

Safety and health at work is everyone's concern. It's good for you. It's good for business

First findings of the Fourth European Survey of Enterprises on New and Emerging Risks (ESENER 2024)

First findings

EU-OSHA's fourth European establishment survey aims to assist workplaces to deal more effectively with health and safety and to promote the health and wellbeing of workers. It provides cross-nationally comparable information relevant for the design and implementation of new policies in the field of occupational safety and health (OSH).

Background

EU-OSHA's Fourth European Survey of Enterprises on New and Emerging Risks (ESENER 2024) asks those 'who know best about health and safety in the establishments' about the way health and safety risks are managed at their workplace, with a particular focus on psychosocial risks, that is, work-related stress, violence and harassment. Between May and October 2024, a total of 41,458 establishments — across all activity sectors and employing at least five people — were surveyed in the 30 countries covered: the EU-27 as well as Iceland, Norway and Switzerland. Although the questionnaire has been kept largely the same as the ones in ESENER 2014 and 2019 to allow for comparisons over time, there have been some updates aimed at reflecting on the impact of the COVID-19 pandemic on the management of OSH.

Developed with the support of governments and social partners at European level, ESENER 2024 aims to assist workplaces across Europe by better understanding their needs for support and expertise as well as identifying the factors that encourage or hinder action. ESENER explores in detail four OSH areas:

1. The general approach in the establishment to managing OSH.
2. How the 'emerging' area of psychosocial risks is addressed, including digitalisation.
3. The main drivers and barriers to the management of OSH.
4. How worker participation in OSH management is implemented in practice.

This report presents a first analysis of the main findings of ESENER 2024. More detailed results and analyses will be presented in forthcoming publications, to be published in 2026 and beyond.

Main findings

ESENER 2024 sheds light on some of the changes in social and economic conditions that have an effect on European workplaces **employing at least five people**. This constant evolution brings about new challenges that require action with a view to guaranteeing high levels of health and safety at work, and the 2024 results show some of the impacts of the COVID-19 pandemic — see Table 1.

- As expected, the share of workplaces in the EU-27 reporting to have employees working from home on a regular basis has almost doubled since 2019, reaching 23% in 2024 — and going over 40% in Finland and the Netherlands. By activity sector, the highest shares correspond to information and communication (53%) and professional, technical and scientific activities (39%).
- In line with this, risk assessments are increasingly covering home workplaces (8% in 2024, up from 3% in 2019) even though the shares are still low. By sector, the highest shares are reported in information and communication (18%).
- Less than a fifth (18%) of workplaces in the EU-27 report consulting employees on working from home practices, with the Netherlands (37%), Finland (34%) and Lithuania (33%) showing the highest shares of consultation.
- As a reflection of the increasing use of digital technologies, ESENER 2024 has updated its questions on digitalisation. Risk assessments cover the use of digital technologies in 43% of workplaces in the EU-27 — going beyond 60% in Spain and Slovenia. By sector, the highest shares of risk assessments covering digital technologies are reported in education (51%). Meanwhile, training on the use of digital technologies is reported to be provided in 42% of workplaces — with up to 75% in Malta — and for sectors it is particularly high in information and communication (51%) and financial and insurance activities (51%).

Table 1. Changing world of work: selection of indicators, in % of establishments in the EU-27, 2024 and 2019 (when available).

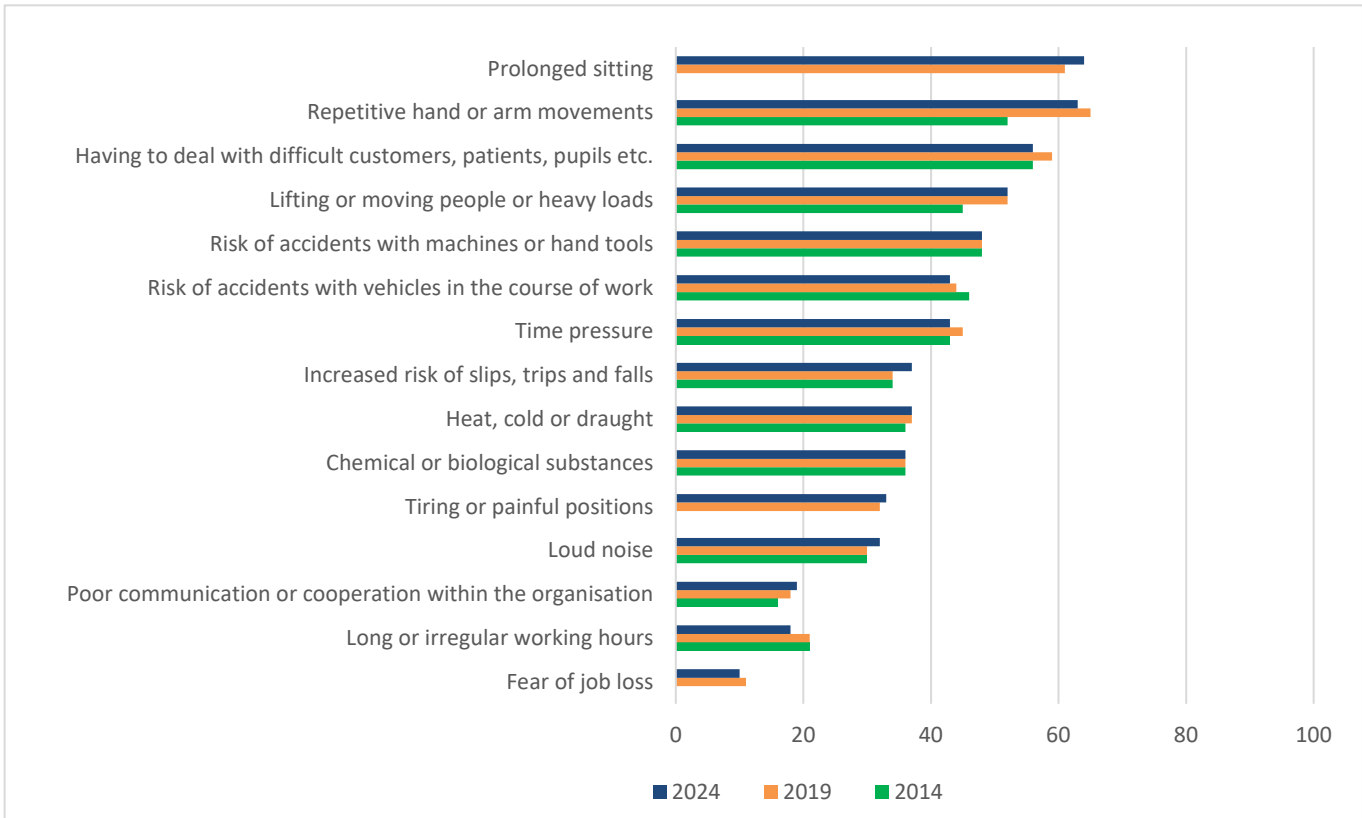
Indicator	ESENER-2024 question	EU-27 2024 (2019)	Countries	
			2024 (2019)	
Workplaces	Employees working from home on a regular basis	23% (13%)	Finland: 45% (17%) Netherlands: 42% (33%) Lithuania: 36% (15%)	Bulgaria: 10% (5%) Croatia: 10% (7%) Portugal: 10% (5%)
	Risk assessments cover home workplaces	8% (3%)	Estonia: 14% (2%) Finland: 13% (4%) Germany: 12% (5%)	Cyprus: 1% (0%) Portugal: 2% (1%) Greece: 3% (1%)
	Employees consulted on working from home practices	18%	Netherlands: 37% Finland: 34% Lithuania: 33%	Bulgaria: 6% Cyprus: 7% Croatia: 7%
	Use of digital technologies covered in risk assessments	43%	Spain: 62% Slovenia: 60% Malta: 59%	France: 24% Germany: 29% Luxembourg: 30%
Language	Having employees who have difficulties understanding the language spoken at the premises	10% (8%)	Cyprus: 19% (20%) Sweden: 17% (19%) Luxembourg: 17% (17%)	Bulgaria: 3% (2%) Slovakia: 3% (3%) Hungary: 4% (3%)
Training	Routine use of digital technologies	42%	Malta: 75% Slovakia: 63% Ireland: 59%	France: 24% Austria: 34% Luxembourg: 36%
	Assess mobile or external workplaces on OSH risks	25% (20%)	Malta: 45% (25%) Slovenia: 35% (28%) Romania: 33% (15%)	Bulgaria: 14% (12%) Poland: 16% (17%) France: 20% (17%)

