsi-Fb-St</b>  <b>At-Us</b>

**Proposal 23:** Article R IV 1.32 – Travelling expenses (Change of duty station)

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
Under the conditions laid down by the Director-General, the Organization shall pay or reimburse the travelling expenses to the member of the personnel upon a change in his duty station decided by the Director-General.	MPE-Atp	<b><i>Text not amended</i></b>	<b>MPE</b>

**Proposal 24:** Article R IV 1.33 – Travelling expenses (Home leave)

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
Under the conditions laid down by the Director-General, the Organization shall pay or reimburse the travelling expenses to the member of the personnel for home leave (Article R II 4.31).  The member of the personnel and his family shall be entitled to the payment or reimbursement of the travelling expenses up to the amount of a return journey to and from the home station in accordance with the conditions laid down by the Director-General.	Tsi-Fb-MPA	Under the conditions laid down by the Director-General, the Organization shall pay or reimburse the travelling expenses of <b>international staff members</b> for home leave (Article R II 4.31).  <b>The international staff member</b> and his family shall be entitled to the payment or reimbursement of the travelling expenses up to the amount of a return journey to and from the home station in accordance with the conditions laid down by the Director-General.	<b>Tsi</b>

**Proposal 25:** Article R IV 1.35 – Travelling expenses (Members of the family)

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
Under the conditions laid down by the Director-General, the Organization shall pay or reimburse the travelling expenses of members of the family (Article R IV 1.16) of a member of the personnel if they accompany him:	MPE-Atp	Under the conditions laid down by the Director-General, the Organization shall pay or reimburse the travelling expenses of members of the family (Article R IV 1.16) of a member of the personnel if they accompany him:	MPE-Atp
a) on an official mission of at least six months' duration at the request of the Organization;		a) on an official mission of at least six months' duration at the request of the Organization;	MPE-Atp
b) on a journey provided for by Articles R IV 1.30 to 1.34.		b) on a journey provided for in Articles R IV 1.30 and 1.31. This provision shall apply to the family of a <b>paid associate only if his period of association with the Organization as a paid associate is for a minimum of six months and if his family resides with him for at least six months;</b>	MPE-Atp
This provision shall apply to the family of an associate member of the personnel only if his family resides with him for at least six months and if his period of association is for six months or longer.		c) on a journey provided for in Articles R IV 1.32 to 1.34.	MPE

**Proposal 26:** Article R IV 1.36 – Travelling expenses (Family reasons)

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
If they occur outside the local zone, the family reasons set out in Articles R II 4.23 and R II 4.24 shall entitle the non-resident member of the personnel concerned and his family (Article R IV 1.16) to payment or reimbursement of travelling expenses up to the amount payable for a return journey to the home station of the member of the personnel concerned.	Tsi-Fb-Atp	If they occur outside the local zone, the family reasons set out in Articles R II 4.23 and R II 4.24 shall entitle the non-resident <b>international staff member or the fellow</b> concerned and his family (Article R IV 1.16) to payment or reimbursement of travelling expenses up to the amount payable for a return journey to the home station of the member of the personnel concerned.	<b>Tsi-Fb</b>

**Proposal 27:** Article R IV 1.42 – Distance indemnity

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
A distance indemnity shall be paid for home leave journeys as set out in Article R II 4.31 at the rate of 10 francs per person for one-way journeys of at least 750 km and for each completed 100 km beyond this distance.	MP	<b><i>Text not amended</i></b>	<b>Tsi</b>

**Proposal 28:** Article R IV 1.48 – Removal expenses

CURRENT TEXT	Applicable to	PROPOSED AMENDMENT	Applicable to
<p>The Organization shall pay or reimburse the removal expenses of members of the personnel entitled to the reimbursement of travelling expenses if the removal takes place during the two years following:</p> <p>a) his appointment if the distance in a straight line between his previous and his new residence is 20 km or more;</p> <p>b) a change of his duty station;</p> <p>c) the termination of his contract if the distance in a straight line between his previous and his new residence is 20 km or more;</p> <p>except when his contract is for less than 12 months [paragraphs a) and c)] or when he resigns during the first year [paragraph c)], unless the Director-General waives these restrictions.</p>	Tsi-Fb-Atp	<p>The Organization shall pay or reimburse the removal expenses of <b>international staff members</b> entitled to the reimbursement of travelling expenses if the removal takes place during the two years following:</p> <p>a) his appointment if the distance in a straight line between his previous and his new residence is 20 km or more;</p> <p>b) a change of his duty station;</p> <p>c) the termination of his contract if the distance in a straight line between his previous and his new residence is 20 km or more;</p> <p>except when his contract is for less than 12 months [paragraphs a) and c)] or when he resigns during the first year [paragraph c)], unless the Director-General waives these restrictions.</p>	<b>Tsi</b>

**Proposal 29:** Article R IV 1.49 – Reimbursement of removal

CURRENT TEXT	Applicable to	PROPOSED AMENDMENT	Applicable to																																			
<p>The Organization shall reimburse per family a single removal of furniture and personal effects from a single place to another single place, within the following limits:</p> <table><tr><th>Category</th><th>Recipient of the family allowance</th><th>Tsi</th><th>Fb-Atp</th></tr><tr><td>Removal</td><td></td><td></td><td></td></tr><tr><td>In the European territory of one of the Member States</td><td>Yes</td><td>6000 kg</td><td>2000 kg</td></tr><tr><td></td><td>No</td><td>4000 kg</td><td>1300 kg</td></tr><tr><td>Outside the European territory of one of the Member States</td><td></td><td>25 m<sup>3</sup></td><td>10 m<sup>3</sup></td></tr></table>	Category	Recipient of the family allowance	Tsi	Fb-Atp	Removal				In the European territory of one of the Member States	Yes	6000 kg	2000 kg		No	4000 kg	1300 kg	Outside the European territory of one of the Member States		25 m <sup>3</sup>	10 m <sup>3</sup>	Tsi-Fb-Atp	<p>The Organization shall reimburse per family a single removal of furniture and personal effects from a single place to another single place, within the following limits:</p> <table><tr><th>Category</th><th>Recipient of the family allowance</th><th>Tsi</th></tr><tr><td>Removal</td><td></td><td></td></tr><tr><td>In the European territory of one of the Member States</td><td>Yes</td><td>6000 kg</td></tr><tr><td></td><td>No</td><td>4000 kg</td></tr><tr><td>Outside the European territory of one of the Member States</td><td></td><td>25 m<sup>3</sup></td></tr></table>	Category	Recipient of the family allowance	Tsi	Removal			In the European territory of one of the Member States	Yes	6000 kg		No	4000 kg	Outside the European territory of one of the Member States		25 m <sup>3</sup>	Tsi
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<p>For those members of the personnel who move outside the European territory of a Member State and are not nationals of Member States, the Director-General shall decide whether on taking up an appointment or on termination of contract these expenses are reimbursed.</p>		<p>For <b>international staff members</b> who move outside the European territory of a Member State and are not nationals of Member States, the Director-General shall decide whether on taking up an appointment or on termination of contract these expenses are reimbursed.</p>																																				

**Proposal 30:** Article R IV 1.50 – Maxima

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The reimbursement of removal expenses shall not exceed:</p> <p>a) on taking up appointment the removal expenses either from the home station or from the place of residence, at the discretion of the member of the personnel;</p> <p>b) on termination of contract, the expenses of removal to the home station.</p>	Tsi-Fb-Atp	<p>The reimbursement of removal expenses shall not exceed:</p> <p>a) on taking up appointment the removal expenses either from the home station or from the place of residence, at the discretion of the <b>international staff member</b>;</p> <p>b) on termination of contract, the expenses of removal to the home station.</p>	<b>Tsi</b>

**Proposal 31:** Article R IV 1.51 – Estimates, insurance and customs formalities

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The member of the personnel shall submit three removal estimates in the prescribed manner to the Director-General. The reimbursement of expenses shall not exceed the amount approved by the Director-General, less any other assistance with removal expenses. The Organization shall insure the furniture and personal effects of the member of the personnel but shall accept no other liability. The Organization shall reimburse expenses in connection with the necessary customs formalities, but shall not reimburse customs duties.</p>	Tsi-Fb-Atp	<p>The <b>international staff member</b> shall submit three removal estimates in the prescribed manner to the Director-General. The reimbursement of expenses shall not exceed the amount approved by the Director-General, less any other assistance with removal expenses. The Organization shall insure the furniture and personal effects of the <b>international staff member</b> but shall accept no other liability. The Organization shall reimburse expenses in connection with the necessary customs formalities, but shall not reimburse customs duties.</p>	<b>Tsi</b>

**Proposal 32:** Article R IV 1.52 – Storage of furniture

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>On taking up appointment or on change of duty station, a member of the personnel who is entitled to the reimbursement of removal expenses shall also be entitled to the reimbursement of the cost of storage, for a period not exceeding 12 months, of the articles mentioned in Article R IV 1.49 and within the limits indicated therein. All or part of this period of 12 months from the date of appointment may be postponed to the termination of contract.</p>	Tsi-Fb-Atp	<b><i>Text not amended</i></b>	<b>Tsi</b>

**Proposal 33:** Article R IV 1.53 – Installation indemnity

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
On taking up appointment or on change of duty station, a member of the personnel who is entitled to the reimbursement of removal expenses shall receive an installation indemnity at the rates shown in Annex R A 7. Only one such indemnity shall be payable per family. A member of the personnel who resigns during his first year shall repay this indemnity.	Tsi-Fb-Atp	On taking up appointment or on a change of duty station, <b>an installation indemnity shall be paid to those international staff members who are entitled to the reimbursement of removal expenses and to fellows. The amount of this indemnity, which must be repaid if the member of the personnel concerned resigns during his first year, shall be calculated in accordance with Annex R A 7.</b> Only one such indemnity shall be payable per family.	<b>Tsi-Fb</b>

**Proposal 34:** Article R IV 1.54 – Advance payments

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
Advance payments may be granted to members of the personnel under conditions defined by the Director-General. Advances on remuneration or payment, which shall be repayable over a maximum of six months, with or without interest, shall not exceed one and a half months' basic remuneration or monthly payment.	MPE-Atp-St-Pj	Advance payments may be granted to members of the personnel under conditions defined by the Director-General. Advances on remuneration or payment, which shall be repayable, with or without interest, over a maximum of six months, <b>or of twelve months in the case of students,</b> shall not exceed one and a half months' basic remuneration or monthly payment.	MPE-Atp-St-Pj

**Proposal 35:** Annex A 1 – Periodic reviews of the financial conditions of members of the personnel

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>Periodic reviews of the financial conditions of members of the personnel shall consist of:</p> <ul style="list-style-type: none"> <li>-a five-yearly general review, for which the Council shall use the principles and procedures laid down in § I below;</li> <li>-an annual review of the scale of basic salaries applicable to staff members, for which the Council shall use as a guide an index, the composition and method of calculation of which are laid down in § II below;</li> <li>-an annual review of the amounts of the family and child allowances, for which the Council shall use as a guide the data specified in § II below.</li> </ul> <p>The data collected, an analysis of them and proposals relating to these reviews shall be presented by the Director-General to the Finance Committee and Council in accordance with the applicable procedures. In particular, any adjustment proposals resulting from these reviews shall be presented to the Council with a view to a decision being taken in December, normally with effect from 1st January of the following year.</p> <p>I. Five-yearly review of the financial conditions of members of the personnel</p> <p>A) Principles</p> <p>1. Every five years a general review shall take place to examine in detail the financial and social conditions applicable to the Organization's members of the personnel to ensure that these conditions:</p> <ul style="list-style-type: none"> <li>a) allow the Organization to recruit and retain persons according to the principles laid down in Articles II 1.03 and II 1.04 of the Rules;</li> <li>b) remain in line with the situation in the Member States.</li> </ul> <p>2. This review shall be carried out with due regard to the following elements:</p> <ul style="list-style-type: none"> <li>a) the general economic and social situation in the Member States, with particular reference to the state where the Organization has its seat;</li> <li>b) the levels and evolution of remuneration</li> </ul>	MPE	<p>Periodic reviews of the financial conditions of members of the personnel <b>shall be subject to the principles and procedures described below.</b></p> <p>The data collected, an analysis of them and proposals relating to these reviews shall be presented by the Director-General to the Finance Committee and Council in accordance with the applicable procedures. In particular, any adjustment proposals resulting from these reviews shall be presented to the Council with a view to a decision being taken in December, normally with effect from 1st January of the following year.</p> <p>I. Five-yearly <b>general</b> review of the financial conditions of members of the personnel</p> <p>A) Principles</p> <ul style="list-style-type: none"> <li>i) Staff members</li> </ul> <p>1. Every five years a general review shall take place to examine in detail the financial and social conditions applicable to the Organization's <b>staff members</b> to ensure that these conditions:</p> <ul style="list-style-type: none"> <li>a) allow the Organization to recruit and retain persons according to the principles laid down in Articles II 1.03 and II 1.04 of the Rules;</li> <li>b) remain in line with the situation in the Member States.</li> </ul> <p>2. This review shall be carried out with due regard to the following elements:</p> <ul style="list-style-type: none"> <li>a) the general economic and social situation in the Member States, with particular reference to the state where the Organization has its seat;</li> <li>b) the levels and evolution of remuneration</li> </ul>	<b>MP</b>

<p>and financial conditions of other European organizations;</p> <p>c) the movement of the net salaries in the civil services of seven Member States of the Organization and of the state where the Organization has its seat;</p> <p>d) particular requirements of the Organization, such as staff recruitment.</p> <p>3. The financial conditions of the Organization must cover remuneration and may include:</p> <ul style="list-style-type: none"> <li>– payments;</li> <li>– allowances;</li> <li>– indemnities;</li> <li>– grants;</li> <li>– premiums;</li> <li>– reimbursements;</li> <li>– social contributions associated with remuneration conditions;</li> <li>– social benefits as far as this is feasible in practice.</li> </ul> <p>B) Procedures</p> <p>4. Relevant data on the financial and social conditions covered by this review shall be submitted to allow a comprehensive examination of the situation.</p> <p>a) Relevant information shall be obtained for organisations chosen prior to each five-yearly review by the Council from among the following organisations:</p> <ul style="list-style-type: none"> <li>- ESA, ESO, JRC and EMBL as representing European intergovernmental scientific and technical organisations;</li> <li>- ILL and ESRF as representing European internationally financed scientific organisations;</li> <li>- DESY (Germany), INFN (Italy), PSI (Switzerland), CLRC (United Kingdom), CEA and IN2P3 (France) and RISØ (Denmark) as representing national laboratories carrying out similar work in Member States;</li> <li>- the Geneva Public Utility Company (SIG)</li> </ul>	<p>and financial conditions of other European organizations;</p> <p>c) the movement of the net salaries in the civil services of seven Member States of the Organization and of the state where the Organization has its seat;</p> <p>d) particular requirements of the Organization, such as staff recruitment.</p> <p>ii) Fellows and associated members of the personnel</p> <p>3. Every five years a general review shall take place to determine whether the financial conditions of fellows and associates remain attractive compared to those in force in comparable research institutions.</p> <p>4. The financial conditions of the Organization covered by the reviews mentioned in i) c) and ii) above must include remunerations and payments and may include:</p> <ul style="list-style-type: none"> <li>– allowances;</li> <li>– indemnities;</li> <li>– grants;</li> <li>– premiums;</li> <li>– reimbursements;</li> <li>– social contributions associated with remuneration conditions;</li> <li>– social benefits as far as this is feasible in practice.</li> </ul> <p>B) Procedures</p> <p>5. Relevant data on the financial and social conditions covered by this review shall be submitted to allow a comprehensive examination of the situation.</p> <p>a) Relevant information shall be obtained for organisations chosen prior to each five-yearly review by the Council from among the following organisations:</p> <ul style="list-style-type: none"> <li>- ESA, ESO, JRC and EMBL as representing European intergovernmental scientific and technical organisations;</li> <li>- ILL and ESRF as representing European internationally financed scientific organisations;</li> <li>- DESY (Germany), INFN (Italy), PSI (Switzerland), CLRC (United Kingdom), CEA and IN2P3 (France) and RISØ (Denmark) as representing national laboratories carrying out similar work in Member States;</li> <li>- the Geneva Public Utility Company</li> </ul>
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<p>and the Swiss Federal Public Service as representing local employers;</p> <p>- UNOG and ITU as representing international organisations located in Geneva.</p> <p>Relevant information shall also be obtained for high-technology industries in the Member States.</p> <p>This information shall comprise, in particular, comparisons between a set of representative functions of the Organization and their equivalents in the chosen organisations.</p> <p>b) Information on purchasing power parity factors for the conversion of remuneration data from other currencies to Swiss francs shall also be obtained.</p> <p>c) The real net salary movements of the civil services of Switzerland and of seven other Member States of the Organization (Belgium, France, Germany, Italy, the Netherlands, Spain and the United Kingdom), as used in § II A) 1 b) below, shall be collected and analysed.</p> <p>d) The Council may also decide that comparative information be obtained and analysed regarding:</p> <ul style="list-style-type: none"> <li>- the distribution of jobs in the grade structures;</li> <li>- career structure and development;</li> <li>- methods of periodic remuneration adjustment;</li> <li>- recruitment and retention difficulties.</li> </ul> <p>5. Decisions regarding:</p> <p>a) the nature of the financial conditions to be reviewed [§3];</p> <p>b) the organisations for which the relevant data shall be collected [§4 a)];</p> <p>c) the nature of the comparative information to be collected and analysed [§4 d)];</p> <p>d) the arrangements for the collection and analysis of the components of the review; shall be taken at least six months before the start of the five-yearly review.</p> <p>6. The analysis of the collected data shall show</p>		<p>(SIG) and the Swiss Federal Public Service as representing local employers;</p> <p>- UNOG and ITU as representing international organisations located in Geneva.</p> <p>Relevant information shall also be obtained for high-technology industries in the Member States.</p> <p>This information shall comprise, in particular, comparisons between a set of representative functions of the Organization and their equivalents in the chosen organisations.</p> <p>b) Information on purchasing power parity factors for the conversion of remuneration data from other currencies to Swiss francs shall also be obtained.</p> <p>c) The real net salary movements of the civil services of Switzerland and of seven other Member States of the Organization (Belgium, France, Germany, Italy, the Netherlands, Spain and the United Kingdom), as used in § II A) 1 b) below, shall be collected and analysed.</p> <p>d) The Council may also decide that comparative information be obtained and analysed regarding:</p> <ul style="list-style-type: none"> <li>- the distribution of jobs in the grade structures;</li> <li>- career structure and development;</li> <li>- methods of periodic remuneration adjustment;</li> <li>- recruitment and retention difficulties.</li> </ul> <p><b>6. The list of organisations for which relevant information shall be collected for fellows and associated members of the personnel shall be determined at the beginning of each review by the Director-General.</b></p> <p>7. Decisions regarding:</p> <p>a) the nature of the financial conditions to be reviewed [§4];</p> <p>b) the organisations for which the relevant data shall be collected [§5 a)] and 6];</p> <p>c) the nature of the comparative information to be collected and analysed [§5 d)];</p> <p>d) the arrangements for the collection and analysis of the components of the review; shall be taken at least six months before the start of the five-yearly review.</p>	
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<p>how the Organization is situated with regard to the level and evolution of remuneration. These elements shall be brought into relation with the data concerning the Organization's particular requirements, especially its recruitment and retention needs.</p> <p>7. Using these data and analyses as a guide, the Council shall decide on possible adjustment of remuneration and, where appropriate, of the other financial conditions of the Organization, in accordance with the applicable procedures.</p> <p>8. The Council may also decide to review the five-yearly general review procedure and/or the annual adjustment procedure for the scale of basic salaries applicable to staff members and the amounts of the family and child allowances.</p> <p>II. Annual review of the scale of basic salaries applicable to staff members and of the amounts of the family and child allowances</p> <p>A) Annual review of the scale of basic salaries of staff members</p> <p>The scale of basic salaries of staff members as determined at the five-yearly review of financial conditions shall be reviewed annually with the aid of the salary index, the composition and method of calculation of which are detailed below.</p> <p>On the understanding that there is no legal obligation in this respect, the purpose of this index is to maintain the relationship between the Organization's scale of basic salaries and the remuneration paid by the organisations used as a basis for comparison when the scale was last determined on conclusion of a five-yearly review.</p> <p>1. <u>Composition of the salary index</u></p> <p>The salary index shall consist of two components:</p> <p>a) <u>First component</u></p> <p>The Geneva cost-of-living movement for a twelve-month period from August of the year preceding the current year to August of the</p>	<p>8. The analysis of the collected data shall show how the Organization is situated with regard to the level and evolution of remuneration <b>and payments and, where appropriate, the other financial conditions of the Organization.</b></p> <p>These elements shall be brought into relation with the data concerning the Organization's particular requirements, especially its recruitment and retention needs.</p> <p>9. Using these data and analyses as a guide, the Council shall decide on possible adjustment of remuneration, <b>payments and, where appropriate, of the other financial conditions of the Organization,</b> in accordance with the applicable procedures.</p> <p>10. The Council may also decide to review the five-yearly general review procedure and/or the annual <b>procedures for reviewing the remuneration scales and the amounts of the family and child allowances.</b></p> <p>II. Annual review of <b>remunerations and payments and</b> of the amounts of the family and child allowances</p> <p>A) Annual review of <b>remunerations</b></p> <p><b>The remuneration scales</b> shall be reviewed annually, <b>using as a guide the remuneration index,</b> the composition and method of calculation of which are detailed below.</p> <p>On the understanding that there is no legal obligation in this respect, the purpose of this index is to maintain the relationship between the Organization's <b>remuneration scales</b> and the remuneration paid by the organisations used as a basis for comparison when the <b>scales were</b> last determined on conclusion of a five-yearly review.</p> <p>1. <u>Composition of the remuneration index</u></p> <p>The <b>remuneration</b> index shall consist of two components:</p> <p>a) <u>First component</u></p> <p>The Geneva cost-of-living movement for a twelve-month period from August of the year</p>
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current year, namely the year preceding that in which the approved index enters into force, normally with effect from 1st January (data of the Statistical Office of the Canton of Geneva taking the index for the month of August in the year preceding the current year as base = 100).

b) Second component

The average movements of the real net salaries of the Swiss Federal civil servants and of the civil servants of seven other Member States of the Organization (Belgium, France, Germany, Italy, the Netherlands, Spain and the United Kingdom) for a twelve-month period from June of the year preceding the current year to June of the current year, namely the year preceding that in which the approved index enters into force, normally with effect from 1st January (data of the Statistical Office of the European Communities – EUROSTAT – taking the index for the month of June in the year preceding the current year as base = 100).

Half of the second component consists of the data concerning Switzerland and the other half consists of the data relating to the seven other Member States mentioned above, the latter data weighted according to the scale below.

Weighting of real net salary movements (W) in the following Member States:

	W (%)
Belgium	6.3
France	52.1
Germany	10.4
Italy	10.4
Netherlands	4.2
Spain	3.1
United Kingdom	13.5

2. Method of calculation of the salary index

The salary index shall be calculated on the basis of the data collected for each of the two components referred to in §1 above using the following formula:

$$I = \frac{Gva * [CH + \sum_{n=1}^7 a_n * s_n]}{100}$$

I: Salary index

Gva: Geneva cost-of-living movement (August - August)

CH: Average movement of real net salaries of the Civil Service of Member State n (June - June)

preceding the current year to August of the current year, namely the year preceding that in which the approved index enters into force, normally with effect from 1st January (data of the Statistical Office of the Canton of Geneva taking the index for the month of August in the year preceding the current year as base = 100).

b) Second component

The average movements of the real net salaries of the Swiss Federal civil servants and of the civil servants of seven other Member States of the Organization (Belgium, France, Germany, Italy, the Netherlands, Spain and the United Kingdom) for a twelve-month period from June of the year preceding the current year to June of the current year, namely the year preceding that in which the approved index enters into force, normally with effect from 1st January (data of the Statistical Office of the European Communities – EUROSTAT – taking the index for the month of June in the year preceding the current year as base = 100).

Half of the second component consists of the data concerning Switzerland and the other half consists of the data relating to the seven other Member States mentioned above, the latter data weighted according to the scale below.

Weighting of real net salary movements (W) in the following Member States:

	W (%)
Belgium	6.3
France	52.1
Germany	10.4
Italy	10.4
Netherlands	4.2
Spain	3.1
United Kingdom	13.5

2. Method of calculation of the remuneration index

The remuneration index shall be calculated on the basis of the data collected for each of the two components referred to in §1 above using the following formula:

$$I = \frac{Gva * [CH + \sum_{n=1}^7 a_n * s_n]}{100}$$

I: Remuneration index

Gva: Geneva cost-of-living movement (August - August)

CH: Average movement of real net

<p>a<sub>n</sub>: Weighting for Member State n s<sub>n</sub>: Average movement of real net salaries of the Civil Service of Member State n (June - June)</p> <p>3. <u>Decision by Council</u></p> <p>The Council shall take a decision concerning the adjustment of the scale of basic salaries using as a guide the calculated salary index.</p> <p>B) Annual review of the amounts of the family and child allowances</p> <p>The Council shall review the amounts of the family and child allowances annually.</p> <p>The Council shall take a decision concerning the adjustment of the amounts of the family and child allowances using as a guide the Geneva cost-of-living movement, as calculated in accordance with § II A) 1 a) above, and any other data that may be relevant for an appropriate review of these allowances.</p>		<p>salaries of the Civil Service of Member State n (June - June)</p> <p>a<sub>n</sub>: Weighting for Member State n s<sub>n</sub>: Average movement of real net salaries of the Civil Service of Member State n (June - June)</p> <p>3. <u>Decision by Council</u></p> <p>The Council shall take a decision concerning the adjustment of the remuneration scales using as a guide the calculated remuneration index.</p> <p>B) Annual review of <b>payments and of the</b> amounts of the family and child allowances</p> <p><b>The amounts of payments and of the family and child allowances shall be reviewed annually</b> using as a guide the Geneva cost-of-living movement, as calculated in accordance with § II A) 1 a) above.</p>	
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**Proposal 36:** Annex R A 2 –Scale of stipends paid to fellows  
(Article R IV 1.02)

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<div style="border: 1px solid black; padding: 10px; margin: 10px;"> <p><u>Scale of stipend ranges in Swiss francs effective 01.01.06</u></p> <p>5263 -7643 per month</p> </div> <p>Contributions of fellows to the Pension Fund and the health insurance scheme are deducted from the stipend paid to them.</p>	Fb	<p><u>Scale of stipend ranges in Swiss francs effective 1.7.2006</u></p> <p><b>Basic stipend: 4118 per month</b></p> <p><b>This amount may be increased, depending on seniority, by between 950 and 3300</b></p> <p><b>The social contributions of fellows shall be calculated on the basis of:</b></p> <ul style="list-style-type: none"> <li>- the basic stipend for contributions to the Pension Fund;</li> <li>- the total stipend for contributions to the Health Insurance Scheme.</li> </ul>	Fb

**Proposal 37:** Annex R A 3 – Subsistence allowances for students, **project associates and paid associates** (Article R IV 1.03)  
Article R IV 1.03 – Amount of subsistence allowances for Students, Project Associates and Paid Associates

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The amount of the reference allowance is equivalent to the basic salary corresponding to salary band Ca, step 0.</p> <p>a) Students associated for a period of less than 5 months:</p> <ul style="list-style-type: none"> <li>– Students associated as casual help, performing tasks for which no special qualifications are required receive 35% of the reference allowance.</li> <li>– Students without a university degree and summer students receive 50% of the reference allowance.</li> </ul> <p>b) Students associated for a period of between 5 and 48 months: Such students receive 60% to 75% of the reference allowance.</p> <p>Students without a university degree receive the minimum allowance, and those with a university degree or equivalent qualifications in a subject related to the activities of the Organization receive 75% of the reference allowance. The above allowances may be increased within the maximum of 90% of the reference allowance according to the personal circumstances of the student concerned.</p>	St	<p>Amount of <b>subsistence allowances in Swiss francs effective on 1.7.2006:</b></p> <p style="text-align: center;"><b>between 2672 and 3473</b></p> <p style="text-align: center;"><b>between 4000 and 5000</b></p> <p style="text-align: center;"><b>between 6000 and 9500</b></p> <p><b>In exceptional circumstances, the Director-General may, at his discretion, decide to increase these amounts for certain paid associates.</b></p>	<p>St</p> <p>Pj</p> <p>Atp</p>

**Proposal 38:** Annex R A 3 – Subsistence allowances for students, **project associates and paid associates** (Article R IV 1.03)  
Article R A 3.02 – Contribution to the Health Insurance Scheme

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The contribution of students to the health insurance scheme is deducted from the allowance granted to them.</p>	St	<p>The contribution of students to the Health Insurance Scheme is <b>calculated on the basis of the total subsistence allowance</b> granted to them.</p>	St

**Proposal 39:**                      Annexe R A 4 – Family allowance and child allowance.  
(Articles R IV 1.14 – 1.15) - Article R A 4.01 - Family allowance

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
Family allowance: (Article R IV 1.14) 304 Swiss francs per month	MPE-Atp	<b><i>Text not amended</i></b>	<b>MPE</b>

**Proposal 40:**                      Annex R A 4 – Family allowance and child allowance  
(Articles R IV 1.14 - 1.15) - Article R A 4.02 – Child allowance

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
Child allowance: (Article R IV 1.15)  335 Swiss francs per month	MPE-Atp	<b><i>Text not amended</i></b>	<b>MPE</b>

**Proposal 41:**                      Annex R A 5 – Non-resident allowance (Article R IV 1.21)  
Article R A 5.01 – Amount

CURRENT TEXT		Applicable to	PROPOSED AMENDMENT		Applicable to
Recipient of the family allowance	12% of the basic remuneration or of the basic payment	Tsi-Fb-Atp	Recipient of the family allowance	12% of the basic salary or payment	Tsi
Non-recipient of the family allowance	9% of the basic remuneration or of the basic payment		Non-recipient of the family allowance	9% of the basic salary or payment	
In the above table, the minimum basic remuneration taken into consideration is that corresponding to salary band Cb, step 5.  The above table shall apply to staff members until they are awarded an indefinite contract.			In the above table, the minimum basic salary taken into consideration is that corresponding to salary band Cb, step 5.  The above percentages shall apply to international staff members until they are awarded an indefinite contract.		

**Proposal 42:**                      Annex R A 5 – Non-resident allowance (Article R IV 1.21)  
Article R A 5.02 – Non-concurrence of benefits

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
If both spouses are non-resident members of the personnel, only one non-resident allowance shall be paid to the member of the personnel whose position is the most favourable in terms of financial conditions.	Tsi-Fb-Atp	If both spouses are non-resident <b>international staff members</b> , only one non-resident allowance shall be paid to the member of the personnel whose position is the most favourable in terms of financial conditions.	<b>Tsi</b>

**Proposal 43:** Annexe R A 7 – Installation indemnity (Article R IV 1.53)  
Article R A 7.03 – Amount for **fellows**

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
Fellows and paid associates are entitled to one third of the indemnity shown in Article R A 7.01 provided that the duration of the contract is 12 months. Payment is made when the member of the personnel takes up his appointment.	Fb-Atp	<b>The amount of the installation indemnity paid to fellows shall be calculated on the basis of the total monthly amount of the stipend; it shall be 2/3 of the amount resulting from the application to the stipend of the calculation method provided for in Article R A 7.01, provided that the duration of the contract is 12 months. Payment <b>shall be</b> made when the fellow takes up his appointment.</b>	<b>Fb</b>

**Proposal 44:** Annex R A 8 – Education fees (Article R IV 1.22)  
Article R A 8.01 – Amount of the reimbursement of education fees  
(**international staff members and fellows**)

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The maximum amount of the reimbursement of education fees to which international staff members, fellows and paid associates are entitled shall be determined as follows:</p> <p>a) For a child aged at least 8 years during the academic year and attending an establishment, in a Member State, more than 20 km from the place of residence and duty station: 75% of the school fees and cost of boarding or, where applicable, the cost of half board, up to a maximum grant of 16,063 Swiss francs per annum. Or, in the case of free schooling, 75% of the cost of boarding or, where applicable, the cost of transport and half board, up to a maximum reimbursement of 13,849 Swiss francs per annum.</p> <p>b) For a child aged at least 8 years during the academic year or attending an establishment within 20 km of the place of residence or duty station: 75% of the school fees and the cost of boarding or, where necessary, up to a maximum reimbursement of 13,849 Swiss francs per annum.</p>	Tsi-Fb-Atp	<p>The maximum amount of the reimbursement of education fees to which international staff members <b>and fellows</b> are entitled shall be determined as follows:</p> <p>a) For a child aged at least 8 years during the academic year and attending an establishment, in a Member State, more than 20 km from the place of residence and duty station: 75% of the school fees and cost of boarding or, where applicable, the cost of half board, up to a maximum grant of 16,063 Swiss francs per annum. Or, in the case of free schooling, 75% of the cost of boarding or, where applicable, the cost of transport and half board, up to a maximum reimbursement of 13,849 Swiss francs per annum.</p> <p>b) For a child aged at least 8 years during the academic year or attending an establishment within 20 km of the place of residence or duty station: 75% of the school fees and the cost of boarding or, where necessary, up to a maximum reimbursement of 13,849 Swiss francs per annum.</p>	<b>Tsi-Fb</b>

**Proposal 45:** Article R A 8.02 – School fees (**international staff members and fellows**)

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The following, in particular, shall not be considered as school fees: the cost of books, school supplies and clothing.</p> <p>The cost of private tuition in the mother tongue of the child and in French or English shall be considered as school fees.</p>	Tsi-Fb-Atp	<i>Text not amended</i>	Tsi-Fb

**Proposal 46:** Article R A 8.03 – Cost of half board (**international staff members and fellows**)

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The cost of half board shall be included if the distance or the lack of public transport prevent the child from taking a midday meal at home and if the Director-General agrees that the child cannot attend an establishment nearer to the parents' residence.</p>	Tsi-Fb-Atp	<i>Text not amended</i>	Tsi-Fb

**Proposal 47:** Article R A 8.04 – Cost of local transport (**international staff members and fellows**)

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>Without prejudice to the provisions of Article R A 8.01, the cost of transport shall be included:</p> <ul style="list-style-type: none"> <li>a) if the child resides with his parents; and</li> <li>b) if there is no adequate means of public transport; and</li> <li>c) if the transport is privately organised, either by a group of parents or by an educational establishment, to collect at least five children and using a public service vehicle within the meaning of the road traffic regulations.</li> </ul> <p>Total transport costs shall be subject to an annual deduction of 220 Swiss francs, and the Organization's contribution shall not exceed 600 Swiss francs per year.</p>	Tsi-Fb-Atp	<i>Text not amended</i>	Tsi-Fb

**Proposal 48:** Article R A 8.05 – Reduction of maxima

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The maxima (Article R A 8.01) shall be reduced prorata temporis if:</p> <p>a) the child does not attend the establishment for the whole of the academic year;</p> <p>b) the contract of the member of the personnel does not cover the whole of the academic year for a reason other than death.</p>	MPE-Atp	<i>Text not amended</i>	Tsi-Fb

**Proposal 49:** Article R A 8.06 – Death of the member of the personnel

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>In the event of the death of the member of the personnel, entitlement to reimbursement of or to an allowance for educational fees shall continue until the end of the academic year concerned. If this death prevents the child from attending the establishment for which he has been entered, any forfeit payable shall be regarded as school fees.</p>	MPE-Atp	<p>In the event of the death of <b>a staff member or assimilated member of the personnel</b>, entitlement to reimbursement of or to an allowance for educational fees shall continue until the end of the academic year concerned. If this death prevents the child from attending the establishment for which he has been entered, any forfeit payable shall be regarded as school fees.</p>	MPE

**Proposal 50:** Article R A 8.07 – Payment

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>The relevant bills shall be grouped so that not more than three claims in respect of each child are submitted in an academic year.</p>	MPE-Atp	<i>Text not amended</i>	Tsi-Fb

**Proposal 51:** Article R A 8.08 – Total reimbursement

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>For members of the personnel eligible for the reimbursement of education fees for more than one child, the total amount of the reimbursement shall be calculated on the overall amount of the education fees.</p>	Tsi-Fb-Atp	<i>Text not amended</i>	Tsi-Fb

**Proposal 52:** Article R A 8.09 – Handicapped children

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
<p>Notwithstanding any contrary provision, expenses connected with the training of handicapped children who are recognised as such by the Director-General shall be reimbursed as follows, after the deduction of any assistance obtained from other sources:</p> <p>a) 100% reimbursement, without any ceiling, of the expenses incurred in training or apprenticing the child or lodging him permanently or temporarily in a specialised institution (including holiday homes, day nurseries and recreational facilities organised specifically for handicapped children).</p> <p>b) 100% reimbursement, without any ceiling, of the cost of full or half board in one of the establishments mentioned above, without any restriction on the distance from the parents' residence.</p> <p>c) Reimbursement of travelling expenses for the child and one person accompanying him, four times per year, if the establishment concerned is located at a distance of more than 40 km from the parents' residence.</p> <p>d) 100% reimbursement, without any ceiling, of daily travelling expenses for the purposes of training, occupation or treatment as an outpatient, within a radius of 40 km.</p> <p>(...)</p>	MPE-Atp	<p><i>Text not amended</i></p> <p>(...)</p>	MPE

**Proposal 53:** Article R A 8.11 – Education fees (paid associates)

**New Article**

CURRENT TEXT	<i>Applicable to</i>	PROPOSED AMENDMENT	<i>Applicable to</i>
N/A		<p>The provisions of Articles R A 8.01 b) to R A 8.09 shall apply to all paid associates, provided that:</p> <p>-their period of association with the Organization as a paid associate is for six months or more,</p> <p>- their dependent children reside with them for at least six months and attend an educational establishment located at least 20 km from the place of residence or the duty station.</p>	Atp

**ORGANISATION EUROPÉENNE POUR LA RECHERCHE NUCLÉAIRE**  
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**TRIPARTITE EMPLOYMENT CONDITIONS FORUM (TREF)**

**52nd Meeting**

**Geneva – 4 & 5 April 2005**

**STAFF RECRUITMENT AND RETENTION**

This report is established in the framework of the 5-yearly review. It provides information concerning the staff recruitment activity during the period January 2000 to December 2004 and includes information on refused offers and resignations during this period.

Reference is made in this context to an oral presentation and transparencies distributed at the meeting of TREF on 1 and 2 November 2004.

TREF is invited to take note of the present report, the final version of which will be presented to the Finance Committee in June 2005.

## **STAFF RECRUITMENT AND RETENTION JANUARY 2000 TO DECEMBER 2004**

### **1— Introduction**

1.1 In the framework of the 5-yearly review, this draft report contains information on the recruitment and retention of staff for the period January 2000 to December 2004. An oral presentation was made and transparencies were distributed to TREF on 1 and 2 November 2004. In addition to the numerical data, the report includes a qualitative analysis of the experience relative to international recruitment with major input from a survey conducted by HR Department with recruiting supervisors in all departments during the summer 2004. With regard to Local Staff, which was introduced only in the second half of 2003, the report is limited to numerical data relative to recruitment and is presented such that Local Staff can be clearly identified. The subject of staff retention and the qualitative analysis concentrate on international staff.

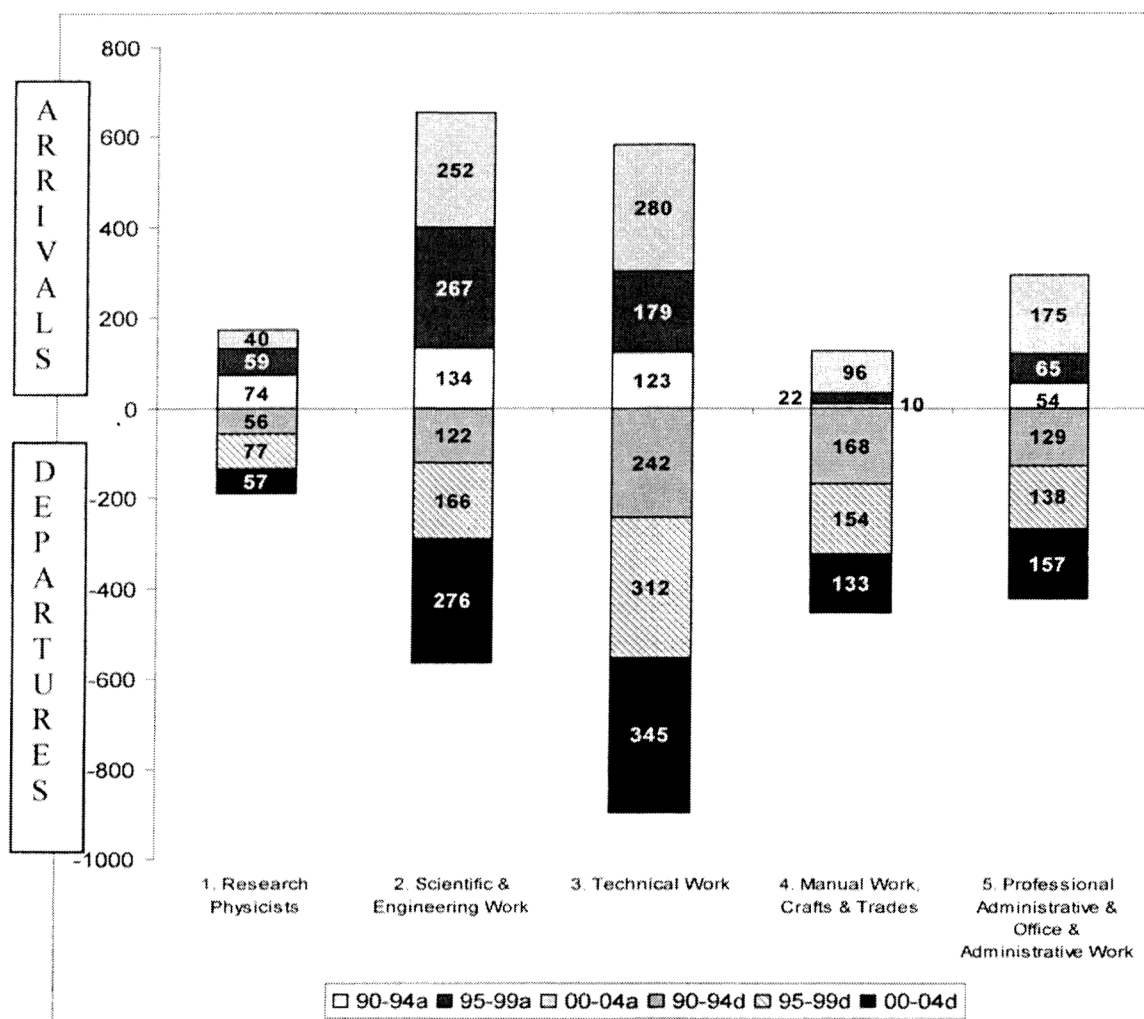
There will be a separate report on the implementation of Local Staff in the course of 2005.

1.2. The main elements of the recruitment procedure and selection criteria are described in Annex 1.

### **2— General recruitment data**

#### **a) Comparison with previous 5-yearly reviews**

2.1 Staff recruitment over the reference period 2000-2004 was much higher than in previous reference periods. There were 843 staff arrivals; this compares with 592 arrivals in the previous period and with 395 between 1990 and 1994. The large number of arrivals for 2000-2004 is mainly due to a large extent to local staff recruitment (accounting for 203 arrivals) and also to the large number of departures. During the period 2000 to 2004, the number of staff departures was 968, compared to 847 and 717 respectively during the two previous 5-year periods. The figure below shows annual arrival and departure numbers by professional category between 1990 and 2004.



*Figure 1 – Staff Arrivals and Departures 1990-2004 by professional category*

In a steady-state situation, the recruitment activity would be expected to decrease in line with the overall rundown of staff numbers (3126 end-1990, 2735 end-1999 and 2614 end-2004). However, staff turnover has not taken place in a homogeneous way, as reflected in the detailed comparison shown above.

2.2 The present report studies the 843 arrivals during the reference period. Staff members on limited duration contracts selected on long-term vacancies are not included, since these were already counted at initial staff recruitment.

2.3 After a comparison of general data with the previous 5-yearly period, this section focuses on the main job profiles, nationalities, gender, age and origin of the recruits.

**STAFF: 1995-1999**

<b>Professional Categories</b>	<b>No Local Staff</b>	<b>International Staff</b>
1. Research Physicists		59
2. Scientific and Engineering Work		267
3. Technical Work		179
4. Manual Work, Crafts and Trades		22
5a. Professional Administrative Work		35
5b/c. Office and Administrative Work		30
<b>Total</b>		<b>592</b>

**STAFF: 2000-2004**

<b>Professional Categories</b>	<b>International and Local Staff</b>	<b>International Staff Only</b>
1. Research Physicists	40	40
2. Scientific and Engineering Work	252	252
3. Technical Work	280	230
4. Manual Work, Crafts and Trades	96	29
5a. Professional Administrative Work	43	43
5b/c. Office and Administrative Work	132	46
<b>Total</b>	<b>843</b>	<b>640</b>

*Table 1- Arrivals by professional category*

2.4 The main differences in recruitment between the periods 1995-1999 and 2000-2004 are due to the introduction and subsequent recruitment of Local Staff as indicated in paragraph 2.1 above. These recruits concern technicians, craftsmen, office and administrative staff in career paths A and B<sup>1</sup>. A separate and detailed report on the implementation of Local Staff will be made in the course of 2005.

- Category 1 recruitment (Research Physicists) decreased due to the fact that the complement was reduced to provide more openings for technicians and engineers for the construction phase of the LHC experiments.
- Category 2 (Applied Scientists and Engineers), despite the transfer of some posts from category 1 to engineers, the number of recruits in this category nevertheless decreased, notably in 2003 and 2004 due to the completion of R&D work for LHC.
- Category 3 (Technical Engineers and Technicians) recruitment increased, which is in line with the requirements for the construction and installation of the LHC machine and experiments. This is a trend that is expected to continue over the next years at least. The increase is also due to the recruitment of 50 Local Staff Members<sup>2</sup>.

<sup>1</sup> Exceptions to recruit international staff in career paths A and B may be authorized by the Director-General. The only exception to date concerns firefighters in career path A, which underlies an established policy of detachments for a 3-year period from national fire brigades from various Member States.

<sup>2</sup> Mainly from insourcing of some activities from manpower contracts

- Category 4 staff (Craftsmen, mainly qualified mechanics) show a marked increase due to 67 Local Staff arrivals<sup>2</sup>.
- In Category 5a, the recruitment of professional administrators remained stable. However, the recruitment of administrative assistants and office workers (categories 5b and 5c) show increases, mainly accountable by 86 Local Staff recruits<sup>2</sup>.

## b) Nationality distribution

2.5 The nationality distribution (see Tables 2a and 2b below) of applicants and recruits in the professional staff categories 1, 2 and 5a (university graduates) is globally satisfactory. Low numbers for some nationalities in other professional categories are due to a deficit of applications. In category 3 (technicians and technical engineers), for example, applicants from 11 of the 20 Member States account for only 8%. This subject will be treated in more detail in Chapter V below.

	1. Research Physicists		2. Scientific and Engineering Work		3. Technical Work		4. Manual Work, Crafts and Trades		5a. Professional Administrative Work		5b/c. Office and Administrative Work		Total	
	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals
AT	7		71	13	27	2	2		30		12		149	15
BE	10	1	202	5	273	12	13		96	3	65	2	659	23
BG	13		124	3	40		35	2	26		8		246	5
CH	20	1	504	9	712	15	119		276	1	306	3	1937	29
CZ	3		73	1	34		17	2	18		15		160	3
DE	102	10	319	23	192	12	24	1	148	5	82	2	867	53
DK	2		56		117	10	13		22		13		223	10
ES	25	3	731	15	371	7	71	3	160	1	98	1	1456	30
FI	8	1	94	3	57	3	48	7	47	3	40	1	294	18
FR	44	4	2275	46	3173	115	643	6	1109	11	1273	23	8517	201
GB	29	5	563	31	445	30	141	5	267	9	185	7	1630	87
GR	26	3	104	5	31		1		46	1	24		232	9
HU	5		97	3	28	1	33		18	1	12		193	5
IT	90	9	1166	41	504	12	217	2	303	5	175	1	2455	70
NL	11	1	115	7	87	4	9		76		70	2	368	14
NO	4		75	1	45	3	2		22		12		160	4
PL	8		362	15	104		9		41		28		552	15
PT	1		205	9	142	1	31	1	65	2	55	2	499	15
SE	3		126	6	68	3	20		47	1	32	2	296	12
SK	4		74	5	21		15		18		6		138	5
NMS	22	2	107	11	42		1		8		21		201	13
Total	437	40	7443	252	6513	230	1464	29	2843	43	2532	46	21232	640

Table 2a – Nationality distribution by professional category of applicants and arrivals (International staff only)

	3. Technical Work		4. Manual Work, Crafts and Trades		5b/c. Office and Administrative Work		Total	
	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals
<b>CH</b>	104	2	72	4	274	10	<b>450</b>	<b>16</b>
<b>FR</b>	549	47	428	60	911	63	<b>1888</b>	<b>170</b>
<b>AT</b>					7		<b>7</b>	
<b>BE</b>	5		4		32		<b>41</b>	
<b>BG</b>	2				7		<b>9</b>	
<b>CZ</b>	2				7		<b>9</b>	
<b>DE</b>	10		4		31	1	<b>45</b>	<b>1</b>
<b>DK</b>	3		1		15	1	<b>19</b>	<b>1</b>
<b>ES</b>	25		12	1	55	1	<b>92</b>	<b>2</b>
<b>FI</b>					9	1	<b>9</b>	<b>1</b>
<b>GB</b>	21		10		94	6	<b>125</b>	<b>6</b>
<b>GR</b>	3		1		19		<b>23</b>	
<b>HU</b>			1		8		<b>9</b>	
<b>IT</b>	28		17	1	97	3	<b>142</b>	<b>4</b>
<b>NL</b>	3		3		27		<b>33</b>	
<b>NO</b>					6		<b>6</b>	
<b>PL</b>	6		2		29		<b>37</b>	
<b>PT</b>	10	1	9	1	17		<b>36</b>	<b>2</b>
<b>SE</b>					9		<b>9</b>	
<b>SK</b>					6		<b>6</b>	
<b>NMS</b>	7		2		73		<b>82</b>	
<b>Total</b>	<b>778</b>	<b>50</b>	<b>566</b>	<b>67</b>	<b>1733</b>	<b>86</b>	<b>3077</b>	<b>203</b>

Table 2b – Nationality distribution by professional category of applicants and arrivals (Local staff only)

## c) Applicants and recruits by gender

International and Local Staff: 2000-2004		Applicants		Arrivals	
		Female	Male	Female	Male
1. Research Physicists		72 (16%)	365	8 (20%)	32
2. Scientific and Engineering Work		930 (12%)	6513	38 (15%)	214
3. Technical Work		593 (8%)	6698	27 (10%)	253
4. Manual Work, Crafts and Trades		56 (3%)	1974	6 (6%)	90
5a. Professional Administrative Work		1367 (48%)	1476	21 (49%)	22
5b/c. Office and Administrative Work		3304 (77%)	961	124 (94%)	8
<b>Total</b>		<b>6322 (26%)</b>	<b>17987</b>	<b>224 (27%)</b>	<b>619</b>

International Staff Only: 2000-2004		Applicants		Arrivals	
		Female	Male	Female	Male
1. Research Physicists		72 (16%)	365	8 (20%)	32
2. Scientific and Engineering Work		930 (12%)	6513	38 (15%)	214
3. Technical Work		545 (8%)	5968	25 (11%)	205
4. Manual Work, Crafts and Trades		37 (3%)	1427	0	29
5a. Professional Administrative Work		1367 (48%)	1476	21 (49%)	22
5b/c. Office and Administrative Work		1912 (76%)	620	43 (93%)	3
<b>Total</b>		<b>4863 (23%)</b>	<b>16369</b>	<b>135 (21%)</b>	<b>505</b>

Table 3 – Gender distribution of applicants and recruits by professional category

2.6 In line with CERN policy, job publicity and recruitment adhere to the principle of equal opportunities, as set out also in the Staff Rules and Regulations. Regular reports are produced, inter alia, by the Equal Opportunities Advisory Panel. As far as staff recruitment is concerned, the overall gender distribution shows 27% female recruits on average, which is close to the gender distribution of applicants (26%). Large differences in numbers are observed by job family, which also reflects the differences in gender distribution of applicants. For example, 10% of technician and technical engineer recruits are female whereas female applicants in that category represent only 8%.