Base: all establishments in the EU-27, ESENER 2019 and 2024.

- In this context of societal change presented in Table 1, the most frequently identified risk factors in the EU-27 are prolonged sitting (64% of establishments, up from 61% in 2019), repetitive hand or arm movements (63% of establishments, slightly down from 65% in 2019), having to deal with difficult customers, pupils, patients (56%, down from 59%), and lifting or moving people or heavy loads (52%, as in 2019). See Figure 1.
- There is a directly proportional relation with size, as larger establishments report the presence of all risk factors most frequently. By sector, as in previous survey waves, having to deal with difficult customers, pupils, and patients is more frequently reported in service sectors, whereas factors leading to musculoskeletal disorders (MSDs) are more evenly mentioned across all sectors, except for lifting or moving people or heavy loads, which is low among establishments in financial and insurance activities (27%), and prolonged sitting, which is reported by only 26% of workplaces in accommodation and food service activities.
- The main risk factors highlighted above are also the most frequently reported ones across most countries, with the exception of time pressure (reported by 43% of establishments in the EU-27), being the top risk factor in Sweden (64%) and the second in Finland (71%).
- It is telling to see prolonged sitting as the most frequently reported risk factor in the EU-27 (64% of establishments). It was introduced as a new item in the ESENER 2019 questionnaire¹ and it sheds additional light on the awareness of sitting as a health risk factor. By sector, it is most frequently reported by establishments in financial and insurance activities (88% of establishments in the sector in the EU-27), public administration (88%), and information and communication (84%).
- Interestingly, only 3% of establishments in the EU-27 report having none of the general OSH risk factors considered. However, when it comes to psychosocial risk factors, it is a quarter of surveyed establishments (25%) that report having none of them. The highest shares of establishments reporting none of the psychosocial risk factors included in ESENER are found in Italy (47%) and Lithuania (44%), while the lowest are in Finland (12%), Cyprus, Belgium and Germany (14%). By size, there is an inversely proportional relation by which these shares (of establishments reporting none of the psychosocial risk factors considered) are highest among the smallest establishments. By sector, they are highest in manufacturing and agriculture.

¹ In ESENER 2014, it was covered under 'Tiring or painful positions, including sitting for long periods'.

Figure 1. Risk factors present in the establishment (% establishments, EU-27), 2014, 2019 and 2024.

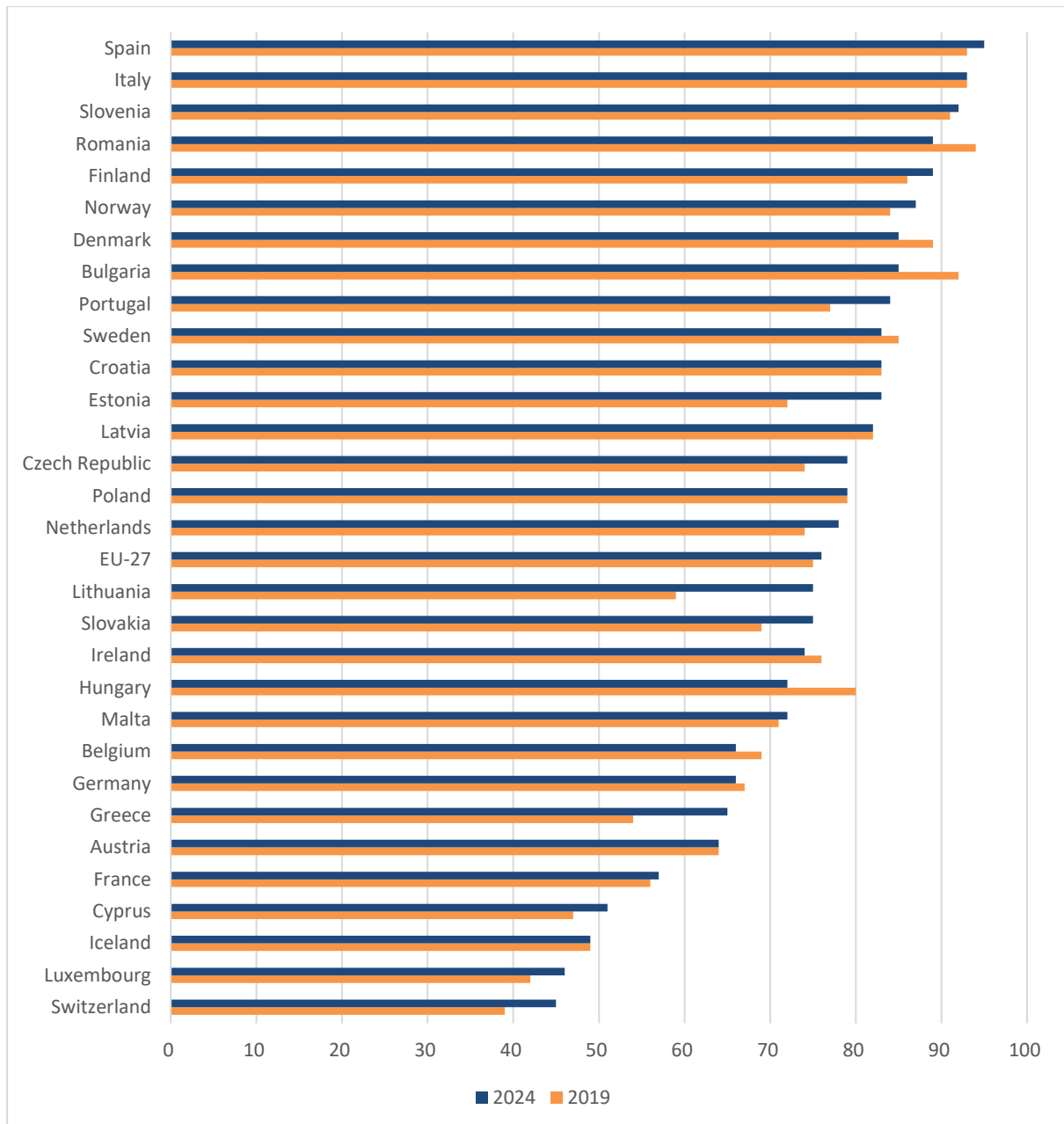


Base: all establishments in the EU-27, ESENER 2014, 2019 and 2024.

OSH Management

- These findings lead to the survey's results on **risk assessment**, the cornerstone of the European approach to OSH, as specified in the [EU Framework Directive on Safety and Health at Work \(Directive 89/391/EEC\)](#). Consistently with the findings in previous waves, 76% of establishments interviewed in the EU-27 in ESENER 2024 indicate that they carry out risk assessments regularly. As expected, there is a positive correlation with establishment size, whereas by country, the values range from 95% of establishments in Spain, Italy (93%) and Slovenia (92%), down to 46% in Luxembourg (Figure 2).
- Focusing on the country breakdown, and compared to 2019, there has been an increase in several EU-27 countries, the most remarkable being Lithuania, Greece and Estonia. On the other end, some countries have reported a drop in their respective shares of establishments carrying out risk assessments regularly, such as Hungary, Bulgaria and Romania.
- As in the past, there are significant differences when it comes to the share of establishments where risk assessments are mainly conducted by internal staff. The country ranking changes significantly, being topped by Sweden (84% of establishments, similarly to 85% in 2019) and Denmark (80%, as in 2019). The lowest shares are found in Spain (6%, down from 10% in 2019) and Slovenia (7%).
- While this does not indicate anything about the quality of these risk assessments — in some countries there may even be a legal obligation to contract OSH services for such tasks— in principle, and under the assumption that those in charge of the work are in the best position to control the risks, all establishments should be able to carry out a basic risk assessment with their own staff only.

Figure 2. Workplace risk assessments carried out regularly, by country (% establishments), 2019 and 2024.



Base: all establishments, all 30 countries, ESENER 2019 and 2024.

- 48%² of establishments in the EU-27 that report having employees working from home on a regular basis indicate that they cover such workers in their risk assessments. This is clearly up from the 31% share reported in 2019 (26% in 2014). This seems to reflect an increased awareness of home workplaces being actual workplaces.
- As in the past, the shares are still higher when it comes to covering other workplaces outside the premises of the establishments (other than working from home), as

66% of establishments in the EU-27 that report having such work arrangements indicate covering them in their risk assessments (65% in 2019). This is most frequently reported by establishments in Italy (80%) and Luxembourg (76%) and, by sector, in construction, as expected (82%, though down from 89% in 2019).

- The use of **health and safety services** reveals occupational health doctors (75%), generalists on health and safety (59%), and experts for accident prevention (52%) to be the most frequently used, with very similar

² This is calculated counting the establishments reporting carrying out risk assessments and having employees working from home, as opposed to the numbers in Table 1, which have been recalculated over the total number of establishments, for the sake of comparability with the other indicators in the table.

shares to those reported in 2019. Focusing on psychosocial risks, the use of a psychologist is reported by 21% of establishments in the EU-27 (19% in 2019). Interestingly though, there are important differences by country: in Finland, 73% of establishments report using a psychologist, be it in-house or contracted externally, followed by Belgium (48%) and Denmark (47%).

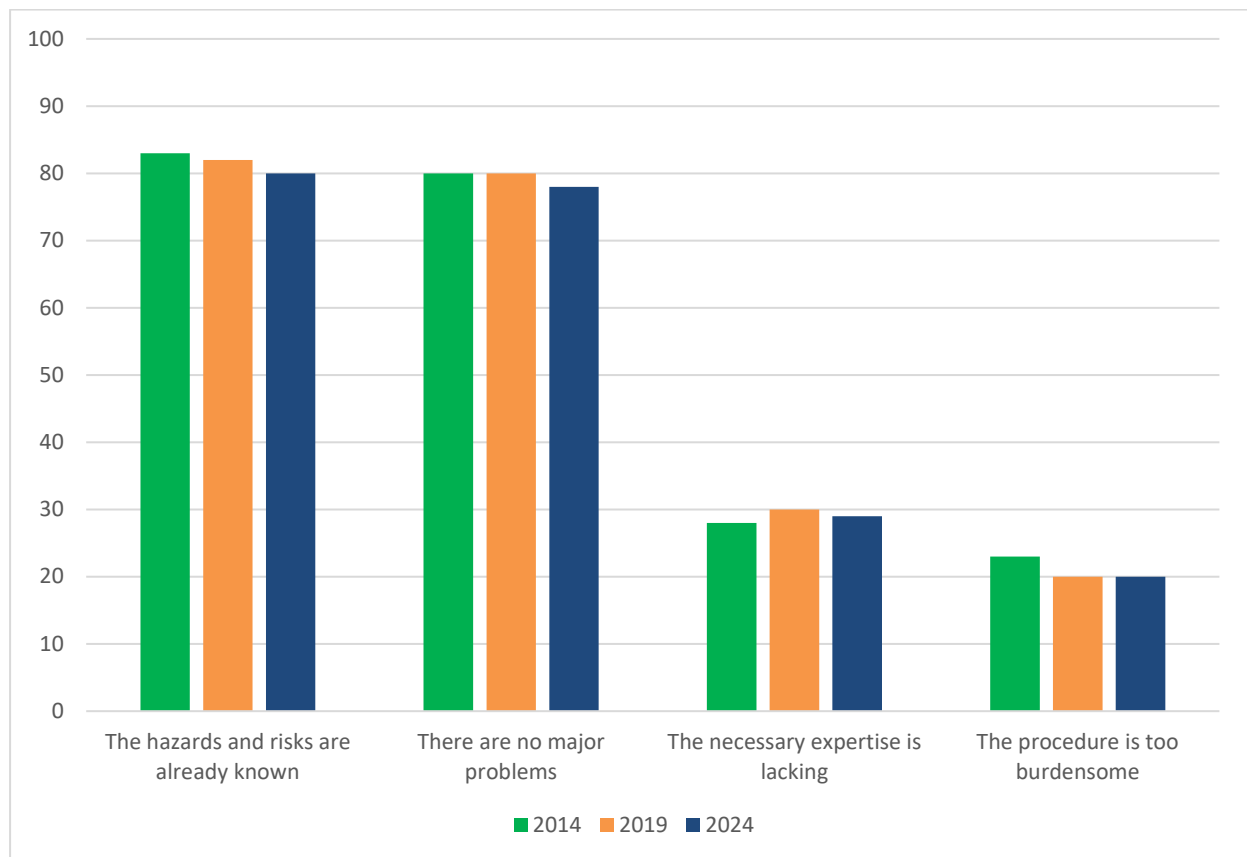
- Further to this, as in 2019, slightly under two-thirds of establishments in the EU-27 (62%) report using the services of an **external provider** to support them in their health and safety tasks, with the shares being highest in Slovenia (92%) and Portugal (88%). Turning to external providers appears to be associated positively with establishment size, while the sector breakdown reveals that it is the most frequent among establishments in electricity (76%).