#### d) Recruits by age

2.7 The age profile of recruits by professional family during the reference period is given in Table 4 below. In line with the established recruitment policy, about 70% of international recruits are in the early stage of their career (normally up to 5 years of relevant experience). However, where required by the functions to be carried out, vacancies calling for more experienced candidates are published. This happened, for example, for about half of the Local Staff vacancies, with the intention of retaining CERN-specific expertise when insourcing some activities previously carried out under manpower contracts.

	Up to 25	26-30	31-35	36-40	41-45	46-50	51-55	56-60	61 and over	Total
1. Research Physicists		6	18	4	4	1	3	2	2	40
2. Scientific and Engineering Work	18	83	83	38	15	6	3	5	1	252
3. Technical Work	58	87	59	32	13	13	16	2		280
4. Manual Work, Crafts and Trades	5	13	20	21	9	11	11	5	1	96
5a. Professional Administrative Work	4	14	12	6	4	1	2			43
5b/c. Office and Administrative Work	16	41	33	17	11	3	4	6	1	132
<b>Total</b>	<b>101</b>	<b>244</b>	<b>225</b>	<b>118</b>	<b>56</b>	<b>35</b>	<b>39</b>	<b>20</b>	<b>5</b>	<b>843</b>

*Table 4 - Age distribution of arrivals in the period January 2000 to December 2004, by professional family*

#### e) Origin of recruits

2.8 The type of previous employer of CERN recruits from outside, with about 2/3 from industry has stayed constant since the previous period. In particular engineers and technicians are recruited primarily from industry while physicists come from the public sector. Fellows are the source of around 1/3 of scientists and engineers recruited as staff members (32% for Cat. 1 Physicists, 25% for Applied Physicist and 33% for Engineers). Table 5 below shows the type of previous employers of Staff Members recruited (total 843) by professional category.

	Industry	Academic Sector	Research Laboratory	Beginning of career	Public Service	International organizations	Total	Recruited from Fellows
1. Research Physicists		12	13		1	1	27	13
2. Scientific & Engineering Work	71	46	40	19	4	2	182	70
3. Technical Work	218	6	9	38	7	2	280	
4. Manual Work, Crafts & Trades	70			1	25		96	
5a. Professional Administrative Work	23	6	3	4	3	2	41	2
5b/c. Office & Administrative Work	119	2	1	2	3	5	132	
Total	501	72	66	64	43	12	758	85

*Table 5 – Origin of recruits by professional category*

### 3— Refused Offers

3.1 The number of offers made to international staff during the reference period was 693. Of those, 53 were refused (7.6%). The tables below show that recruits in professional category 3 (technicians and technical engineers) as well as certain nationalities (DK, CH, BE and IT) show a relatively high rate of offers rejected.

The reasons for refusals are shared evenly between 3 main areas: professional (job/career related), employment conditions (salary, job security) and personal (family, housing etc).

There is no effect in the overall gender distribution. However, men refuse offers for reasons of employment conditions in the majority of cases, which is rarely the case for women.

Professional Category	1. Research Physicists	2. Scientific & Engineering Work	3. Technical Work	4. Manual Work, Crafts & Trades	5a. Professional administrative Work	5b/c. Office & Administrative Work	Total	Total no. of offers made
Nationality								
AT								15
BE			3	1			4	27
BG								5
CH		2	3				5	34
CZ						1	1	4
DE			2				2	55
DK			3			1	4	14
ES	1	1	2				4	34
FI								18
FR		3	2	2	1	2	10	215
GB		1	4	1	1		7	94
GR		1					1	10
HU								5
IT		3	3		2	2	10	80
NL								14
NO			1				1	5
PL		1					1	16
PT		1	1				2	17
SE								12
SK								5
NMS (IN)	1						1	14
<b>Total refused</b>	<b>2</b>	<b>13</b>	<b>24</b>	<b>4</b>	<b>4</b>	<b>6</b>	<b>53</b>	
<b>Total no. of offers made</b>	<b>42</b>	<b>265</b>	<b>254</b>	<b>33</b>	<b>47</b>	<b>52</b>		<b>693</b>

*Table 6 - Refused offers by nationality and by professional category  
Comparison with total offers made, International Staff only*

	Female	Male	Total
Employment Conditions	3	19	22
Personal Reasons	4	12	16
Professional Reasons	5	10	15
<b>Total Refused offers</b>	<b>12</b>	<b>41</b>	<b>53</b>
Offers made	147	546	693
<b>Total Refused offers as percentage of offers made</b>	<b>8.16%</b>	<b>7.51%</b>	<b>7.65%</b>

*Table 7 - Refused offers by gender and reason  
Comparison with total offers made*

### 3.2 The three main reasons for refused offers comprise:

EMPLOYMENT COONDITIONS: salary, job security.

PERSONAL REASONS: non-professional integration problems (e.g. spouse's career, education of children, housing difficulties), or personal motivation (e.g. health, creating own company, studies).

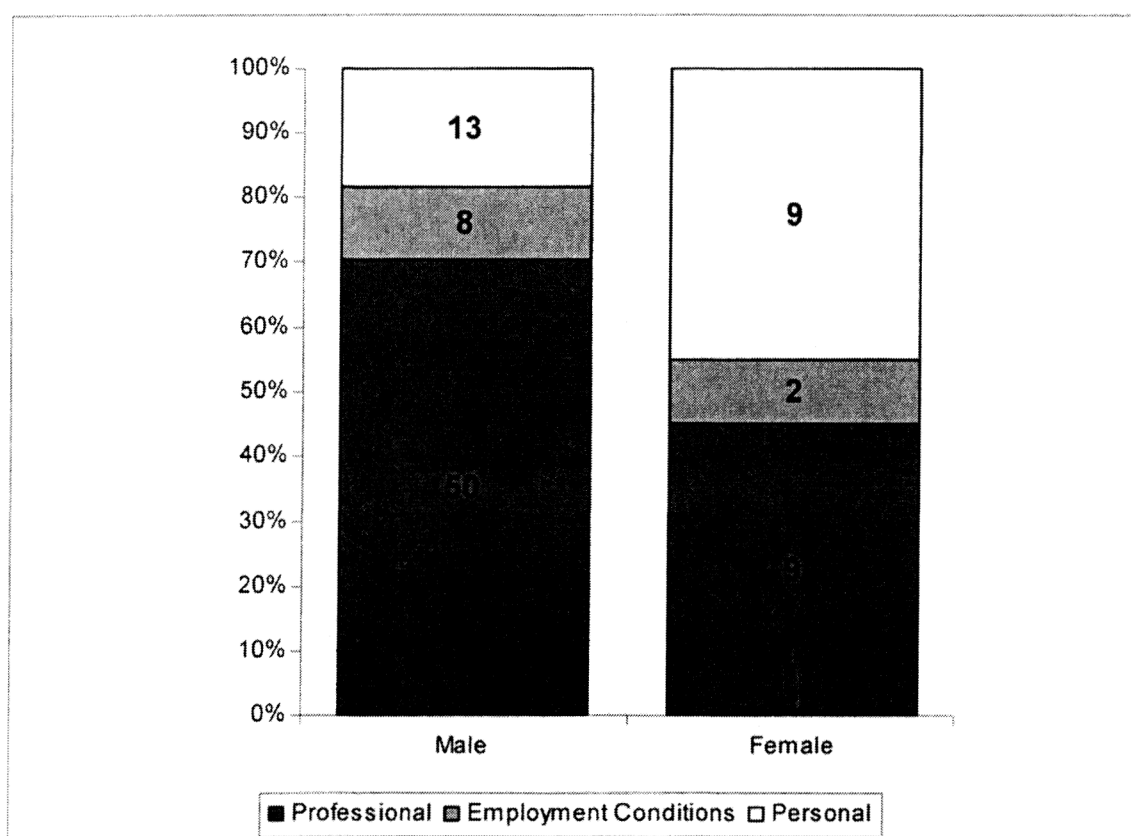
PROFESSIONAL REASONS: use of qualifications, level of recognition of qualifications, career prospects.

## 4— Staff Retention

4.1 The most relevant indicator for retention is an analysis of staff resignations. The term “resignations” is understood as staff departures on the initiative of the staff member, excluding early retirement. The analysis also excludes resignations by mutual agreement initiated by the Organization. The numbers and background information stem primarily from records of a confidential exit interview carried out by the Human Resources Coordinator in HR Department around the last day of work of the staff member.

4.2 Ninety-one resignations were recorded during the reference period. This represents 18 resignations per year on average. The following observations are made on the numbers shown in the figures below:

- The reasons why staff members resign are usually a combination of several elements of dissatisfaction. From this point of view, CERN experience is in line with consistent reports by HR management publications. The reason shown in the figure below represents the primary reason triggering the resignation as given by the staff member.
- Whereas the overall gender distribution of resignations (22% women) is close to the gender distribution of recruits and staff in post, the motivation of men shows a dominance of professional reasons, whilst women resign equally for personal or professional reasons.



*Figure 2 - Resignations by main reason and gender*

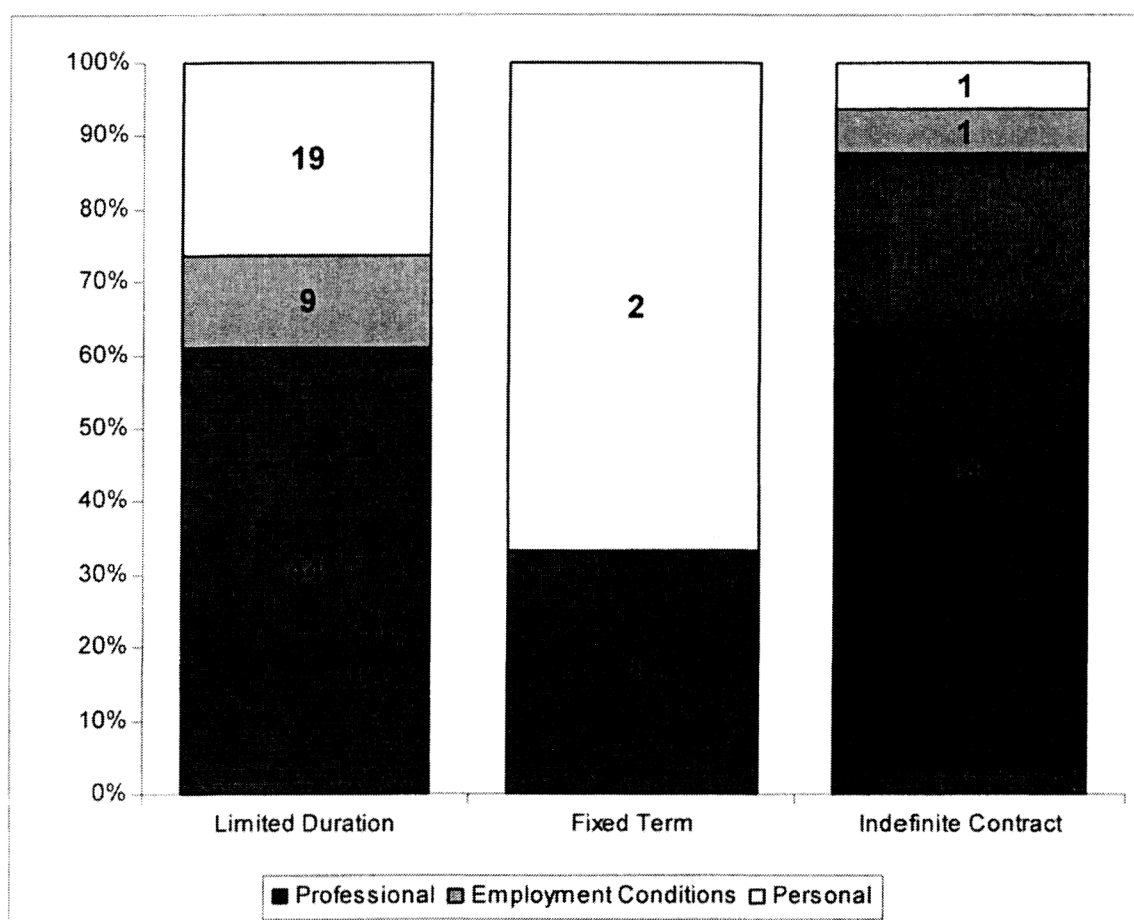
- We note that short-term, non-renewable contracts for category 1 physicists, where indefinite contracts are unlikely, show a relatively high number of resignations for lack of job security (securing a long-term employment elsewhere before the end of the CERN contract).
- Professional administrators also show a relatively high resignation rate. Professional categories 1 and 5a are relatively small job families, however, the above-average resignation rate has already been observed in previous retention reports.
- German, Spanish, British, Portuguese and Nordic nationals tend to resign more frequently whereas French nationals tend to stay, as illustrated in Table 8 below. There are more frequent integration and career problems for some nationals as will be analysed in more detail in Chapter V below.
- Career progression, less dynamic at CERN than in the private sector, notably at the early career stage, as well as the value attributed to diplomas such as those of Technical Engineers, are at the origin of a good deal of resignations for professional reasons.
- Integration problems are caused by limitations in spouse's career opportunities and the acute shortage of affordable accommodation in the Geneva region.

	Staff 2000	Res'd 2000	Staff 2001	Res'd 2001	Staff 2002	Res'd 2002	Staff 2003	Res'd 2003	Staff 2004	Res'd 2004	Staff avg p/a	All res'd
AT	52	1	51		47		47		51		49.6	1
BE	132	1	138		137	1	136		136		135.8	2
BG	1		1		3		3		5		2.6	
CH	262	3	235	1	208	1	186	2	198	3	217.8	10
CZ	2		4		5		5		5		4.2	
DE	235	5	231	4	215	6	199		210		218.0	15
DK	34	1	35	1	32		31	3	34		33.2	5
ES	80	3	84	2	85	2	89	2	92	1	86.0	10
FI	27	2	29		27		27	1	32		28.4	3
FR	1125	2	1089	4	1025	1	987	1	1019	1	1049.0	9
GB	290	4	292	2	286	5	273	3	295	2	287.2	16
GR	15		16		18		16	1	17		16.4	1
HU	3		3		3		6		8		4.6	
IT	242	1	247	5	240	1	235		244	1	241.6	8
NL	85	5	85		88		88		88		86.8	5
NO	19		19		20		18		18		18.8	
PL	17		19	1	19		20		27		20.4	1
PT	23		24	2	27		31		35		28.0	2
SE	41	1	38		39	1	40		44	1	40.4	3
SK	6		7		9		10		11		8.6	
NMS	11		16		17		16		15		15.0	
<b>Totals</b>	<b>2702</b>	<b>29</b>	<b>2663</b>	<b>22</b>	<b>2550</b>	<b>18</b>	<b>2463</b>	<b>13</b>	<b>2584</b>	<b>9</b>	<b>2592.4</b>	<b>91<sup>3</sup></b>

*Table 8 - Resignations and staff in post by nationality*

<sup>3</sup> Total over 5-year period

- The table above shows resignations over the 5-year reference period together with staff in post. The 91 resignations represent a drop-out over 5 years of 3.5%. It must be borne in mind, however, that over 70% of resignations occur during the first 5 years of service. Expressing the drop-out as a percentage of international staff recruits, the drop-out is in fact 10%. This indicates that, once they have decided to settle down, most people grow roots and become less inclined to return to their home country. At the same time, reintegration into the social security system becomes problematic after a long period abroad. As retention problems concern mainly recently recruited staff members, an analysis in relation with recent arrivals seems more appropriate than with staff in post.
- The predominance of resignations in the early stage of the career is also reflected in the distribution of staff resigning from the type of contract held at the date of resignation. The resignations of staff on limited duration contracts (62) represent 68% of the total, while only about 25% of the staff held limited duration contracts over the last 5 years.



*Figure 3 - Number of resignations by reason and type of contract*

4.3 An analysis of the destination of staff resigning shows that 50% return to the home country; 20% stay in the local area; 30% go elsewhere. The main type of the next employer is the private sector (56%); followed by the public sector (38%) and international organizations (6%).

## 5— Experience and problem areas identified relative to International Staff Recruitment and Retention

5.1 A special survey was conducted by HR Department in order to obtain feedback from recruiting supervisors on their experience of recent staff recruitment. A period of 2.5 years, from January 2002 until June 2004, was chosen as an indicative sample of the full reference period. The survey took the form of a questionnaire, which covered the quantity and quality of applicants, candidates and recruits on a vacancy-by-vacancy basis; the areas of difficulty for recruitment and the evolution of recent years as perceived by the recruiting supervisors; some suggestions for improving the quality and quantity of staff for international recruitment. This chapter summarises response from the survey.

The table below gives a breakdown of the recruitments covered in the departmental survey.

Professional Category	TOTAL no. of recruits covered in survey	Gender		Recruits from	
		M	F	Host States (FR/CH)	Non-Host States
1. Research Physicists	21	17	4	2	19
2. Scientific & Engineering Work	109	92	17	21	88
3. Technical Work	108	99	9	65	43
4. Manual Work, Crafts & Trades	17	17	0	2	15
5a. Professional Administrative Work	26	14	12	9	17
5b/c. Office & Administrative Work	23	0	23	13	10
<b>TOTAL</b>	<b>304</b>	<b>239</b>	<b>65</b>	<b>112</b>	<b>192</b>

*Table 9 - CERN Recruits January 2002 - June 2004, International Staff only*

5.2 The conclusions from the survey are:

### Category 1, Particle Physicists

No attraction problems have been encountered here. CERN is very well known by Experimentalists and Theorists as a primary employer. No special measures had to be taken to increase applications for vacancies. However, CERN is known especially amongst Theorists for its recruitment policy of limited duration contracts which accounts for 2 refused offers over the period. The physicists concerned preferred offers of permanent contracts elsewhere. The nationality distribution of candidates and recruits is satisfactory in this category. Resignations typically occur before completing LD contracts to seize opportunities for tenure appointments elsewhere, given the very small chances for indefinite contracts in this job family at CERN.

### Category 2, Applied Physicists and Engineers

Recruiting supervisors attest that there is no shortage of good candidates in this category in general. The nationality distribution is satisfactory across the Member States for both candidates and recruits.

However, in a few specialised fields like power electronics, the choice of qualified candidates is limited to a few countries. In fact, only a handful of countries in Europe offer engineering degrees in the power electronics field. Due to the influence of some large companies, France is one of these countries where a number of Power Engineers graduate each year. Switzerland and Germany are two others. In general, students' interests focus less on hardware aspects of electronics than on design and computing for electronics as well as the softer side of IT like programming, development, telecommunications and networks, systems analysis and systems management. Even renowned technical universities are not able to fill their places within the technical electronics field. In Germany, power engineer graduates are immediately recruited into German industry.

### Category 3, (Technicians and Technical Engineers)

This is the problem area for recruitment due to insufficient choice of applicants in several fields. As the general data shows there has been an increasing need for technicians as the construction/ installation phase of the LHC project gathered momentum, thus there has been a significant increase in the number of posts opened in this category. However, the increase in the number of applicants has been minimal. This shortage of applicants is particularly acute from nationalities other than French. Recruiting supervisors in the departments employing technicians all see this as a major area for concern. They complain that there is neither the quality nor the quantity of applications necessary to ensure recruitment of a high standard. There have been many instances of delayed selection boards because of insufficient candidates. This happened for 22 boards in AB Department alone during the last 2.5 years. In several other cases, second or sometimes third boards had to be organised for the same post due to the poor quality of responding candidates and sometimes simply because the invited candidates did not appear for interview. Indeed, the percentage of invited candidates not attending selection boards is 21% for technician jobs and 11% in other activities. Recruiting supervisors are of the view that CERN should do much more to bring our vacancies for technicians and technical engineers to the attention of potential applicants.

With regard to the quality of category 3 applicants, surveys published in statistical reports and professional journals argue that the possibilities for young people to enter higher education have increased considerably in Europe. Governments announce regularly increases in the percentage of those obtaining academic degrees (30% in some countries, 27% in Switzerland, for example). It appears that this has reduced the quality of candidates below the academic level, e.g. technicians and senior technicians.

#### Category 4, Manual workers

All of the staff in this category were recruited as firefighters.

#### Category 5a, Professional administrative staff.

Recruiting supervisors note a difficulty in attracting good quality candidates for certain specialist CERN positions such as legal advisors and finance professionals. Lack of quick promotion possibilities and competitive financial conditions for professionals in these areas are quoted as the reasons for this.

#### Category 5b/c, Administrative assistants and secretaries.

No particular problems here with a good nationality spread. There is a healthy pool of candidates, many of them working in organizations in the Geneva area on more precarious conditions.

5.3 The granting of Ci permits by the Swiss authorities<sup>4</sup> constitutes a considerable improvement from the legal point of view relative to spouses' employment. Nevertheless, career transition into another country often with a different linguistic and cultural environment hinder the continuation of careers of spouses and thus make some young couples hesitant to go abroad. Moreover, the lack of recognition of unmarried couples in CERN's statutory provisions creates additional problems. This will be addressed separately in the framework of the 5YR.

## **6— Conclusions**

6.1 For a large number of vacancies, CERN does not encounter major recruitment or retention problems. The numbers of refused offers (1 in 13) and resignations (<20 per year for 150 recruits on average or for 2600 staff in post), with only a small fraction for reasons of salary or job security, show that CERN's employment conditions are competitive in general. However, CERN is not the only employer in Europe offering competitive conditions of employment. For example, some multi-national companies and most international organizations offer more favourable conditions to top candidates, as shown also in previous 5-yearly reviews. CERN is not in a position to attract the best candidates in all cases. Therefore, in the fierce competition for talent, CERN must make optimal use of its main selling points as an attractive employer. These are a combination of challenging assignments, employment conditions, the international, non-profit making nature of the organization and its location in Geneva. These arguments are also important reasons why most staff members stay at CERN once they have overcome integration problems for themselves and their family.

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<sup>4</sup> Work permits for the spouses of civil servants working for international organizations in the canton of Geneva

6.2 Given the predominance of technological activities at CERN, it is not surprising that about two-thirds of staff recruited come from industry, whilst 56% of staff resigning move to industry. This shows that our main competitor on the employment market is in fact industry.

6.3 As mentioned in Chapter V above, the main difficulty in staff recruitment is to bring about a satisfactory choice of well-qualified candidates from a variety of Member States, especially in certain job families such as technicians, technical engineers and professional administrators. The type of people needed for employment at CERN is high in demand, even in those countries with a high unemployment rate like Germany<sup>5</sup>. Moreover, technical personnel are known to be less mobile than scientific personnel. This is confirmed by the response rate to CERN job advertisements and from studies outside CERN. In addition, CERN is not well-known as a potential employer for non-scientific staff, particularly outside the Host States. Similar experience has been noted with CERN fellowships, where a relatively low number of applicants in professional category 2 are registered compared to the overall number of engineering graduates in the Member States. The recent shift from category 2 to more category 3 recruitment has made the lack of technician candidates even more acute. The absence of student programmes at senior technician level (higher technical diploma, usually 2 years' study after completed secondary education) is felt as a disadvantage compared to the scientific and engineering job families. The overall number of female candidates and recruits tends to decrease due to a below average female presence in technical job families.

6.4 In the analysis of possibilities for improvement, it becomes obvious that some of the underlying reasons for the lack of applicants are very difficult for the Organization to act upon, in particular the inclination of candidates not to seek employment abroad, the career of spouses or the housing situation in the Geneva area.

6.5 However, there are also other reasons, where initiatives by the Organization could improve the number of applicants and also avoid some of the resignations. A non-exhaustive description of possibilities for improvement is given below.

Above all, CERN must become better known in non-host countries, in particular in technical job families, where the need for improvement is most crucial and which will continue to be CERN's main recruitment area in the foreseeable future. This is not an easy task given that the heavy recruitment procedure connected with international recruitment constitutes a disadvantage compared to employers recruiting on a national or regional level. Although the vacancy notice publication period has been reduced to 6 weeks and our recently introduced electronic recruitment system is much faster in receiving applications, the big players on the recruitment market profit from campus recruitment or fairs and have close connections with

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<sup>5</sup> The unemployment rate in Germany is 10% but only 3% of Fachhochschul-Engineers and 5% of Technical University graduates are unemployed. Moreover, 60% of German companies cannot presently satisfy their needs for engineers by the number of graduates entering the employment market (Sources: Institut für Wirtschaftswissenschaft (IW) Survey 2002/2003 and Verein Deutscher Ingenieure (VDI) Survey 2004).

leading universities and engineering schools in the country. Companies sponsor bright students and create a network with the aim of identifying and attracting the best students even prior to graduation. CERN is not in a position to ensure equal chances to potential candidates in all Member States, given its status as an international organization, as compared to the above targeted approach at national level, used in particular by multi-national companies.

It is proposed to continue the present job marketing efforts as described in more detail in Annex II. In addition, the following measures should be given consideration:

- More systematic publication of vacancies in technical journals.
- Creating a network with large and renowned technical colleges and engineering schools through contacts via CERN technical specialists, an improved coordination of initiatives in HR Department and the help of national employment systems, delegates and industrial liaison officers.
- Consider setting up a training programme for newly qualified technicians and technical engineers as a complement to the Technical Student Programme. The flux of the participants would make CERN better known and could provide a source of candidates for staff vacancies.
- The review of certain aspects relative to employment conditions would be beneficial for more successful job marketing. For example, the publication of 90% of staff vacancies with appointments not convertible into long term employment is off-putting and should be changed; initial financial assistance to face up to the acute shortage of affordable housing in the Geneva area as well as a nursery school (crèche) would also be very favourable selling arguments. Attention must be paid to the consequences of the EC-CH bi-lateral agreements, which will make it easier for talents on the CERN staff to be attracted by the local market.

6.6 Given the fact that attempts made over many years to attract more Career Path C technicians from Member States other than France have not been successful, one could argue that this is an immobile group. In fact, the nationality distribution of the 497 Career Path C staff includes 76% from the host states (329 or 66% French and 52 or 10% Swiss). Further efforts to attract Career Path C candidates in a more systematic manner from non-Host States are required to improve on the nationality distribution (cf. paragraph 6.5 above).

6.7 TREF is invited to take note of the present report, the final version of which will be presented to the Finance Committee in June 2005.

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**Basic elements governing the process of  
International Staff Recruitment at CERN**

1— The principle elements governing CERN's staff recruitment policy are defined in the Staff Rules and Regulations. The statutory texts include two major provisions:

- Staff members must be of the highest competence and integrity and physically fit to carry out the work foreseen, and
- CERN reaffirms equality of treatment between people and rules out discrimination between members of its personnel, in particular on account of sex, race or religion, as one of the basic principles of its personnel policy.

2— The Staff Regulations also prescribe the publication of vacancy notices for posts not filled by internal mobility. In addition to the description of the assignment and the related qualification requirements, vacancy notices must indicate the type of contract foreseen and make the distinction between International Staff and Local Staff. The statutory provisions also foresee recruitment via a selection board procedure.

3— The coherent implementation of the statutory provisions is ensured via internal procedures which are consistently applied on a CERN-wide basis. These procedures set the guidelines for opening vacancies, receiving and considering applications, and reaching a selection decision.

- a) Internal procedures ensure that proposals to open a vacancy must have appropriate budgetary coverage. With a view to allowing as fair a distribution of nationals of the different member states as possible, the publication of vacancies takes place via internet. The vacancy notice provides links to other relevant CERN information and about the activity related to the vacancy. Additional efforts to attract qualified candidates are made via other media and distribution channels as described in Annex II. Vacancy notices are normally published at least six weeks before a selection board is arranged.
- b) Applications may be made, preferably via internet, for specific vacancies or spontaneously. The HR Department conducts an initial screening of applications, mainly relative to formal eligibility criteria, experience profile and qualifications. Those retained are passed on to the recruiting supervisors.

- c) The invitation of qualified candidates retained for interview is decided by consensus between the recruiting department and HR Department.
- d) Selection Boards are organized by HR Department and consist of a full-day programme with panel interviews, one-to-one discussions, tests or presentations. Personality tests are used only occasionally.
- e) The selection board is composed of representatives of the recruiting department, specialists from other departments and HR Department. The latter also ensures that selection board members have a good nationality and gender mix.
- f) References may be obtained and taken into consideration either as part of the application procedure (e.g. systematically for research physicists) or during the selection process, as appropriate.
- g) The selection proposal by the board is usually reached by consensus between all board members. A selection recommendation is prepared (normally by the HR Coordinator with the agreement of the Chairperson of the Board) outlining the selected candidate's competencies in respect to the requirements in the vacancy notice. If the board members have diverging views, a minority report is included in the selection proposal made to the Head of HR Department.

4— Principle elements taken into consideration for selection:

- a) Fulfillment of qualification requirements both in technical and behavioral terms. Job success in an international research organization makes communication skills, integration and flexibility particularly important.
- b) For recruitment on long-term contracts, particular emphasis is put on the capacity of candidates to make medium- and long-term contributions in carrying out various assignments that they could be called upon to perform. To this end, candidates are assessed according to additional criteria, such as performance, initiative, acceptance of responsibility and long-term professional potential.
- c) Throughout the various steps of the selection board, attention is also paid to attitudes shown and expectations expressed by the candidates, which may be relevant for successful integration and performance in the Organization.
- d) Considerations relative to nationality and gender balance are taken into account among equally qualified candidates at pre-selection and selection, with preference given to candidates from under-represented nationalities or sex.

<b>Recruitment advertising and outreach</b>
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1— Overall the effort in this area has been declining with the budgetary and human resources available. The cost of a relatively small (150x150 mm) newspaper advertisement in all Member States is between 100 and 150 KCHF. For reasons mainly of cost, wide scale newspaper advertising has only been used twice in the reference period. In 2000, an advertisement for technicians and technical engineers was published in 16 Member States at a cost of 85 KCHF. A similar advertisement was published in October 2004 in 12 Member States at a cost of 46 KCHF, again for technicians and technical engineers. The advantage of this kind of advertising is that it quickly increases the application stock. The disadvantages are the one-off effect, the high cost and the fact that sometimes the advert triggers a large number of untargeted applicants. Italy, Poland, Portugal and Spain are typical examples, that show that the majority of applications are from university engineers and not from the technicians or technical engineers desired. The result also indicates very clearly that the readiness to move abroad to work is very low technicians and technical engineers including from Member States where unemployment is high. The responses to the advertisement from October 2004 can be seen in the table below:

Prof. Category	1. Research Physicists	2. Scientific & Engineering Work	3. Technical Work	4. Manual Work, Crafts & Trades	5a. Professional Administrative Work	5b/c. Office & Administrative Work	Total
Nationality							
BE		9	13			1	23
DE		3	3		1		7
DK		1	5			1	7
ES		56	23		1		80
FI		4	1		1		6
GB		7	16		2		25
IT	1	95	9			1	106
NL		1	2				3
NO		2	3				5
PL		44	4				48
PT		35	8	1			44
SE		6					6
<b>Total</b>	<b>1</b>	<b>263</b>	<b>87</b>	<b>1</b>	<b>5</b>	<b>3</b>	<b>360</b>

*Table 1 – Responses to October 2004 advertisement for technical work at CERN by Nationality and Professional Category*

2— Given the financial constraints, most advertising during the reference period has been restricted to internet job boards like Jobpilot and Monster. The latter company can advertise our posts over 11 Member States for around 10000 CHF for a year's advertising. We have been relying increasingly on the CERN website to bring in applications. More than 52% of 2003 applicants say that they have found vacancies through the CERN website. This presumes that those applying to CERN on this route are aware of its existence and the fact that the Organization employs staff other than physicists.

3— For certain specific positions, departments have paid for newspaper advertisements themselves. These have included technicians and technical engineers in civil engineering and electronics, professionals in financial and legal fields.

4— In addition to paper and electronic advertising we have continued to use the services of a specialized recruitment agency based in the UK to supply us with technician candidates. This has proved quite successful and accounts for 9 technician recruits from the UK over the reference period. We have not been able to find other agencies of this type that deal specifically with technician recruitment.

5— Human Resources (HR) Department has been involved in 12 recruitment fairs in different Member States and has tried a pro-active approach in visiting technical schools in Denmark, Northern Ireland, Hungary, Greece and Poland to encourage students to apply for the Technical Student programme and staff positions for the newly qualified. The immediate reaction of students is usually quite enthusiastic. However, with the exception of Denmark, where the initiative resulted in the recruitment of 6 technicians, the response in terms of staff applications is rather low. It is known that top students are often sponsored by big companies in the region and receive job offers even before graduating.

It has been learnt that generally technicians and technical engineers from outside the local area are either unaware of CERN as a potential employer or if so believe CERN only employs physicists.

It must be pointed out that participation in recruitment fairs notably in far away countries is a considerable effort in terms of time and resources.

6— Recruiting supervisors are of the opinion that not enough is being done to advertise technician and technical engineer vacancies and that more resources should be devoted to this. Several suggested that we should have a trainee programme for technicians and technical engineers, as we have for engineers under the Fellowship and Technical Student Programmes. This could provide a pool of candidates with CERN experience for staff positions. Such a proposal would have to be analysed and detailed.

7— On several occasions we have used EURES to advertise our positions. This is the European network that connects the employment services of the European Union. It is an electronic job board, free of charge and allows employers to advertise their positions and jobseekers to apply for them. Like other job boards of this type, this is a high-maintenance option and although we would like to exploit this network further, it requires a systematic inputting and communication on our part with the employment agencies in the European member states.

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ORGANISATION EUROPEENNE POUR LA RECHERCHE NUCLEAIRE  
**CERN** EUROPEAN ORGANIZATION FOR NUCLEAR RESEARCH

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TRIPARTITE EMPLOYMENT CONDITIONS FORUM (TREF)

Fifty-eighth Meeting  
Geneva – 7 & 8 March 2006

**5-YEARLY REVIEW 2005**

**STAFF RECRUITMENT & RETENTION**

*Addendum*

A detailed report on the subject of Staff Recruitment and Retention was provided to the Forum in document CERN/TREF/264 in April 2005 covering the period 2000-2004 inclusive. The present addendum updates the information of April 2005 by adding the most relevant data for the full year 2005 thus covering the six-year period 2000-2005 inclusive. Comments on the data observed in 2005, in particular variations in trends compared to the analysis in document CERN/TREF/264 are also made in the present addendum, of which the Forum is invited to take note.

## 1— Introduction

A detailed report on the subject of Staff Recruitment and Retention covering the period January 2000 to December 2004 was provided to the Forum in document CERN/TREF/264 in April 2005. The present Addendum updates the information of last year by adding the data of the full year 2005 relative to the main indicators, notably applicants, recruits, refused offers and resignations. In addition to updated statistics, the document includes comments especially where the 2005 data shows variations compared to the previous period of 2000-2004, as well as a report on recruitment outreach activities 2005.

## 2— Applicants and Recruits

	1. Research Physicists		2. Scientific and Engineering Work		3. Technical Work		4. Manual Work, Crafts and Trades		5a. Professional Administrative Work		5b/c. Office and Administrative Work		Total	
	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals
AT	8		87	17	27	2	2		33		14		171	19
BE	15	1	240	6	304	14	13		106	3	77	2	755	26
BG	17		147	5	41		35	2	31		9		280	7
CH	28	1	606	10	864	24	165		312	1	406	5	2381	41
CZ	3		87	1	38	1	18	2	20		17		183	4
DE	131	12	387	30	229	13	33	2	165	5	93	2	1038	64
DK	6	1	66		135	10	16		23		13		259	11
ES	30	5	886	22	425	11	80	3	174	1	110	1	1705	43
FI	9	1	122	3	70	3	71	7	51	3	45	1	368	18
FR	69	5	2776	55	3806	157	731	6	1234	15	1540	27	10156	265
GB	37	5	647	36	499	36	155	5	283	9	206	8	1827	99
GR	34	3	140	7	42		1		55	1	29		301	11
HU	6		125	5	33	1	33		19	1	13		229	7
IT	119	10	1421	48	552	13	224	2	327	6	204	1	2847	80
NL	16	2	128	7	96	6	9		82	1	78	2	409	18
NO	5		98	1	58	3	2		23		13		199	4
PL	13		455	18	111		9		52		40		680	18
PT	1		291	12	167	2	34	1	69	2	64	2	626	19
SE	6	1	164	6	90	3	24		52	2	33	2	369	14
SK	5		83	6	21		15		20		8		152	6
NMS	34	2	119	11	50		2		9		23		237	13
<b>Total</b>	<b>592</b>	<b>49</b>	<b>9075</b>	<b>306</b>	<b>7658</b>	<b>299</b>	<b>1672</b>	<b>30</b>	<b>3140</b>	<b>50</b>	<b>3035</b>	<b>53</b>	<b>25172</b>	<b>787</b>

*Table 1a – Nationality distribution by professional category of applicants and arrivals (International Staff only)*

	3. Technical Work		4. Manual Work, Crafts and Trades		5b/c. Office and Administrative Work		Total	
	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals	Applicants	Arrivals
CH	146	3	102	6	407	13	655	22
FR	829	59	541	84	1226	77	2596	220
AT	1				9		10	
BE	7		4		44		55	
BG	2				7		9	
CZ	4				9		13	
DE	13		4		40	1	57	1
DK	4		1		17	2	22	2
ES	32		15	1	64	2	111	3
FI	1				14	1	15	1
GB	42		11		120	7	173	7
GR	6		1		26		33	
HU			1		11	1	12	1
IT	38		23	1	125	4	186	5
NL	5	1	4		36		45	1
NO	1				8		9	
PL	7		2		40		49	
PT	17	1	13	1	26		56	2
SE	4		1		12		17	
SK					9		9	
NMS	13		4		76		93	
Total	1172	64	727	93	2326	108	4225	265

*Table 1b – Nationality distribution by professional category of applicants and arrivals (Local Staff only)*

International and Local Staff: 2000-2005		Applicants		Arrivals	
		Female	Male	Female	Male
1. Research Physicists		94 (16%)	499	8 (16%)	41
2. Scientific and Engineering Work		1119 (12%)	7976	48 (16%)	258
3. Technical Work		677 (8%)	7911	33 (9%)	330
4. Manual Work, Crafts and Trades		67 (3%)	2277	6 (5%)	117
5a. Professional Administrative Work		1553 (49%)	1615	25 (50%)	25
5b/c. Office and Administrative Work		3919 (77%)	1148	152 (94%)	9
Total		7429 (26%)	21426	272 (26%)	780

International Staff only: 2000-2005		Applicants		Arrivals	
		Female	Male	Female	Male
1. Research Physicists		93 (16%)	499	8 (16%)	41
2. Scientific and Engineering Work		1112 (12%)	7963	48 (16%)	258
3. Technical Work		613 (8%)	7045	31 (10%)	268
4. Manual Work, Crafts and Trades		41 (2%)	1631		30
5a. Professional Administrative Work		1532 (49%)	1608	25 (50%)	25
5b/c. Office and Administrative Work		2281 (75%)	754	50 (94%)	3
Total		5672 (23%)	19500	162 (21%)	625

*Table 2 – Gender distribution of applicants and recruits by professional category*

2005 data confirms previous years regarding nationality distribution. Although 2005 arrivals of International Staff show two nationalities without recruitment, selection decisions (offers made) have recruits from all Member States (some recruits will take up their appointment only in 2006). Reference is made in this context to Annex 1 describing Recruitment Advertising and Outreach.

	Industry	Academic Sector	Research Laboratory	Beginning of career	Public Service	International Organizations	Total	Recruited from Fellows
1. Research Physicists		15	16		1	1	33	16
2. Scientific & Engineering Work	79	57	48	27	8	2	221	85
3. Technical Work	273	9	12	52	13	4	363	
4. Manual Work, Crafts & Trades	95	1		1	26		123	
5a. Professional Administrative Work	27	7	3	4	4	3	48	2
5b/c. Office & Administrative Work	141	3	2	6	3	6	161	
<b>Total</b>	<b>615</b>	<b>92</b>	<b>81</b>	<b>90</b>	<b>55</b>	<b>16</b>	<b>949</b>	<b>103</b>

*Table 3 – Type of previous employer of recruits by professional category (International and Local Staff)*

Previous employment of 2005 recruits confirms the pattern of previous years with about 2/3 from the private sector.

### 3— Refused Offers

Professional Category	1. Research Physicists	2. Scientific & Engineering Work	3. Technical Work	4. Manual Work, Crafts & Trades	5a. Professional administrative Work	5b/c. Office & Administrative Work	Total	Total no. of offers made
Nationality								
AT								19
BE			4	1			5	31
BG								7
CH		2	3				5	46
CZ						1	1	5
DE		1	2			1	4	68
DK			4			1	5	16
ES	1	1	2				4	47
FI		1					1	19
FR		5	2	2	2	2	13	278
GB		2	4	1	1		8	107
GR		1					1	12
HU								7
IT		3	3		2	2	10	90
NL			1				1	19
NO			2				2	6
PL		1					1	19
PT		1	1				2	21
SE					1		1	15
SK								6
NMS	1						1	14
<b>Total refused</b>	<b>2</b>	<b>18</b>	<b>28</b>	<b>4</b>	<b>6</b>	<b>7</b>	<b>65</b>	
<b>Total no. of offers made</b>	<b>51</b>	<b>324</b>	<b>327</b>	<b>34</b>	<b>56</b>	<b>60</b>		<b>852</b>

*Table 4a - Refused offers by nationality and by professional category  
(comparison with total offers made, International Staff only)*

Professional Category	1. Research Physicists	2. Scientific & Engineering Work	3. Technical Work	4. Manual Work, Crafts & Trades	5a. Professional administrative Work	5b/c. Office & Administrative Work	Total	Total no. of offers made
Nationality								
AT								19
BE			4	1			5	31
BG								7
CH		2	3	1			6	69
CZ						1	1	5
DE		1	2			1	4	69
DK			4			1	5	18
ES	1	1	2				4	50
FI		1					1	20
FR		5	4	3	2	2	16	501
GB		2	4	1	1		8	114
GR		1					1	12
HU								8
IT		3	3		2	2	10	95
NL			1				1	20
NO			2				2	6
PL		1					1	19
PT		1	1				2	23
SE					1		1	15
SK								6
NMS	1						1	14
<b>Total refused</b>	<b>2</b>	<b>18</b>	<b>31</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>69</b>	
<b>Total no. of offers made</b>	<b>51</b>	<b>324</b>	<b>394</b>	<b>128</b>	<b>56</b>	<b>168</b>		<b>1121</b>

*Table 4b - Refused offers by nationality and by professional category  
(comparison with total offers made, International and Local Staff)*

	Female	Male	Total
Employment Conditions	3	24	27
Personal Reasons	5	15	20
Professional Reasons	5	17	22
<b>Total Refused offers</b>	<b>13</b>	<b>56</b>	<b>69</b>
Offers made	285	836	1121
<b>Total Refused offers as percentage of offers made</b>	<b>4.56%</b>	<b>6.70%</b>	<b>6.16%</b>

*Table 4c - Refused offers by gender and reason  
(comparison with total offers made, International and Local Staff)*

The percentage of refusals of staff offers during 2005 was only half of the average of the previous five-year period. Consequently, the overall rate of offers refused during the six-year period was 6.16%, compared to 7.65% shown in the report of last year.

The gender distribution shows the largest variance with only one female out of the total of 16.

The share of French nationals refusing staff offers is higher than during the previous period but this is largely caused by three Local Staff offers refused, all of which concern French nationals. Reference is made in this context to a separate, dedicated report on Local Staff implementation (CERN/TREF/295). Four (25%) of the 16 refusals during 2005 are from Nordic nationals, from where applicants and recruits are scarce (<5%).

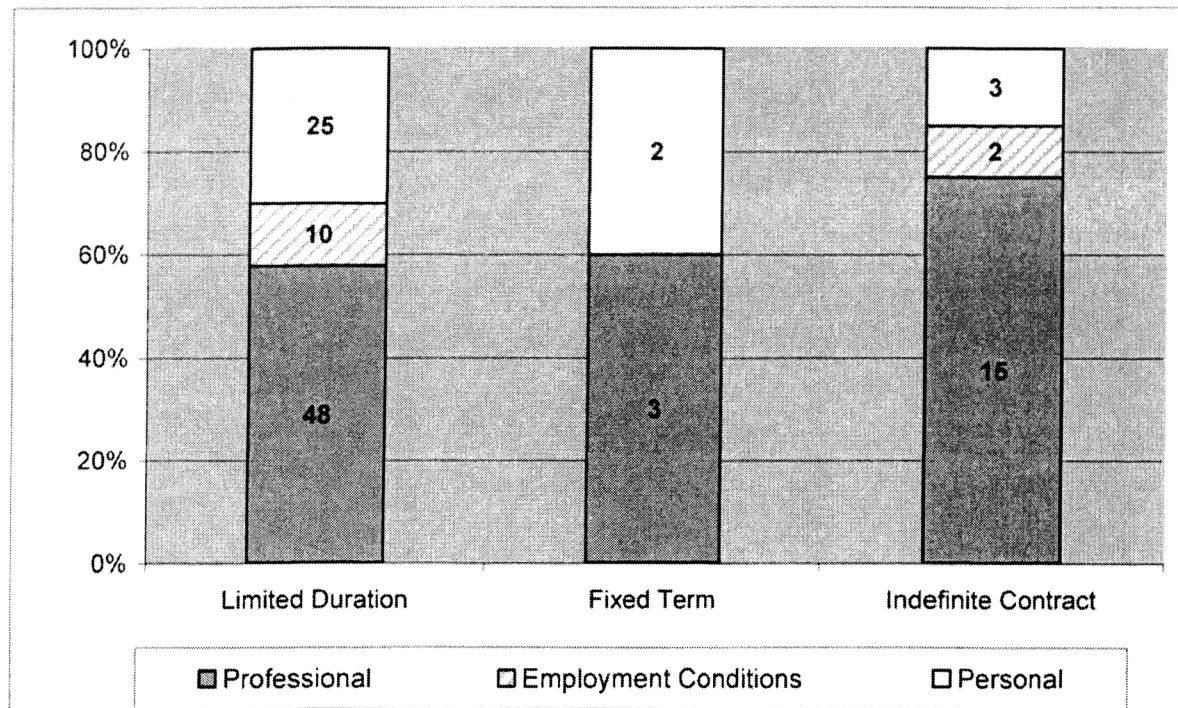
#### 4— Staff Retention

	Staff 2000	Res'd 2000	Staff 2001	Res'd 2001	Staff 2002	Res'd 2002	Staff 2003	Res'd 2003	Staff 2004	Res'd 2004	Staff 2005	Res'd 2005	Staff avg p/a	All res'd
AT	52	1	51		47		47		51		46		49	1
BE	132	1	138		137	1	136		136		121	1	133.3	3
BG	1		1		3		3		5		7		3.3	
CH	262	3	235	1	208	1	186	2	198	3	165	2	209	12
CZ	2		4		5		5		5		4		4.2	
DE	235	5	231	4	215	6	199		210		189	4	213.2	19
DK	34	1	35	1	32		31	3	34		26		32	5
ES	80	3	84	2	85	2	89	2	92	1	95	1	87.5	11
FI	27	2	29		27		27	1	32		25	2	27.8	5
FR	1125	2	1089	4	1025	1	987	1	1019	1	952		1032.8	9
GB	290	4	292	2	286	5	273	3	295	2	264	4	283.3	20
GR	15		16		18		16	1	17		17		16.5	1
HU	3		3		3		6		8		9		5.3	
IT	242	1	247	5	240	1	235		244	1	228	1	239.3	9
NL	85	5	85		88		88		88		83		86.2	5
NO	19		19		20		18		18		16		18.3	
PL	17		19	1	19		20		27		26		21.3	1
PT	23		24	2	27		31		35		36	1	29.3	3
SE	41	1	38		39	1	40		44	1	39	1	40.2	4
SK	6		7		9		10		11		12		9.2	
NMS	11		16		17		16		15		14		14.8	
<b>Totals</b>	<b>2702</b>	<b>29</b>	<b>2663</b>	<b>22</b>	<b>2550</b>	<b>18</b>	<b>2463</b>	<b>13</b>	<b>2584</b>	<b>9</b>	<b>2374</b>	<b>17</b>	<b>2556</b>	<b>108<sup>1</sup></b>

*Table 5 - Resignations and staff in post by nationality (International Staff only)*

<sup>1</sup> Total over six-year period

There has been only one resignation of Local Staff in the six-year period in August 2005. This resignation is not shown in the table above as the period of observation of Local Staff in post is still too short to draw conclusions.



*Figure 1 - Number of resignations by reason and type of contract*

The overall situation including trends reported in April 2005 have not changed during 2005. The number of resignations during 2005 was 17, which is close to the annual average of the previous 5 years (18).

The main reasons for leaving were for job-related or personal reasons. Only 2 of the 17 staff members left for reasons connected primarily to employment conditions.

There was only one female staff resigning, which is below the average of previous years (22%).

Compared to the number of staff in post and to recent recruits, British (28% of resignations) and German nationals (22%), career path E (50%) resignations as well as those of administrative staff (37%) scored relatively high.