Drivers and barriers

- Looking at those establishments that do not carry out regular risk assessments, the main reasons given for not doing so are that the risk and hazards are already known (80% of establishments) and that there are no major problems (78%), as was the case in 2014 and 2019 (Figure 3). These results represent

24% of the surveyed establishments but still trigger the question of whether these establishments, particularly the smallest ones, have fewer problems or if they are simply less aware of workplace risks. Interestingly, and focusing on the smallest establishments, they report less frequently than their larger counterparts that the procedure is too burdensome.

Figure 3. Reasons why workplace risk assessments are not carried out regularly (% establishments, EU-27), 2014, 2019 and 2024.



Base: establishments in the EU-27 that do not carry out risk assessments regularly, ESENER 2014, 2019 and 2024.

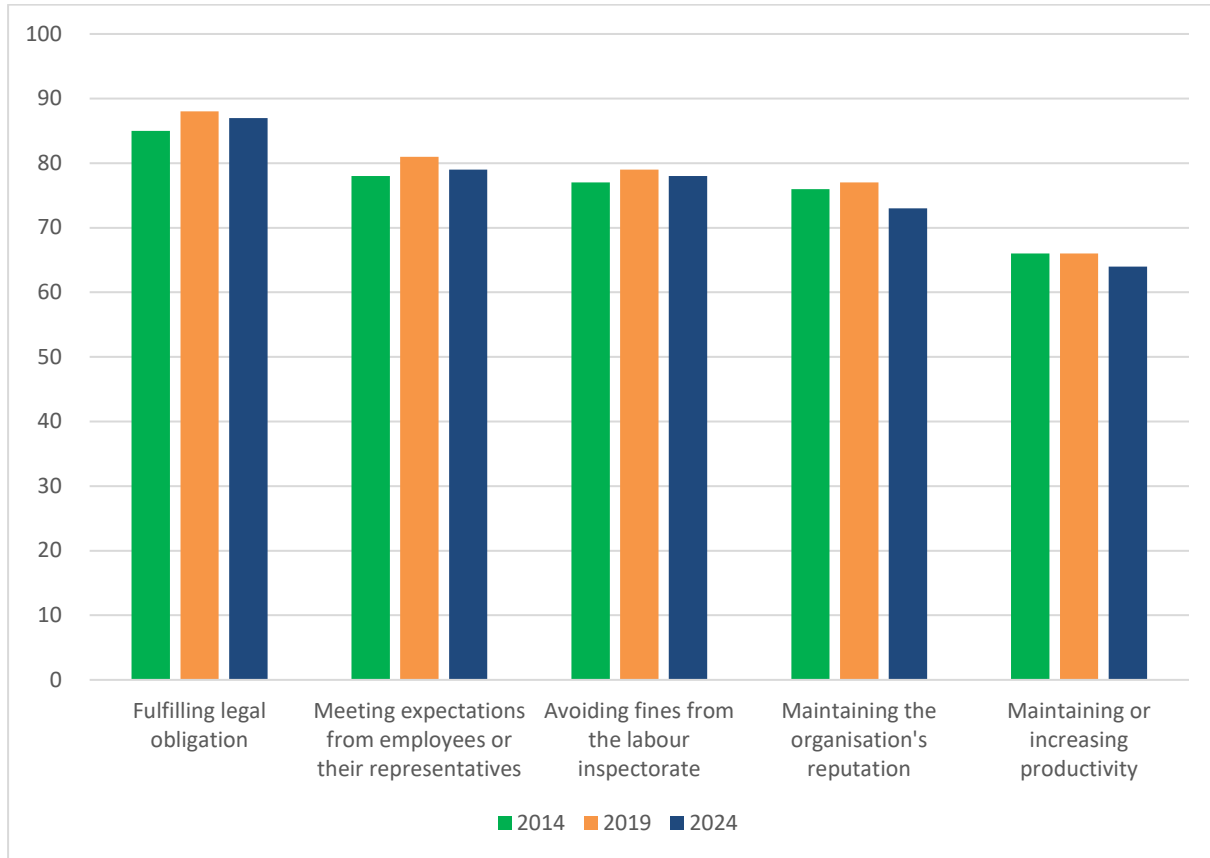
- Moving on to the **reasons that motivate enterprises to manage OSH**, fulfilling the legal obligation is reported to be a major reason by 87% of establishments in the EU-27, in line with 2014 and 2019 (Figure 4). There is a

directly proportional relation with establishment size, whereas by country the shares range from 68% of establishments in Denmark to 97% in Portugal and Sweden.

- The second most important driver for action on OSH is ‘meeting expectations from employees or their representatives’, followed by ‘avoiding fines from the labour inspectorate’. ESENER 2024 shows that four in five establishments that carry out risk assessments

regularly in the EU-27 (79%, similarly to 80% in 2019) report involving their employees in the design and implementation of measures that follow a risk assessment.

Figure 4. Major reasons for addressing health and safety (% establishments, EU-27), 2014, 2019 and 2024.