There were only 3 resignations from holders of indefinite contracts and only 4 had more than 5 years of service (maximum 13 years), which also confirms previous observations that voluntary departures of staff firmly established at CERN and in the region tend to stay until retirement.

## **5— Conclusion**

The recruitment activity during 2005 was very intensive with 147 International and 62 Local Staff joining CERN. Therefore, the effect of 2005 on the total six-year period is relatively high.

There were no major variations from previous years in the nationality and gender distribution. The type of employer from which they were attracted with over 2/3 from industry also remained constant.

The rate of refused staff offers in 2005 was much lower than in previous years by almost 50% with a particularly low rate from female staff selected.

No variations are to be reported regarding staff resigning except again a low rate by female staff. They continue to occur at the early stage in the career and mainly for personal or job related reasons. Only few are primarily due to employment conditions.

TREF is invited to take note of the present Addendum, the final version of which will be presented to Finance Committee in March 2006.

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<b>Recruitment Advertising and Outreach 2005</b>
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**a) Newspaper Advertising:**

A newspaper advertisement was placed in 10 Member States to improve on the low number of applications from Technicians and Technical Engineers for international staff vacancies. The returns can be seen in the table below:

<b>Prof cat</b>	<b>Engineers</b>	<b>Technicians</b>	<b>Crafts</b>	<b>Admin</b>	<b>Total</b>
<b>BE</b>	8	3		1	12
<b>CZ</b>	4				4
<b>DE</b>	4	3	2		9
<b>ES</b>	42	19			61
<b>GB</b>	4	5			9
<b>GR</b>	22	11			33
<b>HU</b>	4	10			14
<b>PL</b>	34	9			43
<b>PT</b>	34	25			59
<b>SE</b>	5	4			9
<b>Total</b>	170	90	2	1	263

It was decided not to advertise in Italy this time because experience shows that the response comes from university engineers rather than from the targeted technicians. In addition, advertising in Italy is particularly expensive. There was no advert placed in Finland nor in Denmark as these countries have been targeted for a special outreach event to be organized with EURES, technical schools and ILOs.

We have noted a decline in the total number of applicants from paper media, despite the careful researching of publicity media in relation to a similar advertisement in 2004 and in previous years.

The fall in overall response from newspaper advertising has been progressive over the last five years. However, the corresponding rise in applications directly to our website or via internet media, about 55% of total applications, confirms a change in the way people search for work and training opportunities, which is a general observation on the European employment market. This is valid also at the level of technicians. Improving the visibility, the attractiveness and the user friendly side of our recruitment website are therefore new priorities for 2006.

**b) Specific Outreach Activities:**

With the decline in response to newspaper advertisements and with a view to increase awareness of CERN as a potential employer, CERN representatives went out to schools and job fairs in countries where difficulties are encountered in attracting sufficient candidates.

The main strategy of 2005 Outreach Actions was the establishment and reinforcement of relationships with organizations and individuals and their networks in the Member States, as well as the use of contacts to join up CERN with jobseekers and students. These included: European Employment Services (EURES), present in most of our Member States; National Employment Services; technical schools and technical universities; CERN staff and CERN Industrial Liaison Officers (ILOs). The main target in 2005 was technicians and technical engineers from Scandinavian countries. Similar initiatives were undertaken in previous years in Belgium, Poland, the Czech Republic, Austria, the Netherlands, Portugal, Switzerland, UK (Northern Ireland) and Greece.

In April 2005, CERN participated in a EURES fair in Granada, Spain where contacts were made with several EURES delegates forming the basis of collaborations for the organization of recruitment events for CERN's Learning and Working programmes. Following up with these contacts, recruitment events have been organized in Sweden, Denmark and Norway. Others are planned for 2006 in Hungary, Finland and Italy. The first event in Sweden in October 2005 has brought a noticeable increase in the number of Swedish applicants for staff and technical student programmes.

Our annual attendance at the Trondheim Technical University job fair has also had a noticeable effect on the Norwegian technical student and fellow applications. Following last year's visit, 9 technical students were placed at CERN.

Other events included participation in the EUREKA job fair organized by EURES Germany and held in Berlin in November. This one day event attracted a lot of job seekers and also allowed us to make contact with the federal agency for the placement of German workers abroad (ZAV).

\* \* \*

ORGANISATION EUROPEENNE POUR LA RECHERCHE NUCLEAIRE  
**CERN** EUROPEAN ORGANIZATION FOR NUCLEAR RESEARCH

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TRIPARTITE EMPLOYMENT CONDITIONS FORUM

Fifty-fourth Meeting

Geneva – 31 May & 1 June 2005

**RESULTS OF THE DATA COLLECTION ENQUIRY**

**- SALARY COMPARISONS -**

This document outlines the approach followed to conduct the data collection enquiry for the current 5-yearly Review and provides a summary of resulting data regarding salary comparisons and movements over the reference period, as well as a reminder of other main items on which results are to be reported to TREF at its present meeting.

## **RESULTS OF THE DATA COLLECTION ENQUIRY**

### **- SALARY COMPARISONS -**

#### **1— Introduction**

In June last year, the Council approved the content and work planning of the current 5-yearly Review, including the main topics to be covered in the data collection enquiry, which was launched last autumn in collaboration with comparator organizations in Member States<sup>1</sup>. Progress with preparatory work was reported to TREF in November 2004<sup>2</sup>. In accordance with the Forum's work planning, a presentation on progress with the enquiry itself and first provisional data was made at the meeting on 4 & 5 April this year<sup>3</sup>. In this document, the Management presents more complete information on salary comparisons and salary movements over the reference period.

#### **2— The data collection enquiry**

2.1 In accordance with the agreed scope of the current Review, the Management drew up a questionnaire to be addressed to the various participants in the enquiry, taking advice of an external consultant<sup>4</sup> on the design and content of this document. The questionnaire is divided into six sections<sup>5</sup>: update of general information on some aspects provided in the previous enquiry; benchmark jobs and remuneration of staff; career structures and advancement systems; social conditions; allowances, indemnities and other benefits; and information concerning fellows, associates and students programmes, in order to reflect the situation as at end 2004.

2.2 Internal preparatory work started last summer and, in autumn 2004, specifications were drawn up to commission certain tasks concerning the data collection to two external bodies: HAY GROUP Management Consultants, Belgium, for information on hi-tech/private sector firms, and the Inter-Organizations Service (IOS) of OECD for information on taxation/social security contributions.

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<sup>1</sup> CERN/2567, CERN/FC/4824

<sup>2</sup> CERN/TREF/259 & 261

<sup>3</sup> CERN/TREF/266

<sup>4</sup> HAY GROUP Management Consultants, Brussels

<sup>5</sup> Contents of questionnaire for the data collection enquiry, shown in Annex 1

2.3 By the end of last year, all comparator organizations and services who had kindly agreed to participate in CERN's enquiry, had been contacted and, by February 2005, all but one of the initial visits to comparator organizations had been made for the data collection enquiry. Further contacts were required in March and April to validate and, as far as possible, complete the initial information collected.

2.4 It is recalled that the following samples of comparator organizations/employers were retained:

**Comparator organizations/employers - samples for INTERNATIONAL STAFF survey**

<b>Table 1</b>	<b>Salaries/remuneration and Advancement/career</b>
	European Commission (JRC), European Space Agency (ESA), European Southern Observatory (ESO) (as representing European intergovernmental scientific and technical organizations)
	CEA(FR), DESY(DE), CLRC(UK), ETHZ(CH) (as representing National Laboratories)
	CH Federal Service, Services Industriels de Genève (SIG) (as representing local employers)
	International Telecommunications Union (ITU), United Nations Organization Geneva (UNOG) for some non-technical professions (as representing international organizations located in Geneva)
	Hi-tech industries / private sector : Sample in CH, DE, FR, UK (survey provided by HAY Management Consultants)

**Comparator organizations/employers – specific samples for LOCAL STAFF survey**

<b>Table 2</b>	<b>Salaries/remuneration and Advancement/career</b>
	CH Federal Service, SIG (as Table 1)
	UNOG (as Table 1)
	Published local Swiss rates for various professions (see document CERN/2499/Rev*)

- \*) CERN/2499/Rev, Annex 6A provided salary comparisons for :  
CERN Local Staff, CERN non-resident staff, UNOG General Services scale, Secretaries (Watson-Wyatt remuneration survey June 2002 for Switzerland), Services Industriels de Genève, Mécatronique Geneva collective agreement (Industrial Union covering mechanical, electrical electronics trades and technicians), and Société Suisse des Employés de Commerce (equivalent to a collective agreement).

### 3— Comparisons of salary levels - results of the enquiry

3.1 Information has now been compiled on salary comparisons for industry/private sector firms, as well as for eight of the eleven comparator organizations. Results are summarised in Table 4 below indicating minimum and maximum rates for single persons. Additional indications on salary differentials applicable to married persons are presented in a separate document concerning family and child allowances<sup>6</sup>.

3.2 The equivalence of job levels has been established on the basis of the benchmark jobs set out in Annex 2, using CERN's career path guide and, as available, job descriptions and other relevant information provided by the comparator organizations/employers. Comparative information is provided in Table 4, except in those cases where similar positions do not exist or could not be matched, or where information is not yet available.

3.3 CERN has requested information on salaries corresponding to the top and bottom of each career path concerned and, wherever possible, to the three levels within career paths (first level, practitioner level and experienced practitioner level). Although many Organizations do not have a career path concept similar to that of CERN, they often have salary scales with grades and step increments, which help in this process. Wherever this is not the case, e.g. for HAY's survey in industry/the private sector, medians or average rates have been applied, as indicated in Table 4.

3.4 For comparison with the CERN scale of basic salaries, data from comparator organizations has to be expressed in amounts net of income tax. For international organizations, this is usually straightforward, as these Organizations generally have readily available net salary scales. For national Organizations and employers in the private sector, however, it is necessary to deduct income tax from gross salaries to arrive at amounts net of income tax, taking account of social security contributions for the determination of taxable income.

3.5 For salary information provided by national employers in France, Germany and the UK, CERN has applied income tax tools provided by the IOS service of OECD, which take account of standard obligatory social contributions of the employee. For the case of Switzerland, CERN has applied similar tools provided by the fiscal authorities of the Cantons of Geneva and Zurich (the latter for ETHZ). It is to be noted that no further income tax

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<sup>6</sup> CERN/TREF/272

deductions for personal situations, such as mortgages or tax rebates, have been taken into account.

3.6 For salary information concerning industry/private sector firms in the four countries surveyed – Switzerland (Geneva rates), Germany, France and the UK, HAY has drawn up rates for both gross salaries and salaries net of income tax, which take account of standard obligatory social contributions of the employee for the determination of taxable income. HAY has provided this salary information for both the median and the third quartile of the rates in hi-tech industry markets (essentially: engineering, R&D, technical services and IT firms), excluding fringe benefits which are difficult to quantify but which can be substantial in the private sector, particularly at the higher executive levels (e.g. company car, extra pension plan, ‘top hat’ schemes, share options, long-term cash incentives).

3.7 Other than in the cases of Swiss employers, as well as UNOG, ITU and ESA (for their grade ‘A’ levels) who have salary scales in Swiss francs, processing of salary data also entails the conversion into Swiss francs of amounts expressed in other currencies. As in past reviews, this conversion has been calculated by applying the Purchasing Power Parity factors (PPP) provided by the OECD for France, Germany and the United Kingdom. Current PPP rates of the OECD for the countries concerned were presented to TREF in November<sup>7</sup> and are recalled in Table 3 below.

<b>TABLE 3</b>	PPP in national currency	PPP in CHF equivalent
CH	CHF 1.000	100.0
FR	EUR 0.565	86.4
DE	EUR 0.515	78.6
UK	GBP 0.369	84.3

3.8 The resulting comparisons of data available to-date (2004 rates) are summarised in Table 4 below. It is recalled that these data concern **salaries net of income tax for single persons** corresponding to benchmark jobs covered in the enquiry. They do not cover the situation of non-resident<sup>8</sup> or expatriate staff, which is the object of a dedicated study in the present review<sup>9</sup>. Similarly, data for industry/private sector firms are rates applied to nationals employed in their home country and not rates applied to these firms’ expatriate personnel.

<sup>7</sup> CERN/TREF/261

<sup>8</sup> As defined in Article R II 1.35 of the Staff Regulations

<sup>9</sup> CERN/TREF/275

**Table 4a – Industry/Private Sector - CERN=100 (single residents), Median of markets**  
benchmarks for Mechanic up to Senior Engineer/Applied Physicist

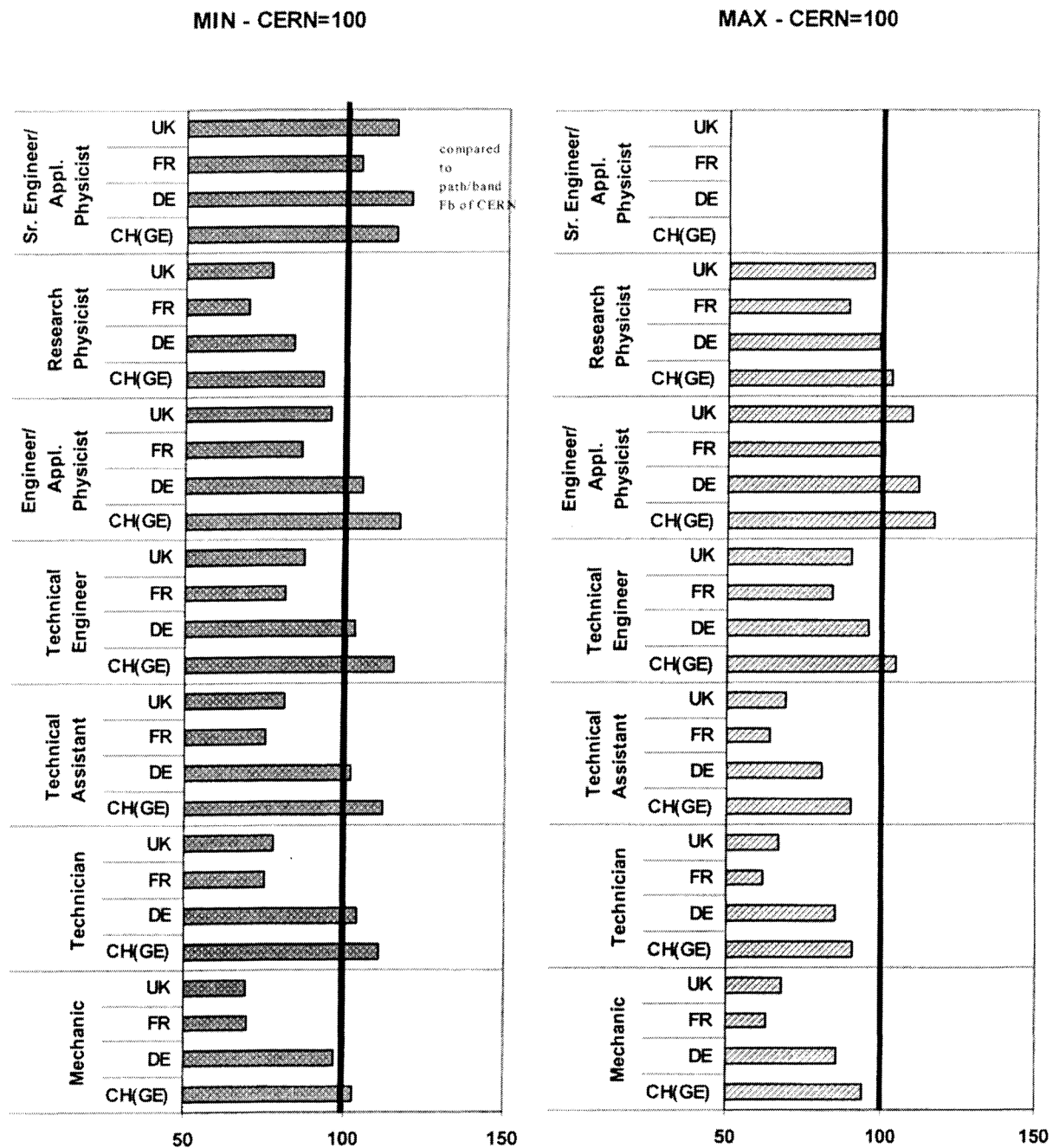
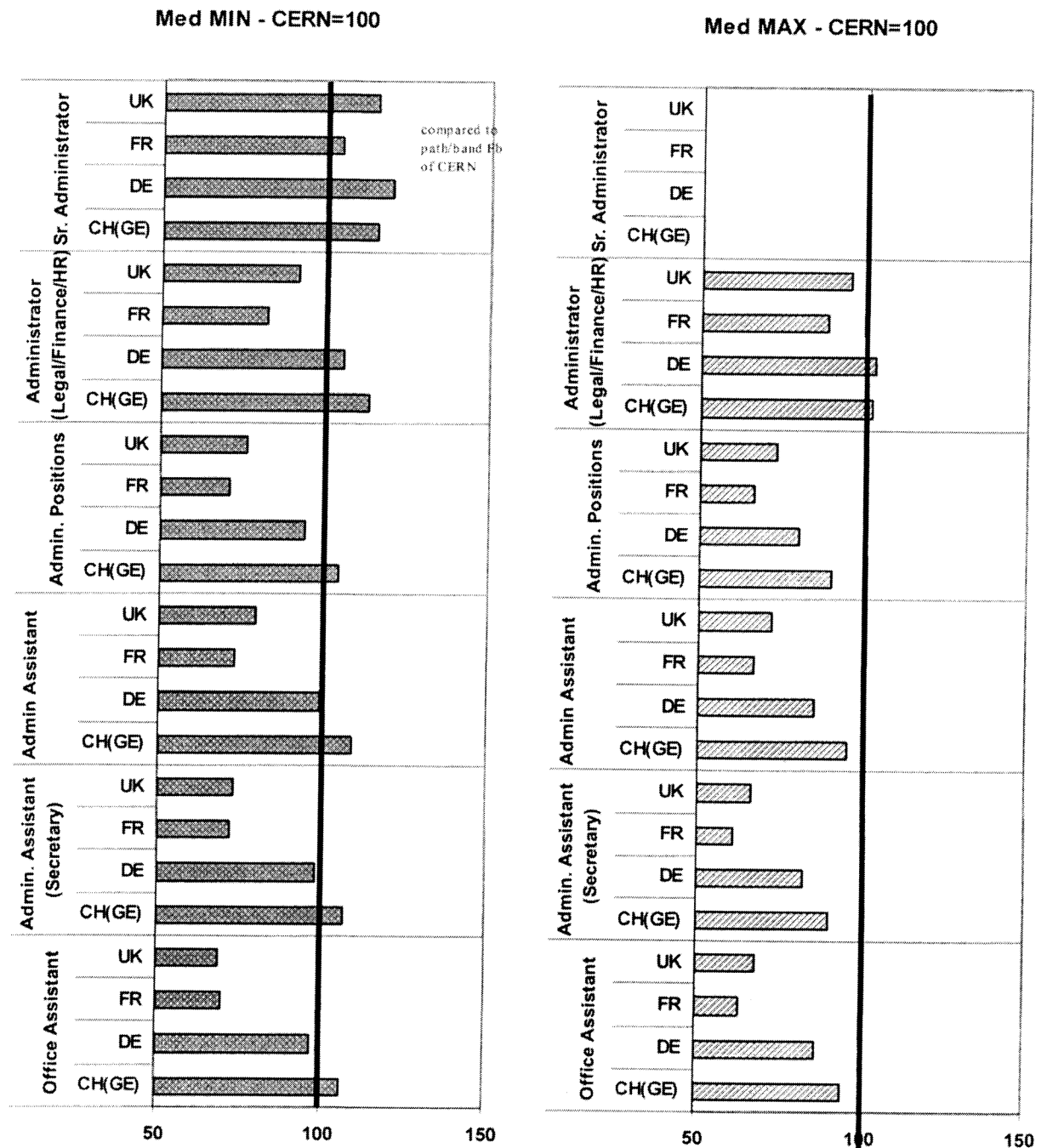
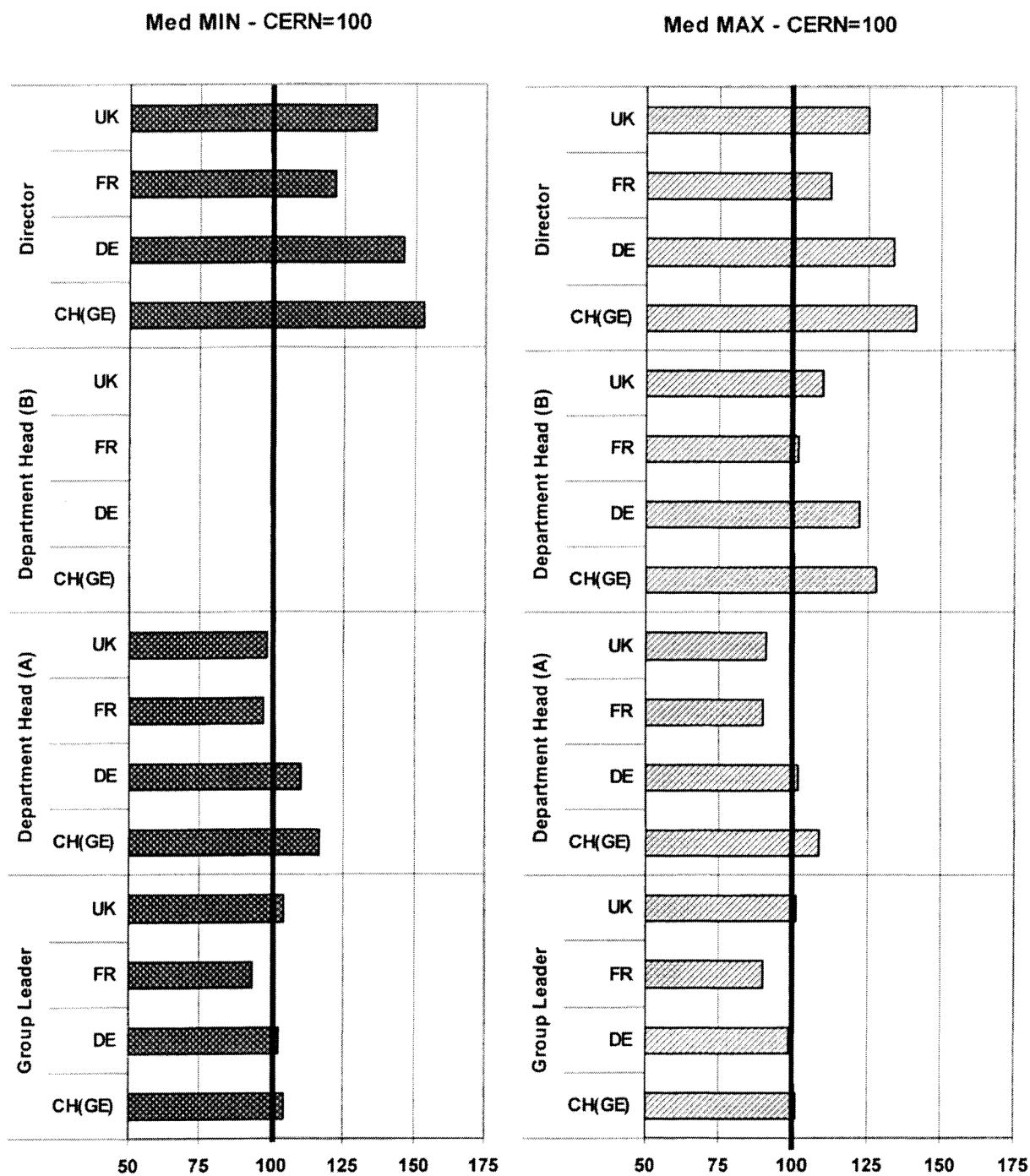


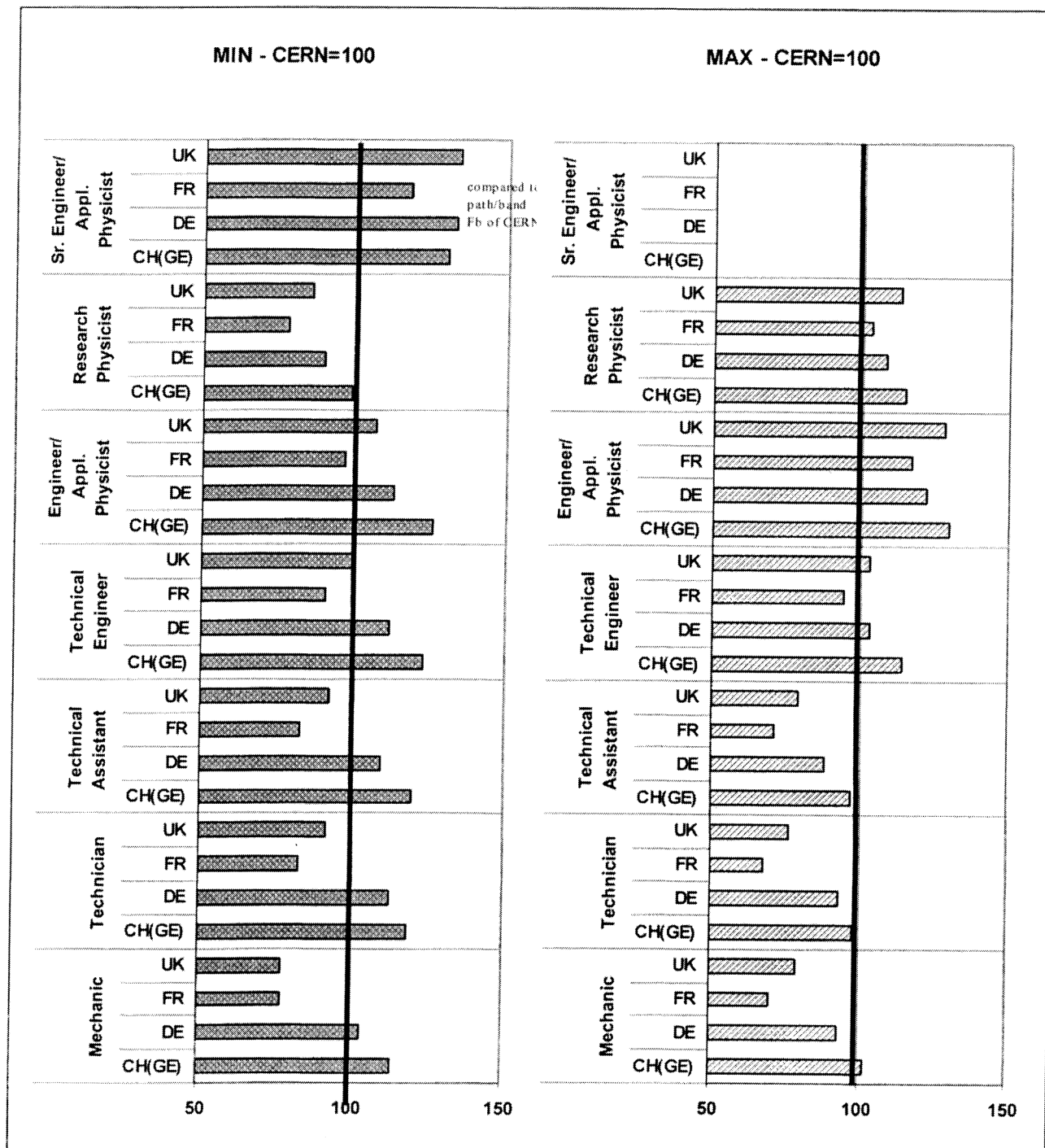
Table 4b – Industry/Private Sector - CERN=100 (single residents), Median of markets - benchmarks for Administrative jobs



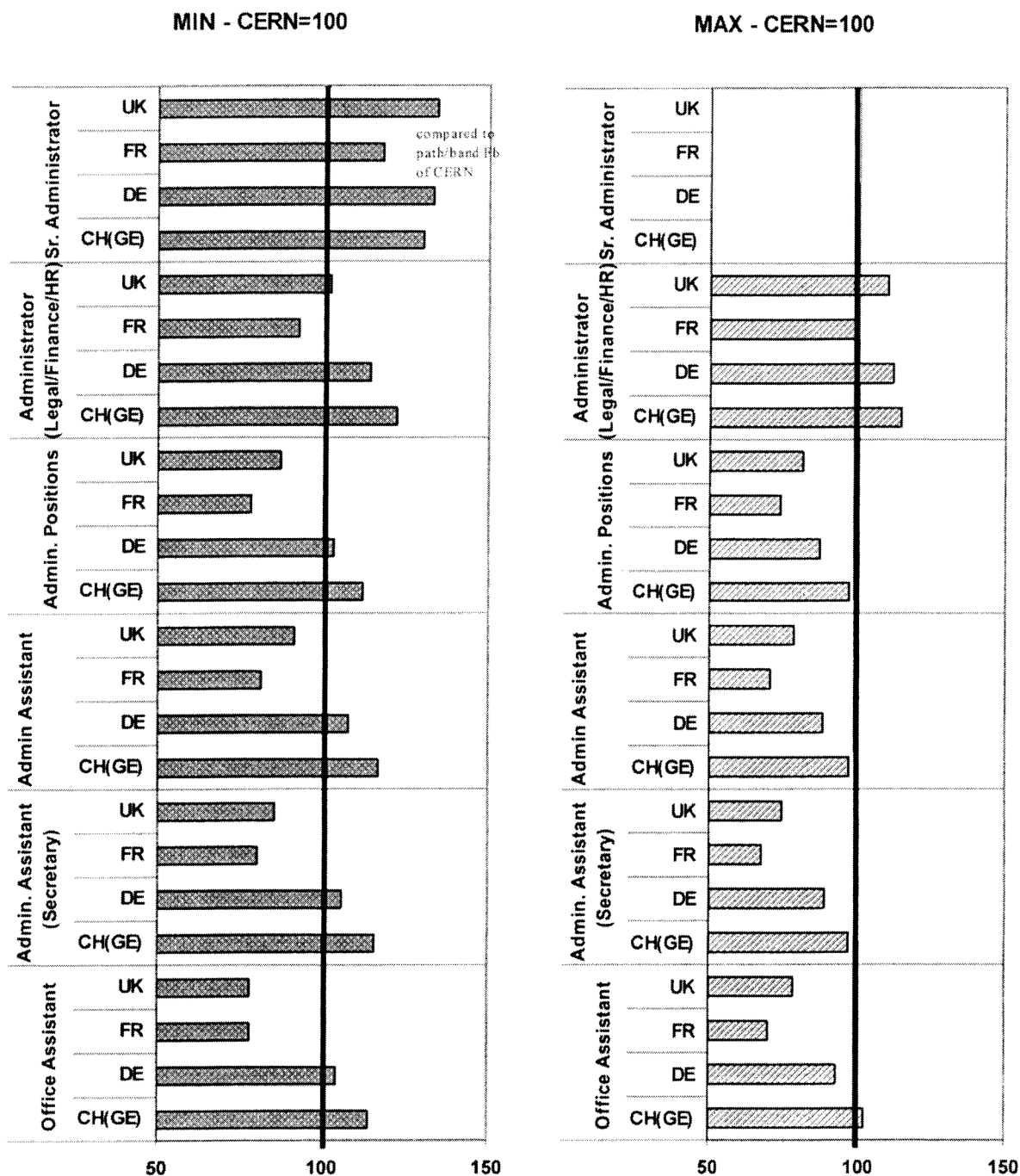
**Table 4c – Industry/Private Sector - CERN=100 (single residents), Median of markets - benchmarks for Executive positions - Group Leader up to Director**



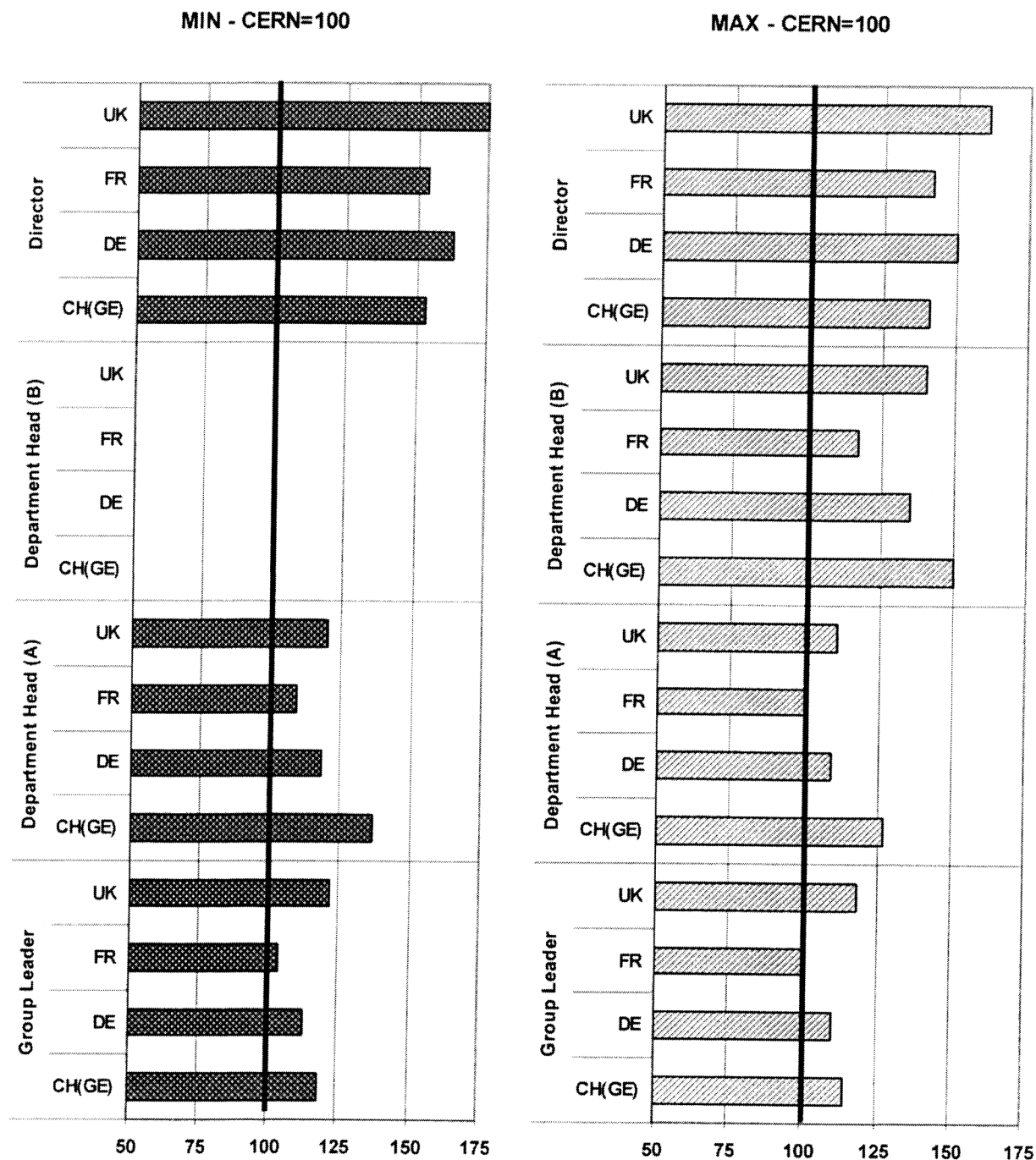
**Table 4d – Industry/Private Sector - CERN=100 (single residents), 3<sup>rd</sup> Quartile of markets**  
 benchmarks for Mechanic up to Senior Engineer/Applied Physicist



**Table 4e -Industry/Private Sector CERN=100 (single residents), 3<sup>rd</sup> Quartile of markets**  
 benchmarks for Administrative jobs



**Table 4]- Industry/Private Sector -CERN=100 (single residents), 3<sup>rd</sup> Quartile of markets**  
 benchmarks for Executive positions - Group Leader up to Director



**Table 4g - European/International Organizations - CERN=100 (single residents)**

benchmarks for Mechanic up to Senior Engineer/Applied Physicist

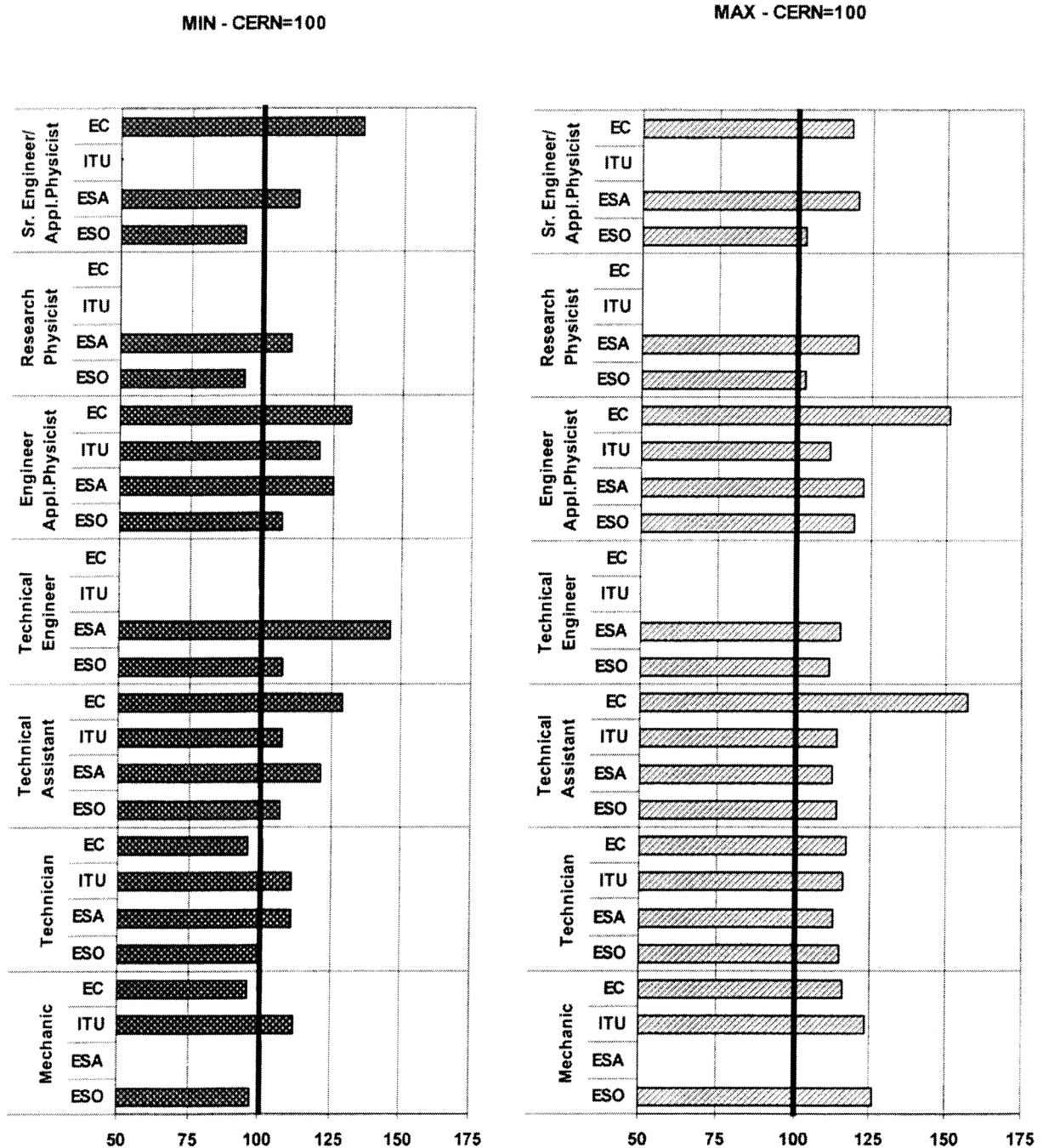
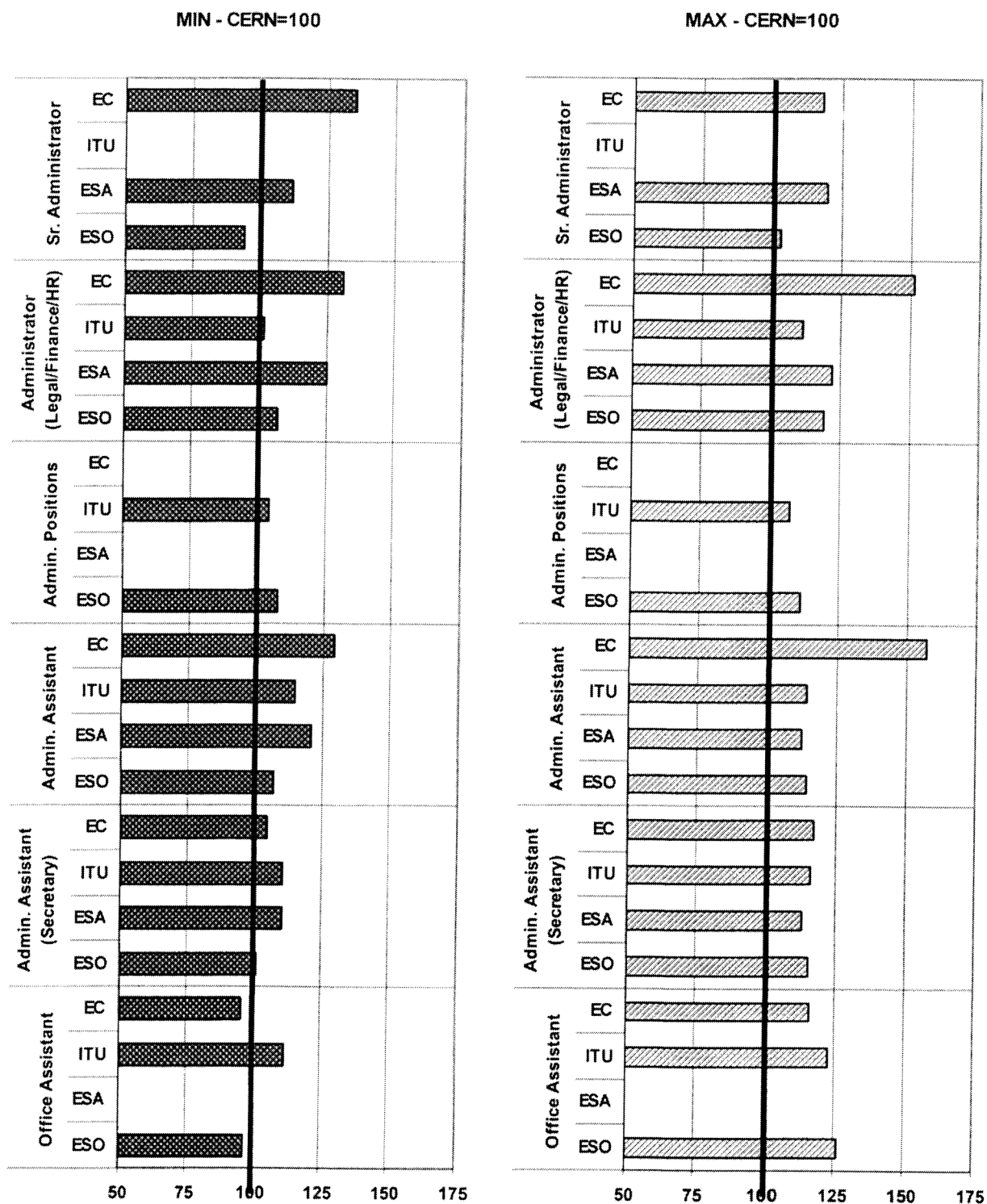


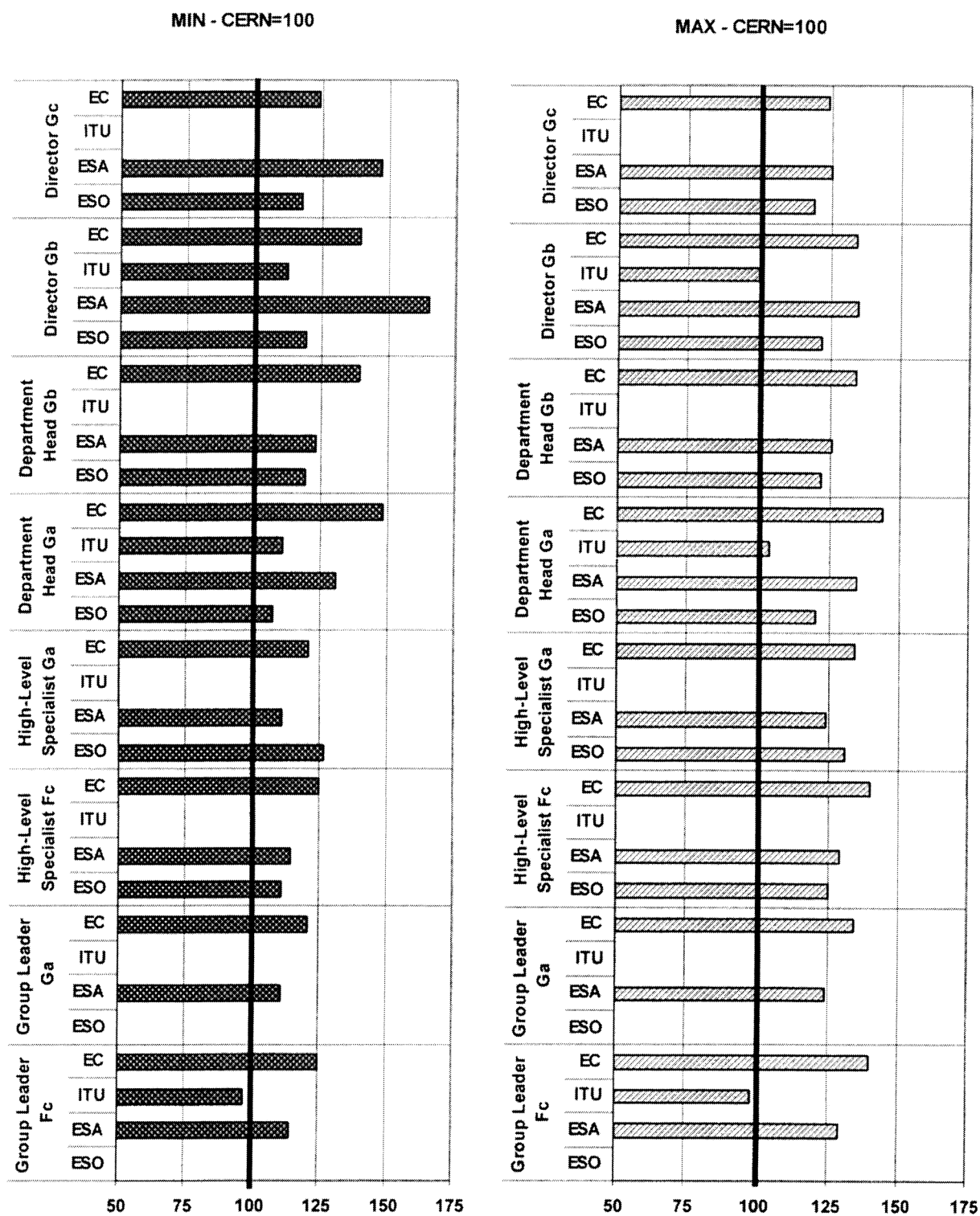
Table 4h - European/International Organizations - CERN=100 (single residents)

benchmarks for Administrative jobs



**Table 4i - European/International Organizations - CERN=100 (single residents)**

benchmarks for Executive positions - Group Leader up to Director



**Table 4j** – National Laboratories / Public Services- CERN=100 (single residents)

benchmarks for Mechanic up to Senior Engineer/Applied Physicist

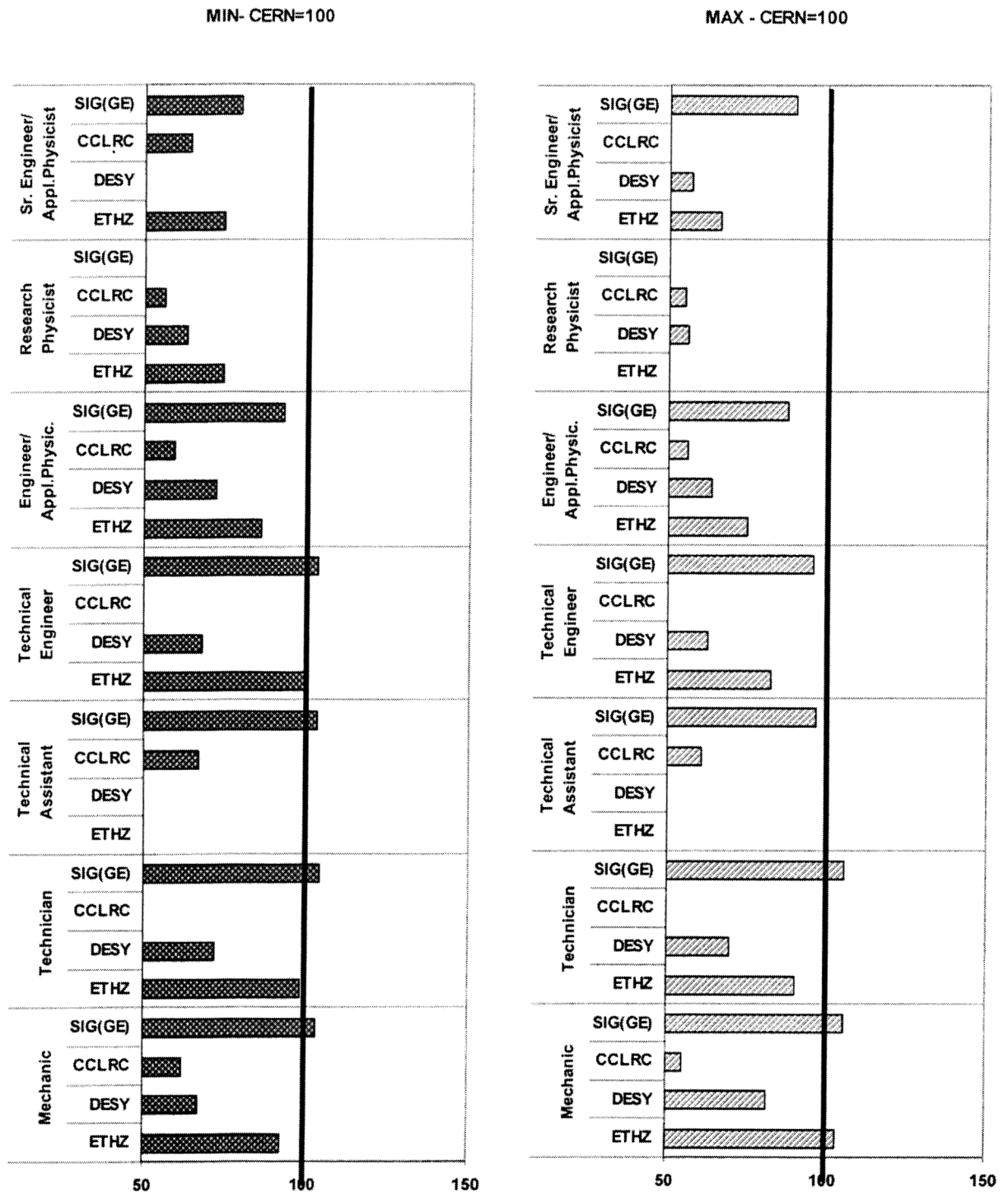
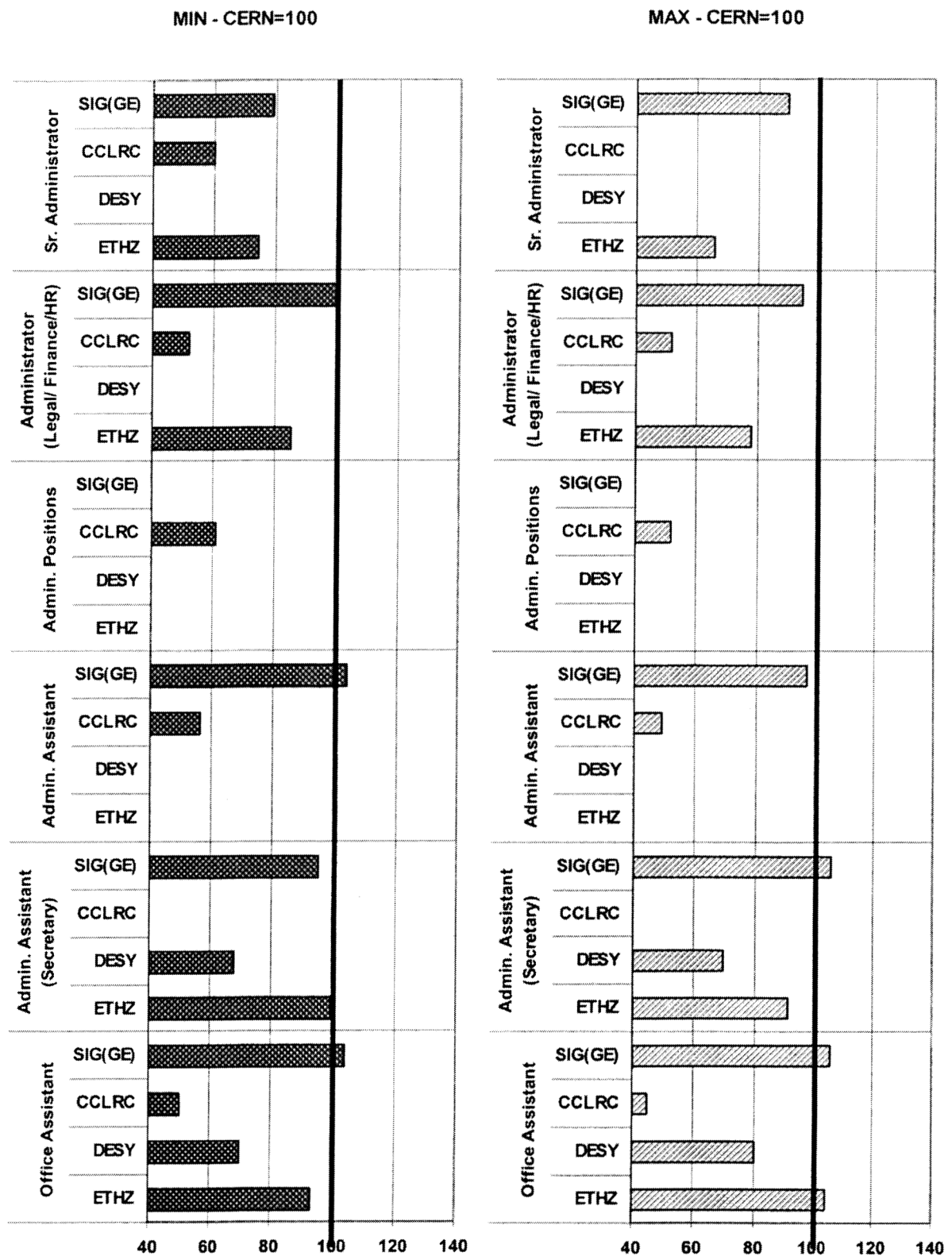