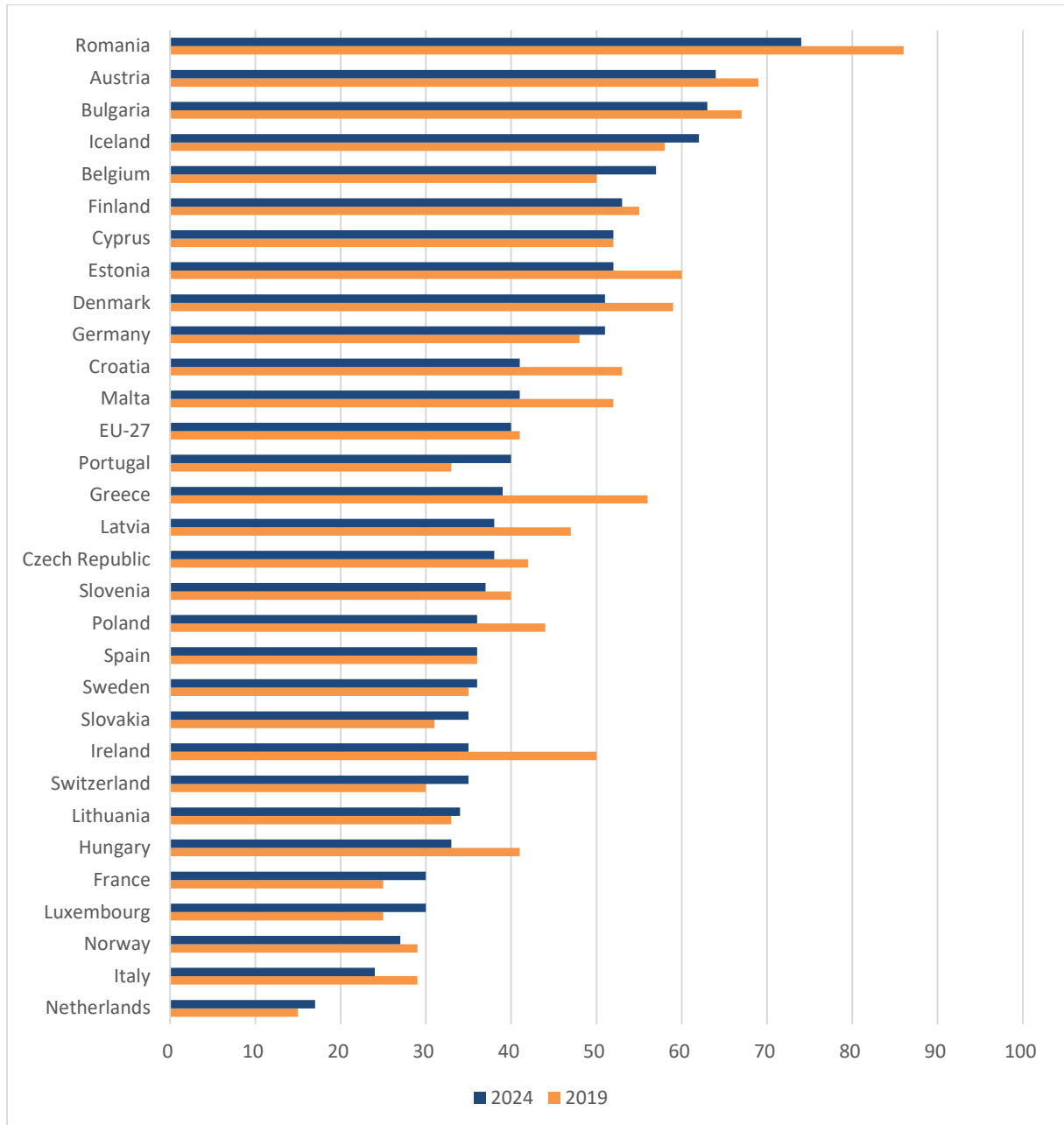


Base: all establishments in the EU-27, ESENER 2014, 2019 and 2024.

- Building on the issue of **labour inspection** and the avoidance of their fines as a motivation to manage OSH, it is worth pointing out the continued reduction in the shares of establishments that report having had a visit from the labour inspectorate in the three years prior to the survey: 40% in 2024, slightly down from 41% in 2019 (and 49% in 2014) (Figure 5). The biggest decreases are reported in Greece (down from 56% to

39%) and Ireland (down from 50% to 35%). Some countries have reported an increase, the biggest being Portugal (up from 33% to 40%), and France and Luxembourg (both up from 25% to 30%). The overall reduction is witnessed across all sizes of establishments, whereas by sector the picture is more diverse, with some reporting an increase, like public administration at 32%, up from 23% in 2019

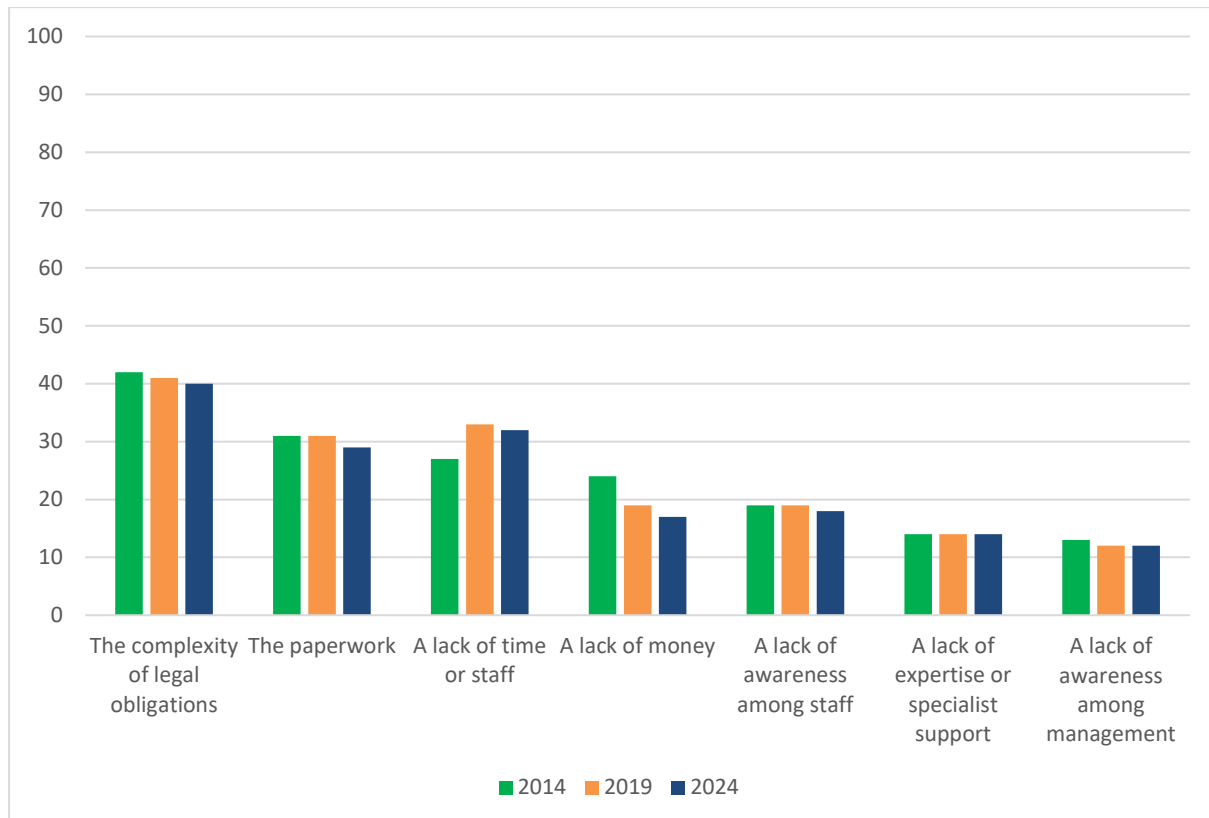
Figure 5. Visit by the labour inspectorate in the three years prior to the survey, by country (% establishments), 2019 and 2024.



Base: all establishments, all 30 countries, ESENER 2019 and 2024.

- The complexity of legal obligations is still reported to be a **major difficulty in addressing OSH** by 40% of establishments in the EU-27, slightly down from 41% in 2019 and 42% in 2014 (Figure 6). The country breakdown shows a very diverse picture though, with the highest shares of complexity as a major difficulty being reported in Belgium (58% of establishments) and Italy (48%), as opposed to Lithuania (15%), Finland (16%), and Latvia and Malta (17%). It is revealing to see the remarkable decrease in Greece (down from 46% of establishments in 2019 to 28% in 2024), France (52% to 44%) and Sweden (38% to 31%), which helps explain the interpretation of this finding not exclusively as the difficulty in the legal obligation per se but rather the possible modifications and updates in the legislation that may be perceived as difficult by the establishments.
- Most factors show a slight drop in their respective shares, but over the years a lack of time or staff has become the second most reported factor (32% of establishments in 2024). This is particularly the case among establishments in Belgium (56%), the Netherlands (42%) and France (41%).

Figure 6. Major difficulties in addressing health and safety (% establishments, EU-27), 2014, 2019 and 2024.

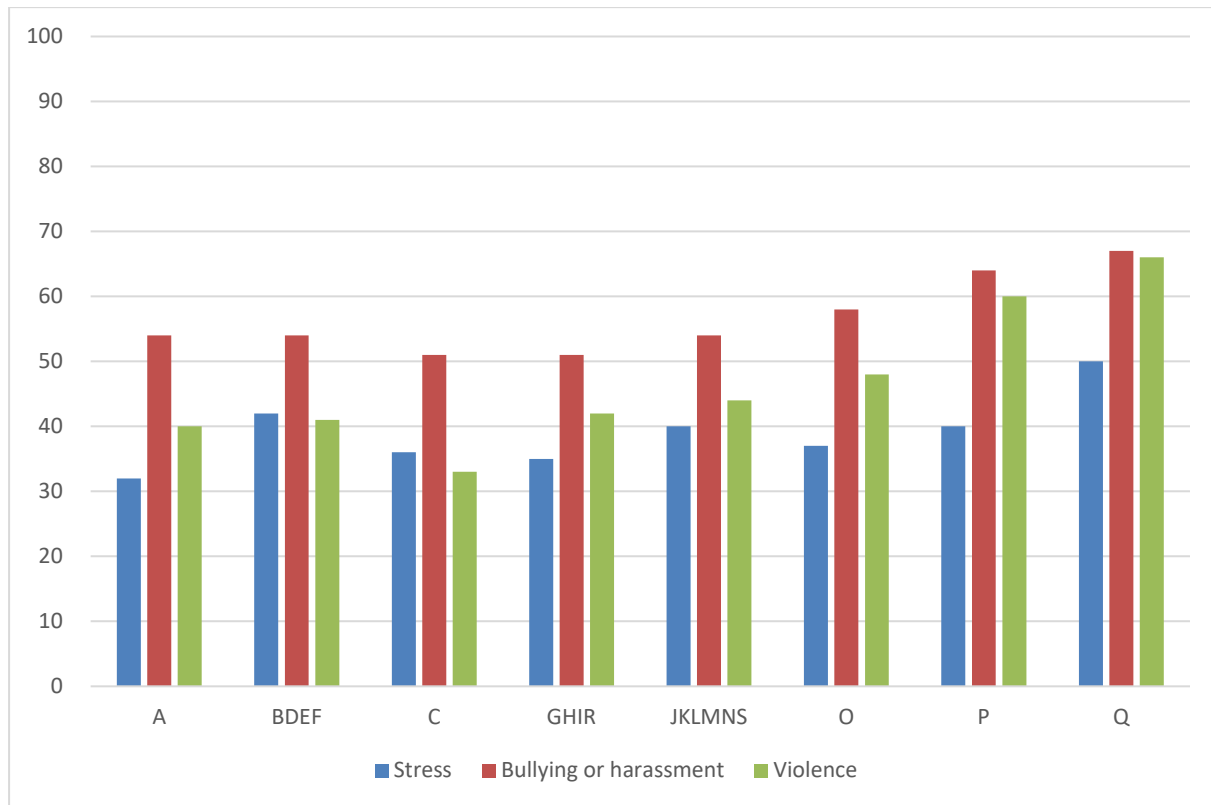


Base: all establishments in the EU-27, ESENER 2014, 2019 and 2024.

New and emerging risks: Psychosocial risks and digitalisation

- As shown above, some of the **psychosocial risk factors** are reported in a significant share of establishments in the EU-27, namely having to deal with difficult patients, customers and pupils (56%) and time pressure (43%). Among those establishments that report having psychosocial risk factors, 21% of them in the EU-27 perceive them as more difficult than other risks, with the highest shares being found in the Nordic countries, as in previous ESENER waves: Sweden (38% of establishments), Denmark (37%) and Finland (35%). On the other hand, only 6% of establishments in Bulgaria and 8% in Croatia regard psychosocial risks to be more difficult than other risks.
- Focusing on the establishments reporting that psychosocial risk factors are more difficult to manage than other OSH risks, ESENER 2024 shows that a reluctance to talk openly about these issues seems to be the main difficulty for addressing psychosocial risks (59% of this group of establishments in the EU-27). This, as with all the other difficulties considered (lack of awareness among staff/management and lack of expertise or specialist support), is reported more frequently as establishment size grows.
 - Specifically among those establishments that report having to deal with difficult customers, patients or pupils, 46% of those employing 20 or more people report having a procedure in place to deal with possible cases of threats, abuse or assaults by clients, patients or other external persons (EU-27 average, down from 51% in 2019). This share rises to 66% among establishments in human health and social work activities (Figure 7).
 - Regarding action plans against stress (39% of establishments with 20 or more employees in the EU-27, up from 33% in 2019) and procedures to deal with possible cases of bullying or harassment (55% in 2024, up from 45%), the increase has been reported across all activity sector groups.