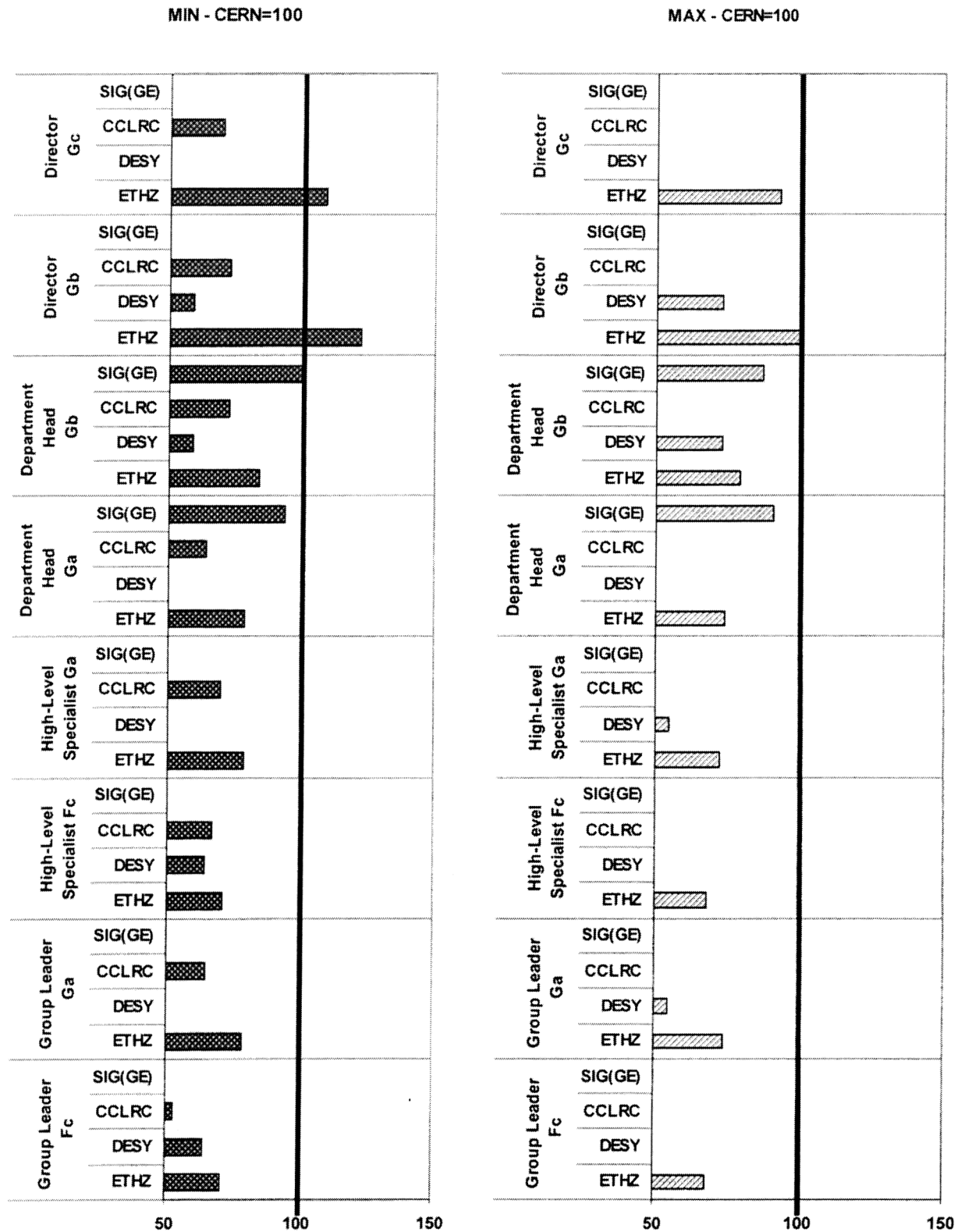
Table 4k – National Laboratories / Public Services- CERN=100 (single residents)

benchmarks for Administrative jobs



**Table 41 – National Laboratories / Public Services- CERN=100 (single residents)**

benchmarks for Executive positions - Group Leader up to Director



3.9 It is to be noted that any survey of this type has an inherent confidence or uncertainty margin. This is recognised by reputed experts who rarely claim less than a global 10% margin. Considering only the remuneration side of this enquiry, comparisons are difficult enough to evaluate to a high degree of precision in a national context, particularly between the public and private sectors. In the context of international comparisons, additional complexities arise due to factors such as deduction of income tax and social security contributions applied in various systems, as well as different purchasing powers, standards of living and life-styles in the respective countries. On the other hand, these margins are generally more limited in areas such as the first part of careers, the more 'classical' professions and non-managerial positions, and various cross-checks are applied to limit uncertainty margins as much as possible.

#### **4— Comparisons of salary movements - results of the enquiry**

4.1 The 5-Yearly Review procedure provides for comparison of movements of salaries over the reference period and, in particular, of real net salary movements (RNM) in civil services of Member States. This latter information, which is used to calculate the annual CERN salary index, and the RNM method have already been presented to TREF last November<sup>10</sup>. The method indicates salary movements above or below local cost-of-living, after deduction of local income tax and social security contributions. Results are presented in Table 5 below, which includes the CERN RNM applied from 2001 to 2005. It is recalled that data for EU Member States is provided by EUROSTAT<sup>11</sup> and for Switzerland by the Swiss Statistical Office.

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<sup>10</sup> CERN/TREF/259

<sup>11</sup> Statistical Office of the EC

**Table 5 - Real net movements of Civil Servants and CERN's salary index**

	Member State (June <i>n-2</i> - June <i>n-1</i> )	Weighting [%]	Applied as of 1 January					Cumulative
			2001	2002	2003	2004	2005	
i	Austria	2	*100.0	97.6	98.9	101.7	**100.5	98.7
ii	Belgium	6	97.9	101.5	103.4	101.5	99.4	103.6
iii	France	50	99.7	99.8	100.0	100.4	99.1	98.9
iv	Germany	10	99.6	100.0	101.3	100.7	99.1	100.7
v	Italy	10	99.0	101.7	99.2	103.3	97.7	100.8
vi	Netherlands	4	100.25	103.5	98.5	99.9	96.6	98.6
vii	Spain	3	*100.0	97.5	98.5	101.4	99.0	96.4
viii	Sweden	2	*100.0	98.7	100.3	101.0	*100.0	100.0
ix	United Kingdom	13	101.0	102.6	102.5	99.7	99.4	105.3
x	Total	100	99.7	100.5	100.5	100.7	99.0	100.3
xi	Switzerland		99.3	100.4	100.7	100.1	100.2	100.7
xii	CERN real net movement		#99.2	100.4	100.6	100.4	99.6	100.2

# The net granted salary index for 2001 was 99.2 according to the previous formula instead of 99.5 of the new formula.

\* Not available.

\*\* The data for movement of net salaries of civil servants for Austria has been taken from "Bundesgesetzblatt", dated 30.12.2003, since EUROSTAT does not provide this information any longer. The reference dates are January 2003 - January 2004.

4.2 The same RNM approach – taking account of deductions of social security contributions on salaries and of income tax - can also be applied on the basis of data provided by international comparator organizations. This information is being collected and compiled and will be presented to TREF as soon as possible. However, wherever data from the enquiry is expressed in gross salary terms, which is the case for national laboratories, public services and firms in the private sector, drawing up RNMs is a much more cumbersome and time-consuming process.

4.3 As regards industry/private sector, HAY has provided data for three job levels<sup>12</sup> relating to its annual general market surveys (i.e. not specific to hi-tech industry) in the four countries in CERN's enquiry. This data concerns gross basic salaries and is being processed to arrive at figures net of local cost-of-living movements. This approach provides reliable indications, without taking into account, however, other variations due, in particular, to any changes in tax brackets applicable to the salaries concerned.

4.4 As regards national laboratories, the approach adopted in the previous 5-Yearly Review was to consider that the data provided by EUROSTAT for national civil services was

<sup>12</sup> Technical Assistant, Engineer, Group Leader.

a sufficient indication of RNMs over the reference period, the more so since the movements had been rather moderate. This remains the case for the current review, as observed in Table 5 above (i.e. total cumulative RNM for Member States data = 100.3, for Swiss data = 100.7 and for CERN data = 100.2).

4.5 Confidence or uncertainty margins are considered to be relatively limited for comparisons of salary movements as this approach does not generate the difficulties intrinsic to conversion between different currencies. On the other hand, it would not be feasible to compute such data for the various benchmark jobs examined in the current review. Consequently, only average situations could be examined. Furthermore, the RNM method is not readily adaptable to taking account of 'one-off' or lump sum salary increases.

## **5— Further information to TREF concerning the data collection enquiry**

5.1 In addition to the information already presented, data on salary comparisons based on 2004 rates will have to be adapted to take account of adjustments in 2005, wherever they have been applied by the various organizations/employers. This matter is under examination and will be presented to TREF as soon as possible.

5.2 Further information from the data collection enquiry concerning other topics is provided at the present meeting of TREF in separate documents on: Family & Child Allowances<sup>13</sup>, Education expenses<sup>14</sup>, Crèche facilities<sup>15</sup>, Non-Resident Allowance<sup>16</sup>, Definition of Family/Spouse and Maternity and Parental Leave<sup>17</sup>, and a Comparison of Working Time & Leave<sup>18</sup>. Three other issues are foreseen in the work planning of TREF for its next meeting, namely: a dedicated report on the implementation of Local Staff, information concerning Career Structures and Advancement systems, and a discussion on future review methods.

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<sup>13</sup> CERN/TREF/272

<sup>14</sup> CERN/TREF/273

<sup>15</sup> CERN/TREF/274

<sup>16</sup> CERN/TREF/275

<sup>17</sup> CERN/TREF/265/Rev.

<sup>18</sup> CERN/TREF/269/Rev.

## 6— Concluding remarks

6.1 The present document outlines the approach followed to conduct the data collection enquiry for the current 5-yearly Review and provides a summary of resulting data regarding salary comparisons and movements over the reference period, as well as a reminder of other main items on which results are to be reported to TREF at its present meeting.

6.2 As regards the analysis of data to be conducted following this enquiry, attention is drawn to the corresponding text of the document 'Preparation for the 5-Yearly Review 2005 and Work Planning of TREF'<sup>19</sup>, approved by the Council in June 2004. That document determined the various items to be covered by the review, as well as the list of comparator organizations/employers from which data were to be collected. For the analysis and use of the remuneration data collected, it was agreed to focus on the most competitive employment terms in the area constituting CERN's main recruitment pool.

6.3 CERN's analysis of the recruitment situation over the review period confirms that, as in former years, about two thirds of recruitments come from industry<sup>20</sup>.

\* \* \* \*

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<sup>19</sup> CERN/2567, CERN/FC/4824

<sup>20</sup> CERN/TREF/264, paragraph 2e)

## **ANNEX 1 DATA COLLECTION QUESTIONNAIRE - TABLE OF CONTENTS**

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**ANNEX 2****BENCHMARK JOBS** *(alternatives shown in italics)*

Extract from CERN/2567, CERN/FC/4824

	<b>Title or position</b>
1	Mechanic (construction & fitting), <i>(maintenance &amp; repair), (machining)</i> Office Assistant.
2	Technician / Administrative Assistant, <i>Secretary</i>
3	Technical Assistant (Electronics), (Mechanics), <i>(Electricity), (Cryogenics), (Vacuum), (Radiation Protection), Designer (Mechanical).</i>
4	Technical Engineer (Computing), <i>(Electronics), (Mechanical)</i> , and some Administrative positions
5	Engineer (Electronics) / Applied Physicist, <i>Engineer (Electricity), (Cryogenics), (Vacuum), (Mechanics), (Programming)</i>
6	Physicist (Experimental Physics)... with PhD
7	Buyer / Procurement Officer, <i>Qualified Accountant, Administrator.</i>
8	Senior Engineer, Senior Applied Physicist or Senior Administrator
9	Group Leader / Project Leader / High level specialist
10	Department Heads / Heads of largest projects
11	Directors

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TRIPARTITE EMPLOYMENT CONDITIONS FORUM

Fifty-fourth Meeting

Geneva – 31 May & 1 June 2005

**ADDENDUM**

**RESULTS OF THE DATA COLLECTION ENQUIRY**

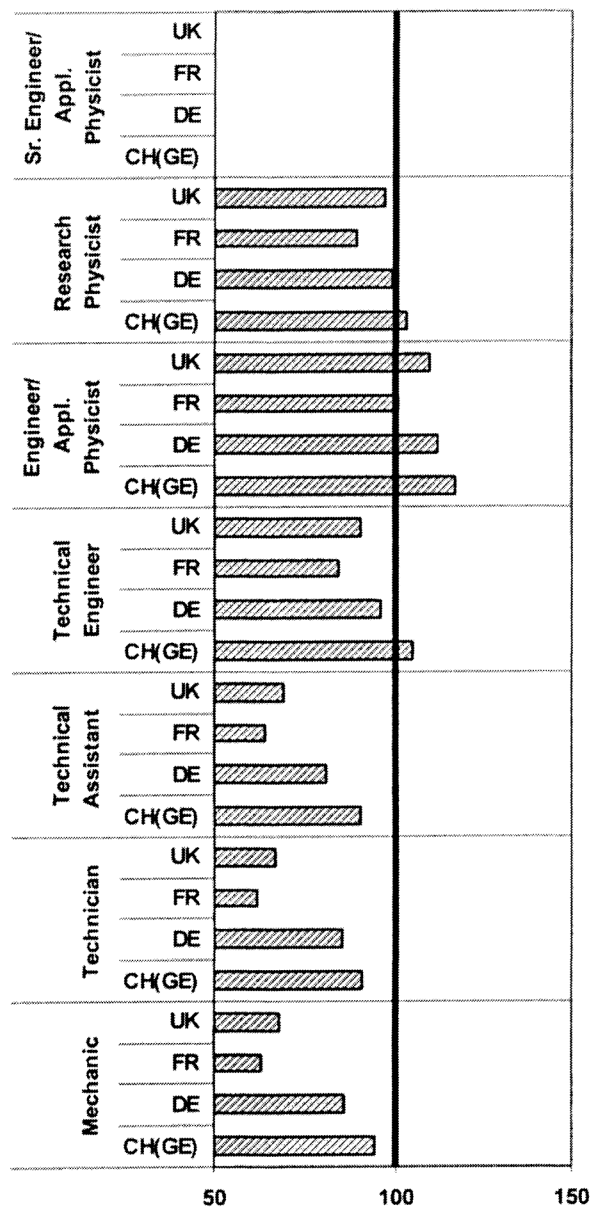
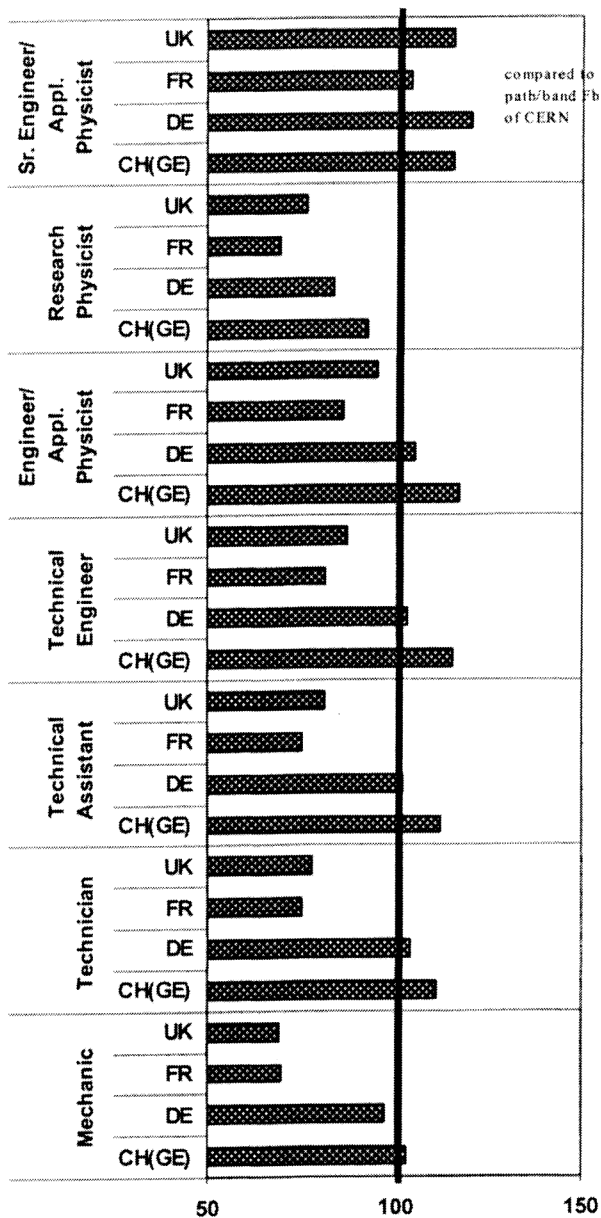
**- SALARY COMPARISONS-**

As agreed at the meeting of TREF on 31 May & 1 June, this document provides additional information on comparisons of salary levels set out in section 3 of CERN/TREF/276, concerning the United Nations Organization, Geneva and the Swiss Federal Public Service. This information is included in the attached Tables 4g, 4h & 4i concerning European/International Organizations, and Tables 4j, 4k & 4l concerning National Laboratories/Public Services.

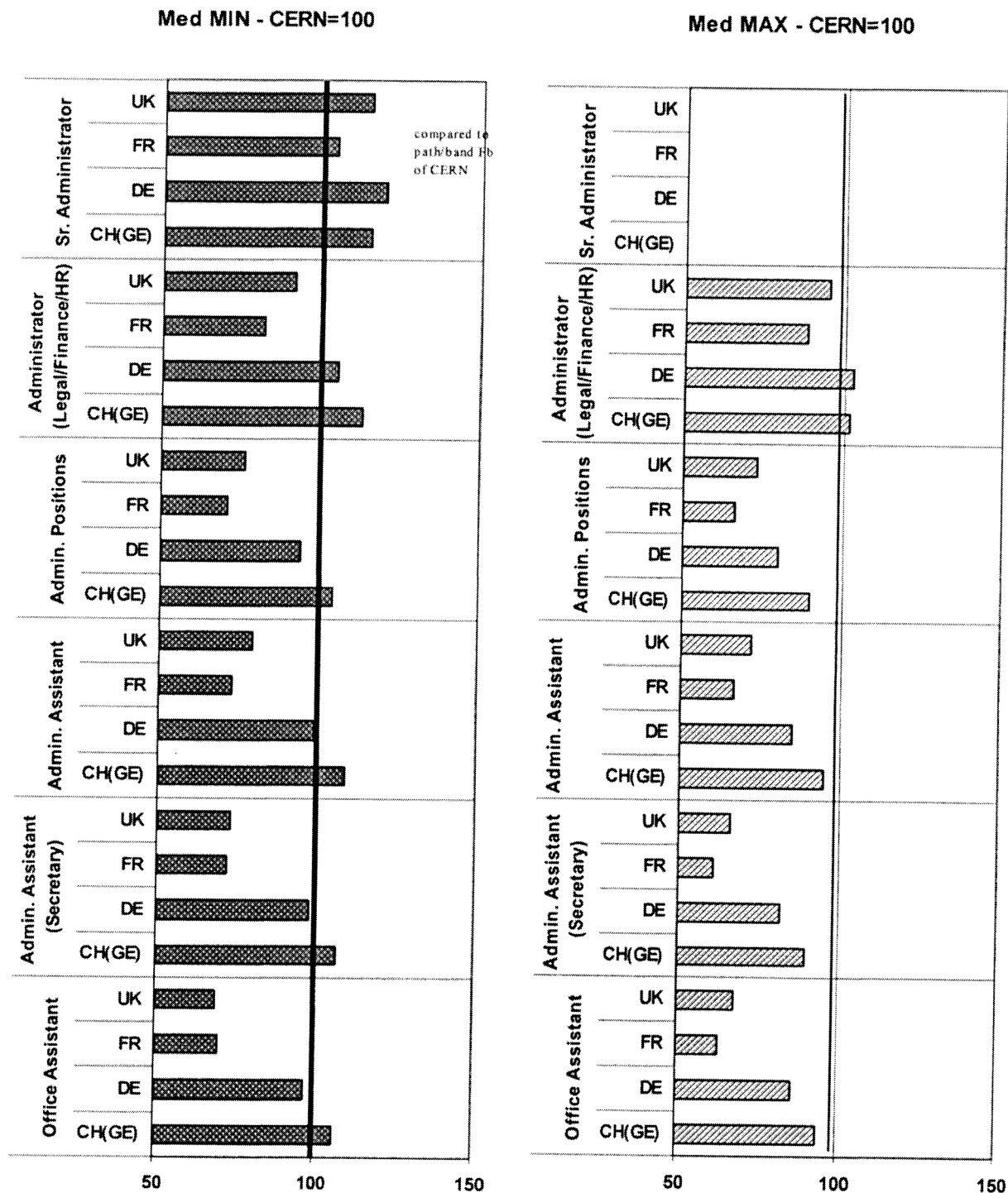
**Table 4a** Industry/Private Sector - CERN=100  
(single residents)  
Median of markets - benchmarks for Mechanic up to Senior  
Engineer/Applied Physicist

MIN - CERN=100

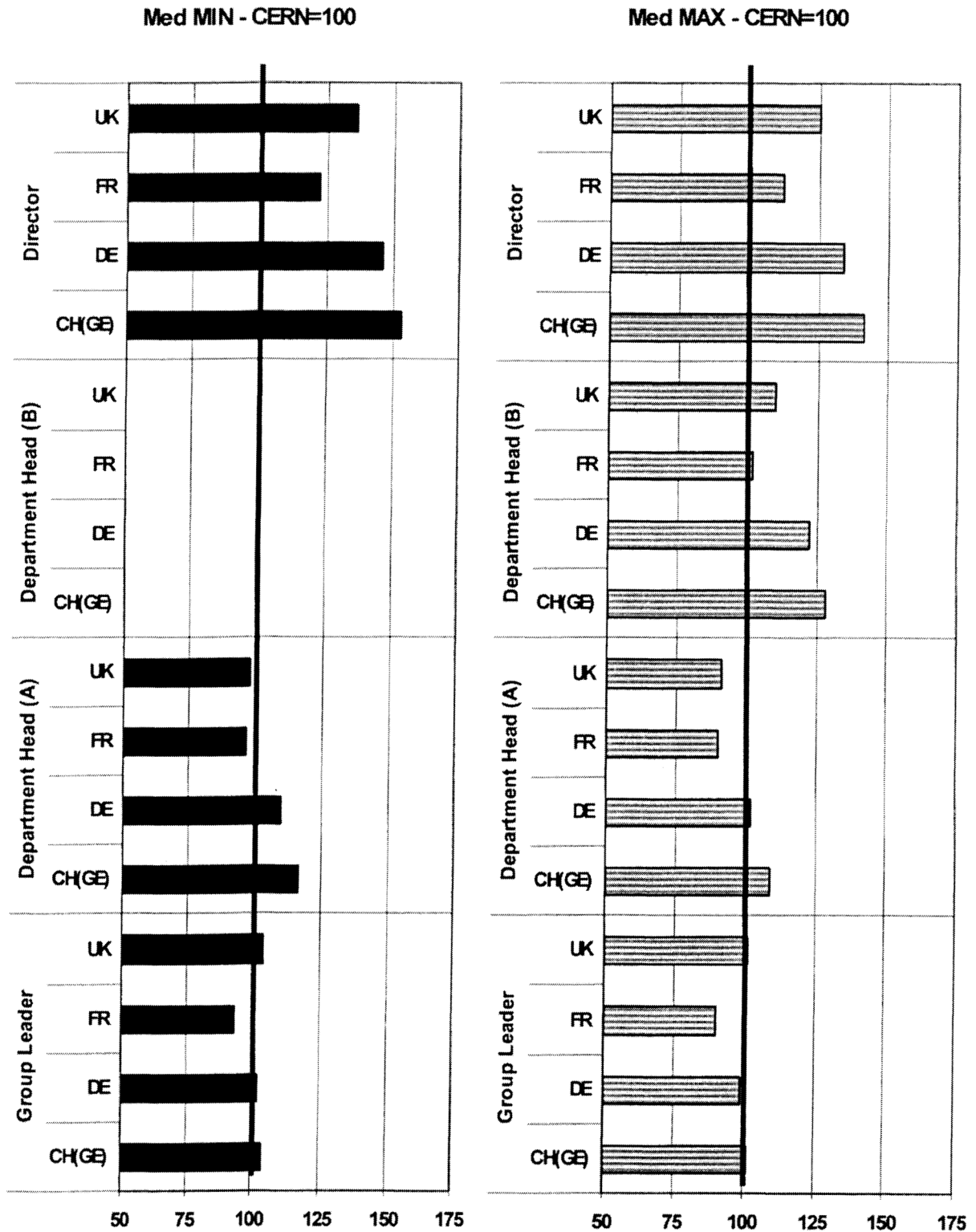
MAX - CERN=100



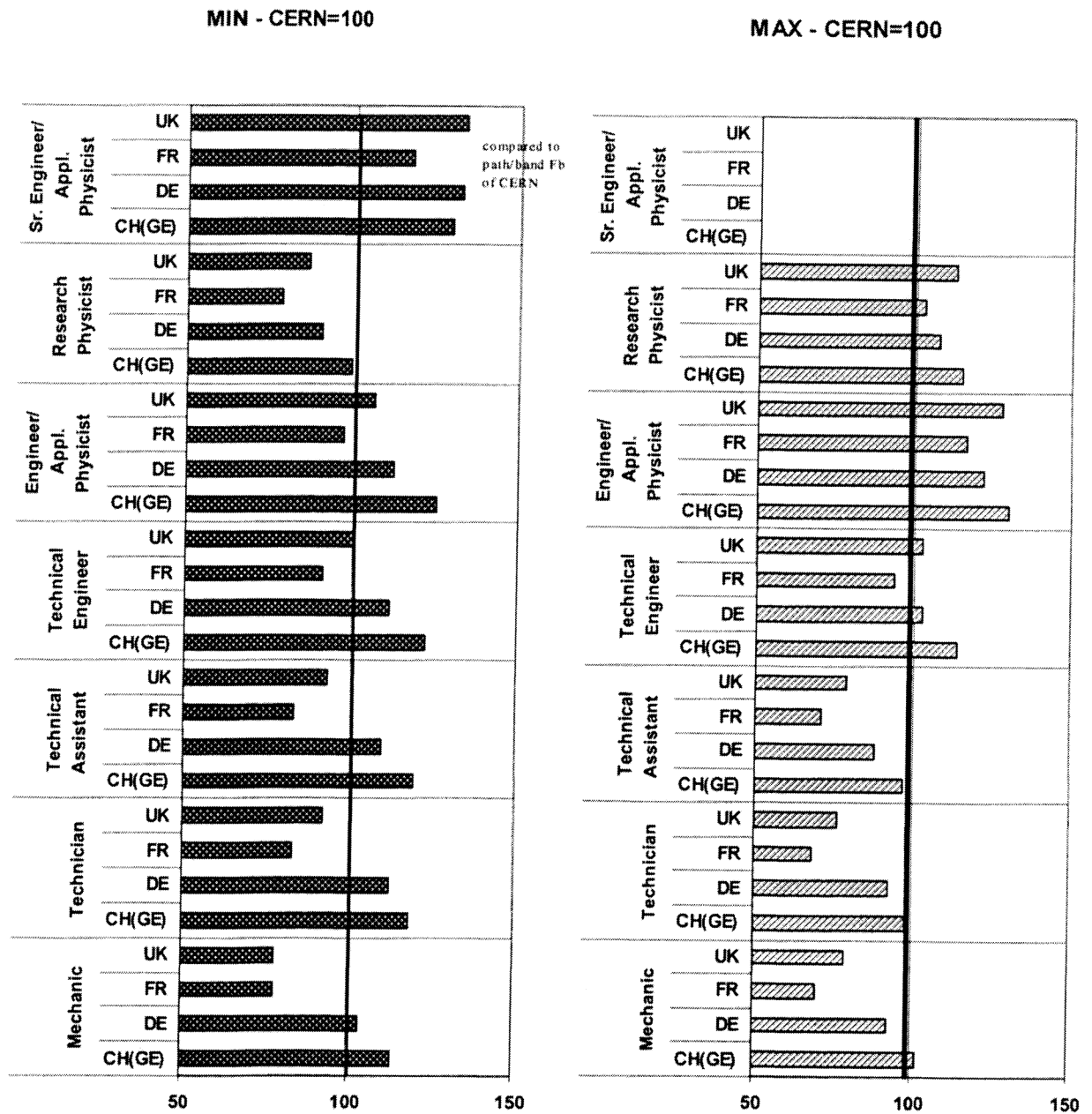
**Table 4b** Industry/Private Sector - CERN=100 (single residents)  
Median of markets - benchmarks for Administrative jobs



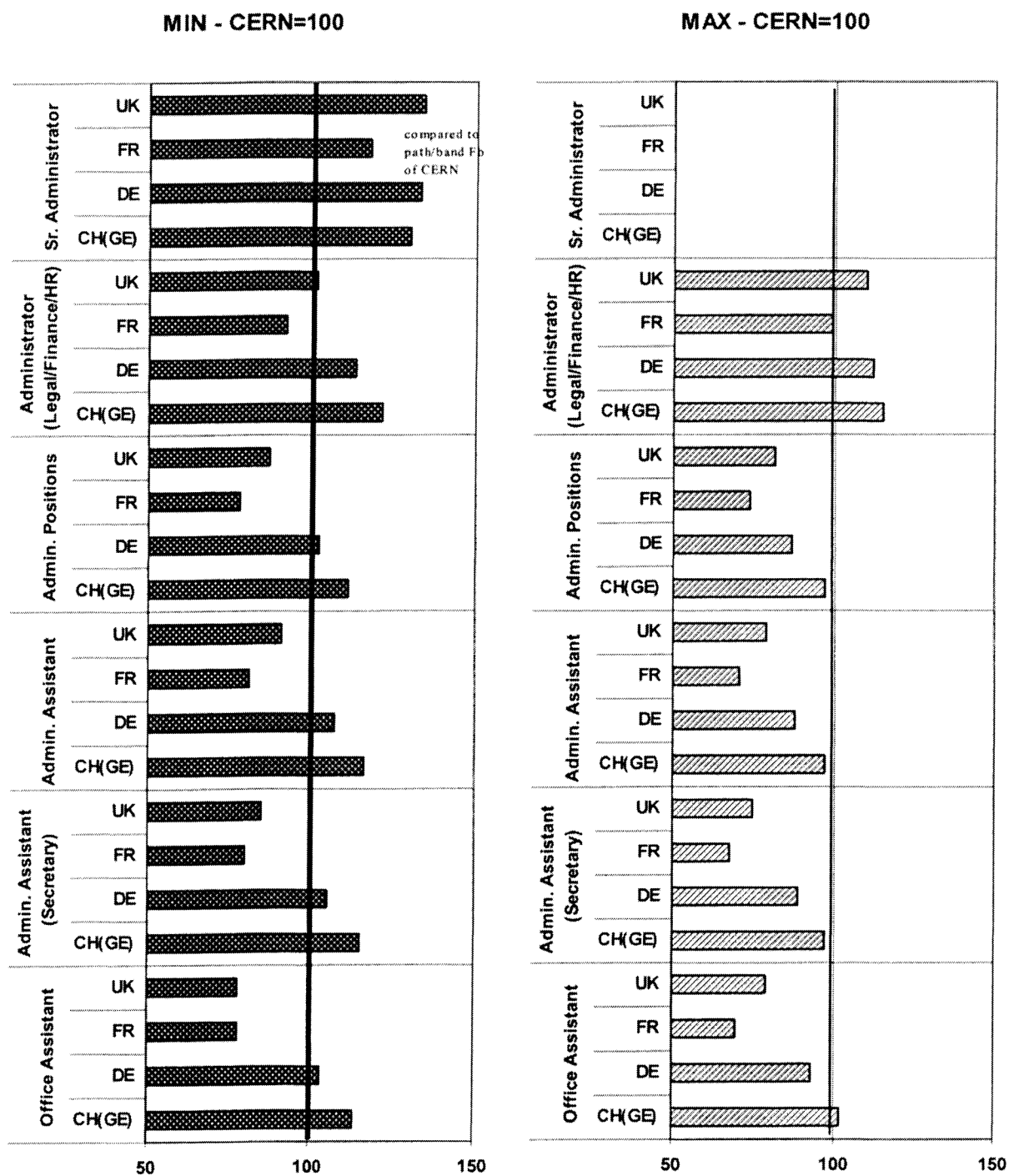
**Table 4c Industry/Private Sector - CERN=100 (single residents)**  
Median of markets - benchmarks for Executive positions - Group Leader up  
to Director



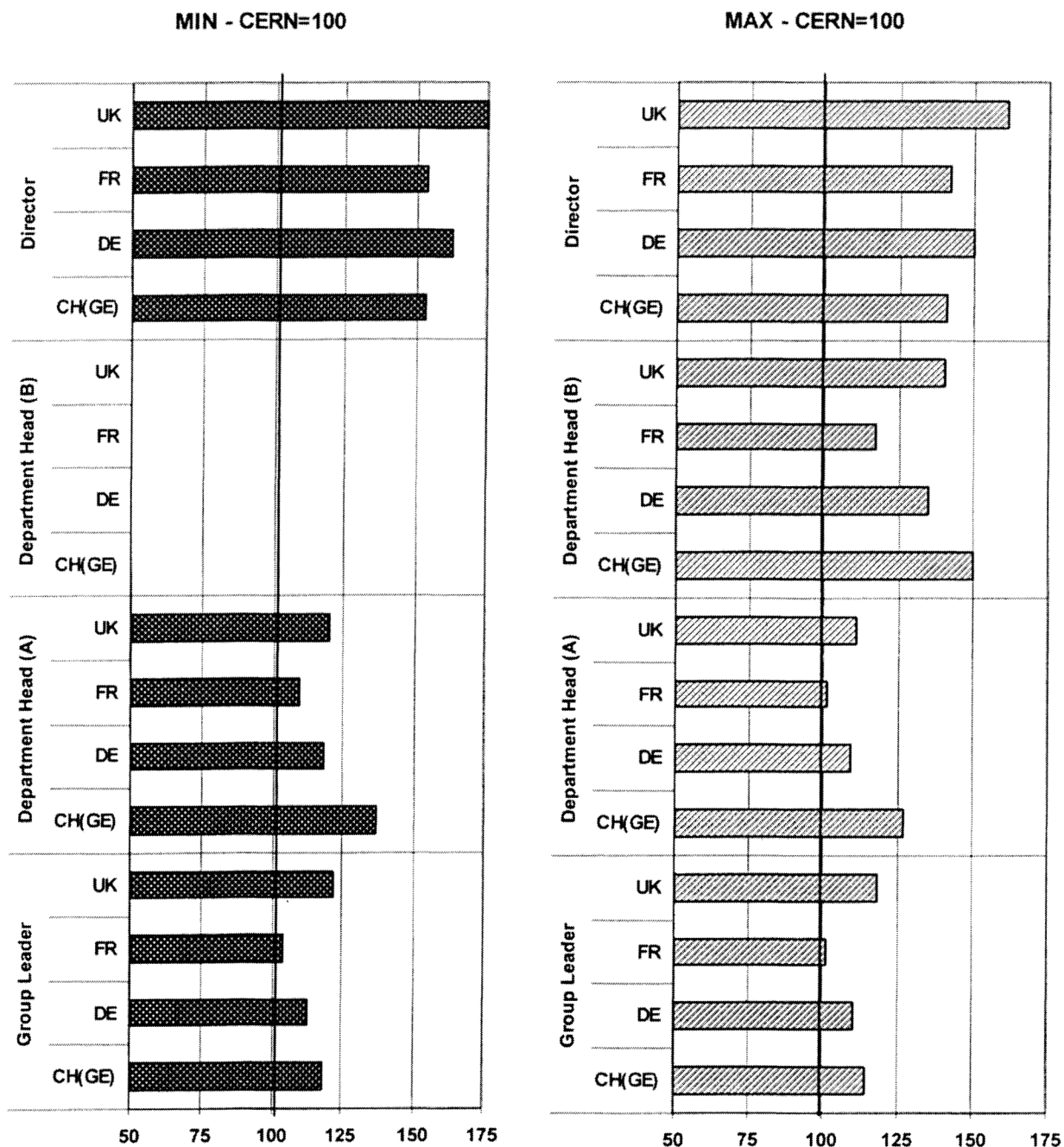
**Table 4d** Industry/Private Sector - CERN=100 (single residents)  
3rd Quartile of markets- benchmarks for Mechanic up to Senior  
 Engineer/Applied Physicist



**Table 4e** Industry/Private Sector CERN=100 (single residents)  
3rd Quartile of markets-benchmarks for Administrative jobs

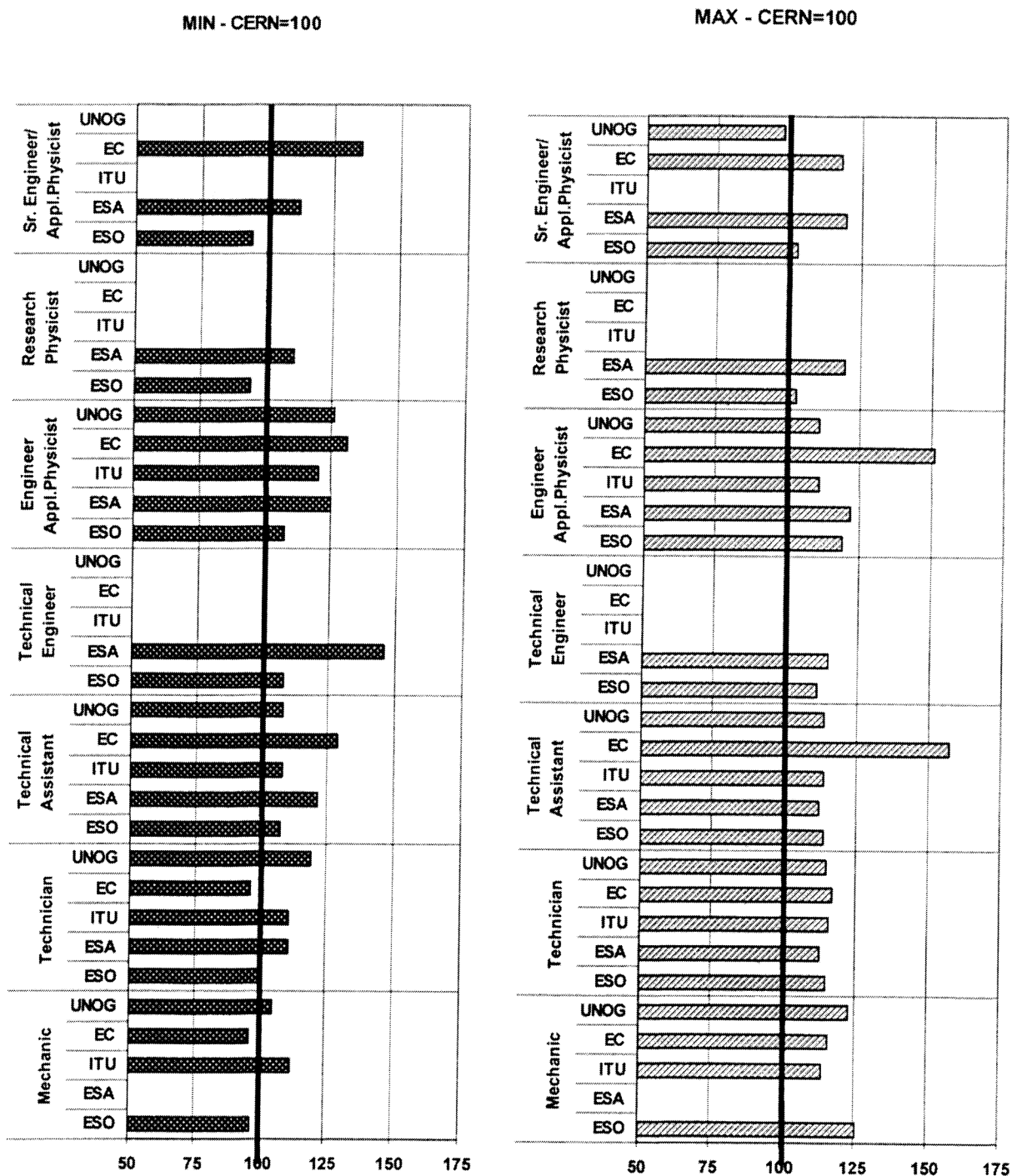


**Table 4f Industry/Private Sector - CERN=100 (single residents)**  
 3rd Quartile of markets benchmarks for Executive positions  
 - Group Leader up to Director



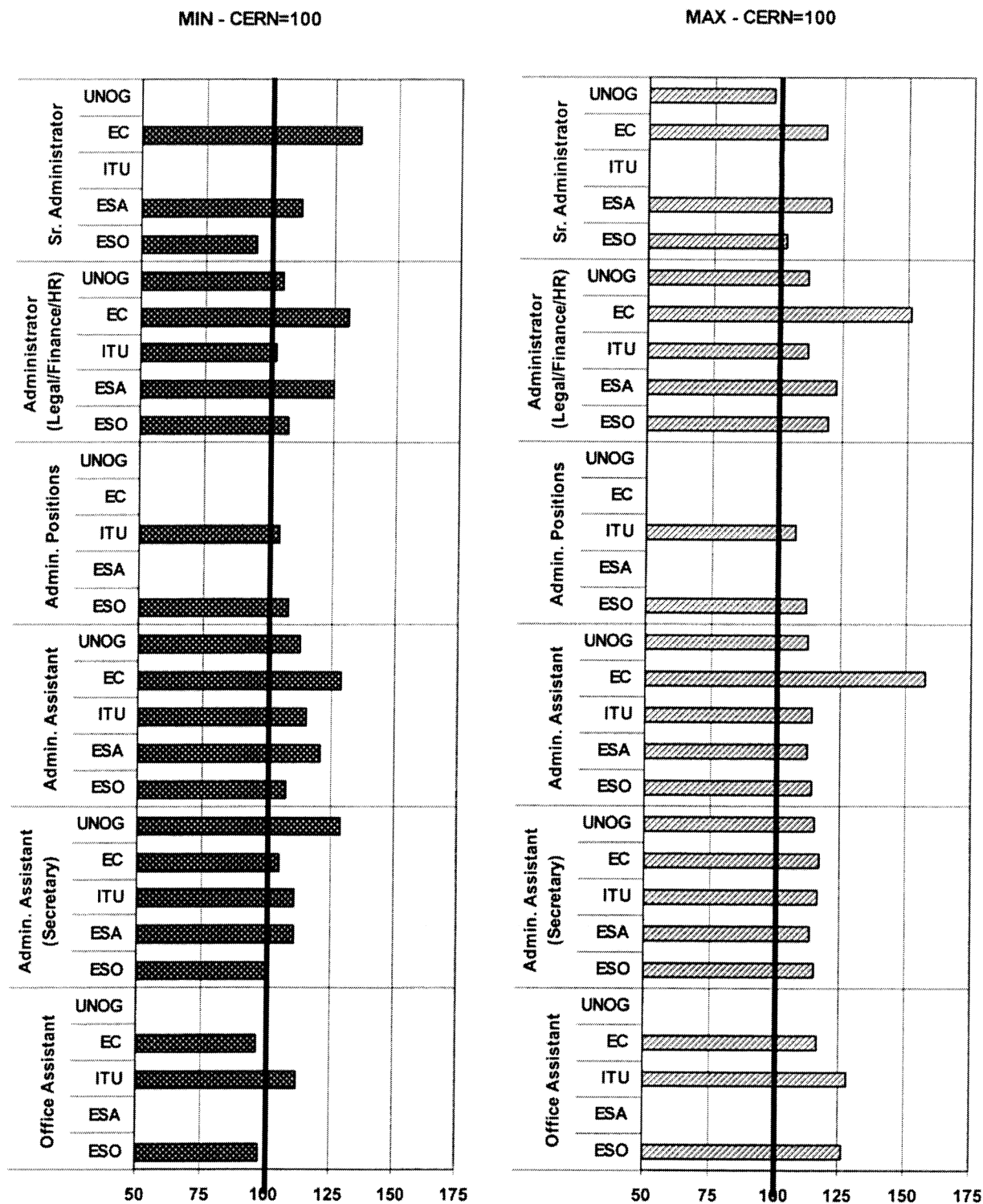
**Table 4g** - European/International Organizations - CERN=100 (single residents)

benchmarks for Mechanic up to Senior Engineer/Applied Physicist



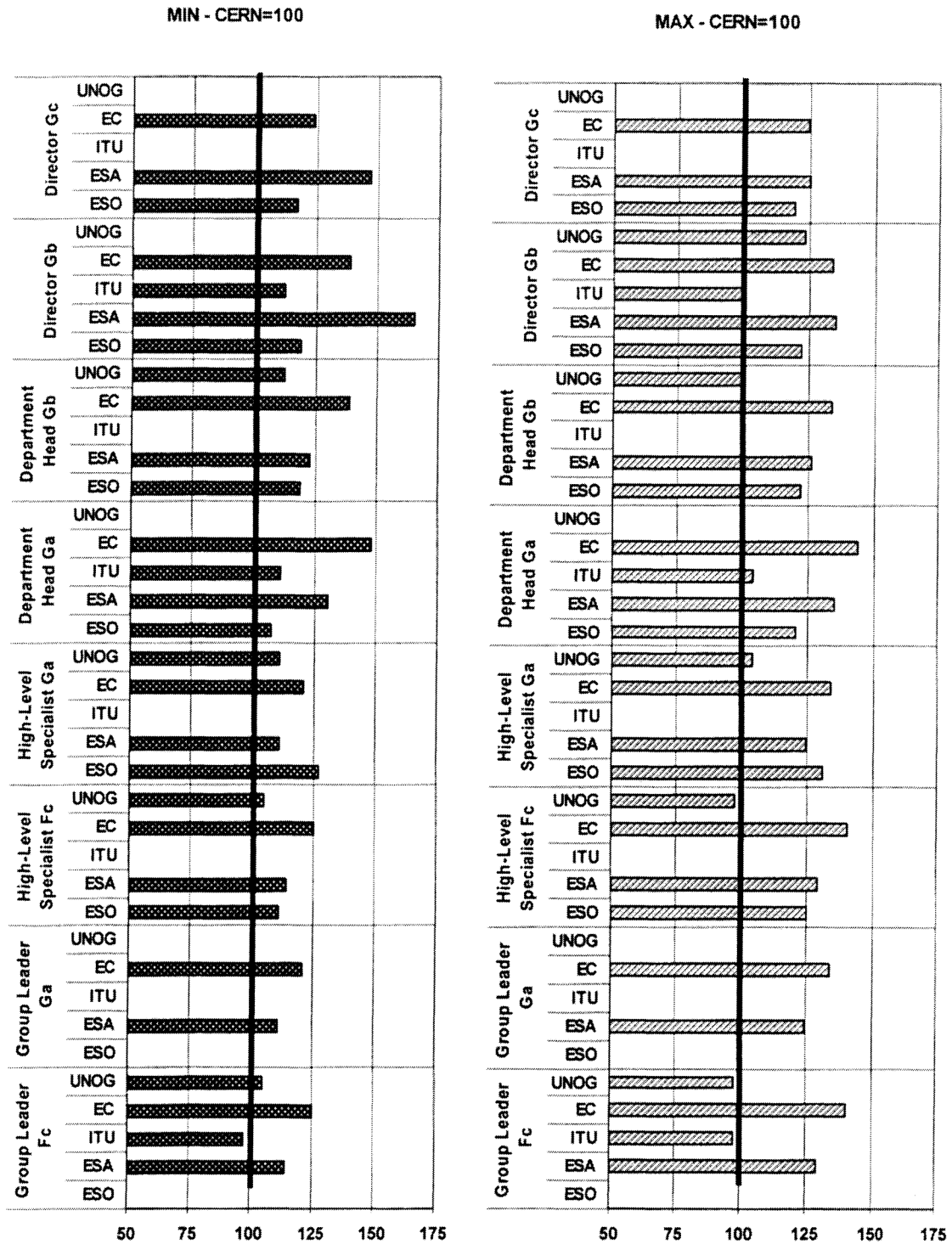
**Table 4h** - European/International Organizations - CERN=100 (single residents)

benchmarks for Administrative jobs



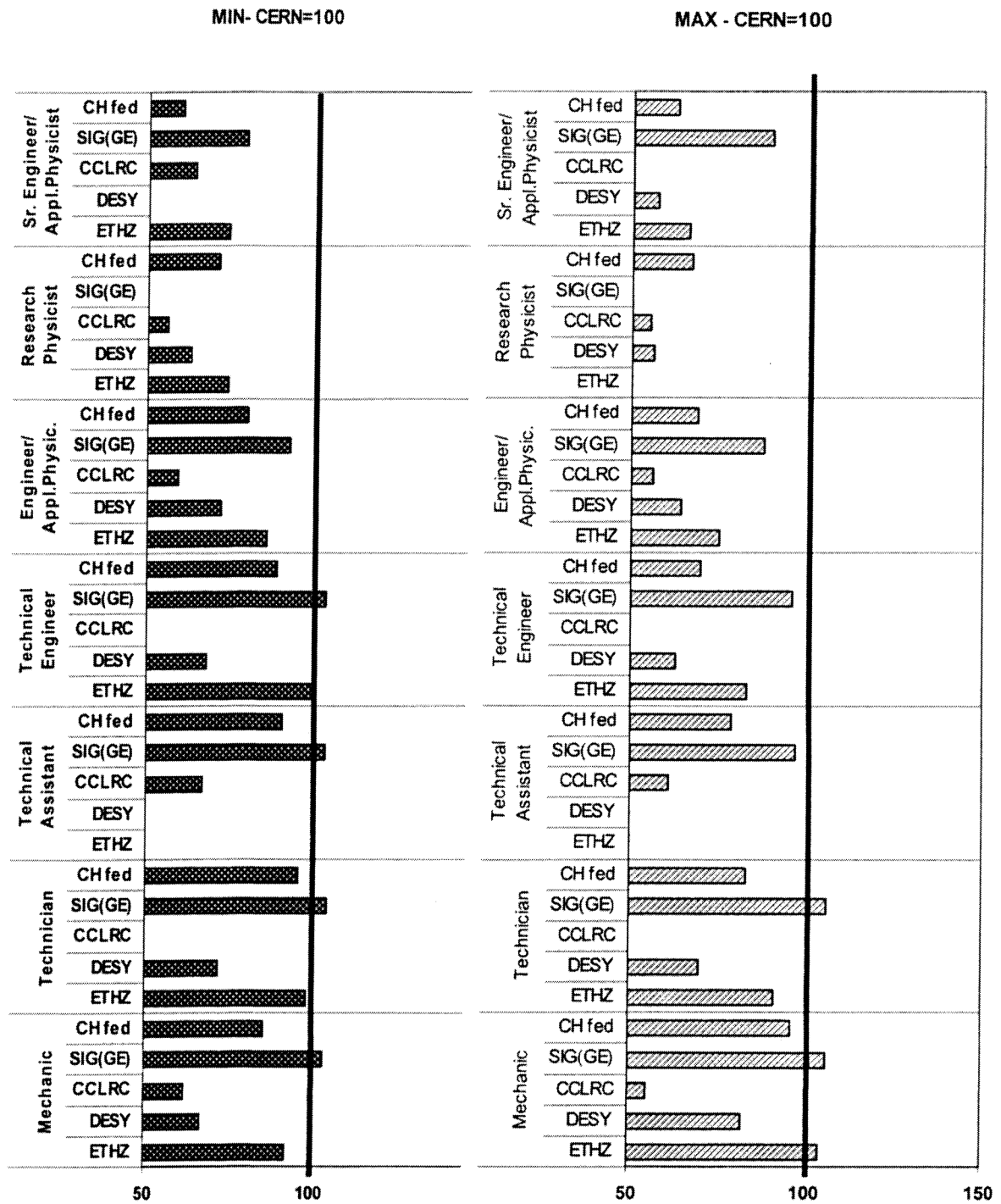
**Table 4i** - European/International Organizations - CERN=100 (single residents)

benchmarks for Executive positions - Group Leader up to Director



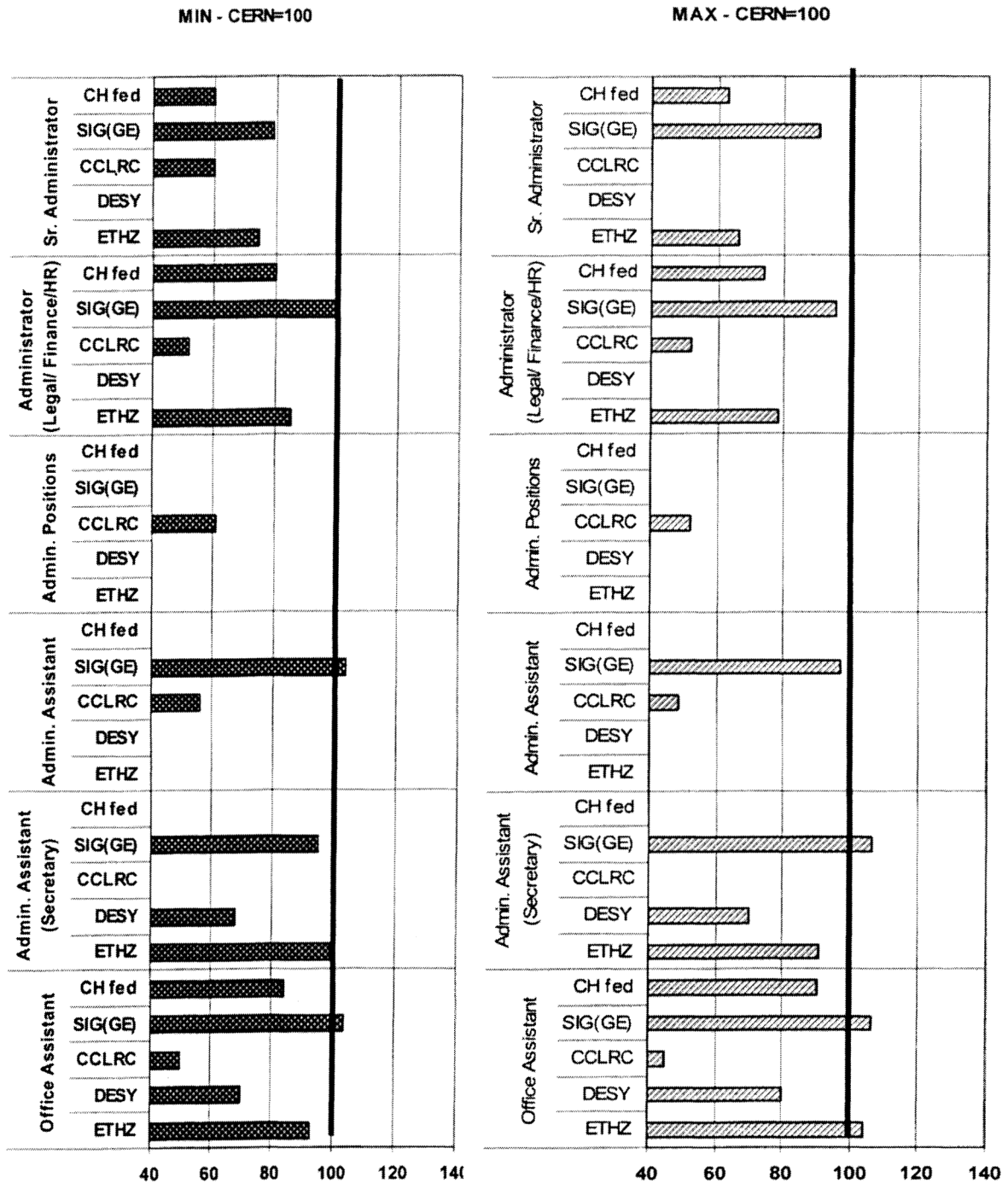
**Table 4j** – National Laboratories / Public Services- CERN=100 (single residents)

benchmarks for Mechanic up to Senior Engineer/Applied Physicist



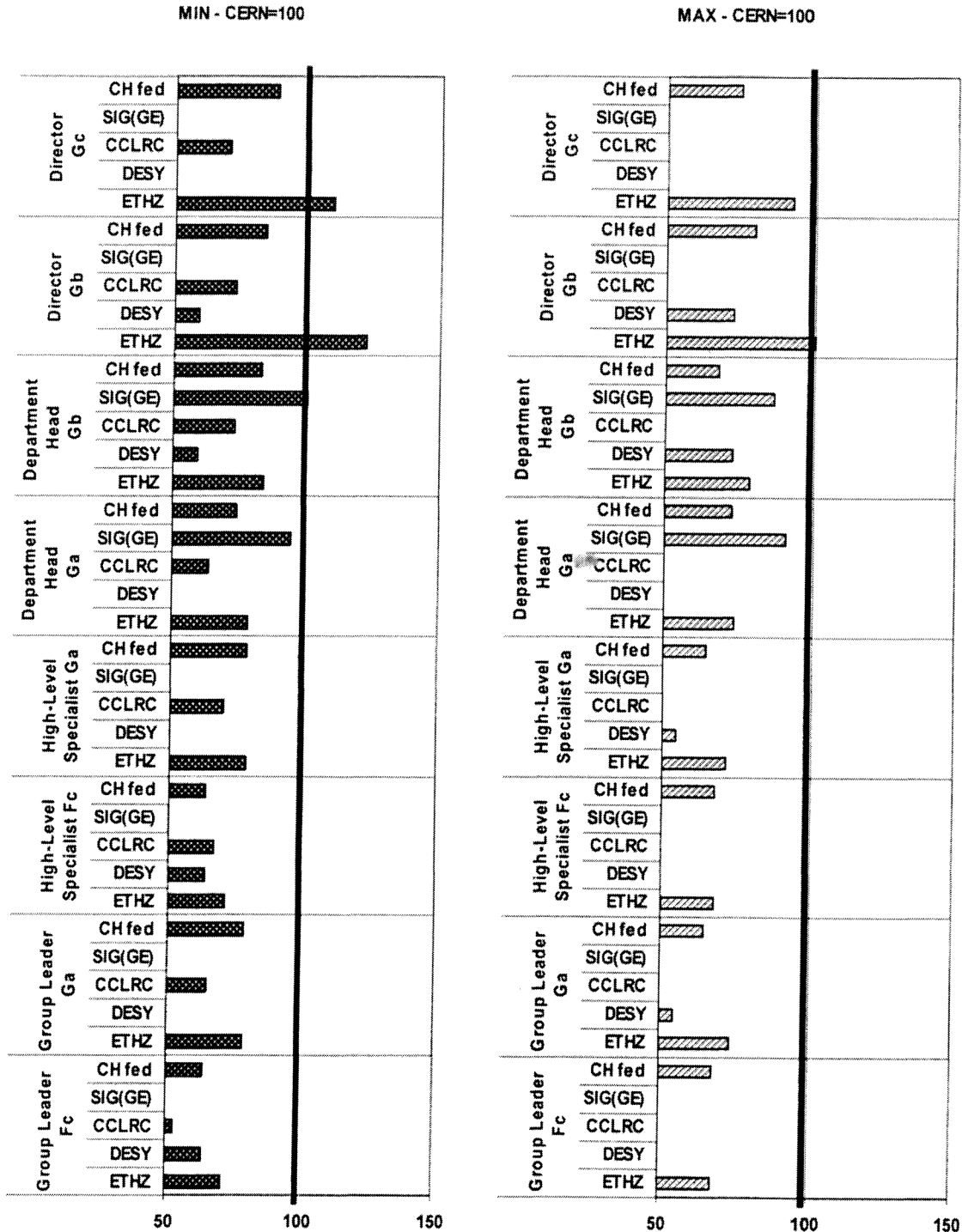
**Table 4k – National Laboratories / Public Services- CERN=100 (single residents)**

benchmarks for Administrative jobs



**Table 4I** – National Laboratories / Public Services- CERN=100 (single residents)

benchmarks for Executive positions - Group Leader up to Director



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TRIPARTITE EMPLOYMENT CONDITIONS FORUM (TREF)

Fifty-eighth Meeting

Geneva – 7 & 8 March 2006

**5-YEARLY REVIEW 2005**

**RESULTS OF THE DATA COLLECTION ENQUIRY**

**- SALARY MOVEMENTS -**

***Addendum 2***

As agreed at the meeting of TREF on 31 May & 1 June, this document provides additional information on movements of salaries over the reference period as addressed in section 4 of CERN/TREF/276, *Results of the data collection enquiry – Salary comparisons*.

The document recalls real net salary movements in the civil services of Switzerland and other Member States used for the calculation of the CERN salary index, as well as CERN's real net salary movement over the reference period 2001-2005, which were already presented to TREF at its fifty-fourth meeting. In addition, data is provided for: salary movements in the European and International Organizations that participated in the current 5-Yearly Review, as well as gross salary movements in the industry/private sector for firms in France, Germany, Switzerland and the United Kingdom. Applying the industry/private sector movement for 2005 to the 2004 salary level comparison results of the data collection enquiry shows there has been very little variation for 2005.

**TABLE 1 - Real net movements of Civil Servants and CERN's salary index**

	Member State (June <i>n-2</i> - June <i>n-1</i> )	Weighting [%]	Applied as of 1 January					Cumulative
			2001	2002	2003	2004	2005	
i	Austria	2	*100.0	97.6	98.9	101.7	**100.5	98.7
ii	Belgium	6	97.9	101.5	103.4	101.5	99.4	103.6
iii	France	50	99.7	99.8	100.0	100.4	99.1	98.9
iv	Germany	10	99.6	100.0	101.3	100.7	99.1	100.7
v	Italy	10	99.0	101.7	99.2	103.3	97.7	100.8
vi	Netherlands	4	100.25	103.5	98.5	99.9	96.6	98.6
vii	Spain	3	*100.0	97.5	98.5	101.4	99.0	96.4
viii	Sweden	2	*100.0	98.7	100.3	101.0	*100.0	100.0
ix	United Kingdom	13	101.0	102.6	102.5	99.7	99.4	105.3
x	Total	100	99.7	100.5	100.5	100.7	99.0	100.3
xi	Switzerland		99.3	100.4	100.7	100.1	100.2	100.7
xii	CERN real net movement		#99.2	100.4	100.6	100.4	99.6	100.2

**Notes:**

- # The net granted salary index for 2001 was 99.2 according to the previous formula instead of 99.5 of the new formula.
- \* Not available.
- \*\* The data for movement of net salaries of civil servants for Austria has been taken from "Bundesgesetzblatt", dated 30.12.2003, since EUROSTAT does not provide this information any longer. The reference dates are January 2003 - January 2004.

**TABLE 2 – Real net movements in European/International Organizations**

Trend 2001-2005	
Organization	RNM
European Space Agency	108.4
European Southern Observatory	103.1
European Commission (EU)	99.2
United Nations Organization, Geneva	107.8
International Telecommunications Union, Geneva	N/A
CERN	100.2

## SALARY MOVEMENTS IN INDUSTRY/PRIVATE SECTOR

**TABLE 3 – Gross base salary movements in  
industry/private sector (France, Germany, Switzerland & UK)**

Country	2001	2002	2003	2004	2005	Cumulative 2001-2005
FR	101.4	101.1	101	100.7	101.2	105.5
DE	100.5	101.7	101.1	100.1	100.6	104.1
CH	101.5	101.7	101.8	101.3	100.9	107.4
UK	103.3	102.2	102.3	102	101.7	112.0

**Notes:**

- Data provided by HAY Group Management Consultants who indicate that: *The year-to-year Base Salary increases over the last five years are represented [...] per country. These increases represent the total of the individual increases per benchmark [HAY] point level.*
- This average data is calculated on gross base salary movements across four benchmark HAY point levels (corresponding to CERN levels for Technician, Technical Assistant, Engineer and Group Leader).
- Changes in social contributions or tax rates have not been taken into account.

**Industry/private sector 2005 salary movements  
in Table 3 applied to 2004 net salary comparisons**

The industry/private sector movements for 2005, indicated in Table 3, have been applied to the 2004 salary level comparison results of the data collection enquiry for four job levels (Technician, Technical Assistant, Engineer and Group Leader). This shows there has been very little variation for 2005 (Switzerland/Geneva, 1 percentage point; Germany, 0 to 1 percentage point; France, 1 to 2 percentage points; and UK, 2 to 3 percentage points).

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TRIPARTITE EMPLOYMENT CONDITIONS FORUM (TREF)

Fifty-eighth Meeting

Geneva – 7 & 8 March 2006

**5-YEARLY REVIEW 2005**

**REPORT ON LOCAL STAFF EMPLOYMENT CONDITIONS  
WITHIN THE 5-YEARLY REVIEW 2005**

At its meeting on 22 June 2003, Council approved a revised proposal by the Management (document CERN/2499/Rev.) concerning the introduction of Local Staff (LS). The Council document stated in its conclusions under paragraph 7.5 “The experience gained during the initial period of implementation will be evaluated as part of the next 5-Yearly Review exercise, which will be concluded at the end of 2005”.

The present report concentrates on the review of employment conditions of LS as one of the main items of the 5-Yearly Review<sup>1</sup>.

The implementation took place within the shortest possible time-scale due to the impending phasing-out of manpower contracts. With 53 LS in post at the end of 2003 and 204 at the end of 2004, reporting on LS is based on two years of experience. An implementation report covering the recruitment process and costing aspects is the subject of a separate document outside the 5-Yearly Review (CERN/TREF/295).

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<sup>1</sup> Ref. CERN/2567, “Preparation for the 5-Yearly Review 2005 and Work Planning for TREF”, Article 2.4.1

## **I. Introduction**

1. At its meeting on 22 June 2003, Council approved a revised proposal by the Management (document CERN/2499/Rev.) concerning the introduction of Local Staff (LS). The Council document stated in its conclusions under paragraph 7.5 “The experience gained during the initial period of implementation will be evaluated as part of the next 5-Yearly Review exercise, which will be concluded at the end of 2005”.
2. The present report concentrates on the review of employment conditions of LS as one of the main items of the 5-Yearly Review<sup>2</sup>.
3. The implementation took place within the shortest possible time-scale due to the impending phasing-out of manpower contracts. With 53 LS in post at the end of 2003 and 204 at the end of 2004, reporting on LS is based on two years of experience. An implementation report covering the recruitment process and costing aspects is the subject of a separate document outside the 5-Yearly Review (CERN/TREF/295).

## **II. Scope of and Method used for the Review of LS conditions**

4. The specific LS employment conditions examined in this report cover salary levels in the Geneva area in career paths A and B for skilled craftsmen and technicians as well as for qualified office workers and secretaries. These jobs are part of the benchmarks for the data-collection of the general 5-Yearly Review (5YR). Where available and relevant, local staff conditions regarding allowances and benefits in other international organizations are also addressed.
5. The comparisons regarding salary levels cover similar employer families as those used at the introduction of LS. Median market rates are generally referred to as “going rates”, which is the term used in this report. The employer families consist of an accessible sample of local employers: the Geneva public sector represented by SIG (Services Industriels de Genève, the Geneva public facility provider), international organizations (General Services) in Geneva represented also in the 5YR by UNOG and ITU, as well as collective agreements representing minimum salary levels.

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<sup>2</sup> Ref. CERN/2567, “Preparation for the 5-Yearly Review 2005 and Work Planning for TREF”, Article 2.4.1

6. As far as the going rates are concerned, data is provided for ABB-Sécheron, Geneva, Galay SA (a turbine constructor in Geneva) as well as rates for relevant benchmark jobs published by Watson-Wyatt<sup>3</sup> in their annual salary review, which includes the Geneva market. Salary data from Hay are given in separate columns showing both median and 3<sup>rd</sup> quartile rates. The median rates from Hay can be assimilated to the family of going rates paid in Geneva by hi-tech companies whereas HAY Q3 represents the 75<sup>th</sup> percentile level. It should be noted that SIG establishes its salary levels by comparison with “going rates” in Geneva. Salaries at UNOG are established by comparison with the most competitive employers in the local area.
7. With regard to social coverage and contract policy, the survey with local comparators shows that, in general, no difference is made in these respects between employees at LS levels and international levels.

### III. Results from the Review of Salaries

8. The tables attached in Annex Ia to Id show salary data from comparators as a percentage of CERN LS (equals 100). In line with the general 5YR data collection, each benchmark job covers 3 levels:
  - First level: 3 years of relevant experience;
  - Second level: Approx. 10 years of relevant experience;
  - Third level: 15 years (or more) of relevant experience.
- a) **Skilled craftsmen** (career path A = completed apprenticeship of 3-4 years). The data shows that:
  - At the first level, CERN is situated 20% above the minima represented by collective agreements and 9% above going rates but 4 and 5 % respectively below SIG and Hay median or UN. Hay Q3 levels are 14% above CERN.
  - At the second level (approximately 10 years of experience), CERN equals Hay median and has just moved ahead of SIG, while Hay Q3 is still 10% higher. CERN salaries are now 30% above collective agreements.
  - At the third level (15 years or more of experience), CERN LS salaries are ahead of going rates by 14%, of SIG by 7% and of Hay median by 4%. Hay Q3 is 2% above CERN.

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<sup>3</sup> “A management consultancy company carrying out annual, international salary comparisons, which are frequently referred to in international compensation surveys. Median salary data were taken for LS comparisons”.

- b) **Office worker** (career path A = completed apprenticeship of 3-4 years) with foreign language skills:  
The data shows a situation very similar to that for craftsmen.
  - c) **Technician** (career path B = technical diploma):  
Salaries of most comparators are above CERN level by 5-10% at the first level, except collective agreements (-8%). With increasing experience however, CERN moves ahead up to some 10%. Exceptions are the UN, which is 20-25% above CERN and Hay Q3, which is 19% above CERN at the beginner level and 5% below CERN at the more experienced level.
  - d) **Qualified secretary or administrative assistant** (career path B) with foreign language skills:  
The data collection shows a very similar situation as that reported above for Technicians.
9. At introduction of LS in 2003, LS salaries were established on the basis of the existing scale of basic salaries. The data of local salaries available at that time showed that these levels corresponded to “going market rates”, i.e. above collective agreements and below the best paying employers like the UN. However, it was also found that salary progression in the benchmarks of career paths A and B of most comparators was less favourable than at CERN. Therefore, it was decided to limit LS salary progression to the middle of the last salary band in the respective career path pending a more comprehensive examination within the 5YR 2005. It was hoped that these levels were adequate to attract and retain qualified staff in the job families concerned on the local employment market, in which CERN has to compete.
  10. The picture which emerges from the data given in this report shows that CERN LS salary levels at the beginning of the career are 5-10% below Hay median data and going rates on the Geneva market for career path B and about level with or above for career path A. Only the UN and Hay Q3 show a larger differential (15-20%). With increasing experience, salary progression at CERN is more favourable than the market. Only the UN organisations show a more favourable progression than CERN, which is mainly due to a different market reference (comparators).

#### IV. Recruitment experience to date

11. The initial recruitment of LS concerned primarily activities in-sourced from manpower contracts. With large numbers of highly skilled candidates from industrial services contracts applying for the initial LS vacancies published, most recruitment experience to date stems from the recruitment of candidates already working on the

site. As reported in the separate LS implementation report, both salary and other employment conditions specifically agreed for LS did not present major problems in attracting qualified candidates.

There were 6 rejections out of a total of 249 offers extended including two for salary reasons. It must be said that the financial conditions of industrial services personnel were at a low market level (collective agreements) in most cases for technical personnel and below the minimum recommended rates for most administrative personnel, where no collective agreements exist in Geneva. So far, no LS has resigned.

12. There were 243 Local Staff in post on 30 June 2005 with 197 of them recruited from industrial services personnel. This means that experience with recruitment from the local outside market is limited to 46 recruits. Information on application forms and from selection interviews show that the pharmaceutical and chemical industry, multinational companies banks, etc. pay higher salaries than CERN, as we also see from external salary surveys. Nevertheless, major difficulties were not encountered with LS recruitment. However, in some cases the lack of flexibility regarding entrance salaries for highly skilled craftsmen and technicians did create difficulties in attracting well-qualified specialists.
13. Some difficulties were encountered when experienced Local Staff changed from the national to the CERN system after many years of social security contributions outside. This transition is often associated with a loss in benefits at both leaving and re-entering a national system. Two of the refused offers were due to disadvantages of changing pension systems.

## **V. Evaluation**

### **A. *Salaries***

14. The salary data collected and presented in Chapter III of this document shows that, broadly speaking, CERN levels are in line with “going rates” in the Geneva area. CERN LS salaries are either level with or slightly below going rates at the entrance level and slightly above going rates for more experienced staff. Hay Q3 levels (75th percentile) are some 15-20% higher at the entrance level and are relatively small or even non-existent for more experienced staff.
15. The introduction of LS was accompanied by specific entrance salary conditions connected with the in-sourcing exercise, for which Industrial Services personnel provided well-qualified candidates with extensive CERN-specific expertise. The particular measures included limitations in the recognition of professional experience

and seniority in the establishment of entrance salaries as well as the introduction of 3 “L” salary positions below the normal minima in the second bands of career path B (technicians and secretaries – band Bb) and career path A (skilled craftsmen and office workers – band Ac). This was illustrated in the 2003 LS salary scale attached to CERN/2449/Rev. A copy is attached to the present document (Annex II).

16. Given that the “L” positions in salary bands Bb, Bc and Ac were associated with the specific in-sourcing action in 2003, these positions seem to have become superfluous. The 3 “L” positions in salary band Ab could become first employment positions for skilled crafts and office personnel with less than 3 years of professional experience. In as much as it is an explicit requirement in the qualification profile of the vacancy, relevant professional experience should be recognized in line with standard policy.
17. The in-sourcing of some activities from manpower contracts under LS included a number of crafts and office work functions at semi-skilled apprenticeship level. It is expected that similar functions will continue to exist at both semi-skilled and skilled levels in the future. In the present salary grid, the semi-skilled crafts and office work functions are covered in bands a and b of career path A, while the fully-skilled levels in these activities are covered by bands b and c of career path A. This is an anomaly in our career path system and causes confusion. As the introduction of LS implied a considerable increase in craftsmen and office workers at career path A level, a new, distinct career path for semi-skilled work could be considered. The present career path A would then be restricted to fully-skilled work.

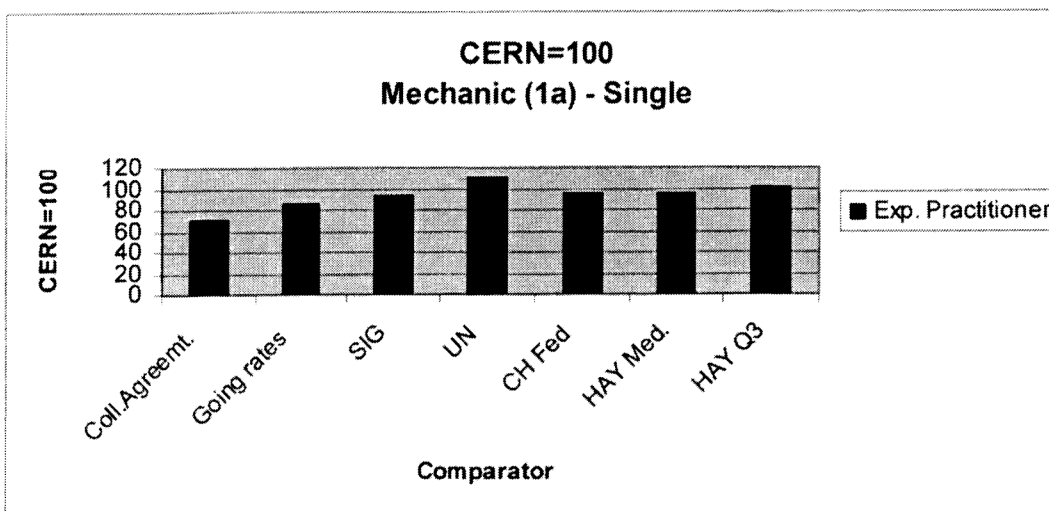
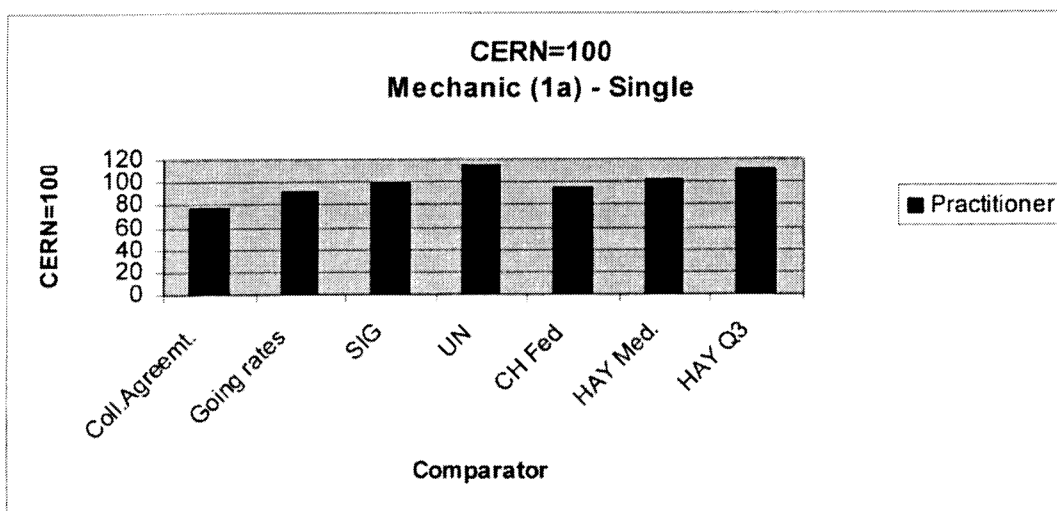
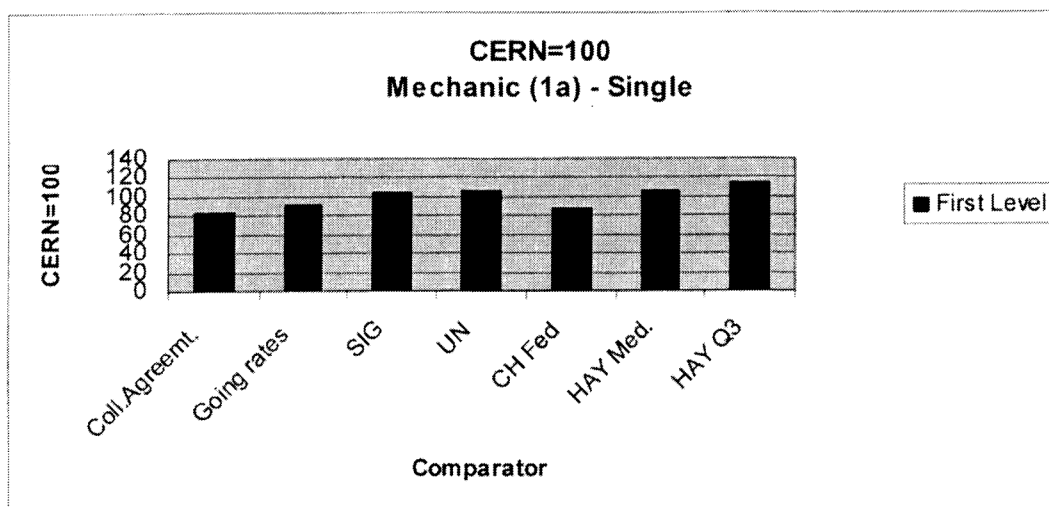
The benchmark positions established for the salary data collection within the 5-Yearly Review did not include jobs below the fully-skilled crafts or office work level of career path A. However, the dedicated LS salary review offered the opportunity of extending the data collection with local comparators down to the semi-skilled level. The evaluation of the resulting data is shown in Annex III. The CERN line 100 is derived from the structure of the new salary scale and is consistent with the salary comparison for career paths A and B.

#### ***B. Other employment conditions***

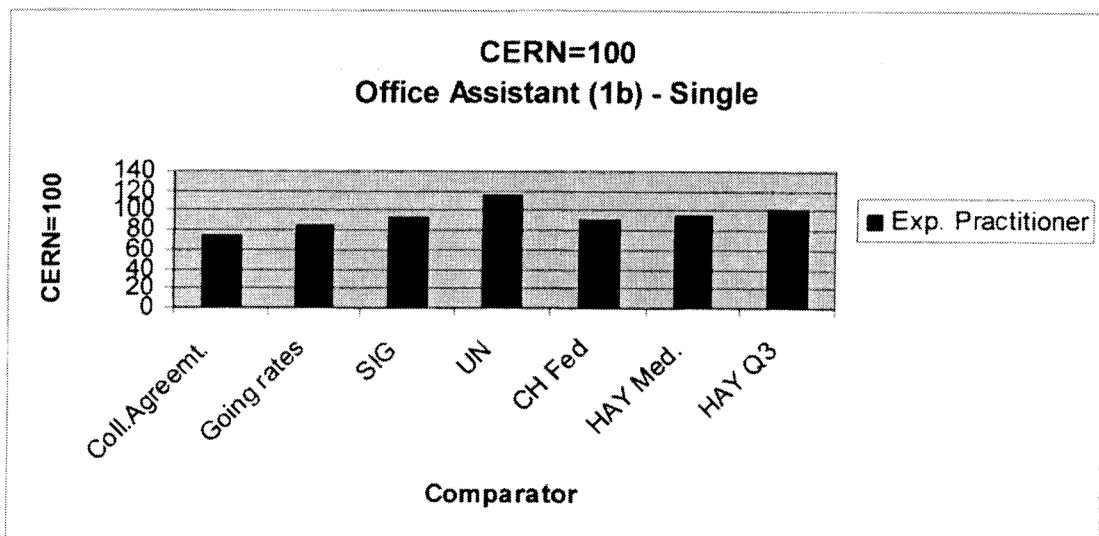
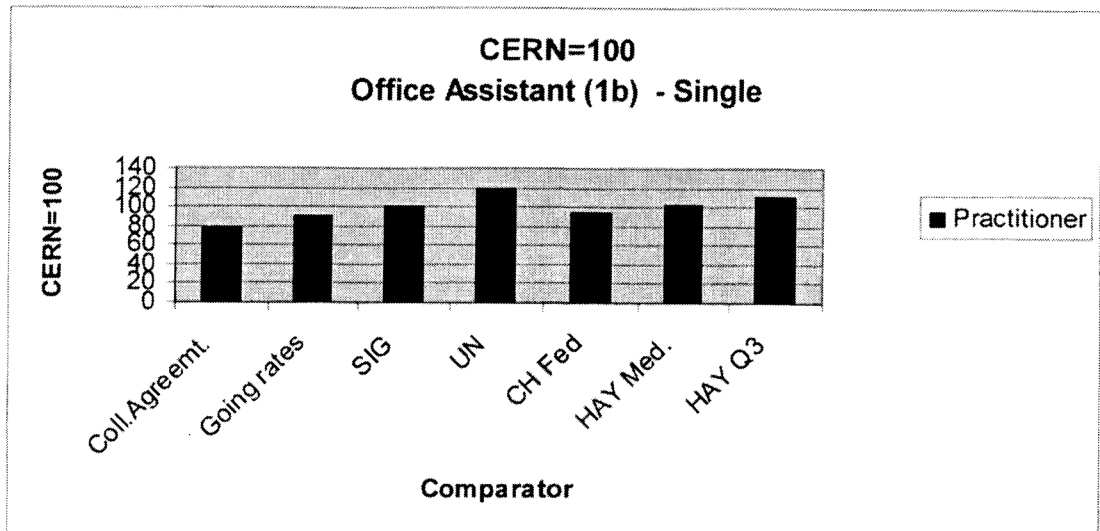
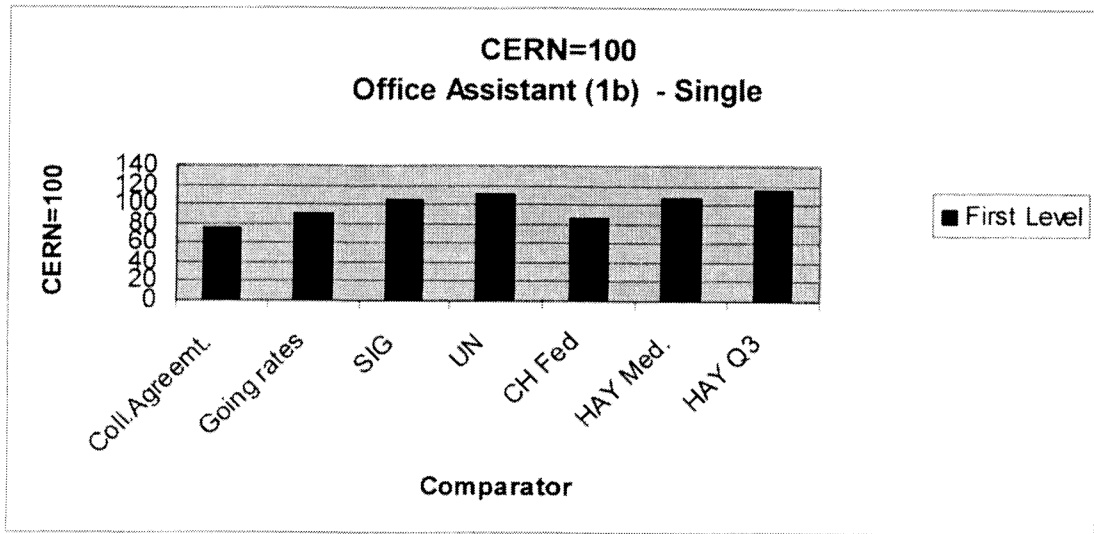
18. The data collection shows that international benefits are not paid to Local Staff (or similar categories) in other international organizations. This applies also to school fee reimbursement. However, grants and loans (often means tested) exist for post-secondary studies in the national context.
19. As far contract policy is concerned, there is no reason to adopt a different approach from international staff. The type and duration of assignments relate to the same

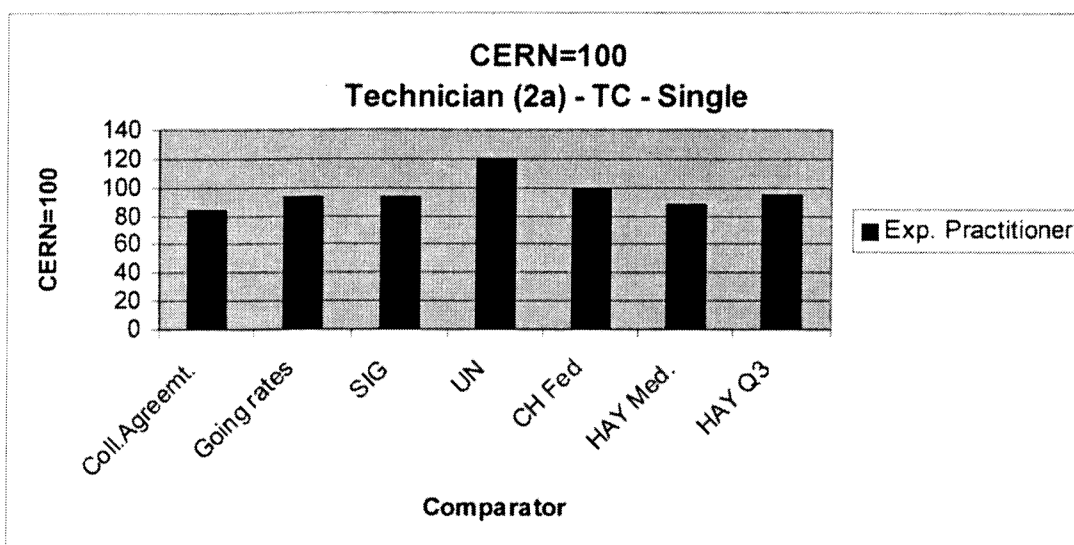
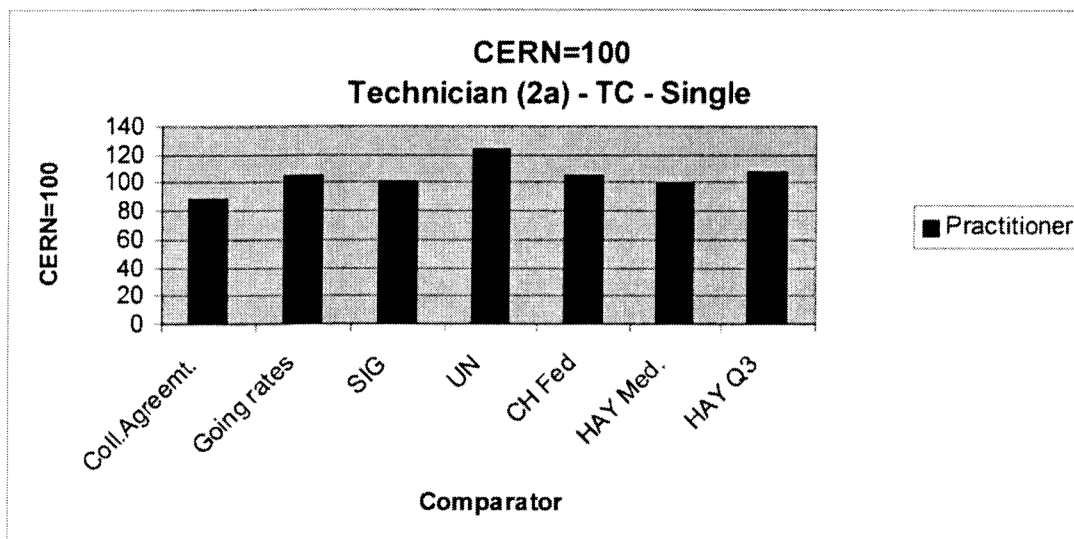
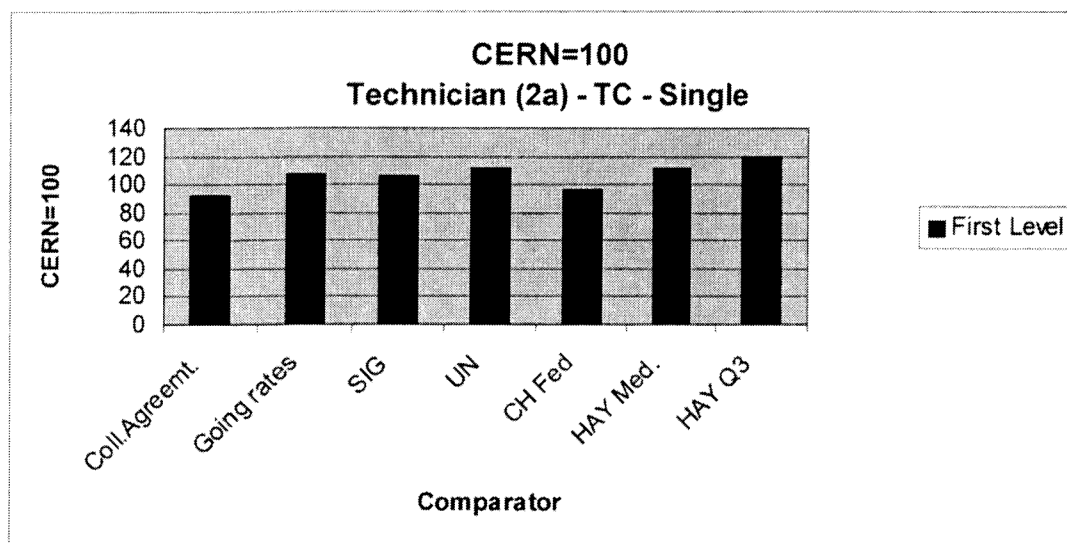
- activities as international staff and the attribution of long-term or short-term contracts is derived from the Manpower Plan in the same way as for international staff.
20. With regard to the social package (Health Insurance, Pension Fund and Unemployment benefits), it is found that these are appropriate for LS.
  21. Another issue, which was to be examined is the possibility and, if appropriate, the conditions for LS justifying promotion to career paths beyond the LS range. After thorough reflection, it is felt that such promotions should be possible, subject to positive job evaluation according the standard career path definitions but without changes in other conditions.