Figure 7. Action plan and procedures in place against psychosocial risks, by activity sector group (% establishments, EU-27), 2024.



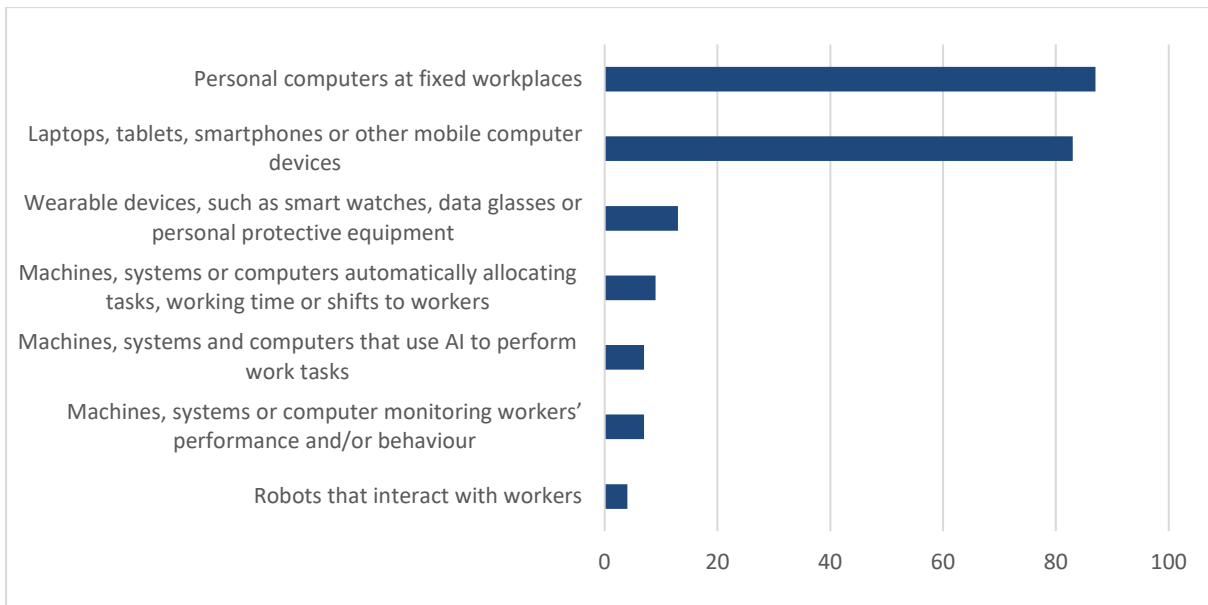
Base all establishments in the EU-27 employing 20 or more employees, ESENER 2024. Procedures on violence asked only to those reporting 'having to deal with difficult customers' to be present as a health risk factor.

NACE³ Rev. 2 sections: **A:** Agriculture, forestry and fishing. **B, D, E, F:** Construction, waste management, water and electricity supply. **C:** Manufacturing. **G, H, I, R:** Trade, transport, food/accommodation and recreation activities. **J, K, L, M, N, S:** IT, Finance, Real estate, and other technical scientific or personal service activities. **O:** Public administration. **P:** Education. **Q:** Human health and social work activities.

- 64% of surveyed establishments in the EU-27 carrying out risk assessments report having sufficient information on how to include psychosocial risks in such risk assessments, up from 60% in 2019. As expected, this share varies more by establishment size (increases with size) than by sector. The findings are particularly diverse by country, with the highest figures coming from the Netherlands (79%), Spain (71%), and Italy and Denmark (70%), as opposed to Malta (38%) and Bulgaria (45%).
- Already in 2019, and in order to better measure the societal and economic changes mentioned above (see Table 1) ESENER included a new section on the impact of **digitalisation** on the health and safety of workers. As back then, in 2024 there is great diversity when it comes to the types of digital technologies reported by the establishments. Personal computers (PCs) at fixed workplaces (87% of surveyed establishments in the EU-27) and laptops, tablets, smartphones or other mobile devices (83%, up from 77% in 2019) are frequently reported across all activity sectors and establishment sizes.
- Unsurprisingly, the use of the remainder of technologies considered is less widespread but still some sectors report significantly higher than average shares: 21% of workplaces in information and communication report the use of machines, systems or computers that use artificial intelligence (AI) (EU-27 average: 7%), whereas the use of machines, systems or computers monitoring workers' performance and/or behaviour is reported by 15% of establishments in transportation and storage (EU-27 average: 7%).
- Only 4% of surveyed establishments in the EU-27 reported using none of the digital technologies included in the questionnaire.

³ Statistical Classification of Economic Activities: <https://ec.europa.eu/eurostat/web/nace>

Figure 8. Digital technologies at work (% establishments, EU27), 2024.



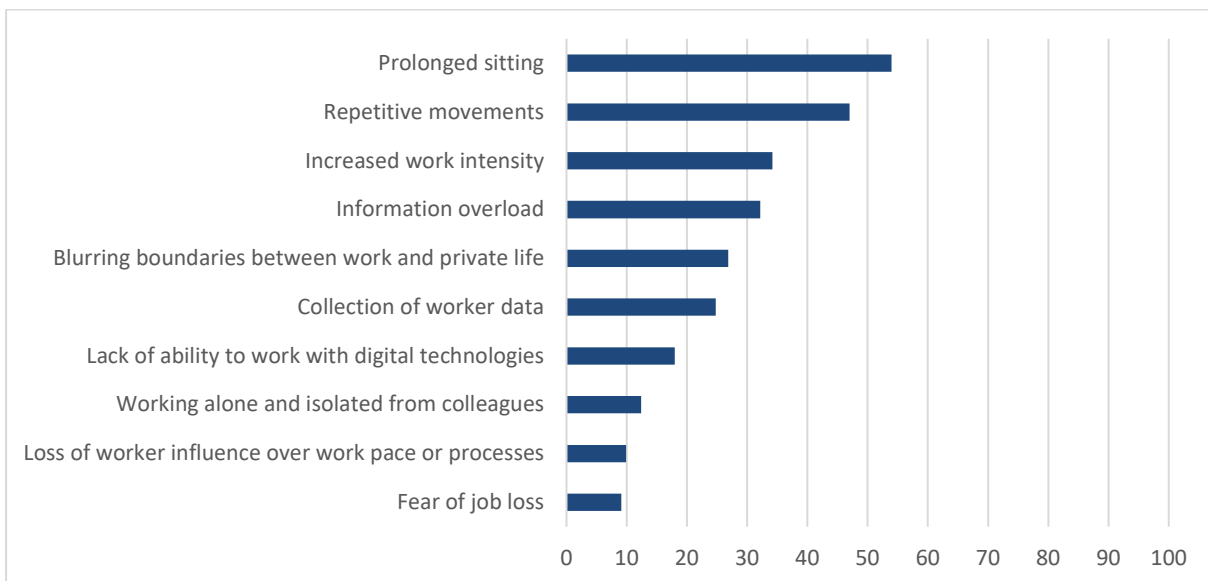
Base: all establishments in the EU-27, ESENER 2024.