\* \* \*

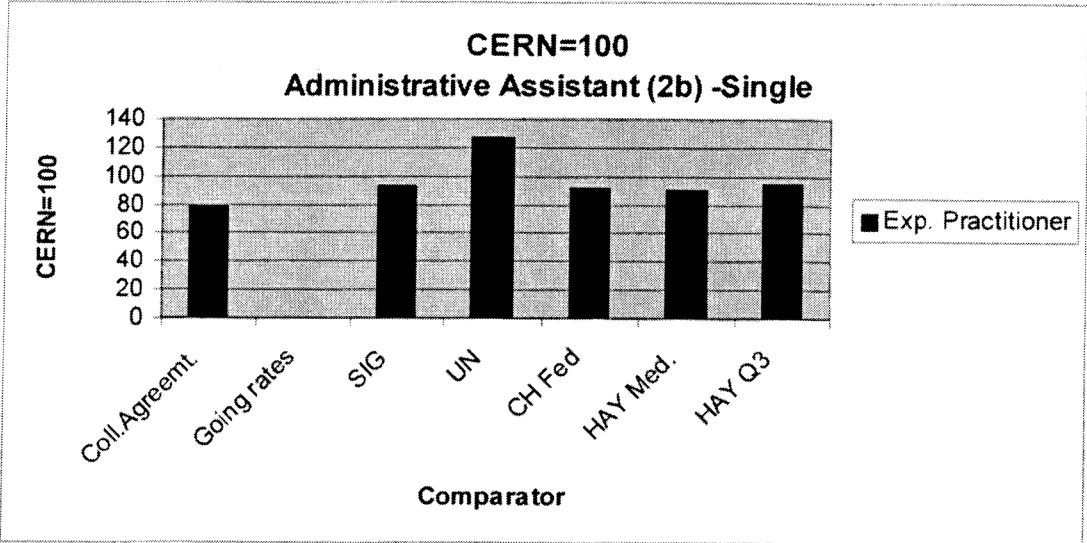
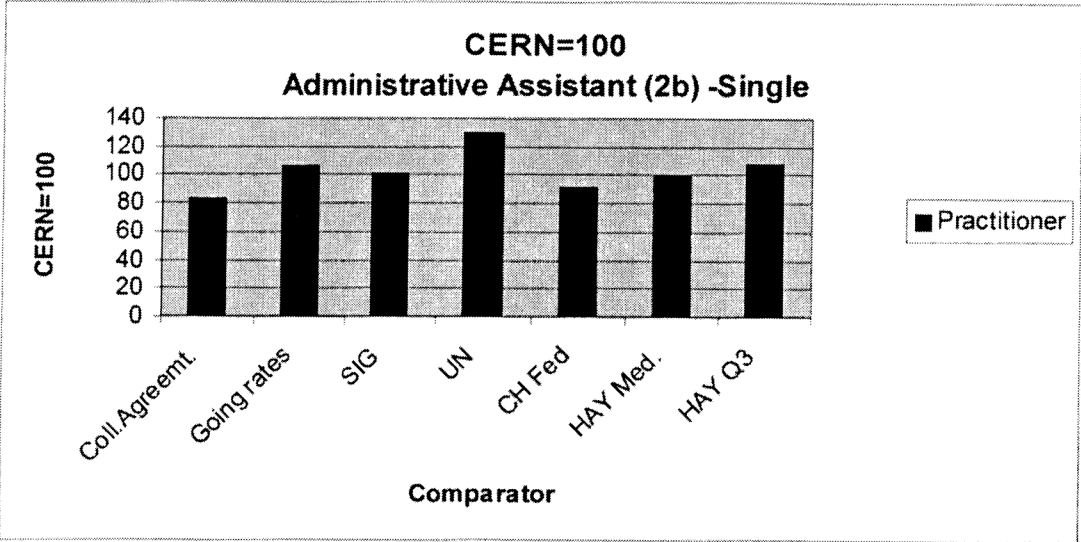
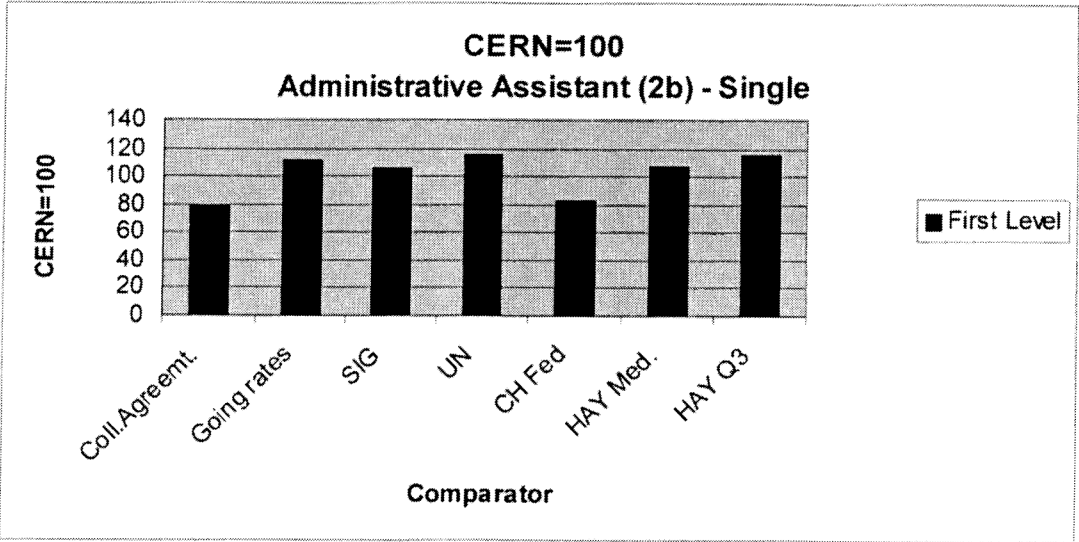


## Annex Ib



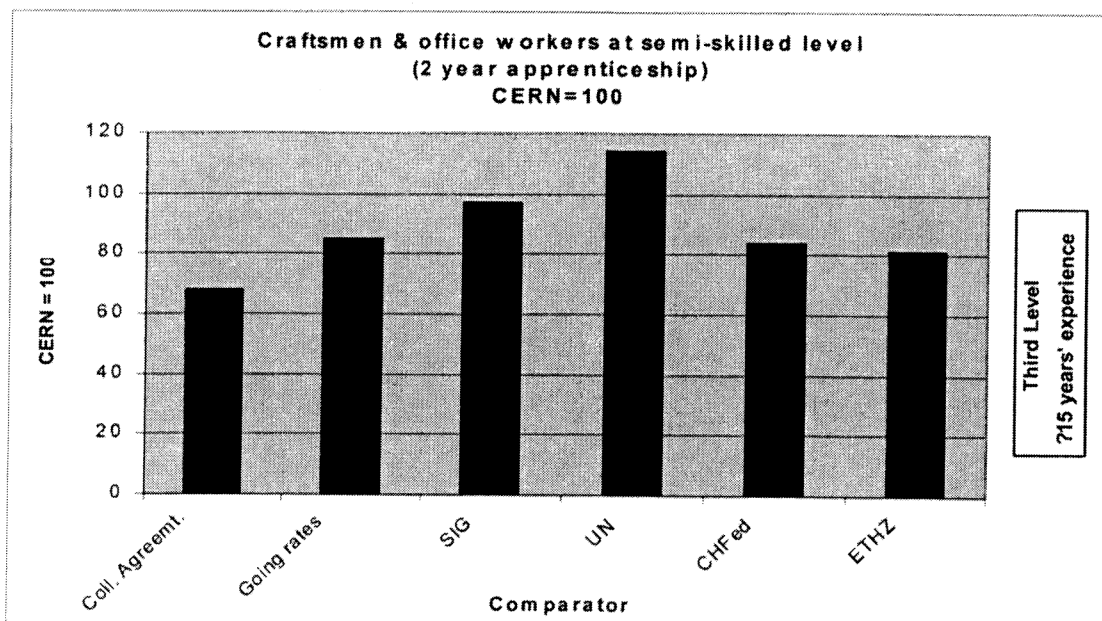
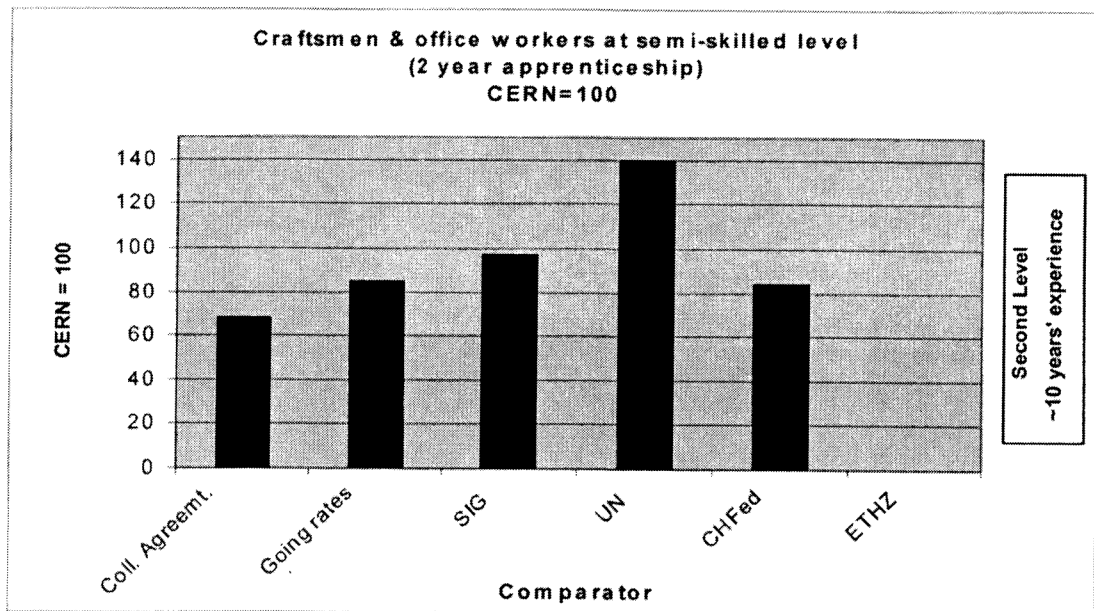
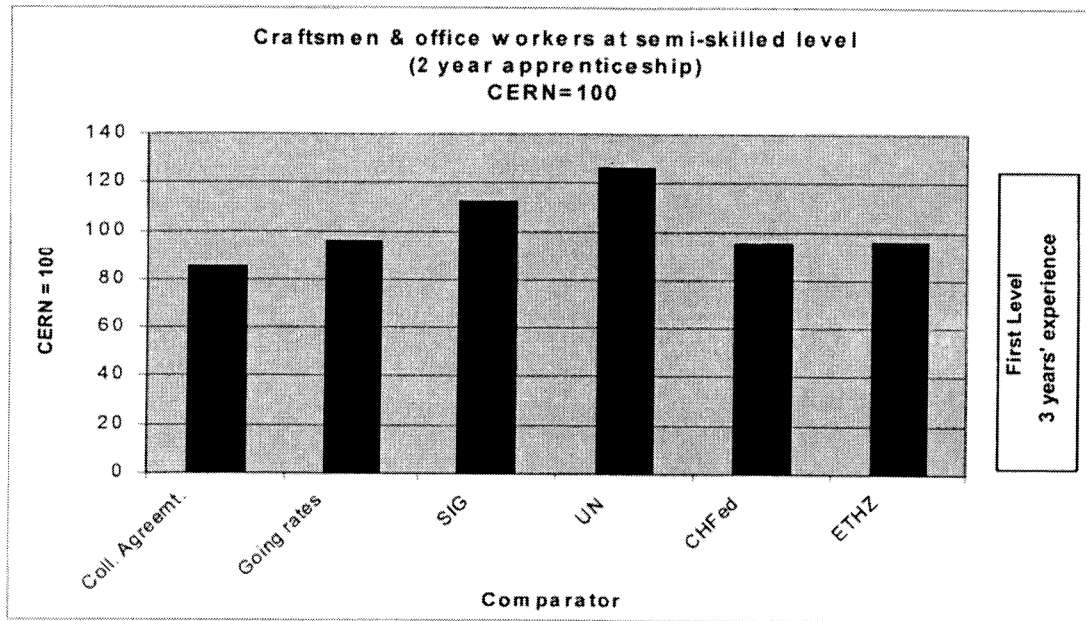


Annex Id



## 2003 Salary scale by career path and salary band (LS revised proposal)

A			B		
Aa	Ab	Ac	Ba	Bb	Bc
	increment =			increment =	
88	92	100	92	100	114
Fully Qualified Apprenticeship			Technical Diploma		
Mechanics/ Electromechanics			Technicians		
Electricians			Secretaries/ Admin. Assistants		
Office work					
F0 3757			F0 4583		
F1 3845			F1 4675		
F2 3933			F2 4767		
0 4021			0 4859		
1 4109			1 4951		
2 4197			2 5043		
3 4285			3 5135		
4 4373	L1(*) 4399		4 5227	L1(*) 5218	
5 4461	L2(*) 4491		5 5319	L2(*) 5318	
6 4549	L3(*) 4583		6 5411	L3(*) 5418	
7 4637	0 4675		7 5503	0 5518	
8 4725	1 4767		8 5595	1 5618	
9 4813	2 4859		9 5687	2 5718	
10 4901	3 4951		10 5779	3 5818	
11 4989	4 5043	L1(*) 5017	11 5871	4 5918	L1(*) 5942
12 5077	5 5135	L2(*) 5117	12 5963	5 6018	L2(*) 6056
13 5165	6 5227	L3(*) 5217	13 6055	6 6118	L3(*) 6170
	7 5319	0 5317		7 6218	0 6284
	8 5411	1 5417		8 6318	1 6398
	9 5503	2 5517		9 6418	2 6512
	10 5595	3 5617		10 6518	3 6626
	11 5687	4 5717		11 6618	4 6740
	12 5779	5 5817		12 6718	5 6854
	13 5871	6 5917			6 6968
		7 6017			7 7082
No entry to c band above Ac.6		8 6117	No entry to c band above Bc.5		8 7196
or to EAZ range		9 6217	or to EAZ range		9 7310
		10 6317			10 7424
		11 6417			
		12 6517			
				range in EAZ	( 7574
					( 8372
	range in EAZ	( 6626			
		( 7310			
(*) step positions applicable to local staff only			(*) step positions applicable to local staff only		



**ORGANISATION EUROPÉENNE POUR LA RECHERCHE NUCLÉAIRE**  
**CERN** **EUROPEAN ORGANIZATION FOR NUCLEAR RESEARCH**

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TRIPARTITE EMPLOYMENT CONDITIONS FORUM (TREF)

Fifty-eighth Meeting

**Geneva – 7 & 8 March 2006**

**5-YEARLY REVIEW 2005**

**RESULTS OF THE DATA COLLECTION ENQUIRY**

**- INFORMATION ON CAREER STRUCTURES AND ADVANCEMENT SYSTEMS -**

1. In the context of the 5-Yearly Review 2005, extensive information has been collected from comparators about Career Structures and Advancement Systems.
2. The attached document summarises the feedback received. The information is structured in two main parts: Part I summarises the information provided by international organisations; Part II gives the information from national organisations. To place the information into context, a cover sheet on each part summarises general data about each organization.
3. Relevant information has also been provided by Hay Associates covering industry. However, the very flexible, market-driven career and advancement systems cannot be presented in a structured manner similar to systems in national or international organisations. Nevertheless, some common features do exist, which are shown in a synopsis comparing most common patterns of career structure and individual advancement as well as performance appraisal systems in national organisations, international organisations and industry.
4. Several national and international organisations recently introduced or are planning to introduce merit advancement and promotion systems, thus following practice in industry. However, where such systems exist, the progress in producing visible modulation in career development based on performance appraisals is still limited. The feedback also reveals that effective management of under-performance of staff with long periods of service remains a problem in all comparator organisations.
5. The main learning points from the data collection have been taken into account for the development of proposals on Career Structures and Advancement Systems in the Review Report by the Management

**5 – Yearly Review 2005**  
**Information on Career structures & Advancement systems**  
**CERN and comparator organizations**

Career structure and individual advancement				
	CERN	Most common patterns in Comparator Organizations		
		Nat. Org	Int. Org	Industry
Number of grades	21 bands	Minimum 8, maximum 38	Minimum 13, maximum 19	Not available
Steps versus salary ranges	Steps	Salary ranges or steps	Steps	Salary ranges
Where applicable, number of steps per grade	10-14	Between 9 and 15	Between 5 and 15	Not applicable
Where applicable, annual step value	2%	Between 2% and 4%	Between 1.6% and 2.8%	Not applicable
Performance requirement for individual salary progression	Fully satisfactory performance	Fully satisfactory performance, or seniority-based	Fully satisfactory performance	Above fully satisfactory
Profile of salary progression	Slown down as from band midpoint	Constant or degressive % increase	Constant or slown down as from band midpoint	Degressive % increase

Performance appraisal				
	CERN	Most common patterns in Comparator Organizations		
		Nat. Org	Int. Org	Industry
Assessment	Narrative & rating	Narrative & rating	Narrative & rating	Narrative & rating
Rating scale	5 levels	5 levels	5 levels	Not available
Direct link between performance & advancement	Yes	CHFEd SIG	EC (for promotion only), ESO, ESA	Yes
Management of underperformance	Performance restoration plan, but difficult to implement	Diverse array of specific measures, but difficult to implement	Diverse array of specific measures, but difficult to implement	More direct and immediate approach

**PART I**  
**CAREER STRUCTURE**  
Comparison CERN – International Organizations  
*Update 20.02.2006*

All figures concern 2004, except otherwise indicated (n/a = data not available)	CERN	ESA	ESO	EC	ITU	UNOG
<b>General Data</b>						
Organization's budget	K CHF 1,293,625	K€ 2'851'552	K€ 110'969	K € 2'432'154	n/a	n/a
Personnel expenditure	K CHF 450,825	K€ 231'800	K€ 46'081	K € 1'924'117	n/a	n/a
Number staff members	2594	2'070	412	19'774	745	About 3000
Turnover (arrivals + depart.)	9%	3%	4.20%	4.30%	7.5%	7%
Individual salary increases	between 0 and 2%	n/a	2.0%	2.0%	n/a	n/a

## CAREER STRUCTURE

### Comparison CERN – International Organizations Update 20.02.2006

All figures concern 2004, except otherwise indicated (n/a = data not available)	CERN	ESA	ESO	EC	ITU	UNOG	
General description	Seven career paths, with 3 salary bands each. Slower progression in second part of salary band. Award of one or more incremental steps based on performance appraisal. Changes of salary band and career path by job evaluation.	7 A (= professional grades), 6 B, 6 C (general services grades) and 5 L (linguists) grades. 11 steps per grade. Annual step every year up to certain step level, afterwards every 2 years.	7 career paths, containing each 3 grades (except CP VI). Award of one or more incremental steps based on performance appraisal. Change of grade possible, based on nature of functions and performance. Change of career path possible at important change of functions.	16 grades: Assistants (AST): grades 1 to 11 (old C & B categories); Administrators (AD): grades 5 to 16 (old A & LA categories); Heads of Unit: grades 9 to 14; Directors: grades 14/15; 5 seniority steps per grade. Automatic one step increase every 2 years. Significant salary increases happen through promotions rather than automatic advancement.	7 General Services (G), 5 Professional (P) and 2 Senior Counsellor (D) grades. G grades: 11 steps; P grades: between 10 and 15 steps; D grades: between 6 and 9 steps.	7 General Services (G), 5 Professional (P) and 2 Senior Counsellor (D) grades. G grades: 11 steps; P grades: between 10 and 15 steps; D grades: between 6 and 9 steps.	
Number of grades	21	13	19	16	14	14	
Number of steps per grade	10-14 (excl. Gc)	11 (excl. A7/A6)	10-15 (excl. Grade 14)	5	10-15 (excl. D grades)	10-15 (excl. D grades)	
Job classification method	Benchmark jobs comparison system. Nine evaluation factors with 5 to 7 levels by factor.	Factor comparison system	Same as CERN's previous grade level definition	Point factor system	For P-grades: point factor system. Six evaluation factors	For P-grades: point factor system. Six evaluation factors	
Percentage increase on promotion	between 1.0% and 3.1%	between 1 and 2 steps in the previous grade.	equivalent to 1.5 step	n/a	n/a	n/a	

## CAREER STRUCTURE

### Comparison CERN – International Organizations *Update 20.02.2006*

All figures concern 2004, except otherwise indicated (n/a = data not available)	CERN	ESA	ESO	EC	ITU	UNOG
<b>Performance Appraisal</b>						
Categories to which applicable	Staff members.	All staff after one year, except Directors, A6, Research Fellows and YGTs.	Staff members, paid associates, fellows, students.	All categories.	Staff members.	Staff members.
Appraisal by	Direct supervisor.	Direct supervisor.	Direct supervisor.	Direct supervisor.	Direct supervisor.	Direct supervisor.
Appraisal criteria	Results (qualitative + quantitative) Professional skills and abilities Flexibility Commitment to the Organization Communication and ability to work in a team Supervisory skills Narrative.	Achievement of objectives.	Performance, results, qualification, competence, relationship, communication.	1. Efficiency (=SMART objectives, up to 10 merit points). 2. Competencies (up to 6 merit points). 3. Aspects of conduct (up to 4 merit points).	1. Key results. 2. Competencies	1. Key results. 2. Competencies
Narrative and/or grid rating?		Narrative and rating.	Narrative and rating.	Narrative and rating. Each of the three performance criteria is rated separately, the sum of the three ratings gives the final rating on a scale between 0 and 20.	Narrative and rating.	Narrative and rating.
Performance levels and distribution	1. Particular Merit: 0.7% 2. Meritorious: 25.2% 3. Fully satisfactory: 73.4% 4. Partly Satisfactory: 0.4% 5. Unsatisfactory: 0.3%	Beyond level required Excellent Meets standards Partial command Insufficient	Outstanding: 6% Very good: 42% Good: 48% Satisfactory: 4% Unsatisfactory: 0%	The rating culminates at 14 and 15, which corresponds to the average rating between the minimum satisfactory (10) and the maximum (20)	n/a	n/a

## CAREER STRUCTURE

### Comparison CERN – International Organizations *Update 20.02.2006*

	CERN	ESA	ESO	EC	ITU	UNOG	
All figures concern 2004, except otherwise indicated (n/a = data not available)							
Link performance level - individual remuneration	YES 1. Particular Merit: more than 1 additional step may be awarded 2. Meritorious: 1 additional step may be awarded 3. Fully satisfactory: 1 periodic step 4. Partly Satisfactory: delayed step by 6 months 5. Unsatisfactory: no step, plan for restoration of performance set up	YES	YES. Outstanding/Very good: additional step(s) or award. Very good/good: 1 step. Satisfactory: refused or delayed step. Unsatisfactory: performance restoration plan.	YES. The outcome of the Career Development Review is mainly used to decide on promotions, via a system of accumulated merit points and priority points (PP).	NO Consistently exceeds expectations, frequently exceeds expectations & fully successful: incremental step increase. Partially meets expectations: possibly no step increase. Does not meet expectations: administrative actions.	NO. Consistently exceeds expectations, frequently exceeds expectations & fully successful: incremental step increase. Partially meets expectations: possibly no step increase. Does not meet expectations: administrative actions.	
Managing underperformance	Plan for restoration of performance, may lead to contract termination	Involvement of HR advisors.	Plan for restoration of performance, may lead to contract termination	Escalation of measures: remedial programme, reinforced remedial programme, achieve performance within 6 months, downgrading, dismissal.	Transfer to another post, no step increase, non-renewal of contract, termination.	Transfer to another post, no step increase, non-renewal of contract, termination.	
Average number of subordinates per supervisor	5	5	5 to 10	n/a	n/a	n/a	

**CAREER STRUCTURE**  
Comparison CERN – International Organizations  
*Update 20.02.2006*

All figures concern 2004, except otherwise indicated (n/a = data not available)	CERN	ESA	ESO	EC	ITU	UNOG
	Individual salary progression (excluding general increases)					
Nature of performance-based awards	Additional step increases for meritorious or particularly meritorious performance, including advancement increases in EAZ. Exceptional Service Premiums (ESPs), lump sum payments.	Exceptional step advancement Premium Bonus in kind	Step increases and awards.	Salary increases by steps.	Not applicable	Not applicable
Value of rewards	Step increase approx. 2% at step zero of salary band. ESP multiples of 1000 CHF between 1-5 kCHF	Step increase: 2.8 % Premium: € 1500 Bonus in kind: € 2500 Professional bonus: € 5000	One or more steps.	3.3% every two years.	Not applicable	Not applicable
Eligible population	Additional step increase: staff members from CP A-Ga ESPs: all staff	1. Promotion: B2-B5; A2, A3 2. Exceptional advancement, premiums and bonus: all staff except directors, A6, A5, A1	Staff members.	Staff members.	Not applicable	Not applicable
Distribution of merit awards according to:						
Reason	1. Periodic Step (satisfactory perf.) 1.1% 2. Additional steps (> fully satisf.) 0.4% 3. Change of function 0.06% and 0.14% ESPs	n.a.	1. Satisfactory performance (Good or Very Good): 1.7% 2. Merit 0.3%	n/a	Not applicable	Not applicable
Nature	1. Recurrent pensionable remuneration: 1.5% 2. Non-pensionable bonuses or cash: 0.14%	n.a.	1. Recurrent pensionable remuneration: 2% 2. Non-pensionable bonuses or cash: 0.09%	1. Recurrent pensionable remuneration: 2%	Not applicable	Not applicable

## CAREER STRUCTURE

Comparison CERN – International Organizations  
*Update 20.02.2006*

	CERN	ESA	ESO	EC	ITU	UNOG	
All figures concern 2004, except otherwise indicated (n/a = data not available)							
% increase	1. Recurrent 0%: 31.1% 0-2%: 48.1% 2-4%: 16.6% >4%: 4.0% 2. Non-recurrent 0%: 86.9% 0-2%: 11.3% >2%: 1.7%		1. Recurrent 0%: 13% 0-1%: 2% 1-2%: 75% 2-3%: 9% 3-4%: 1% 2. Non-recurrent 0%: 91% 1-2%: 4% 2-3%: 4% 3-4%: 1%	1. Recurrent 1-2%: 55% 2. Non-recurrent n/a	Not applicable	Not applicable	
% not receiving any awards (neither recurrent nor non-recurrent)	27.0%		13.0%	45.0%	Not applicable	Not applicable	

## CAREER STRUCTURE

Comparison CERN – International Organizations  
*Update 20.02.2006*

All figures concern 2004, except otherwise indicated (n/a = data not available)	CERN	ESA	ESO	EC	ITU	UNOG
	Others					
Responsibility allowances	Yes, up to 10% of basic salary	Yes: 2 steps in present grade. Min 2, max 6 months	Yes (Substitution Allowance and Special Allowance)	Yes	Yes (Special Post Allowance)	Yes (Special Post Allowance)
Succession planning	Nothing formalised, but some informal planning at departmental level.	No, but Advance Recruitment Scheme used in anticipation of staff leaving.	Partly formalised.	n/a		

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## PART II

### CAREER STRUCTURE

Comparison CERN – National Organizations  
*Update 21.02.2006*

All figures concern 2004, except otherwise indicated (n/a = data not available)	CERN	DESY	CCLRC	ETHZ	CH Fed	SIG
<b>General Data</b>						
Organization's budget	K CHF 1,293,625	K € 134'000	n/a	n/a		K CHF 850'000
Personnel expenditure	K CHF 450,825	K € 84'709	n/a	K CHF 560'678		K CHF 223'000
Number staff members	2594	1'390	1'743	5'326		1537
Turnover (arrivals + depart.)	9%	3%	n/a	n/a		6.1%
Individual salary increases	between 0 and 2%	2.0%	1.2%	2.4%	3%	0.8%

[illegible]

## CAREER STRUCTURE

Comparison CERN – National Organizations  
*Update 21.02.2006*

All figures concern 2004, except otherwise indicated (n/a = data not available)	CERN	DESY	CCLRC	ETHZ	CH Fed	SIG	
<b>Performance Appraisal</b>							
Categories to which applicable	Staff members.	not applicable	All staff.	not applicable	All staff	All staff	
Appraisal by	Direct supervisor.	not applicable	Manager and employee jointly. Signed by Senior Manager.	not applicable		Direct Supervisor.	
Appraisal criteria	Results (qualitative + quantitative) Professional skills and abilities Flexibility Commitment to the Organization Communication and ability	not applicable	Contribution to CCLRC, based on criteria such as: Quality and quantity of output Ideas Responsibility Value	not applicable		Work results Commitment Inter-personal relationships Managerial competencies (when applicable)	
Narrative and/or grid rating?	Narrative.	not applicable	Narrative.	not applicable	Narrative and rating.	Narrative and rating.	
Performance levels and distribution	1. Particular Merit: 0.7% 2. Meritorious: 25.2% 3. Fully satisfactory: 73.4% 4. Partly Satisfactory: 0.4% 5. Unsatisfactory: 0.3%	not applicable	No specific rating system	not applicable	A++: 3% A+: 28% A: 65% B: 4% C: 0%	Exceptional: 0.2% Above expectations: 30% Meets expectations: 55% Insufficient: 14.6% Unsatisfactory: 0.2%	

## CAREER STRUCTURE

Comparison CERN – National Organizations  
*Update 21.02.2006*

All figures concern 2004, except otherwise indicated (n/a = data not available)	CERN	DESY	CCLRC	ETHZ	CH Fed	SIG		
	YES. 1. Particular Merit: more than 1 additional step may be awarded 2. Meritorious: 1 additional step may be awarded 3. Fully satisfactory: 1 periodic step 4. Partly Satisfactory: delayed step by 6 months 5. Unsatisfactory: no step, plan for restoration of performance set up	not applicable	NO. No specific link to salary. Excellent employees may receive performance bonus. Possibility to withhold pay increases in case of significant underperformance	not applicable	YES. A++: 4-6% A+: 3-4% A: 3% B: 2% C: 0%	YES. Merit increases based on performance and position in salary range.		
Managing underperformance	Plan for restoration of performance, may lead to contract termination	not applicable	Identification of specific actions.	not applicable	Specific measures.	Specific measures: action plan, warning, downgrading, dismissal.		
Average number of subordinates per supervisor	5	not applicable		not applicable		Between 6 and 8.		

## CAREER STRUCTURE

Comparison CERN – National Organizations  
Update 21.02.2006

All figures concern 2004, except otherwise indicated (n/a = data not available)	CERN	DESY	CCLRC	ETHZ	CH Fed	SIG	
<b>Individual salary progression (excluding general increases)</b>							
Nature of performance-based awards	Additional step increases for meritorious or particularly meritorious performance, including advancement increases in EAZ. Exceptional Service Premiums (ESPs), lump sum payments.	Variable	Once above standard pay: n/a merit increases and/or bonuses.	n/a	Salary increases.	Salary increases.	
Value of rewards	Step increase approx. 2% at step zero of salary band.	1 step = average 2 4% every 2 years	n/a	1 step = 4%	n/a	Between 0.3% and 2.2%	
Eligible population	Additional step increase: staff members from CP A-Ga ESPs: all staff		All staff.		All	All staff.	
<b>Distribution of merit awards according to:</b>							
Reason	1. Periodic Step (satisfactory perf.) 1.1% 2. Additional steps (> fully satisf.) 0.4% 3. Change of function 0.06% and 0.14% ESPs	Seniority 2 % (4% every 2 years)	n/a	no merit increases	n/a	Merit 0.7%	
Nature	1. Recurrent pensionable remuneration: 1.5% 2. Non-pensionable bonuses or cash: 0.14%	Non-pensionable bonuses or cash: 2 %	1. Recurrent pensionable remuneration: 2% 2. Non-pensionable bonuses or cash: 0.2%	1. Recurrent pensionable remuneration: 4%	1. Recurrent pensionable remuneration: 3%	1. Recurrent pensionable remuneration: 0.65% 2. Non-pensionable bonuses or cash: 0.05%	

## CAREER STRUCTURE

Comparison CERN – National Organizations  
Update 21.02.2006

	CERN	DESY	CCLRC	ETHZ	CH Fed	SIG		
All figures concern 2004, except otherwise indicated (n/a = data not available)								
% increase	1. Recurrent 0%: 31.1% 0-2%: 48.1% 2-4%: 16.6% >4%: 4.0% 2. Non-recurrent 0%: 86.9% 0-2%: 11.3% >2%: 1.7%	1. Recurrent (increase every 2 yrs) 0%: 79 % 0-2%: 0.5 % 2-4%: 5 % >4%: 15 % 2. Non-recurrent 0%: 76 % 0-2%: 2.7 % 2-4%: 14 % >4%: 8 %		1. Recurrent 0%: 15% 0-1%: 20% 3-4%: 50% 4-5%: 13% >5%: 2%	n/a	1. Recurrent 0-1%: 95% 2. Non-recurrent 0-1%: 5%		
% not receiving any awards (neither recurrent nor non-recurrent)	27.0%	62.0%	n/a	15.0%	n/a	0.0%		

**CAREER STRUCTURE**

Comparison CERN – National Organizations  
*Update 21.02.2006*

All figures concern 2004, except otherwise indicated (n/a = data not available)	CERN	DESY	CCLRC	ETHZ	CH Fed	SIG	
	Others						
Responsibility allowances	Yes, up to 10% of basic salary		Yes, maximum 7.5% of basic salary.	No	Yes	Only at lower levels.	
Succession planning	Nothing formalised, but some informal planning at departmental level.	No systematic plan	n/a	No	No	Nothing formalised.	

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ORGANISATION EUROPÉENNE POUR LA RECHERCHE NUCLÉAIRE  
**CERN** EUROPEAN ORGANIZATION FOR NUCLEAR RESEARCH

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TRIPARTITE EMPLOYMENT CONDITIONS FORUM (TREF)

Fifty-third Meeting

Geneva – 31 May & 1 June 2005

**5-YEARLY REVIEW 2005**

**INFORMATION ON THE NON-RESIDENT ALLOWANCE**

Following the oral report on this subject made to TREF on 2 May 2005, this document presents the data related to non-resident allowance. The document also includes a comparison with other international organizations.

TREF is invited to take account of this information during its discussions of the current 5-Yearly Review.

*N.B. Following discussion at TREF a correction has been made to paragraph 4.2*

## **INFORMATION ON THE NON-RESIDENT ALLOWANCE**

### **1— Introduction**

1.1 The purpose of this document is to provide an overview of the present scheme of non-resident allowance at CERN and a comparison with other international organizations.

1.2 The existing scheme of non-resident allowance was introduced in 1955 and last modified in 1996. It has mainly two objectives:

- 1) attract international staff and
- 2) compensate for disadvantage due to distance with home station.

1.3 This scheme provides for a non-resident allowance payable according to a geographical criterion, and amounting to 9% or 12% of basic salary for single persons or persons with dependants, respectively. For staff hired after 31<sup>st</sup> December 1995, the amount of the allowance decreases to half its initial value as of the granting of an indefinite contract.

1.4 The non-resident allowance was not reviewed in the last 5-yearly review.

1.5 The cost to the Organization for non-resident allowance was 24 592 kCHF in 2004, out of which 2 036 kCHF for Fellows and Associates.

### **2— Reasons for non-resident allowance**

The reasons for a non-resident allowance are multiple and have already often been studied in the past. It should be noted that they evolve with the age of the person.

- Language problems (non-francophone staff) for self and family;
- Difficulty for spouse to find employment or be authorized to take it up, involving possible loss of family income;
- Cost and inconvenience of finding suitable education for children of expatriate staff;
- Diploma equivalence or recognition problems for spouse and children;
- Residence problems after age 20 and employment difficulties for children;
- Difficulties and expenses of maintaining contact with ageing parents in home country;
- Residence problems: for staff upon retirement or unemployment, for survivors upon staff member's death;

- Staff members are encouraged to maintain professional contacts in their home countries to facilitate eventual professional reintegration; in practical terms, this is difficult and involves expenses.

### **3— History at CERN**

3.1 At the time of its introduction, in 1955, the local zone comprised the districts situated within a 20 km radius around the Geneva city limits. In 1962, the allowance was fixed at 9% of the basic salary for single staff and at 12% for staff in receipt of the family allowance throughout the period of employment.

3.2 The RESCO Working Group submitted its Report in December 1979. The report contained a proposal to base entitlement to the allowance on nationality and no longer on the distance between the place of residence prior to recruitment and the duty station. In the face of strong opposition from the French Delegation to a distinction based on nationality, the Finance Committee requested a further study for 1980. The Finance Committee took no decision in the matter. Discussions were resumed in 1983 by the CERN Employment Conditions Working Group (CEC) but were inconclusive.

3.3 Between 1985 and 1987, the CCEC (Consultative Committee on Employment Conditions) further addressed the issue of the non-resident allowance. The Swedish Delegation submitted a first proposal to increase the radius of the local zone to 150 km and to supplement the non-resident allowance of 12% of basic salary for those in receipt of family allowance with an 8% expatriation allowance, not payable to French and Swiss nationals, which would decrease to zero between the sixth and ninth year of service.

3.4 In 1986, CCEC examined a second Swedish proposal aimed at replacing the non-resident allowance with an expatriation allowance, not payable to French and Swiss nationals, with two components, a non-resident element, which would remain constant over time (12% for those in receipt of family allowance, 9% for the other staff), and a 'strangeness' element (8%) which would decrease after several years' service. No agreement was reached in support of this proposal.

3.5 A third proposal was made, aimed at a non-resident allowance increase to 20% for beneficiaries of family allowance and to 16% for non-beneficiaries during the first six years' service, thereafter decreasing by 2% per annum to reach the current rate after nine years' service, but without result.

3.6 In December 1987, the CERN Review Committee proposed for international staff to abolish the non-resident allowance, at any rate. In the case of fixed-term contracts, it was suggested to examine how the allowance could be granted in a more flexible, realistic and equitable way to take account of the country, place of origin and family circumstances of the newly recruited employees.

3.7 In 1996, the present scheme was introduced.

#### **4— Comparison**

4.1 Each organization uses its own definition for non-resident allowance. A number of organizations use the word expatriation but in all cases one has to look carefully at the definition given by the organization concerned.

4.2 For 2 organizations (CERN and ITU), the main basis for allocation is the place of residence, for 5 other organizations (ESA, EU, UN, EMBL and ESO) it is the place of residence and the nationality.

4.3 CERN, ESO and EMBL grant at the start the lowest indemnity (9 and 12% respectively for no household or with household allowance compared to 14% and 18% respectively at ESA which is the highest), with the exception of ESO for staff in South America (i.e. 35%).

4.4 Some organizations introduced a system of degressivity alike CERN. ESA goes down from 18% to 15% and 14% to 11% respectively in the 11<sup>th</sup>, 12<sup>th</sup> and 13<sup>th</sup> year of employment. ESO has introduced the same system as CERN.

4.5 For detailed information, see tables enclosed.

4.6 From the comparison it appears that most organizations have chosen expatriation rather than non-residence. For CERN, the situation is complicated due to the two host states. CERN also makes no distinction between the nationalities of its staff.

\* \* \*

EXPATRIATION AND NON-RESIDENCE ALLOWANCE IN INTERNATIONAL ORGANIZATIONS								
I.O.	Denomination	Eligible population	Conditions	Rates	Duration	Non-concurrence	Beneficiaries	Other considerations
CERN	Non-residence	Non-resident SMs, fellows and paid associates at the time of appointment <sup>1</sup>	-Home station outside the local zone: < 100 km (150 km if in the Host States) from Geneva; and  -< 5 years of residence in this zone.	-Recipient of the family allowance: 12% of basic salary or payment.  -Non-recipient of the family allowance: 9% of basic salary or payment.  Minimum : salary band Cb, step 5).	Reduced over 12 years until between 6% and 4.5% of basic salary or payment as of the granting of an indefinite contract.	-If both spouses are entitled to the allowance it is paid only to the MP whose financial conditions are the most favourable.  -Deduction of any similar benefits received by the MP, his spouse or a dependent child.	73% of international staff	N/A

## Legend:

— : no data available

N/A: not applicable

SM : Staff Member

MP: Member of Personnel

<sup>1</sup> Or, at the time of appointment to another international organization for MPs who for this reason reside in the local zone at the time of appointment to CERN.

I.O.	Denomination	Eligible population	Conditions	Rates	Duration	Non-concurrence	Beneficiaries	Other considerations
EC	Expatriation	Officials	<p><i>-Officials who are not and have never been nationals of the State where duty station is located<sup>2</sup>: &lt; 5 years<sup>3</sup> of residence or work within the European territory of that State.<sup>4</sup></i></p> <p><i>-Officials who are, or have been, nationals of the State where duty station is located: ≥ 10 years of residence outside the European territory of that State before entering the service.<sup>5</sup></i></p>	<p>16% of the total of the basic salary, household allowance and dependent child allowance.</p> <p>Minimum : € 442.78 per month.</p>	No limit.	No	71%	<p>-EC provides officials with a <b>foreign residence allowance</b> when:</p> <p>*not being, and have never been, national of the State where duty station is located;</p> <p>*not fulfilling the conditions laid down for having access to expatriation allowance.</p> <p>Rate: 1/4 of the expatriation allowance.</p>

<sup>2</sup> It includes officials who have, by marriage, automatically acquired, without the possibility of renouncing it, the nationality of the State where duty station is located.

<sup>3</sup> Period ending six months before official entered the service.

<sup>4</sup> Circumstances arising from work done for another State or for an international organization are not to be taken into account.

<sup>5</sup> For reasons other than the performance of duties in the service of a State or of an international organization.

I.O.	Denomination	Eligible population	Conditions	Rates	Duration	Non-concurrence	Beneficiaries	Other considerations
EMBL	Non-residence	Non-resident SMs defined as those in grades 4 or above who are not nationals of the host country at the time of their duty station at the time of appointment.	< 6 months of continuous residence in the host country of the duty station at the time of job application.	<p>-Recipient of family allowance: 12% of basic salary.</p> <p>-Non-recipient of the family allowance: 9% of basic salary.</p> <p>Minimum: according to family situation, € 430 or € 323 per month (in the lowest salary position being considered; 2003 figures).</p>	9 years.	Deduction of similar benefits received by spouse.	—	N/A

I.O.	Denomination	Eligible population	Conditions	Rates	Duration	Non-concurrence	Beneficiaries	Other considerations
ESO	Expatriation	<p>SMs, fellows and paid associates in grade 4 or above who are:</p> <ul style="list-style-type: none"> <li>-Expatriate MPs, defined as those who are not nationals of the duty station country at the time of appointment.</li> <li>-By way of exception, MPs nationals of the duty station country at time of appointment.</li> </ul>	<ul style="list-style-type: none"> <li>-For expatriates: &lt; 3 years of continuous residence in the duty station country at the time of appointment.<sup>6</sup></li> <li>- For non-expatriates: ≥ 10 years of continuous residence in other countries.<sup>7</sup></li> </ul>	<ul style="list-style-type: none"> <li>-Between 9% and 35% of basic salary, depending on: <ul style="list-style-type: none"> <li>*whether household allowance perceived;</li> <li>*place of residence.</li> </ul> </li> <li>According to family situation and to duty station:</li> <li>-Minimum: between € 1094 and € 170 per month (in the lowest salary position being considered).</li> <li>-Maximum: between € 2110 and € 509 per month (in the highest salary position being considered).</li> </ul>	<ul style="list-style-type: none"> <li>Reduced over 12 years until between 29% and 4.5% of basic salary as of the granting of an indefinite contract.</li> </ul>	<ul style="list-style-type: none"> <li>Deduction of any benefits of a similar nature received by the MP, his spouse or a dependent child.</li> </ul>	70%	N/A

<sup>6</sup> No account being taken of previous service in their own country's administration or with other international organizations.  
<sup>7</sup> Period ending six months before official entered the service

I.O.	Denomination	Eligible population	Conditions	Rates	Duration	Non-concurrence	Beneficiaries	Other considerations
ESA	Expatriation	-Expatriate SMs defined as those of categories A, L or B; young graduate trainees; and internal research fellows who are not nationals of the duty station country at time of appointment.	-< 1 year of continuous residence in the duty station country at the time of appointment <sup>8</sup> .  - Proof of residence <sup>9</sup> if any point on the border of the SM's country is within a radius of 50 km from the duty station.	-14% or 18% of basic salary <sup>10</sup> depending on: *whether household allowance perceived; *category of MP.  Minimum: € 898 or € 659 per month (in the lowest salary position being considered), according to family situation and category.  -Supplementary allowance (in respect of each dependent child): amount fixed by the Council for each duty country.	Decreases with time until 15% or 11% when $\geq 11$ years of service. <sup>11</sup>	-Deduction of any similar allowance to which a SM or his spouse are entitled from another source.  -If concurrence because spouse employed by ESA or another CO: 14% each. Decreases with time until 11%.	69%	N/A

<sup>8</sup> Period ending six months before official entered the service.

<sup>9</sup> In the duty country or, exceptionally, in another country of which he is not a national, taking account of his family circumstances.

<sup>10</sup> Calculated on the first step in grade of recruitment or promotion irrespective of any increase in the official's basic salary by movement up the incremental scale.

<sup>11</sup> With the Agency, or with another international organization or with the administration of the SM if in the host country and if he has been appointed immediately after by the Agency, without changing country.

I.O.	Denomination	Eligible population	Conditions	Rates	Duration	Non-concurrence	Beneficiaries	Other considerations
ITU <sup>12</sup>	Non-residence	General service SMs.	<p>-At the Headquarters in Geneva: not being locally recruited,<sup>13</sup> which implies:            *Not being a Swiss national,<sup>14</sup>            *Not being resident within a radius of 25 km from Geneva (regardless of the duration of such residence).<sup>15</sup></p> <p>-In other duty stations:            *Not having the nationality of the duty station;            *Being recruited beyond the local area of recruitment.</p>	<p>-Single Staff member: \$2'400            -Staff member with dependants: \$3'000.</p>	Until the voluntary acquisition, other than by marriage, of the nationality of the country of the duty station.	No	—	<p>-A rental subsidy is paid to non-local General Service staff posted to a duty station where no non-resident's allowance is payable.</p> <p>Rate: it may not exceed the amount of the non-resident's allowance.</p> <p>-The non-resident's allowance is taken into account in determining Staff Health Insurance contributions.</p>

<sup>12</sup>

For the Professional and higher categories the expatriation is taken into account in the salary scale by means of a net remuneration margin.

<sup>13</sup>

A SM who has been locally recruited acquires non-local status if he or she becomes a member of the Professional category.

<sup>14</sup>

A non-locally recruited official who acquires voluntarily, other than by marriage, the nationality of the country of the duty station shall be reclassified as locally recruited.

<sup>15</sup>

If an official has previously enjoyed non-local status during his or her employment with an international organization in the local area, this period does not count as residence for this purpose.

I.O.	Denomination	Eligible population	Conditions	Rates	Duration	Non-concurrence	Beneficiaries	Other considerations
UN <sup>16</sup>	Non-residence	General service SMs.	<ul style="list-style-type: none"> <li>-Serving at designated duty stations.</li> <li>-Have been recruited from outside the country of the duty station.</li> <li>-Not being member of the Field Service category.<sup>17</sup></li> <li>-Have not been recruited specifically for service with a mission.</li> </ul>	<ul style="list-style-type: none"> <li>-Single staff member: \$2'400</li> <li>-Staff member with dependants: \$3'000.</li> </ul>	5 years	<p>When both spouses are SMs entitled to the allowance: -it is paid to each at the single rate;</p> <p>-if they have a dependent child, it is paid at the dependency rate to the spouse having the higher salary level and at a single rate to the other spouse.</p>	—	N/A

<sup>16</sup>

For the Professional and higher categories the expatriation is taken into account in the salary scale by means of a net remuneration margin.

<sup>17</sup>

Peace-keeping missions and operations of the UN telecommunications system.

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TRIPARTITE EMPLOYMENT CONDITIONS FORUM (TREF)

Fifty-fourth Meeting

Geneva – 31 May & 1 June 2005

**5-YEARLY REVIEW 2005**

**INFORMATION ON FAMILY AND CHILD ALLOWANCES**

Further to the presentation made at TREF on 2 May 2005, this document provides information concerning family and child allowances. The first part describes benefits granted to families at CERN, in four Member States (Germany, United Kingdom, France and Geneva, Switzerland) and in other International Organizations (EC, ESA, ESO and ITU). The second part shows a comparison of these benefits at CERN and in the above-mentioned comparators where, in most cases, benefits are higher, as shown in paragraph II.

## INFORMATION ON FAMILY AND CHILD ALLOWANCES

### I – DESCRIPTION OF BENEFITS

#### A – CERN

##### 1. Family allowance:

According to Article R IV 1.14 of the CERN Staff Rules and Regulations, “a member of the personnel who has a family (...) shall receive a family allowance, the amount of which is shown in Annex R A 4.” (295 CHF per month in 2004, 300 CHF in 2005). Members of the personnel entitled to the payment of a family allowance are: Staff Members, Fellows and Paid Associates.

##### 2. Child allowance:

According to Article R IV 1.15 of the CERN Staff Rules and Regulations “A member of the personnel shall for each dependent child (...) receive a child allowance the amount of which is given in Annex R A 4.” (326 CHF per month in 2004, 331 CHF in 2005).

The definition of family is set out in Article R IV 1.16.

Members of the personnel entitled to the payment of a child allowance are identical to those entitled to the payment of a family allowance (Staff Members, Fellows and Paid Associates).

3. The number of family allowances and child allowances paid to staff members and the budget spent from 2002 to 2004 is shown below:

***Table 1: Child and family allowances at CERN 2002 – 2004***

<b>N° of Staff – average incl. Fellows</b>	<b>Family allowances Total</b>	<b>Family allowances / month</b>	<b>N° of family allowances paid/month</b>	<b>Child allowances Total</b>	<b>Child allowances / month</b>	<b>N° of child allowances paid/m.</b>
<b>2724 (2002)</b>	6.7 MCHF	291 CHF	1 935	7.8 MCHF	322 CHF	2 032
<b>2667 (2003)</b>	6.5 MCHF	293 CHF	1 841	7.7 MCHF	323 CHF	2 001
<b>2740 (2004)</b>	6.7 MCHF	295 CHF	1 882	8.3 MCHF	326 CHF	2 117

**B – MEMBER STATES****1) Private Sector****a) Germany**

In the German private sector, the tax calculation differs according to family situation, taking into account child benefits already paid. Child benefits “Kindergeld” amount to 154 Euros/child/month for the first, second and third child and 179 Euros for each additional child.

**b) United Kingdom**

The child allowances in the United Kingdom are the following<sup>1</sup>:

- £ 16.5 per week for the first child (£ 71.5 / month)
- £ 11.05 per week for each additional child (£ 47.8 / month)

In addition to child allowances, a child tax credit<sup>2</sup> of 545 £ per year is paid to families with 2 children whose gross income is less than £ 50 000 a year.

The tax calculation does not differ according to the marital situation.

**c) France**

In France, family allowances are paid as of the second child<sup>3</sup> and are not income related. Families receive 112 €/ month for 2 children and 257 €/month for 3 children and an increasing scale of amounts thereafter.

In addition, the tax calculation differs according to the family situation.

**d) Switzerland**

Child allowances paid in Switzerland depend on the “canton” of residence. In Geneva, families receive<sup>4</sup>:

- 200 CHF / month for a child up to 15 years old and
- 220 CHF for a child up to 18 years old.

The calculation of taxes also differs according to family situation.

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<sup>1</sup> Source: OECD 2004 – UK NCS Net Pay Calculation

<sup>2</sup> <https://www.taxcredits.inlandrevenue.gov.uk/Qualify/WhatAreTaxCredits.aspx>

<sup>3</sup> <http://vosdroits.service-public.fr/particuliers/F798.xhtml>

<sup>4</sup> Source: Office Fédéral des Assurances Sociales

## 2) *Public Sector*

Benefits granted to civil servants in the United Kingdom (CCLRC) and Switzerland (SIG) are equal to those provided in the private sector.

In Germany, in DESY, employees also receive an “Ortszuschlag” (“residence allowance”) the amount of which depends on their salary and on their family situation.<sup>5</sup>

## C – INTERNATIONAL ORGANIZATIONS

The situation in comparator International Organizations is the following<sup>5</sup>:

*Table 2 – Family and child allowances in International Organizations*

Organization	Family allowance	Child allowance
EC	149 €/month + 2% of basic salary	326 €/month/child
ESA	6% of basic salary	269 €/month/child
ESO	165 €/month	248 €/month/child
ITU (G grades)	600 CHF/month	326 CHF/month/child
ITU (P grades)	N/A but internal taxation: effect on salary if staff members have dependants	314 CHF/month/child

## II – COMPARISONS OF BENEFITS

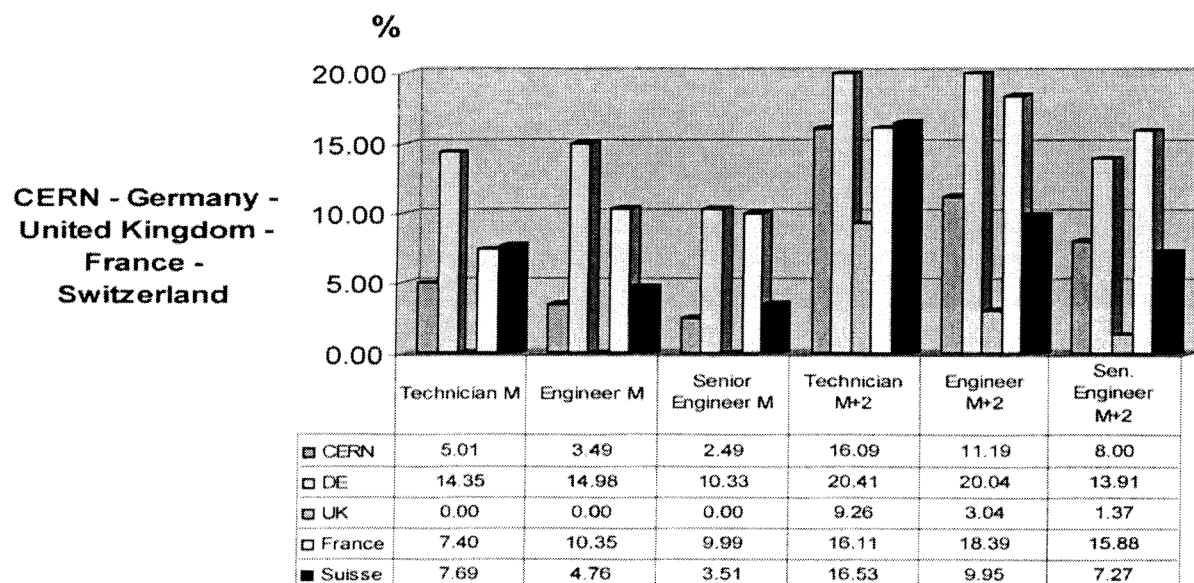
### Comparison method

Based on the results of the data collection enquiry, comparator salaries were used for three benchmarks (technician, engineer, senior engineer or the closest benchmark available), which explains some differences in the figures shown for CERN. A tax tool provided by OECD was used for calculating tax in Germany, the United Kingdom and France, and a tax tool provided by the Geneva authorities was used for Swiss/Geneva calculations. The numbers taken into account are the 2004 amounts.

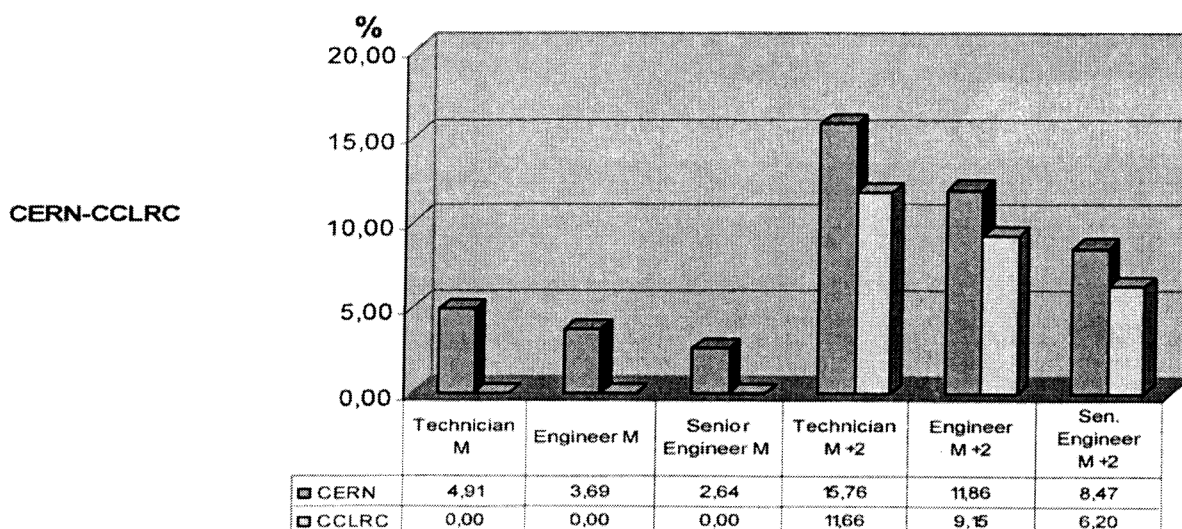
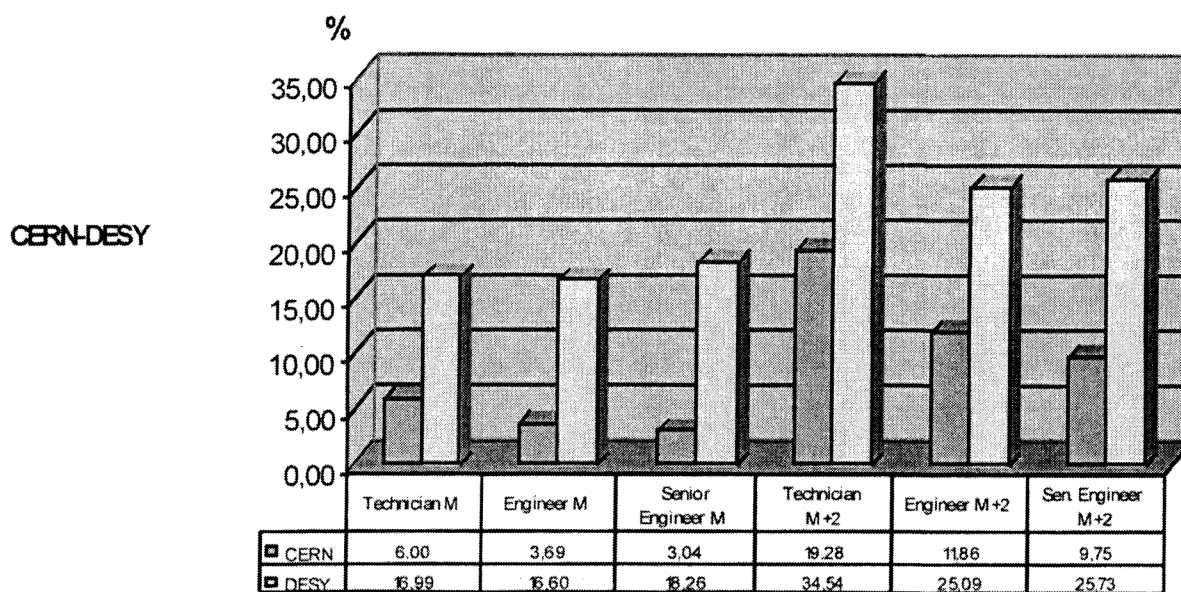
The results are shown as a percentage of benefits granted to a married person and a married person with two children, compared to the situation of a single person.

<sup>5</sup> Source: 5-yearly review questionnaire

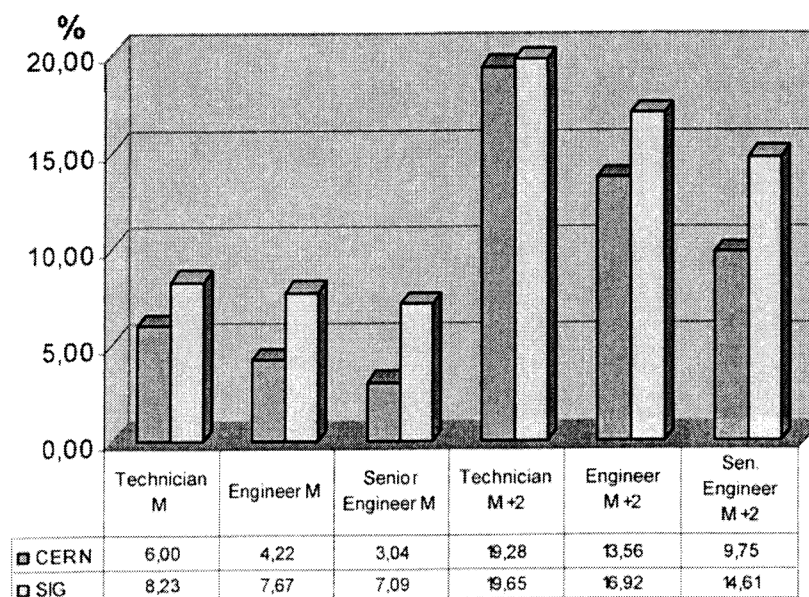
## a) Member States – private sector



## b) Member States – public sector

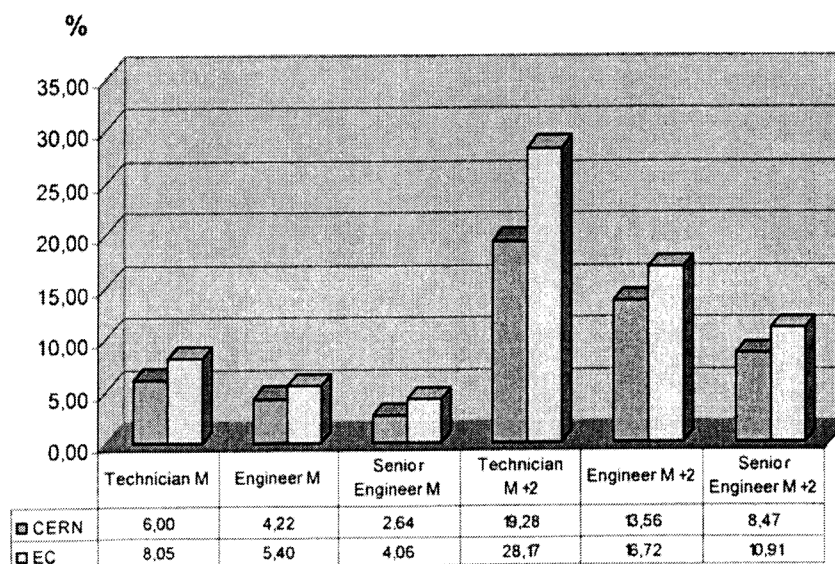


## CERN-SIG

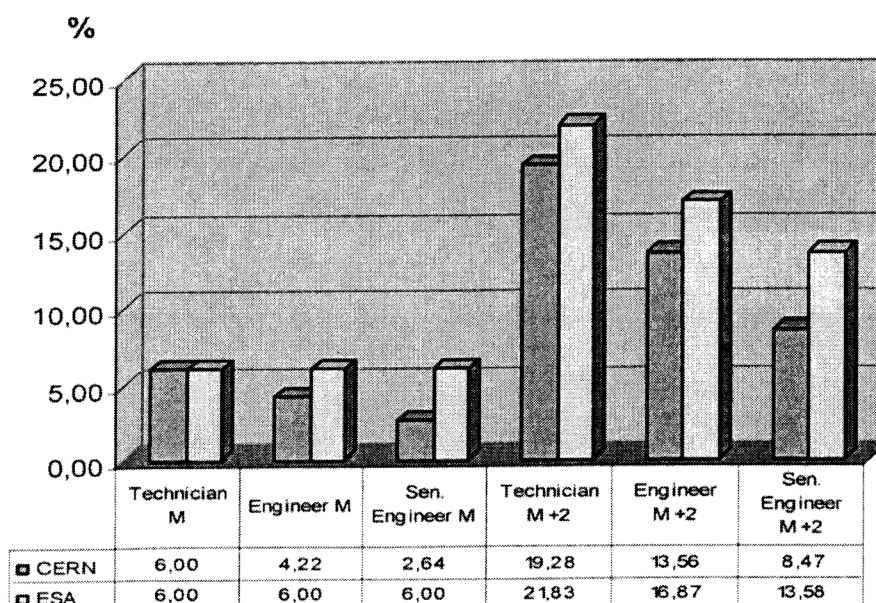


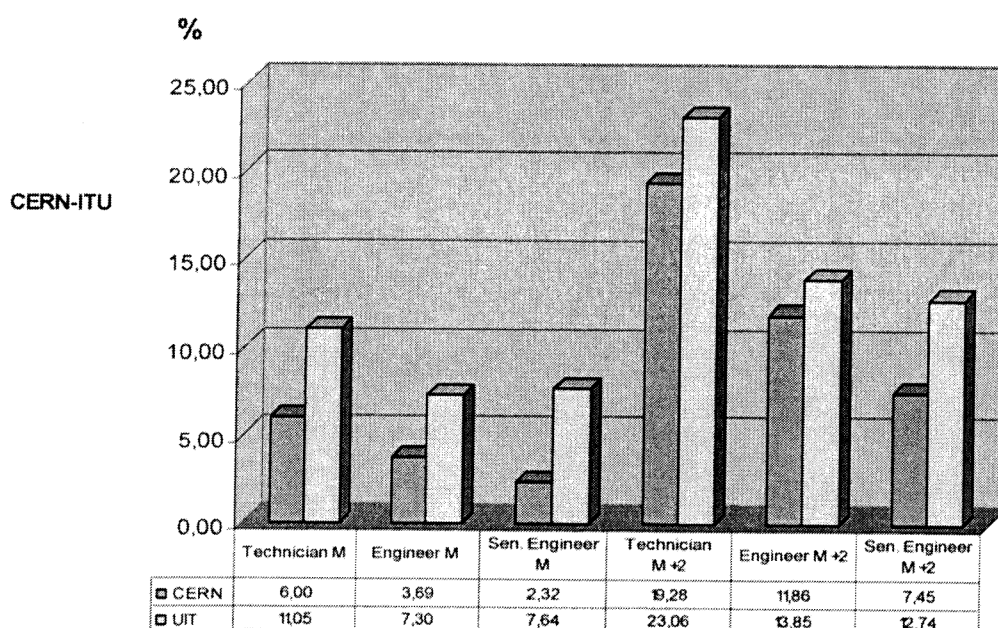
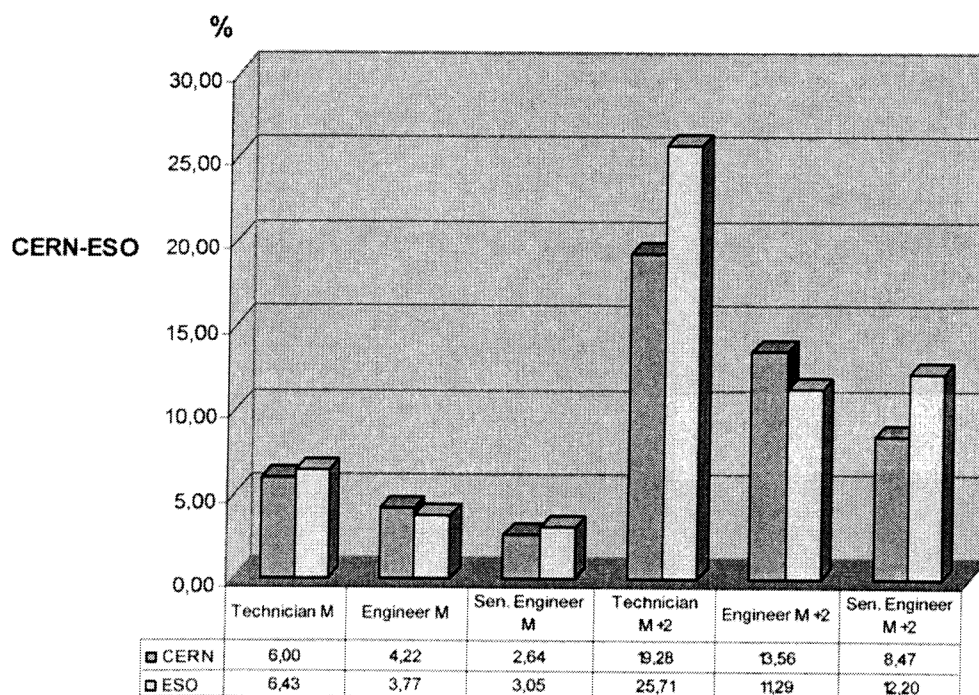
## c) International Organizations

## CERN-EC



## CERN-ESA





### III. CONCLUSION

Further to the presentation made at TREF on 2 May 2005, this document provides information concerning family and child allowances. The first part describes benefits granted to families at CERN in four Member States (Germany, United Kingdom, France and Geneva, Switzerland) and in other International Organizations (EC, ESA, ESO and ITU). The second part shows a comparison of these benefits at CERN and in the above-mentioned comparators where, in most cases, benefits are higher, as shown in paragraph II.

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TRIPARTITE EMPLOYMENT CONDITIONS FORUM (TREF)

Fifty-fourth Meeting

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**5-YEARLY REVIEW 2005**

**INFORMATION ON REIMBURSEMENT OF EDUCATION FEES**

Further to the presentation made at TREF on 2 May 2005, this document provides information concerning the reimbursement of education fees. The CERN situation is first described, followed by a comparison with provisions of other International Organizations.

## INFORMATION ON REIMBURSEMENT OF EDUCATION FEES

### I. REIMBURSEMENT OF EDUCATION FEES AT CERN

As a preliminary remark, it is to be noted that benefits of a similar nature obtained from any other source outside the Organization are deducted from the amounts paid by the Organization.

#### *A— Eligible population*

In application of Article R IV 1.22 & Annex R A 8 of the CERN Staff Rules and Regulations, CERN reimburses education fees to International Staff Members, Fellows and Paid Associates. Specific benefits are also payable to Local Staff Members.

#### *B— Rate of Reimbursement*

The reimbursement rate of education fees for International Staff Members, Fellows and Paid Associates is 75%. For Local Staff see C 2) below.

#### *C— Reimbursements*

##### **1) International Staff Members, Fellows and Paid Associates**

These members of the personnel can be reimbursed, under certain conditions, for their children aged between 3 and 25 years old and studying in CERN Member States, the following expenses at a rate of 75%: registration fees, half board, boarding, accommodation costs, language courses in their mother tongue as well as in English or French. In addition, the cost of local transport and journey expenses can also be reimbursed under specific conditions.

Two ceilings are applicable (see Table 2)

- one to children aged less than 8 years or studying within a circle of 20 km from their parents' duty station and residence; or in the case of free schooling
- and another ceiling to children studying outside this circle.

##### **2) Local Staff Members**

Local Staff Members can benefit, for their dependent children, from:

- reimbursement of school or university registration fees that the Staff Member, by virtue of his fiscal status, is obliged to pay for a dependent child at a public education establishment in the Host States,
- payment of a monthly education allowance amounting to 200 CHF per month for each dependent child attending a higher education establishment in a Member State.

The annual cost to the Organization is about 12'500 CHF per year in total.

### ***D— Statistics***

Expenses of the Organization for the reimbursement of education fees in the years 2000 – 2004 are the following:

**TABLE 1**

<b>Year</b>	<b>Education expenses (MCHF)</b>	<b>Basic salaries, non-resident allowance, family and child allowances (MCHF)</b>	<b>Percentage</b>
<b>2000</b>	9.1	306.5	2.98
<b>2001</b>	8.5	316.8	2.68
<b>2002</b>	8.2	309.9	2.66
<b>2003</b>	7.4	298.2	2.47
<b>2004*</b>	7.2	301.6	2.38

*\* Data incomplete for 2004: Reimbursement over 2-year period*

## **II. REIMBURSEMENT OF EDUCATION FEES IN OTHER INTERNATIONAL ORGANIZATIONS**

### ***A— Eligible population***

In most other International Organizations, the reimbursement of education fees is linked to expatriation. This is the case for ESA, UNOG, WTO and ITU. On the contrary, ESO, like CERN, reimburses education fees to all Staff Members, Fellows and Paid Associates, without any distinction based on the residential category. EC provides an education allowance to its officials and European Schools are open to children of officials in big centres.

### ***B— Rate of reimbursement***

In International Organizations, the reimbursement rate of education fees varies from 70% to 75%.

### ***C— Reimbursement***

The type of expenses reimbursed is similar in all International Organizations. Notable differences are the reimbursement of uniforms and textbooks which is granted in a few Organizations only.

**TABLE 2**

This table describes the system of reimbursement of education fees in the following International Organizations: ESO, ESA, UNOG, ITU and EC.

	<b>Population</b>	<b>Ceiling</b>	<b>Rate</b>	<b>Age</b>	<b>Expenses reimbursed</b>
<b>CERN</b>	International Staff Members, Fellows, Paid Associates	Child >8 years and establishment > 20 km: 15 873 CHF/year (if free schooling: 13 685 CHF) Child < 8 years or establishment < 20 km: 13 685 CHF/year	75 %	3-25 years	School fees. Under certain conditions: boarding, half board, accommodation, journey expenses, local transport, language courses (Member States).
<b>ESO</b>	Staff Members, Fellows, Paid Associates	Children < 8 years: 7 400 €/year Children > 8 years: 8 550 € or 7 400 €/year if free schooling	75 %	3-25 years	School fees. Under certain conditions, registration in private school, boarding, half board, transport, school uniforms, language courses. Vocational training.
<b>ESA</b>	Members of the personnel benefiting from expatriation allowance except if nationality of duty station.	Education allowance: 2.5 times of the amount of dependant allowance, 3 times if child registered in Staff member's country of origin.	70 %	From primary school to end of post secondary studies, maximum 26 years	School fees. Under certain conditions, books, school uniforms, private tuition, boarding, half board, transport, travelling expenses, examination fees. Vocational training.
<b>UNOG</b>	Internationally recruited staff members serving outside their home country	19 010 CHF/ year for Geneva	75 %	From primary school to end of 4th year of post-secondary studies or first recognized degree. Age max.: 25 years	School fees. Under certain conditions, boarding, travelling expenses, mother tongue language courses.
<b>ITU</b>	Internationally recruited Staff members serving outside their own country	19 010 CHF/ year for Geneva	75 %	From primary school to end of 4th year of post-secondary studies or first recognized degree. Age max.: 25 years	School fees. Under certain conditions: textbooks, registration fees for private school, travelling expenses, examinations, diplomas.
<b>EC</b>	Civil servants	Monthly education allowance: 221,50 €/month/child or 79,74 € if child < 5 years or not attending school full time, the double if school at more than 50 km of duty station, 3 times the double if civil servant in non EC countries		Primary school-26 years	European Schools accessible to civil servants.

### III. CONCLUSION

Further to the presentation made at TREF on 2 May 2005, this document provides information concerning the reimbursement of education fees.

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**ORGANISATION EUROPEENNE POUR LA RECHERCHE NUCLEAIRE**  
**CERN** **EUROPEAN ORGANIZATION FOR NUCLEAR RESEARCH**

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TRIPARTITE EMPLOYMENT CONDITIONS FORUM

Fifty-fourth Meeting

Geneva – 31 May and 1 June 2005

**5-YEARLY REVIEW 2005**

**INFORMATION ON THE DEFINITION OF THE FAMILY/SPOUSE,  
MATERNITY AND PARENTAL LEAVE**

In the context of the current 5-Yearly Review, this document presents completed information on the definition of family/spouse, maternity and parental leave (cf. CERN/2567, CERN/FC/4824, paragraph 2.1)

This is the result of a thorough study of recent societal developments in these fields in Member States and comparator organizations.

Proposals by the Management for modifications of CERN's social conditions and the potential financial implications thereof, will be put forward at a later stage in the light of the feedback obtained from TREF.

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## **INFORMATION ON THE DEFINITION OF THE FAMILY/SPOUSE, MATERNITY AND PARENTAL LEAVE**

### **I. Introduction**

In June 2004, the Council approved a document entitled “Preparation for the 5-Yearly Review and Work Planning of TREF”<sup>1</sup>, in which proposals for the conditions to be examined in the current 5-Yearly Review were listed. The definition of family/spouse and maternity and parental leave were mentioned as priority issues to be examined under the heading “Social Conditions”.

The definition of “family” contained at present in the CERN Staff Rules and Regulations encompasses the Member of the Personnel’s spouse and dependent children. The “spouse” is currently defined as the wife or husband of the Member of Personnel following a formal marriage, substantiated by a valid marriage certificate. It is not specified whether the spouse should be of same or opposite sex, however CERN’s current policy is to recognize opposite-sex marriages only. Registered partners and common-law spouses are not considered as spouses. In view of societal development in various Member States, a study on the review of the definition of spouse was presented to TREF on 25 November 1997. At that time, TREF “urged that a start be made in the matter of the definition of family and spouse, which was an important issue...”. On 3 June 1998, TREF took note of the review of the definition of spouse status (CERN/TREF/111) as “a positive start” and stated that “the item should be kept open and proposals concerning the recognition of such partnerships at CERN prepared for discussion in the next review of the Staff Rules and Regulations” (CERN/TREF/115).

Regarding maternity and parental leave, whilst provisions for a 16-week maternity leave, complemented by a 4-week allowance in case of breast-feeding, are contained in CERN’s rules, parental leave is currently not provided for.

### **II. Scope of study**

The Management decided to draw up a summary of information on conditions in the Host States<sup>2</sup> and in other Member States, as available, as well as in other International Organizations, in particular those listed in Annex A 1 of the Staff Rules and Regulations. Investigation of financial consequences, in particular on the CERN Health Insurance Scheme and the Pension Fund, of extending the definition of family/spouse will be examined at a later stage.

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<sup>1</sup> CERN/2567, CERN/FC/4824

<sup>2</sup> Switzerland is considered at federal level as well as at cantonal level for Geneva and Vaud as these are the cantons where staff reside.

Initial discussions concluded that, in the light of previous discussions at TREF (25 November 1997 and 25 February 1998) and of social and employment legislation developments in the Member States, the following topics should be examined in detail:

Definition of family/spouse	Marital partnerships Non-marital partnerships
Maternity and parental leave	Maternity leave Parental leave Paternity leave Adoption leave Special leave

### III. Guiding Principles

Feedback from inside the laboratory, in particular the Equal Opportunities Advisory Panel, has shown that certain issues relating to the definitions of spouse, family and leave are not comprehensively covered by the present Staff Rules and Regulations.

Therefore the first aim was to identify key guiding principles which were defined as the need to:

- improve CERN's image as an employer offering attractive recruitment conditions which ultimately have an impact on staff retention, motivation and commitment to the Organization;
- promote equality for male and female Staff Members;
- help Staff Members to reconcile work and family life.

More globally, CERN, as a European Organization with its seat in Geneva, should follow social developments in its Member States and in particular in the Host States.

### IV. Working Procedures

Complementing the data collected from the comparator organizations via the 5-Yearly Review questionnaire, data were obtained mainly from analyzing their Rules and Regulations, from the official web sites of these organizations and of Member State governments. Additional detailed questions to the comparator organizations were compiled and discussed with them regarding the topics identified in Section II.

Furthermore, the CERN service for Relations with Host States consulted the Host State authorities on certain topics. The current status of this work is as follows :

- A written request was sent on 02/02/05 to the French Ministry of Foreign Affairs and the Swiss Mission in Geneva enquiring about a possible evolution regarding civil union and same-sex partners;
- A written reply was received on 03/02/05 from the French Ministry of Foreign Affairs by the Vice Director of Protocol, Diplomatic Privileges and Immunities informing CERN that the situation had not evolved. It indicated that concerning civil union (“PACS”) a document with reform proposals had been submitted to the Minister of Justice on 30/12/04;
- A written reminder was sent on 26/04/05 by the CERN service for Relations with Host States to the Swiss Mission and enquiring under which circumstances the Federal Department of Foreign Affairs delivers a Swiss permit for international civil servants, and which privileges and immunities apply to partners united by civil union or partners of the same sex of a member of personnel holding a “Carte de légitimation” or an “Attestation de fonctions”.

As a result, data were compiled on the following and are available in the annexes accompanying the present document:

Definition of family/spouse	<ul style="list-style-type: none"> <li>• Table 1: Same-sex marriage in the comparator organizations</li> <li>• Table 2: Same-sex marriage in other organizations</li> <li>• Table 3: Same-sex marriage in Member States</li> <li>• Table 4: Non-marital partnerships in comparator organizations</li> <li>• Table 5: Non-marital partnerships in other organizations</li> <li>• Table 6: Non-marital partnerships in Member States</li> </ul>
Maternity and parental leave	<ul style="list-style-type: none"> <li>• Table 7: Maternity/Paternity/Parental/Adoption leave in comparator organizations</li> <li>• Table 8: Maternity/Paternity/Parental/Adoption leave in Member States</li> </ul>

These tables represent a concise picture of the data at 13/05/05. The data are subject to change due to the evolving state of national laws and collective agreements.

To ensure these tables are correctly interpreted, the following offers the verbal text equivalent for a few examples:

- Table 1 column 1: CERN does not recognize same sex marriages however the topic is under study<sup>3</sup>;

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<sup>3</sup> in the context of the current 5-Yearly Review

- Remaining columns of Table 1 and Tables 2-6 should be interpreted in a similar way taking into account the relevant footnotes where appropriate. In the case where the data have not been received, for example CEA, or are not known, the column is blank. In cases where same-sex marriages and non-marital partnerships are under study in Member States or organizations other than the comparators, if details about applicability, conditions or benefits are known, this information has been included;
- Tables 7 and 8 follow a different format based on the largely differing leave variations offered by the comparator organizations and Member States;
- Table 7 row 1:
  - CERN offers basic Maternity Leave of 16 weeks;
    - normally 6 of the weeks should be taken before the birth. The note explains that this can be reduced to 4 weeks on presentation of a medical certificate;
    - no extra entitlement is offered for Single Parents, Multiple Births, Premature Births, or if the birth is for a third child or above;
    - an additional 4 weeks are allocated to mothers who breast-feed;
    - maternity Leave is fully paid.
  - Fathers are allocated 3 days of leave for the birth of their child;
  - Adoption Leave of 8 weeks for the mother or father is allocated if the adopted child is under the age of 6, otherwise as stated in the note for adopted children over the age of 6 the allocation is 4 weeks;
  - No Parental Leave is offered at CERN however Special Paid Leave exists allowing up to 7 days per year to be taken to care for seriously ill children up to the age of 10 on presentation of a medical certificate;
  - Unpaid Special Leave of up to 1 year is also available upon request to and approval by the Director-General.
- remaining rows of tables 7 and 8 should be interpreted in a similar way. A zero in a column signifies no entitlement whereas a blank column signifies that data were not available or have not been received.

## V. Findings

- 1) The data collection shows that there have been developments in Member States and other organizations which are not currently covered in CERN's Staff Rules and Regulations and which should be studied in more detail.

- 2) In the field of family/spouse definition there have been movements in *partnerships and marriage for same and opposite sexes*. Initial findings have shown that:
- same-sex marriages are recognized by
    - 3 of the comparator organizations: JRC (EC), ESA and UNOG if recognised by the Staff Member's country. Refer to Table 1 for further details.
    - 3 of the 4 other organisations: Council of Europe, WHO and EMBL. Refer to Table 2 for further details.
    - 2 Member States: Belgium and the Netherlands with possibly Spain soon recognising such marriages. Refer to Table 3 for further details.
  - a special status for same-sex and opposite-sex partnerships other than marriage exists in
    - 4 of the comparator organizations: JRC (EC) if officially registered under the legislation or procedures of a Member State, CLRC, Swiss Federal Service in some Departments such as Federal Department of Finance or Federal Department of Foreign Affairs and UNOG if recognized by the staff member's country. Refer to Table 4 for further details.
    - 1 of the 4 other organizations: Council of Europe (under study in 1 more: WTO). Refer to Table 5 for further details.
    - 11 Member States: recognition is already effective in the Canton of Geneva whilst for the whole of Switzerland a referendum will be held on 5th June 2005, France, Belgium, Germany, Denmark, Finland, Hungary, Netherlands, Norway, Portugal and Sweden. Refer to Table 6 for further details.
- 3) For *maternity leave*, CERN's allocation corresponds to the practice in most Member States, comparator and other organizations.
- A variant observed in some cases, is additional maternity leave in cases of multiple and/or premature births and single mother situations: JRC (EC), ESA, DESY, Austria, Czech Republic, France, Germany, Norway, Poland, Portugal, Slovak Republic, Spain and Sweden. Refer to Tables 7 and 8 for further details.
  - There is also the variant of granting additional maternity leave from the third child onwards: ESA, France, Poland and Spain already from the second child onwards. Refer to Tables 7 and 8 for further details.
- 4) For *paternity leave*, CERN currently grants 3 days.

- Among the comparator organizations, 11 offer such leave: JRC (EC), ESA, ESO, DESY, CLRC, ETHZ, Swiss Federal Service, SIG, ITU, UNOG and EMBL with an average duration of 5 days. Refer to Table 7 for further details.
  - In 13 Member States: Austria, Belgium, Denmark, Finland, France, Greece, Hungary, Netherlands, Norway, Portugal, Spain, Sweden, United Kingdom, the average duration of paternity leave is 14 days. Refer to Table 8 for further details.
  - In the Host States, there is no Confederation-wide paternity leave in Switzerland, although civil servants in the Canton of Vaud may receive 5 days; France offers 14 days with the possibility of 21 days in the event of multiple births.
- 5) The notion of *parental leave* for tending to (young) children does not exist at CERN. Under the current rules at CERN (R II 4.29), a Staff Member would have to apply for unpaid leave for personal convenience, which is granted at the discretion of the Director-General and during which social coverage is only maintained if fully financed by the Staff Member.
- Among the comparator organizations, 7 offer Parental Leave: JRC (EC), ESA, DESY, CLRC, SIG, UNOG, EMBL for an average length of 13 months. Although not statutory, the Swiss Federal Service has granted Parental Leave on a case by case basis; similarly, ESO has granted up to 3 months' Parental Leave in a few cases. Refer to Table 7 for further details.
  - Parental Leave exists in all of the Member States except Switzerland at Confederation level (one year maximum for civil servants in the Canton of Vaud).
- 6) *Adoption leave* at CERN currently stands at 4 to 8 weeks depending on the age of the adopted child.
- Data from 8 of the comparator organizations: JRC (EC), ESA, ESO (at the discretion of the Director General), CLRC, ETHZ, ITU, UNOG, EMBL show an average length of 11 weeks with the maximum being 26 weeks. Refer to Table 7 for further details;
  - in 13 Member States for which data are available: Belgium, Czech Republic, Denmark, France, Italy, Netherlands, Norway, Poland, Portugal, Spain, Sweden, Switzerland (Geneva and Vaud Cantons only) and United Kingdom, the average duration for adoption leave is 21 weeks with a maximum of 64 weeks. Refer to Table 8 for further details;

- In the Host States, adoption leave is 16 weeks in the Canton of Geneva, 8 weeks for civil servants in the Canton of Vaud and 10 weeks in France.
- 7) The notion of *special leave* at CERN also covers the context of illness (substantiated by a medical certificate) of a dependent child up to 10 years old, for up to 7 calendar days per year
- Practice in 8 of the comparator organizations: JRC (EC), ESA, ESO, CLRC, ETHZ, SIG, UNOG, EMBL is to grant an average of 9 days, maximum 15 days, for special leave to care for close relatives. Refer to Table 7 for further details. Such leave is also referred to as compassionate or distress leave.

## VI. Conclusions

In the context of the current 5-Yearly Review, this document presents completed information on the definition of family/spouse, maternity and parental leave (cf. CERN/2567, CERN/FC/4824, paragraph 2.1).

This is the result of a thorough study of recent societal developments in these fields in Member States and comparator organizations.

Proposals by the Management for modifications of CERN's social conditions and the potential financial implications thereof will be put forward at a later stage in the light of the feedback obtained from TREF.

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Table 1 : Same sex marriage - Comparator Organizations

13 May 2005

	CERN	JRC (EC)	ESA	ESO	CEA	DESY	CLRC	ETHZ	CH Fed Service	SIG	ITU	UNOG
<b>Recognition</b>												
Recognized	N	Y	Y	N		N	N	N	N	N	N	Y <sup>1</sup>
Under study	Y	N	N	N		N	N	N	N	N	N	N
<b>Benefits</b>												
Health ins.		Y	Y	N		N	N	N	N	N	N	Y
Pension		Y	Y	N		N	N	N	N	N	N	Y
Fam. allow.		Y	Y	N		N	N	N	N	N	N	Y
Child allow.		Y	Y	N		N	N	N	N	N	N	Y
School fees		Y	Y	N		N	N	N	N	N	N	Y
Expat. allow.		Y	Y	N		N	N	N	N	N	N	Y
Home leave		Y	Y	N		N	N	N	N	N	N	Y
Special leave		Y	Y	N		N	N	N	N	N	N	Y
Other		Y	Y	N		N	N	N	N	N	N	Y

Table 2 : Same sex marriage - Other Organizations

	Council of Europe	WTO	WHO	EMBL
<b>Recognition</b>				
Recognized	Y	N	Y	Y
Under study	N	N	N	N
<b>Benefits</b>				
Health ins.	Y	N	Y	N
Pension	Y	N	Y	N
Fam. allow.	Y	N	Y	Y
Child allow.	Y	N	Y	N
School fees	Y	N	Y	N
Expat. allow.	Y	N	Y	N
Home leave	Y	N	Y	N
Special leave	Y	N	Y	N
Other	Y	N	Y	N

Y=yes; N=no; blank=not known.

<sup>1</sup> Only if recognized by the staff member's country.

Table 3 : Same-sex marriage - Member States

13 May 2005

	CH	CH GE	CH VD	FR	AT	BE	BG	CZ	DE	DK	ES <sup>1</sup>	FIN	GR	HU	IT	NL	NO	PL	PT	SK	SE	UK
<b>Recognition</b>																						
Recognized	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N
Under study	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N
<b>Benefits</b>																						
Health ins.	N	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	N	N
Death duties	N	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	N	N
Social benefits	N	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	N	N
Pension	N	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	N	N
Employ. ben.	N	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	N	N
Inheritance	N	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	N	N
Adopt / Cust.	N	N	N	N	N	N <sup>2</sup>	N	N	N	N	Y	N	N	N	N	Y <sup>3</sup>	N	N	N	N	N	N
Immig. rights	N	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	N	N
Taxes	N	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	N	N
Tenancy/prop.	N	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	N	N
Other	N	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	Y	N	N	N	N	N	N

Y=yes; N=no; blank=not known.

<sup>1</sup> Project of law approved by Parliament. Under study by the Senate. Details on benefits are based on the project of law.<sup>2</sup> Even if joint adoption is not allowed, the spouse can adopt the spouse's child.<sup>3</sup> Joint adoption is allowed but it is limited to children of Dutch nationality or who reside in the Netherlands.

13 May 2005

Table 4 : Non-marital Partnership - Comparator Organizations &amp; the Host States + Germany and the United Kingdom

	CERN	JRC (EC)	ESA	ESO	CEA	DESY	CLRC	ETHZ	CH Fed Serv	SIG	ITU	UNOG
<b>Recognition</b>												
Recognized	N	Y <sup>4</sup>	N	N		N	Y <sup>5</sup>	N	Y <sup>6</sup>	N	N	Y <sup>7</sup>
Under study	Y	N	Y	N		N	N	N	N	N	N	N
<b>Applicability</b>												
Opposite sex		Y		N		N	Y	N	Y	N	N	Y
Same sex		Y		N		N	Y	N	Y	N	N	Y
Both		Y		N		N	Y	N	Y	N	N	Y
<b>Conditions</b>												
Registered		Y <sup>8</sup>		N		N	N	N	N	N	N	Y
Common life		N		N		N	N	N	Y <sup>9</sup>	N	N	N
Other		Y <sup>10</sup>		N		N	Y <sup>11</sup>	N	N	N	N	Y <sup>12</sup>
<b>Benefits</b>												
Health ins.		Y <sup>13</sup>		N		N	N	N	Y <sup>14</sup>	N	N	Y
Pension		Y		N		N	Y <sup>15</sup>	Y <sup>16</sup>	Y <sup>16</sup>	N	N	Y
Fam. allow.		Y		N		N	N	N	N	N	N	Y
Child allow.		Y		N		N	N	N	N	N	N	Y
School fees		Y		N		N	N	N	N	N	N	Y
Expat. allow.		Y		N		N	N	N	N	N	N	Y
Home leave		Y		N		N	N	N	N	N	N	Y
Special leave		Y <sup>13</sup>		N		N	Y <sup>17</sup>	N	Y <sup>18</sup>	N	N	Y
Other		Y <sup>19</sup>		N		N	Y <sup>20</sup>	N	Y <sup>21</sup>	N	N	Y <sup>22</sup>

Y=yes; N=no; blank=not known.

<sup>4</sup> Only if officially registered under the legislation or procedures of a member state.<sup>5</sup> Does not cover staff on long-term attachment overseas - our contact thinks this is likely to be reviewed.<sup>6</sup> In some departments such as the Federal Department of Finance (DFF) or the Federal Department of Foreign Affairs (DFAE).<sup>7</sup> Only if recognized by the staff member's country.<sup>8</sup> Requires legal document recognized by a Member State.<sup>9</sup> The DFAE requires a written statement of common life.<sup>10</sup> Two levels of benefit according to whether the option of marriage is open to the partners (currently, in Belgium and the Netherlands) or not. Most of benefits applies to couples where legal marriage not available.<sup>11</sup> Pension scheme requires certification of partnership.<sup>12</sup> The Organization requests the Permanent Mission to the United Nations of the country of nationality of the staff member to confirm the existence and the validity of the domestic partnership contracted by the staff member under the law of that country.<sup>13</sup> The condition of access to legal marriage in a Member State does not apply.<sup>14</sup> Benefits in event of professional accident or illness.<sup>15</sup> Some differences between the pension schemes - one of the schemes provides for partnerships as well as marriage. A life insurance is provided as part of the Pension Scheme.<sup>16</sup> The Federal Pension Fund provides a pension for the surviving partner of every Federal employee when the partners have lived as a married couple over the last 5 years and the beneficiary has been supported by his/her partner. The partnership must be proven through a "contrat d'assistance" drafted by the Federal Pension Fund.<sup>17</sup> Covers Paternity Leave and other "Domestic Distress" such as death of relative, difficulties with childcare, severe damage e.g. flooding, fire.<sup>18</sup> 3 days of paid leave in the event of the death of the partner.<sup>19</sup> Access to official buildings, ID card, etc.<sup>20</sup> Terms and conditions negotiated with the union.<sup>21</sup> Entertainment expenses : costs cover the partner if s/he is present. An accompanying person's allowance can also be paid at duty stations overseas.<sup>22</sup> As married couples.

Table 5 : Non-marital Partnership - Other Organizations

13 May 2005

Recognition	Council of Europe	WTO	WHO	EMBL
Recognized	Y <sup>1</sup>	N		
Under study	N	Y		N
Applicability				N
Opposite sex	Y			
Same sex	Y			N
Both	Y			N
Conditions				N
Registered	Y			
Common life	N			N
Other	Y <sup>2</sup>			N
Benefits				N
Health ins.	Y <sup>3</sup>			
Pension	Y <sup>4</sup>			N
Fam. allow.	Y <sup>4</sup>			N
Child allow.	N			N
School fees	N			N
Expat. allow.	N			N
Home leave	N			N
Special leave	Y <sup>5</sup>			N
Other	N			N
Y=yes; N=no; blank=not known.				

- <sup>1</sup> Only if officially registered under the legislation or procedures of a member state.
- <sup>2</sup> Recognition by the Organization.
- <sup>3</sup> French social security rule : persons cohabiting with staff members, if they are totally dependent on them.
- <sup>4</sup> Applies only to same sex partners who do not have access to marriage.
- <sup>5</sup> Leave for : conclusion of partnership, severe illness, death of partner.

Table 6 : Non-marital Partnership - Member States

12 May 2005

	CH	GE <sup>1</sup>	VD	FR	AT	BE	BG	CZ	DE	DK	ES <sup>2</sup>	FIN	GR	HU	IT	NL	NO	PL	PT	SK	SE	UK
<b>Recognition</b>																						
Recognized	N	Y	N	Y	N	Y	N	N	Y	Y	N	Y	N	Y	N	Y	Y	N	Y	N	Y	N
Under study	Y <sup>3</sup>	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	Y
<b>Applicability</b>																						
Opposite sex	N	Y	N	Y	N	Y	N	Y	N	N	N	N	N	Y	N	Y	N	N	Y	N	N	N
Same sex	Y	Y	N	Y	N	Y	N	Y	Y	Y	N	Y	N	Y	N	Y	Y	N	Y	N	Y	Y
Both	N	Y	N	Y	N	Y	N	Y	N	N	N	N	N	Y	N	Y	N	N	Y	N	N	N
<b>Conditions</b>																						
Registered	Y	Y	N	Y	N	Y	N	Y	Y	Y	N	Y	N	N	N	Y	Y	N	Y	N	Y	Y
Common life	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y	N	N	Y	N	Y	N
Other	Y <sup>4</sup>	Y <sup>5</sup>	N	N	N	N	N	N	N	Y <sup>6</sup>	N	N	N	N	N	N	N	N	N	N	N	N
<b>Benefits</b>																						
Health ins.	Y	Y	N	Y	N	N	N	N	Y	Y	N	Y	N	Y	N	Y	Y	N	Y	N	Y	Y
Death duties	Y	N	N	Y	N	N	N	N	Y	Y	N	Y	N	Y	N	Y	Y	N	Y	N	Y	Y
Social benefits	Y	N	N	Y	N	N	N	N	N	Y	N	Y	N	Y	N	Y	Y	N	N	N	Y	Y
Pension	Y	N	N	N	N	N	N	N	Y	Y	N	Y	N	Y	N	Y	Y	N	N	N	Y	Y
Employ. ben.	N	N	N	Y	N	N	N	N	N	Y	N	Y	N	Y	N	Y	Y	N	Y	N	Y	Y
Inheritance	Y	N	N	N	N	N	N	Y	Y	Y	N	Y	N	Y	N	Y	Y	N	N	N	Y	Y
Adopt / Cust.	N	N	N	N	N	N	N	N	N	Y <sup>7</sup>	N	Y	N	N	N	Y <sup>8</sup>	Y <sup>8</sup>	N	Y <sup>9</sup>	N	N	Y
Immig. rights	Y <sup>10</sup>	N	N	N <sup>11</sup>	N	N	N	N	Y	Y	N	Y	N	Y	N	Y	Y	N	N	N	Y	Y
Taxes	Y	N	N	Y	N	N	N	N	N	Y	N	Y	N	Y	N	Y	Y	N	Y	N	Y	Y
Tenancy/prop.	Y	Y	N	Y	N	Y	N	Y	Y	Y	N	Y	N	Y	N	Y	Y	N	Y	N	Y	Y
Other	N	Y <sup>12</sup>	N	N	N	N	N	N	N	Y <sup>13</sup>	N	Y <sup>12</sup>	N	Y <sup>12</sup>	N	Y <sup>12</sup>	Y <sup>12</sup>	N	N	N	Y <sup>12</sup>	Y <sup>12</sup>

Y=yes; N=no; blank=not known.

1 Other cantons recognizing domestic partnerships : Zurich (same sex partners have the same rights as married couples); Neuchâtel (same sex and opposite sex partners are recognized almost with same rights as married couples).

2 In Spain, eleven out of seventeen autonomous regions recognize certain rights for partners, in particular for same sex partners. Nevertheless there is no form of domestic partnership recognition at national level.

3 Details on applicability, conditions and benefits are based on the respective projects of law.

4 At least one of the partners has Swiss nationality.

5 At least one of the partners resides in the canton.

6 Citizenship and residence of one of the partners (citizens of Iceland, Norway and Sweden excepted).

7 Only adoption of the partner's children.

8 Adoption limited to children of Dutch nationality or residing in the Netherlands.

9 Only for opposite sex partners.

10 The procedure to obtain naturalization is made easier in particular shortening the length of minimal residence required to five years. Right to a residence permit.

11 But partnership is taken into account as an element to be considered for the granting of a residence permit.

12 The partners, if at least one of them is a civil servant, have the same rights as married couples, except the pension.

13 As married couples.

Table 7 : Maternity/Paternity/Parental/Adoption leave in Comparator Organizations															
Last updated 13-05-2005	BB-Before Birth (included in Base), SP-Single Parent, MB-Multiple Births, PB-Premature Birth, 3C-3rd Child, BF-Breast Feeding, AD-Adoption eligibility														
	Organisation	Maternity (weeks)							Paternity (days)	Adoption Leave (weeks)	Parental Leave (months) Unpaid			Note	Special leave
		Base	BB	SP	MB	PB	3C	BF			Benefit (%)	Base	Age Limit child		
	CERN	16	6	0	0	0	0	4	100	3	8	0		<u>Maternity Leave:</u> Before birth period reduced to 4 with medical certificate. <u>Adoption Leave:</u> 8 weeks if child < 6 years old, 4 weeks if child > 6 years old	7 paid days per year for children up to 10 years for serious illness with Medical Certificate. Unpaid special leave for personal convenience up to 1 year (DG approval).
	JRC (EC)	20	0	0	4	4	0	4	100	10	20	6	yes	<u>Maternity Leave:</u> 24 weeks in case of handicapped child. Premature birth = before end of 34th week of pregnancy. <u>Adoption Leave:</u> can be shared if both parents are EC officials and increased to 24 weeks in case of handicapped child. <u>Parental Leave:</u> allowance 798.77 €/month or 1065.02 €/month for Single parent. Membership of social security continues, acquisition of Pension Rights, Child and education allowances maintained, entitlement to advancement. Can be taken on a half-time basis.	Serious illness of child or relative in ascending line(=parents, grandparents + spouse/partners parents) up to 2 days with extensions up to 6 days maximum. Serious illness of spouse up to 3 days. Very serious illness of a child <12 (+ certificate) up to 5 days with possibility of extension up to a maximum total of 15 days.

Organisation	BB-Before Birth (included in Base), SP-Single Parent, MB-Multiple Births, PB-Premature Birth, 3C-3rd Child, BF-Breast Feeding, AD-Adoption eligibility												Note	Special leave	
	Maternity (weeks)						Paternity (days)	Adoption Leave (weeks)	Parental Leave (months) Unpaid						
	Base	BB	SP	MB	PB	3C	BF	Benefit (%)	Base	Base	Age Limit child	SP			AD
ESA	16	6	0	2	0	10	0	100	2	10	2	1	yes	<b>Maternity Leave:</b> 16 weeks for 1 or 2 children (18 for double birth) 26 weeks for 3 or more children. <b>Parental Leave:</b> if used in case of adoption it must be taken within 1 year of child's arrival within the household.	8 paid days maximum for family reasons or special circumstances. Unpaid Family care leave can be taken for up to 2 months owing to serious illness of a child, spouse or parent or for imperative or private reasons (DG approval)
ESO	16	6	0	0	0	0	0	100	3	10 (see note)	3 (see note)			<b>Maternity Leave:</b> Before Birth period can be reduced with written statement + certificate. <b>Adoption Leave:</b> 10 weeks paid adoption leave is at the discretion of the DG (not in Staff Rules). All cases approved so far, however if age of child $\geq 16$ it is likely that only the statutory 3 days would be granted. <b>Parental Leave:</b> there is no statutory Parental Leave however young mothers may ask for special unpaid leave for up to 3 months, which is usually granted (only 2 or 3 cases so far). If Staff Member continues Health Insurance & Pension Fund contribution during Parental Leave, ESO pays its share.	10 paid days per year for serious illness of children up to 12 years.
CEA														Data not yet received	

Organisation	BB-Before Birth (included in Base), SP-Single Parent, MB-Multiple Births, PB-Premature Birth, 3C-3rd Child, BF-Breast Feeding, AD-Adoption eligibility													Note	Special leave		
	Maternity (weeks)								Paternity (days)	Adoption Leave (weeks)	Parental Leave (months) Unpaid						
	Base	BB	SP	MB	PB	3C	BF	Benefit (%)	Base		Base	Age Limit child	SP			AD	
DESY	14	6	0	4	4	0	0	0	see note	1		36	3		yes	<u>Maternity Leave:</u> entitlement is an average daily net salary based on the salary over the last 3 months, <u>Parental Leave:</u> can be taken by either parent and is unpaid, of the 36 months 24 must be taken before child's 3rd birthday, the remaining 12 months can be taken between child's 3rd & 8th birthday. An education allowance and child benefit is received from the state. No Social Security to be paid during parental leave.	Additional unpaid leave up to child's 18th birthday under special conditions
CLRC	26+ 26	0	0	0	0	0	0	0	100	10		26+26	3	5	yes	<u>Maternity Leave:</u> An additional 26 weeks unpaid leave after birth or adoption possible. <u>Parental Leave:</u> to be taken 4 weeks at a time up to 5th birthday or 18th if child disabled	5 days per year, covers all family members and "domestic distress" such as death of relative, childcare difficulties, flooding, fire.
ETHZ	16	0	0	0	0	0	0	0	100	2		8	0			<u>Maternity Leave:</u> In cases where both spouses are employed by the ETHZ, up to 8 weeks of the maternity leave can be transferred to the father. This provision has never been used.	5 days per year to care for a sick family member if no other solution is possible
CH Federal Service OFP	16	0	0	0	0	0	0	0	100	2			0			<u>Parental leave:</u> in the Swiss Federal Civil Service, in principle unpaid parental leave is allowed. There is no statutory basis for it and it is decided by the various Federal Departments case by case.	Care of family member of 2 days per occasion

Organisation	BB-Before Birth (included in Base), SP-Single Parent, MB-Multiple Births, PB-Premature Birth, 3C-3rd Child, BF-Breast Feeding, AD-Adoption eligibility												Note	Special leave	
	Maternity (weeks)							Paternity (days)	Adoption Leave (weeks)	Parental Leave (months)					
	Base	BB	SP	MB	PB	3C	BF			Benefit (%)	Base	Age Limit child			AD
SIG	20	0	0	0	0	0	0	0	100	2		12		<u>Parental Leave:</u> allocated based on Years of Service (YoS): 3 months after 1 YoS, 6 months after 2 YoS, 9 months after 3 YoS, 12 months after 4 YoS	Up to 10 days for illness of a close family member
ITU	16	2	0	0	0	0	0	0	100	1	10	0		<u>Adoption Leave:</u> depends on the age of the child: <12 months 10 weeks, 12-24 months 8 weeks, 24 - 36 months 6 weeks, 3-4 years 5 weeks, 4-6 years 4 weeks, 6-8 years 3 weeks, 8-11 years 2 weeks, >11 years none	No provisions in case of family related urgencies
UNOG	16	6	0	0	0	0	0	0	100	20	8	24	18	<u>Maternity Leave:</u> Before Birth period can be reduced to 2 weeks with medical certificate. For breast-feeding mothers up to 2 hours/day off working time. <u>Parental Leave:</u> to be eligible the parent must have a permanent appointment or 3 years of continued service on a Fixed Term Contract and be expected to serve at least 6 months beyond date of return. In practice Parental Leave is taken during the early years of the child.	Up to 7 working days for family related emergencies. Special leave without pay for up to 2 weeks/year in case of serious family emergency may also be granted.

Organisation	BB-Before Birth (included in Base), SP-Single Parent, MB-Multiple Births, PB-Premature Birth, 3C-3rd Child, BF-Breast Feeding, AD-Adoption eligibility											Special leave			
	Maternity (weeks)								Paternity (days)	Adoption Leave (weeks)	Parental Leave (months) Unpaid		Note		
	Base	BB	SP	MB	PB	3C	BF	Benefit (%)	Base		Base			Age Limit child	AD
EMBL	16	6	0	2	0	0	0	100	3	3 days	9			<u>Maternity Leave:</u> Before Birth period can be reduced to 4 weeks with Medical certificate. <u>Parental Leave:</u> granted on request to DG to Mothers only and can be taken immediately after maternity leave. EMBL pays contributions to the Health Insurance Scheme during the Parental Leave period.	10 days paid leave/leave year of a dependent child aged less than 12 years, substantiated by a medical certificate.If both parents are members of the staff, ten days each per year per child. Single parent can claim 20 days per year per child. If three or more children under twelve, a maximum twenty-five days per year (fifty days for single parent families).

**Table 8: Maternity/Paternity/Parental/Adoption leave in Member States**

Table 8: Maternity/Paternity/Parental/Adoption leave in Member States																
Last Updated 13-05-2005	BB-Before Birth (included in Base), SP-Single Parent, MB-Multiple Births, PB-Premature Birth, 3C-3rd Child, BF-Breast Feeding, AD-Adoption eligibility															
	Maternity Leave (weeks)								Paternity Leave (days)		Adoption Leave (weeks)		Parental Leave (months)*			
	Base	BB	SP	MB	PB	3C	BF	Benefit (%)	Base	Base	Basic Entitlement	Age limit Child	SP extra	AD		
Austria	16			4			4	100	10		22.0	2		yes	<b>Parental Leave:</b> may be taken by either parent or shared by both. Such leave can start 8 weeks after birth and can last until child's 2nd birthday (3 months can be reserved for use up to child's 7th birthday). In certain cases Social Security pays ~€14.40/day. Fathers can reduce or modify their working time from 8 weeks and until school age reached.	2 weeks to care for a family member at home
Belgium	15	1						<80	10	6	3.0	4		yes	<b>Maternity Leave:</b> maximum 6 weeks in advance, minimum 1week however medical certificate required, minimum 9 weeks after the birth. First 4 weeks 82% of pay, remaining weeks 75% of pay based on a maximum of €101 per day. <b>Paternity Leave:</b> first 3 days paid 100%, subsequent 7 days paid at 82% must all be taken within 30 days of birth. <b>Adoption Leave:</b> 6 weeks if child < 3 years of age, 4 weeks if child > 3 years of age. <b>Parental leave:</b> is 3 months per parent. Part-time leave (6 months) also available. Unpaid however an allocation of €536 per month is received.	
Bulgaria	27	9						100			24.0	2			<b>Maternity Leave:</b> 2 hours per day for up to 8 months for breast-feeding mothers. <b>Parental Leave:</b> Possibility for father or grand-parents to benefit from Maternity or Parental leave if the mother is ill.	

BB-Before Birth (included in Base), SP-Single Parent, MB-Multiple Births, PB-Premature Birth, 3C-3rd Child, BF-Breast Feeding, AD-Adoption eligibility															Notes	Special leave
Maternity Leave (weeks)									Paternity Leave (days)		Adoption Leave (weeks)		Parental Leave (months)*			
	Base	BB	SP	MB	PB	3C	BF	Benefit (%)	Base	Base	Basic Entitlement	Age limit Child	SP extra	AD		
Czech Rep.	28	7	9	9				69		14	23.5	3				
Denmark	16							90	10	26	12.0	8		yes		
														<u>Parental Leave:</u> for either father or mother up to 52 weeks with a state funded flat-rate allowance. Child-care leave of 26 weeks paid at 60% of unemployment pay is also available for children under 1 or in cases of adoption.		
Finland	18							70	18		6.5	3		<u>Maternity Leave:</u> no Before Birth obligation however this is usually 2-4 weeks. <u>Parental Leave:</u> can be shared by both parents.		
France	16	4	0	18 (2) 30 (3+)	0	10	0	100	14	10	36.0	3		yes		
														<u>Paternity Leave:</u> In case of multiple births paternity leave is increased to 21 days. <u>Adoption Leave:</u> can be taken by either parent, 18 weeks if adoption brings to 3 or more number of children in family, 22 weeks in the event of multiple adoption. In the event of international adoption +6 weeks unpaid adoption leave.		

BB-Before Birth (included in Base), SP-Single Parent, MB-Multiple Births, PB-Premature Birth, 3C-3rd Child, BF-Breast Feeding, AD-Adoption eligibility															Notes	Special leave
Maternity Leave (weeks)								Paternity Leave (days)		Adoption Leave (weeks)		Parental Leave (months)*				
	Base	BB	SP	MB	PB	3C	BF	Benefit (%)	Base	Base	Basic Entitlement	Age limit Child	SP extra	AD		
Germany	14	6		4	4			see note	0		36.0	3		yes	<u>Maternity Leave:</u> entitlement is an average daily net salary based on the salary over the last 3 months. <u>Parental Leave:</u> is a right per child which can be taken by either parent and which is unpaid, of the 36 months 24 must be taken before child's 3rd birthday, the remaining 12 months can be taken between child's 3rd & 8th birthday. An education allowance and child benefit is received from the state. No Social Security to be paid during parental leave.	
Greece	17	8						100	2		3.5	4				<u>Parental Leave:</u> 3.5 months per parent
Hungary	24	4						70	5		30.0	3				<u>Maternity:</u> - if breast-feeding 2x1h daily off work time for the first 6 months, 1x1h daily from 7 to 9 months per child. <u>Parental Leave:</u> paid at 70% for first 2 years then 50% of minimal guaranteed salary. If twins, parental leave granted until primary school age.
Italy	20	4						90	0	12	6.0	8		yes	<u>Maternity Leave:</u> This leave can be transferred to the father in case of serious illness or death of the mother or if the mother does not work. <u>Adoption Leave:</u> restricted to children up to the age of 6, or for international adoption up to the age of 18. <u>Parental Leave:</u> per parent or if both work up to a total of 11 months possible.	No limit for sick children up to 3 years of age. 5 days per year for sick children between 5 and 8 years.

BB-Before Birth (included in Base), SP-Single Parent, MB-Multiple Births, PB-Premature Birth, 3C-3rd Child, BF-Breast Feeding, AD-Adoption eligibility															Notes	Special leave	
Maternity Leave (weeks)																	
	Maternity Leave (weeks)							Paternity Leave (days)		Adoption Leave (weeks)		Parental Leave (months)*					
	Base	BB	SP	MB	PB	3C	BF	Benefit (%)	Base		Base		Basic Entitlement	Age limit Child	SP extra	AD	
Netherlands	16	4						100	2	4	3.0	8				<u>Maternity</u> : if breast-feeding : 2 hours rest per day. <u>Parental Leave</u> : 3 months full-time however only available part-time therefore 6 months part-time per parent.	
Norway	9 see note	3	5					80	20 see note	42	12.0	8	12	yes		<u>Maternity Leave</u> : comes from Parental Leave allocation minimum of 9 weeks for mother. <u>Paternity Leave</u> : comes from Parental Leave minimum of 4 weeks for father if not taken lost. <u>Parental Leave</u> : 42 weeks at 100% available to the two parents or 52 weeks at 80%. Single parent gets an extra 12 months.	10 days per calendar year for children up to 12, 15 days for more than 2 children. Working hours reduced by up to 1 hour per day Child's illness
Poland	16		10			2		100	0	16	36.0	4	12			<u>Maternity Leave</u> : can start at the birth date if desired by Mother. 18 weeks of Maternity leave from second child onwards. No formal Paternity leave however if Mother stops maternity leave early (after obligatory 14 weeks after the birth), or dies the father inherits the unused maternity leave right. <u>Parental Leave</u> : can be taken by Mother or Father and split into 4 leave periods. In case of a disabled child an additional 36 months of parental leave can be granted up to child's 18th birthday. During Parental Leave all social privileges are kept, the leave is unpaid however benefits can be claimed depending on the family situation (income, number of children).	

BB-Before Birth (included in Base), SP-Single Parent, MB-Multiple Births, PB-Premature Birth, 3C-3rd Child, BF-Breast Feeding, AD-Adoption eligibility														Notes	Special leave	
Maternity Leave (weeks)								Paternity Leave (days)				Adoption Leave (weeks)				Parental Leave (months)*
	Base	BB	SP	MB	PB	3C	BF	Benefit (%)	Base	Base	Basic Entitlement	Age limit Child	SP extra	AD		
Portugal	24			4				100	5	20	3.0			yes	<u>Maternity Leave:</u> 1 hour per day absence in case of breast-feeding for as long as breast-feeding continues. 2-4 weeks absence in case of abortion. A portion of the leave may be transferred to the father. <u>Adoption Leave:</u> for a child up to the age of 15. <u>Parental Leave:</u> can be replaced by part-time work during 1 year up to the 3 month limit. Can be taken by either parent.	30 days per year for the illness of a child less than 10 years of age. 15 days per year for a child older than 10, or a close family member.
Slovak Rep.	28	7	9	9				90	0		3.0	3				
Spain	16			2		2		100	2	16	36.0	3		yes	<u>Maternity Leave:</u> Up to 10 weeks of Maternity Leave transferable to father. 1 hour absence per day in case of breast-feeding up to 9 months and in case of premature birth. Extra 2 weeks from 2nd birth onwards. <u>Adoption Leave:</u> applies to children under the age of 6 or to handicapped children over the age of 6. Multiple adoptions: additional 2 weeks per child from twins upwards. <u>Parental Leave:</u> is a family entitlement, can be shared between parents and is unpaid.	Following an accident or serious illness of a close family member, up to 1 year of Special Leave

	BB-Before Birth (included in Base), SP-Single Parent, MB-Multiple Births, PB-Premature Birth, 3C-3rd Child, BF-Breast Feeding, AD-Adoption eligibility														Notes	Special leave	
	Maternity Leave (weeks)							Parental Leave (months)*									
	Base	BB	SP	MB	PB	3C	BF	Benefit (%)	Paternity Leave (days)		Adoption Leave (weeks)		Basic Entitlement	Age limit Child	SP extra	AD	
Sweden	12 see note			9				80	70 see note		64		16.0	8		yes	<p><u>Maternity Leave:</u> comes from Parental Leave allocation minimum of 12 weeks for mother. The mother can stop 9 weeks before birth however there is no obligation to do so.</p> <p><u>Paternity Leave:</u> comes from Parental Leave minimum of 12 weeks for father if not taken lost. In addition 10 days paternity leave to be taken within 60 days of birth. <u>Adoption Leave:</u> if child under 10 years of age and adopted from abroad parents benefit from a tax-free allowance in addition to the leave. calculated on the same basis as Parental Leave. <b>Parental Leave:</b> 480 remunerated days to be shared between the parents. 390 days at 80% pay, followed by a reduced rate. Parents have the right to be absent from work full time up to the age of 18 months of the child, and to reduce their working hours by up to 25% up to the child's 8th birthday.</p>

BB-Before Birth (included in Base), SP-Single Parent, MB-Multiple Births, PB-Premature Birth, 3C-3rd Child, BF-Breast Feeding, AD-Adoption eligibility															Notes	Special leave
Maternity Leave (weeks)										Parental Leave (months)*						
	Base	BB	SP	MB	PB	3C	BF	Benefit (%)	Paternity Leave (days)	Adoption Leave (weeks)	Basic Entitlement	Age limit Child	SP extra	AD		
Switzerland	14 see note							80	0		0.0					
U.K.	26 (+26)							90	10	26 (+26)	6.5	5		yes		

\*Parental Leave: Usually such leave is unpaid, however a percentage of the salary or various benefits can be paid e.g. Social Security, Health Insurance depending on the National Laws of the country concerned.

BB-Before Birth (included in Base), SP-Single Parent, MB-Multiple Births, PB-Premature Birth, 3C-3rd Child, BF-Breast Feeding, AD-Adoption eligibility													Notes		Special leave	
Maternity Leave (weeks)								Paternity Leave (days)		Adoption Leave (weeks)		Parental Leave (months)*				
Base		BB	SP	MB	PB	3C	BF	Benefit (%)	Base		Basic Entitlement		Age limit Child		SP extra	AD

Sources for data: European Industrial Relations Observatory, Social Security throughout the World, United Nations International Civil Service Commission ICSC 58 R.8, European Community Commission report on Parental Leave, Internet and personal contacts of study team members

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TRIPARTITE EMPLOYMENT CONDITIONS FORUM

Fifty-fourth Meeting

Geneva – 31 May & 1 June 2005

**5-YEARLY REVIEW 2005**

**INFORMATION ON CRECHE FACILITIES  
FOR THE MEMBERS OF PERSONNEL**

Further to the presentation at TREF on 2 May 2005, this document presents information on the possibilities of crèche facilities for the members of personnel

After preliminary study, the Management is exploring the possibility of a partnership with the Commune of Meyrin's project for crèche facilities (set out in paragraph IV) foreseen to be available in autumn 2006.

## INFORMATION ON PROVIDING CRÈCHE FACILITIES

### I— Introduction

Currently CERN does not provide any facility of help for early child-care other than information on the existing options in Geneva and neighbouring France. The on-site Kindergarten provides places for children aged 2.5 to 6 years, thus leaving a void for the pre-school age.

In the Equal Opportunity Status report presented at TREF on 15 May 2003 and to the Finance Committee on 18 June 2003, particular attention was given to this subject. Following TREF's request for more detailed information resulting in a subsequent study by Management, the setting up of crèche facilities on the CERN site was recommended.

When this issue was discussed at the Finance Committee in 2003, (cf. CERN/FC/4762/Rev annex 2) the idea of investing in crèche facilities was well received. In view of the prevailing financial situation, it was determined that funding for such a project could only be found in the overall framework of the next 5-Yearly Review, which is the review currently in progress.

In June 2004, the Council approved a document entitled "Preparation for the 5-Yearly Review and Work Planning of TREF"<sup>1</sup>, in which proposals for the conditions to be examined in the current 5-Yearly Review were listed. Among several subjects related to family aspects, the study of crèche facilities accessible to members of personnel was included.

### II— Key arguments

The local situation in terms of lack of early childhood facilities, the specific needs of the members of personnel, and the associated benefits for CERN in providing such a facility provide key arguments to find a solution for early-age child-care, in particular in the form of accessible crèche facilities.

- Requests for crèche places in CERN's local region exceed availability:
  - The situation has barely changed since the last study in 2001: crèches in the local zone, be it in France or in Switzerland, are full and satisfy only 40% of the requested places. Due to this lack of places, children are put on a waiting list, on which the CERN members of personnel have low priority<sup>2</sup>.

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<sup>1</sup> CERN/2567, CERN/FC/4824

<sup>2</sup> A crèche is primarily financed by public resources and as non-Swiss members of personnel do not contribute by paying communal/ cantonal taxes, they are considered low priority

- CERN members of personnel have specific needs :
  - Staff are recruited and arrive throughout the year without sufficient time to organize for early child-care;
  - Their child-care need is immediate and more acute as there is no family or social network to rely on temporarily. The same problem exists for child-care during summer holidays, when local premises are closed;
- Providing accessible crèche places offers several benefits for the Organization:
  - CERN's image as an employer would be improved, both externally and internally, as the Organization would be in line with recent evolutions in this area. The reference organizations have indeed undertaken action to provide crèche places to their members of personnel (e.g. JRC, ESA, DESY, ETHZ, CLRC, SIG<sup>3</sup>), as have other organizations and corporations in the local area (e.g. ICRC, ILO, P&G, Philip Morris, Serono)
  - In terms of recruitment and retention, a crèche is an attractive asset, and providing a solution for the early child-care problem can increase the motivation and commitment of the members of personnel concerned.
  - Providing a solution to the early child-care problem would be a concrete sign of support for work/life balance and concrete equal opportunities, and would create favorable conditions for family integration by facilitating the partner's employment and/or integration.

### III— Assessing the needs

Based on the assumption that the data available today can be extrapolated in the future, an attempt was made to assess the real need and interest of members of personnel in accessible crèche places. The information on the current population, i.e. the number of children between 0-3 years old, and the input on the subject from their parents via a questionnaire, was analyzed with external expertise in order to define a realistic forecast of the number of places required.

- Over 400 children in the defined age bracket were identified, of which 360 children of employed members of personnel<sup>4</sup>
- 48% of the questionnaires were returned, covering 196 children

<sup>3</sup> Data on the beneficiaries' participation in the financial aspects are not yet complete

<sup>4</sup> Data from HR database on 30 November 2004, including 333 staff members, 27 fellows, 17 paid associates, 10 unpaid associates, and 50 registered users

The answers to the questionnaire and additional comments confirmed current problems in terms of early child-care infrastructure, resulting for more than half of those replying in professional changes in the couple's life ranging from reduced working hours to, in some cases, resignation. Not unexpectedly, the questionnaire also showed a very strong interest in accessible crèche places (86% of the respondents). 23% of the children concerned occupied a crèche place at the time of reply, thus indicating the strong interest expressed in this type of child-care.

Experts (official bodies and organizations having gone through the experience of providing crèche places) were consulted in order to refine a conservative forecast of effective commitments. Reflecting the local reality that approximately 10% of the 0-3 year olds are cared for in a crèche, a general rule of providing places for 10% of the eligible population was generally used and positively recommended. Depending on the definition of the eligible population, this would concern about 35 children<sup>5</sup>.

#### IV— Options and cost

When defining concrete options to provide crèche places to the members of personnel, two main choices are necessary in terms of:

- ownership: a CERN crèche, or a crèche in partnership with an external partner
- geographical situation: France or Switzerland

The choices influence, or are influenced by, both the cost and the time-scale of providing crèche places.

The construction cost of a crèche place is estimated at 30'000 CHF for Geneva, and 34'500 CHF for France<sup>6</sup>, excluding the cost of the land.

The average operating cost of one crèche place per year is estimated at 29'000 CHF for Geneva<sup>7</sup> and slightly lower for neighbouring France, the difference mainly being accounted for by salaries and overheads on salaries, which constitute about 80% of the operating cost.

Concerning *ownership*, three private companies specializing in the establishment of crèche facilities were asked to give a quote<sup>8</sup> for a CERN-owned crèche, in order to have a first estimation. For a CERN crèche located in France, the average cost per place per year varied from approximately 23'000 to 38'000 CHF; whereas the cost in Switzerland was estimated at 36 000 CHF. According to their expertise, a crèche becomes operational only 2-3 years after signature of the contract.

<sup>5</sup> If eligibility is defined as employed members of personnel only (staff, fellows) or if an extended definition including paid associated members of the personnel is adopted.

<sup>6</sup> Sources : Geneva city and French Family Allocation Fund (CAF)

<sup>7</sup> Sources: Geneva city and French Family Allocation Fund (CAF). Generally, the family participates up to 30% in Switzerland and 21% in France

<sup>8</sup> Based on a limited amount of parameters, such as 12h/day opening time, 12 months/year, 30 slots

Partnerships obviously depend on current possibilities of collaborations. At this point in time, two projects involving local communes are under discussion, one in Meyrin (Switzerland), and one in Pays de Gex (France) :

1. The commune of Meyrin (Switzerland) : In view of the lack of early child-care infrastructure, a project for the opening of a new crèche with 60 places, extendible to 90 in case of interest from a Meyrin-based partner such as CERN, is currently under consideration. The crèche is due to open in Autumn 2006. The operating cost is in line with the local cost, i.e. 29'000 CHF per place per year. The cost for participating in the project is to be negotiated;
2. The Pays de Gex (France): This project is in a very early stage. The forecasted estimated operating cost is slightly lower than for Geneva. The Community of Communes, advisory body and motor behind this project, is in favour of finding local partners such as CERN. If the project materializes, a participation cost will have to be negotiated.

Partnerships have the additional advantage of leaving the management and administration to professionals and allowing some flexibility in transfers of free places; however they require a proactive attitude if CERN wants to participate.

## **V— Conclusions**

Further to the presentation at TREF on 2 May 2005, this document presents information on the possibilities of crèche facilities for the members of personnel

After preliminary study, the Management is exploring the possibility of a partnership with the Commune of Meyrin's project for crèche facilities (set out in paragraph IV) foreseen to be available in autumn 2006.

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**ORGANISATION EUROPEENNE POUR LA RECHERCHE NUCLEAIRE**  
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TRIPARTITE EMPLOYMENT CONDITIONS FORUM

Fifty-fourth Meeting  
Geneva – 31 May & 1 June 2005

**5-YEARLY REVIEW 2005**

**INFORMATION ON COMPARISON  
OF WORKING TIME AND LEAVE**

This document gives an overview of the information currently available on annual working hours at comparator organizations in the 5-Yearly Review 2005 including a comparison with CERN.

Further to a presentation of this document at TREF on 3 May 2005, the table in the annex has been completed for the eleven comparator organizations.

## **5-YEARLY REVIEW 2005**

### **Comparison of Working Time and Leave**

#### **1— Introduction**

As was the case in the last 5-Yearly Review, it was considered important to monitor developments in the area of working time and a dedicated comparison was therefore again included in the inquiry<sup>1</sup>.

As with other areas of labour statistics, the situation across the Member States is not homogenous and even within each individual Member State regional or other specific rules and practices can vary. Nevertheless, it can be observed that flexibility, in various forms, is becoming one of the main themes in bargaining on working time.

The aim of this working time survey is to provide specific data on the provisions applied at the different comparator organizations. It is to be noted that the results of this working time comparison will not be used to compile or process salary data in the salary inquiry.

#### **2— Method of Comparison**

The method of comparison as established for this exercise at the last 5-Yearly Review in 2000 has been retained<sup>2</sup>.

The annual working time in hours is determined by deducting the sum of the employees' annual leave days, official holidays and additional regular time off from the product of 52 weeks multiplied by the number of working hours per week. The result is then compared with CERN's working time.

No account has been taken of special leave or convertible bonuses granted on special occasions for long-service, nor of detailed provisions that could be interpreted as reduced working hours such as breaks or travelling time. In other words, only regularly granted leave and official holidays have been considered in the annexed table.

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<sup>1</sup> CERN/2567, CERN/FC/4824, para. 2.3

<sup>2</sup> cf. CERN/FC/4305, CERN/TREF/161, Annex 7

### **3— Results and Main Observations**

Results from the data collection inquiry are set out in the table shown in the annex.

In general, the comparator organizations with the highest and lowest number of weekly hours are those with the highest and lowest annual hours. However, this does not hold true where the organization shows a combination of a short workweek and a low number of official holidays and annual leave days (cf. “DESY1” for an employee under age 30).

Five of the comparator organizations shown have a system of “demographic” annual leave in place, i.e. a system under which the number of annual leave days is determined in relation to the employee’s age and/or seniority (EC, ETHZ, CCLRC, SIG, DESY, CH Fed). Systems of “demographic” weekly working hours, which are sometimes found in the national context, have not been observed.

### **4— Concluding Remarks**

This document gives an overview of the information currently available on annual working hours at comparator organizations in the 5-Yearly Review 2005 including a comparison with CERN.

\* \* \*

**Working Time and Leave Comparison**

Comparator organization	a)	b)	c)	d)	e)	f)
	Working week (hrs)	Annual leave (days)	Official holidays (days)	Additional regular time off (days)	Annual working time (hrs)	Comparison CERN=100 (%)
<b>ESA</b>	40	30	12	0	1744.0	<b>101.9</b>
<b>ITU</b>	40	30	9	0	1768.0	<b>103.3</b>
<b>ESO</b>	40	30	13	0	1736.0	<b>101.4</b>
<b>UNOG</b>	40	30	10	0	1760.0	<b>102.8</b>
<b>EC 1</b>	37.5	24	13	5	1635.0	<b>95.5</b>
<b>EC 2</b>	37.5	30	13	5	1590.0	<b>92.9</b>
<b>ETHZ 1</b>	41	25	13.54	0	1816.0	<b>106.1</b>
<b>ETHZ 2</b>	41	30	13.54	0	1775.0	<b>103.7</b>
<b>CCLRC 1</b>	37	25	8	2.5	1661.3	<b>97.0</b>
<b>CCLRC 2</b>	37	30	8	2.5	1624.3	<b>94.9</b>
<b>SIG 1</b>	40	25	9	3	1784.0	<b>104.2</b>
<b>SIG 2</b>	40	30	9	3	1744.0	<b>101.9</b>
<b>DESY 1</b>	38.5	26	9	0	1732.5	<b>101.2</b>
<b>DESY 2</b>	38.5	30	9	0	1701.7	<b>99.4</b>
<b>CH Fed 1</b>	42	20	13	5	1864.8	<b>108.9</b>
<b>CH Fed 2</b>	42	30	13	5	1780.8	<b>104.0</b>
<b>CEA</b>	35	26	10	0	1580	<b>89.7</b>
<b>CERN</b>	<b>40</b>	<b>30</b>	<b>10</b>	<b>6</b>	<b>1712.0</b>	<b>100</b>

**Method:**

The annual working time in column e) is determined by deducting the total of columns b) to d) from the product of 52 times the working hours shown in column a). Column f) compares the annual working time at each comparator organization with CERN's working time as a reference set at 100.

If the result shown in column f) is lower than 100, the amount of annual working hours at the comparator organization is lower. If the result is greater than 100, the number of working hours at the comparator organization is higher.

**Remarks:**

The Annual leave entitlement may vary depending on age, grade or length of service ("demographic" annual leave system). Where this is the case, both the minimum and the maximum entitlement have been used in separate comparisons.

- For EC1 and EC2 the average of the possible number of official holidays has been applied (13 days)
- For ETHZ, the calculation of official holidays takes account of the local particularities in connection with "Knabenschiessen", "Sechseläuten", "Gründonnerstag" (Maundy Thursday) and the Wednesday before Ascension.
- As regards organizations/companies based in Geneva, the cantonal holiday "Jeûne Genevois" has been included where applicable.

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**CERN** **EUROPEAN ORGANIZATION FOR NUCLEAR RESEARCH**

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TRIPARTITE EMPLOYMENT CONDITIONS FORUM (TREF)

52<sup>nd</sup> Meeting

Geneva – 4 & 5 April 2005

**5-YEARLY REVIEW 2005**

**REPORT ON THE ECONOMIC AND SOCIAL SITUATION  
IN MEMBER STATES**

Following the oral report on this subject made to TREF on 22 November 2004, this document presents data on the economic and social situation in Member States over the reference period since the last review, with special reference to those countries included in the 5-Yearly Review. The document also includes an outlook using the most recent data available from reliable sources.

Attention is drawn to R&D expenditure and related targets set by EU Member States up to 2010, as described in paragraph 3.3.

In accordance with the review procedure set out in Annex A 1 of the CERN Staff Rules, TREF is invited to take account of this information during its discussions of the current 5-Yearly Review.

## **REPORT ON THE ECONOMIC AND SOCIAL SITUATION IN MEMBER STATES**

### **1— Introduction**

1.1 The purpose of this document is to provide a succinct dynamic overview of the economic situation in the Member States based on published material from official sources. There is no intention to examine each economy exhaustively but to highlight the prevailing trends. Data in relation to the main indicators of growth, inflation, unemployment and public balances are given in Annexes A, B, C and D, and main sources of information are summarized in Annex E. The general trend concentrates on the five-year period 2000-2004 with an outlook for 2005 and beyond where feasible, but the annexes also include data from the previous five-year period of 1995-1999 to take account of trends discernible in both periods.

1.2 Moreover, the aim of the study is to place the Member States within the international economic environment by providing various points of comparison. Within the overall remuneration survey context, emphasis will be placed on the largest Member States and Switzerland, the country where the Organization has its seat.

1.3 It is to be noted that information on real net salary movements, purchasing power parity factors and developments regarding working hours in comparator organizations in the current 5-Yearly Review will be reported by the Management in presenting the results of the data collection enquiry.

### **2— General trends**

2.1 After the end of the stock market bubble in 2000, the world-wide economy slowed down, ending in short recessions in many Member States. Recent fundamental economic data show a return to a phase of growth, especially in the United States after the impact of September 11, 2001, and in emerging markets in Asia. For more than three successive quarters, the European economies have been growing again with the expectation of reduced unemployment rates in 2005 and the following years.

2.2 Other very important features are the successful introduction of the Euro in Europe, the increase of the European Union to 25 Member States and the end of recession in Japan, after more than a decade of stagnation.

2.3 As was the case in the previous reference period, some countries experienced monetary difficulties that were resolved without too significant an impact on the world economy. The generally positive trends in most economies are only partially put into question by the increasing costs of commodities, such as crude oil. This has to be seen, however, in relation with the rapid growth observed in East Asia, notably China, and other factors, such as the risk of terrorism.

### **3— Situation in Europe**

3.1 Today, the overall economic situation shows a continuation of the recovery in 2004, in spite of persistently high oil and other commodity prices. Thus, economic growth tends to be rather robust, supported by the highest stock market values reached in February 2005 for over three years. The growth in Europe clearly benefited from world-wide economic growth, notably in the USA and East Asian countries (particularly China).

3.2 The strong Euro, however, in connection with rapid industrial growth in East Asia, has had an impact on the labour force in the production sector. Nevertheless, the fact that European economies continue to grow is taken as a sign by many analysts to anticipate positive consequences on employment levels (source OECD, 2004). Despite relatively high general unemployment rates in most countries shown, there is still a shortage in specialist manpower, particularly in the fields of hi-tech industry and research, which has led to the introduction of measures to facilitate the employment of foreign nationals in some Member States. This is particularly the case for France and Germany (source Council of Europe, Doc. 10359, 10/11/2004, "What solutions to Europe's unemployment?"). As an illustration one can quote an unemployment rate of 4.9% for highly educated people in the EURO zone with respect to 7.7% for medium-level educated people and 11.2% for low education levels (source EUROSTAT, employment in Europe 2004, page 32).

3.3 As regards expenditure on R&D, the EU Member States are committed to the target set by the Lisbon summit in 2000 to increase their spending in terms of GDP to 3% per annum by 2010. In spite of the difficult economic environment in the years 2001 to 2003, the most recent available data (source EUROSTAT) indicates that European R&D spending as percentage of GDP was maintained at a constant level of on average 1.9-2.0% in the EURO-zone, i.e. the R&D spending did not experience reduction and shall still be significantly increased to reach the Lisbon summit target in 2010.

#### **4— Economic developments in 2000-2004 and outlook for 2005/2006**

4.1 Data on the main indicators of growth, inflation, unemployment and public balances are shown in Annexes A, B, C and D, and commented below. This data is provided for Switzerland, France, Germany, Italy, the United Kingdom and the EURO-zone, from publications by the OECD, including a recent outlook for 2005 and 2006 (OECD database February 2005).

##### **4.2 GDP growth (*Annex A*)**

The real GDP growth indicates the difficult economic environment in the years 2001-2003. All countries shown experienced a severe reduction in growth, turning in some cases into phases of recession. In most cases, however, the year 2003 was the turn-around point towards growth throughout 2004. The period of stable growth in 2004 is all the more remarkable since oil prices had reached record highs. In addition, the US dollar weakened with respect to most European currencies, which further increased the pressure on the exporting capabilities of European goods. These phenomena have lowered expectations in the rate of growth foreseen for 2005 but the first outlooks for 2006 continue to be carefully optimistic.

##### **4.3 Inflation (*Annex B*)**

Over the reference period 2000-2004, inflation in Europe has been stable at very low levels, i.e. below 2% per annum. Although inflation increased in 2004 world-wide, its absolute levels are still near to historic lows in Europe, obviously helped by strong European currencies. Due to the independence of central banks, it is expected that the latter would be ready to increase interest rates in order to keep inflation low. Thus, the outlook continues to estimate low inflation rates in 2005 and 2006 (source OECD, 76<sup>th</sup> economic outlook).

##### **4.4 Unemployment rates (*Annex C*)**

After relatively low rates in 2000 and 2001, the economic downturn caused a measurable increase of unemployment rates in most of the countries shown. However, the turnaround of economic growth in 2003 and the predicted continuation of growth in Europe, in spite of a low dollar and high oil prices, are expected to start showing a positive impact on employment levels. This trend can be supported by labour market reforms in many countries throughout Europe<sup>1</sup>. Furthermore, there is still a shortage of specialised manpower, particularly in the fields of hi-tech industry and research, as mentioned in section 3 above and presented in the Management's report to TREF on staff recruitment and retention.<sup>2</sup>

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<sup>1</sup> Source Employment in Europe, EUROSTAT

<sup>2</sup> CERN/TREF/264

#### 4.5 Public balances (*Annex D*)

The public balances of most European countries worsened in the reference period due to reduced tax income and less favourable economic conditions with respect to the late 1990s. However, in the light of the stability pact existing in the EURO-zone and of expected economic growth, albeit at moderate levels, the ECB looks forward to seeing reduced deficits in 2005 and 2006.

### **5— Concluding Remarks**

5.1 Following the oral report on this subject made to TREF on 22 November 2004, this document presents data on the economic and social situation in Member States over the reference period since the last review, with special reference to those countries included in the 5-Yearly Review. The document also includes an outlook using the most recent data available from reliable sources (as quoted in Annex E).

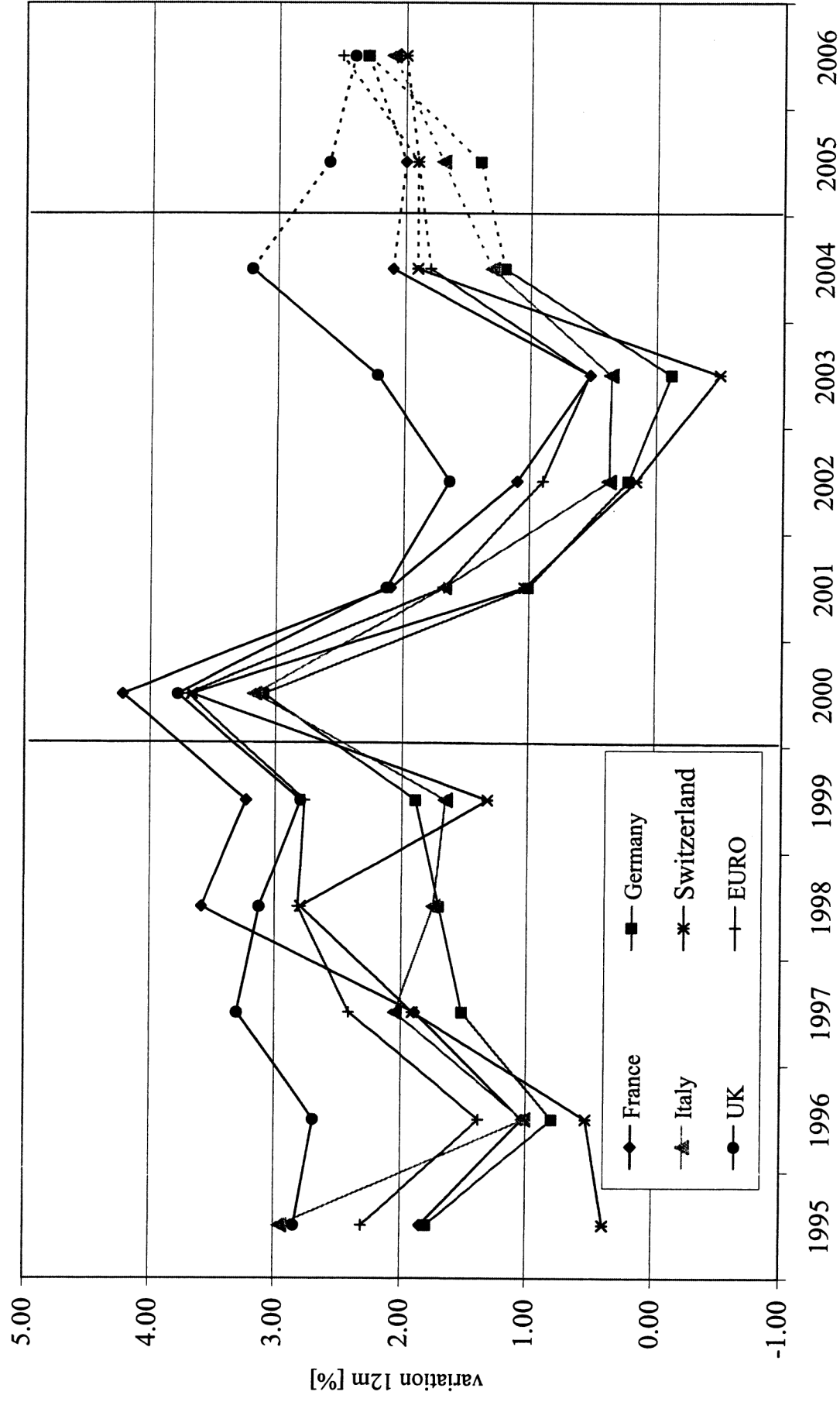
5.2 Attention is drawn to R&D expenditure and related targets set by EU Member States up to 2010, as described in paragraph 3.3.

5.3 In accordance with the review procedure set out in Annex A 1 of the Staff Rules, TREF is invited to take account of this information during its discussions of the current 5-Yearly Review.

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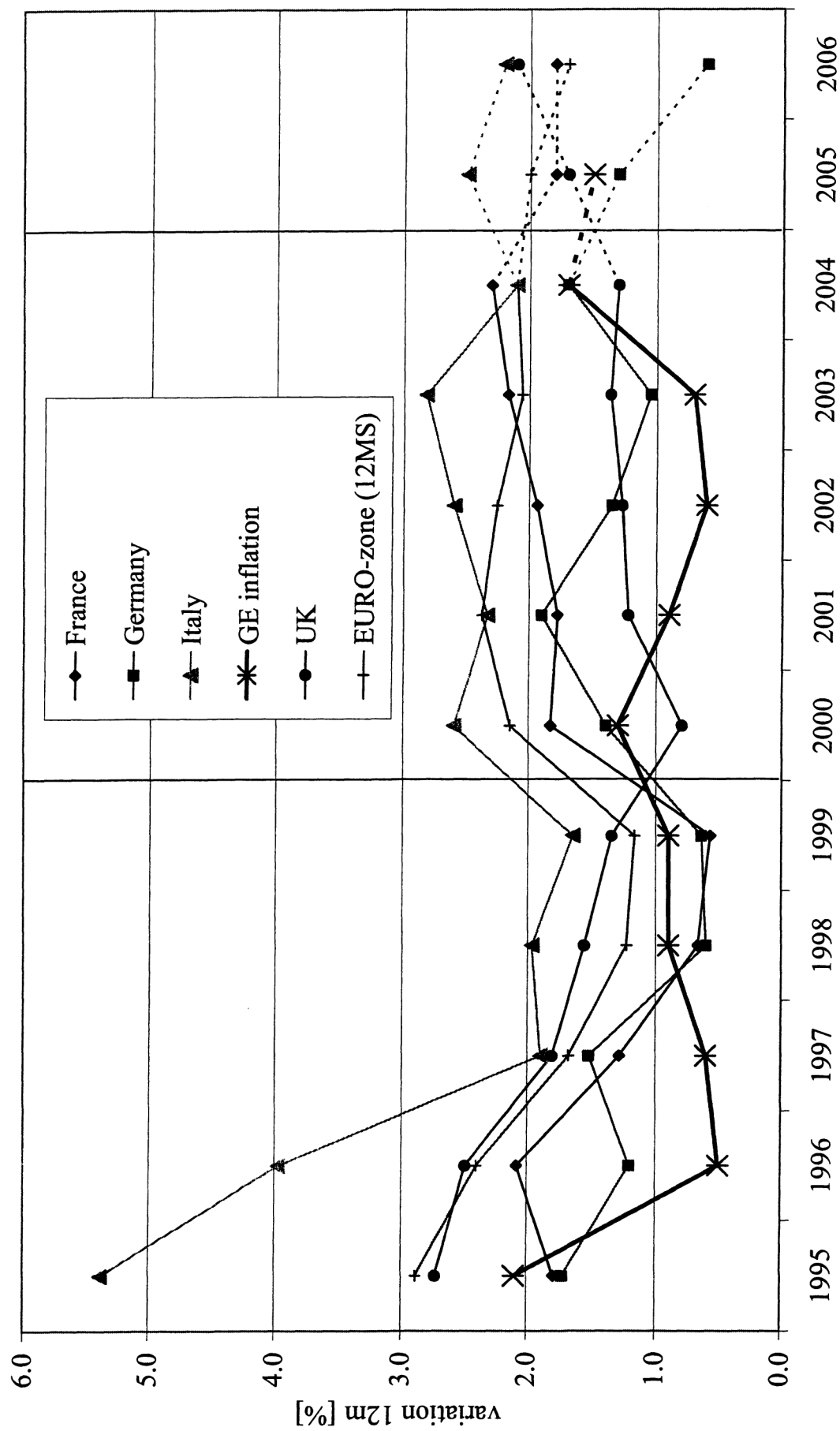
*Annex A*

Economic growth recorded and estimated by means of GDP (source OECD - February 2005)



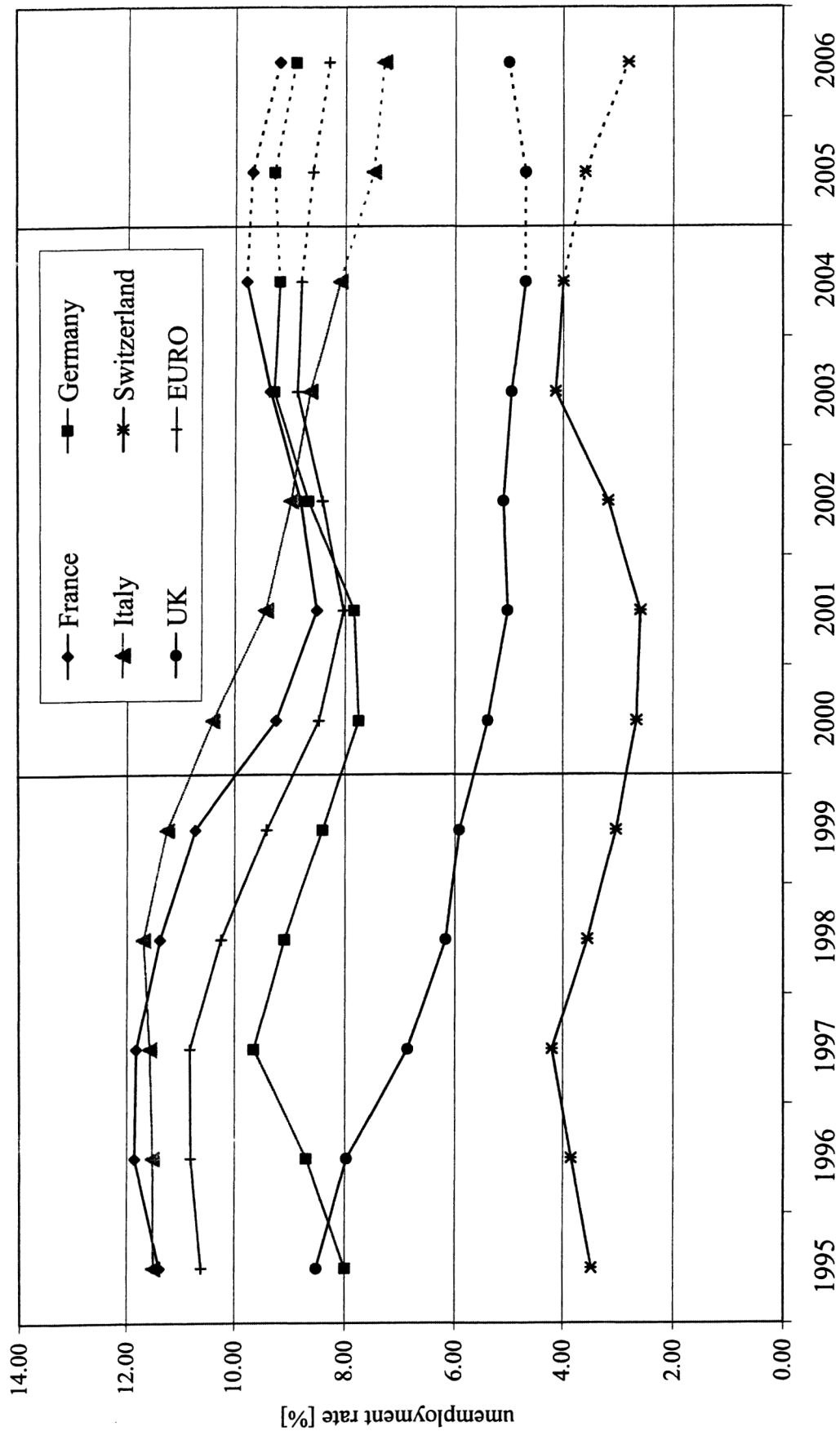
# Annex B

Inflation recorded and estimated (for Geneva source OCSTAT GE, for all others source OECD)

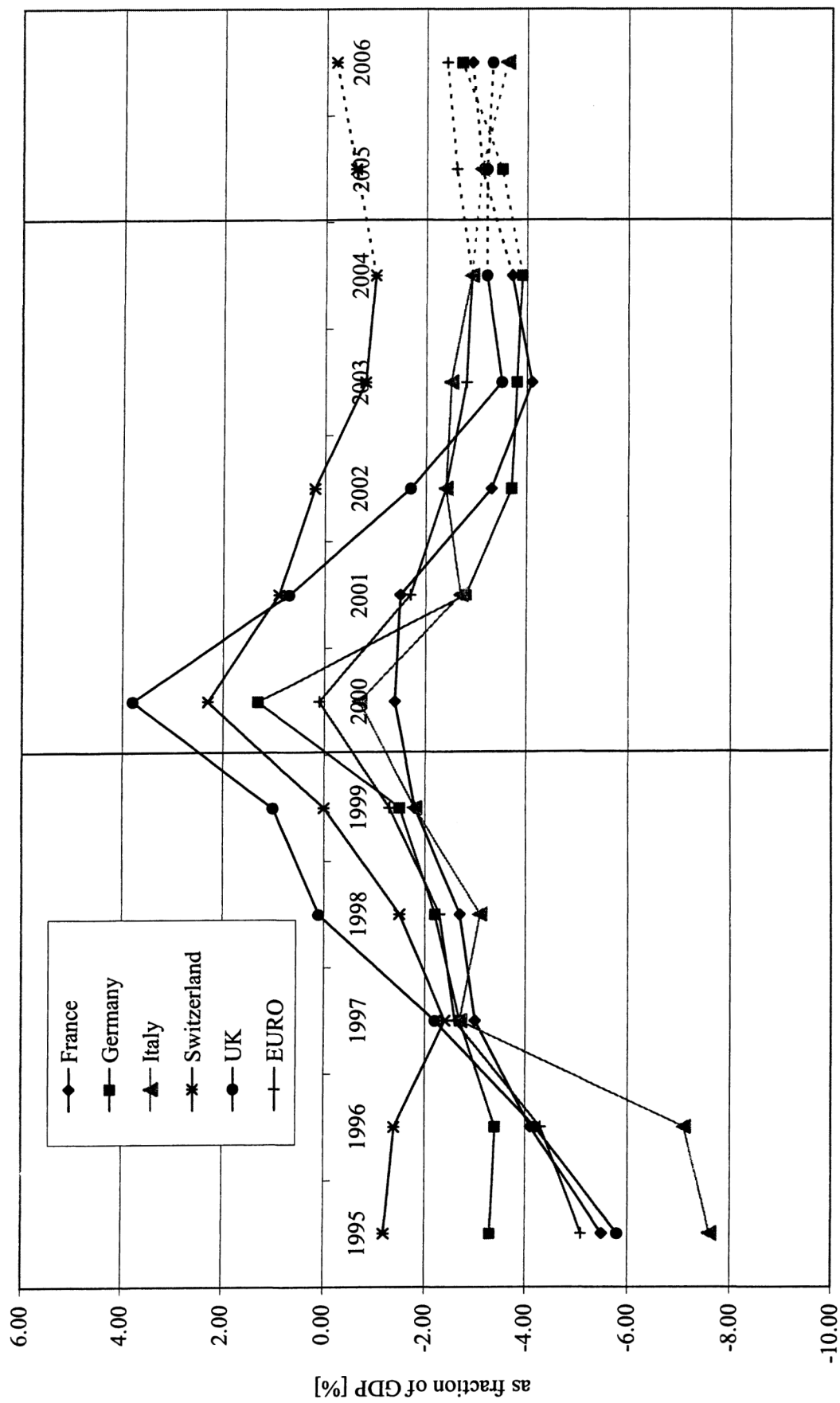


*Annex C*

Harmonised (commonly used definitions) unemployment rates recorded and estimated (source OECD)



## General government financial balances as percentage of nominal GDP (source OECD)



## *Annex E*

### **Main sources of information**

- EUROSTAT database, Gross domestic expenditure on R&D, data extraction 1/3/2005.
- Employment in Europe 2004, EUROSTAT.
- Geneva inflation rates, OCSTAT Geneva.
- OECD database (Economic Outlook No. 76, data extraction 1/3/2005): standardized unemployment rates, consumer price indices, real GDP growth, nominal GDP growth, central government financial balances including local council balances.