- Among those establishments reporting the use of at least one of the aforementioned digital technologies, 35% in the EU-27 point out that they have consulted with employees about the potential impact of the use of such technologies on the health and safety of workers, clearly up from 24% in 2019. By country, the highest shares correspond to Lithuania (57%) and Malta (50%), whereas by sector this type of consultation is reported more frequently among establishments in education (42%), information and communication (41%), and financial and insurance activities (40%).
- A new question has been added in 2024 on the risk factors that may be linked to the use of the digital technologies mentioned above. Interestingly, and very much in line with the main risk factors presented in

Figure 1, the two most frequently reported risk factors linked to digitalisation are MSDs: prolonged sitting (54% of workplaces in the EU-27 using at least one of the digital technologies mentioned above) and repetitive movements (47%) (Figure 9). Next up are increased work intensity (34%) and information overload (32%). The top risk factors are the same across almost all sectors and their reporting increases with establishment size.

- The picture by country, once more, is very diverse. Establishments in Finland report the highest shares of working alone and isolated from colleagues (43%) and lack of ability to work with digital technologies (46%), whereas in Germany 54% of workplaces report increased work intensity and information overload.

Figure 9. Risk factors linked to the use of digital technologies at work (% establishments, EU-27), 2024.

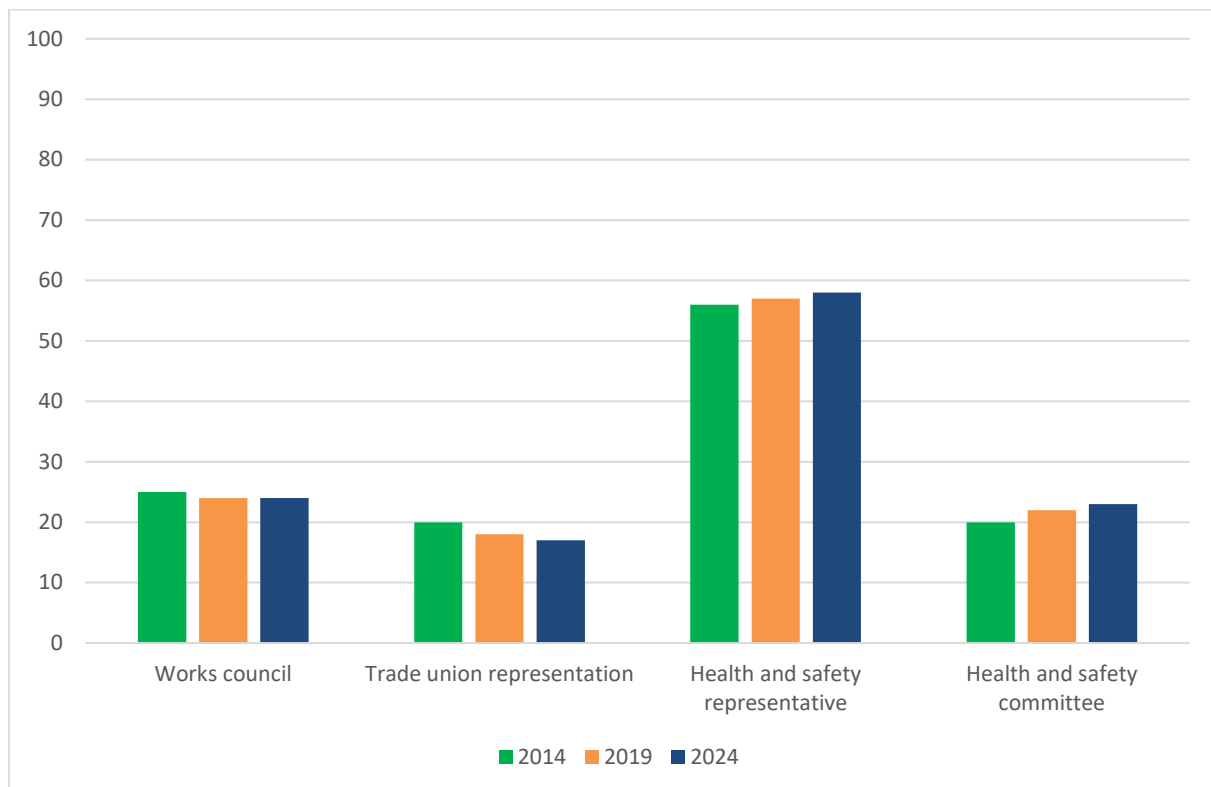


Base: establishments in the EU-27 reporting the use of at least one digital technology, ESENER 2024.

Worker participation

- Finally, as regards **employee participation**, and focusing on those establishments that report having used measures to prevent psychosocial risks in the three years prior to the survey, 55% of establishments in the EU-27 indicate that employees had a role in the design and set-up of such measures, slightly down from 61% in 2019 and 63% in 2014. These findings vary by country, from 77% of establishments in Sweden and 76% in Denmark down to 40% in Poland and 43% in Cyprus.
- The evolution by country since 2019 has been diverse, and while Lithuania, Estonia, Romania, Croatia and Hungary, among others, have reported an increase, some other countries have witnessed a clear decrease, with the biggest being in Slovenia, Germany, Cyprus, Portugal, Latvia and Bulgaria. Due to the nature of psychosocial risks, it would be expected that measures in this area would bring in direct worker involvement and an especially high degree of collaboration from all actors at the workplace, but the findings are not suggesting this.
- Concerning the different forms of employee representation, a health and safety representative was the most frequently reported: 58% of establishments in the EU-27, building a slightly increasing trend since 2014 (Figure 10). By sector, the shares are highest among establishments in electricity, gas, steam and air conditioning (73%) and human health and social work activities (66%). As expected, once more these findings are largely driven by establishment size.

Figure 10. Forms of employee representation (% establishments, EU-27), 2014, 2019 and 2024.



Base: all establishments in the EU-27 — size depending on national thresholds for these representation forms, ESENER 2014, 2019 and 2024.

- Interestingly, almost one-third of establishments in the EU-27 (31%) has none of these forms of employee representation, with the shares being highest in Greece (73%), Portugal (65%) and Latvia (65%). See Table 2.

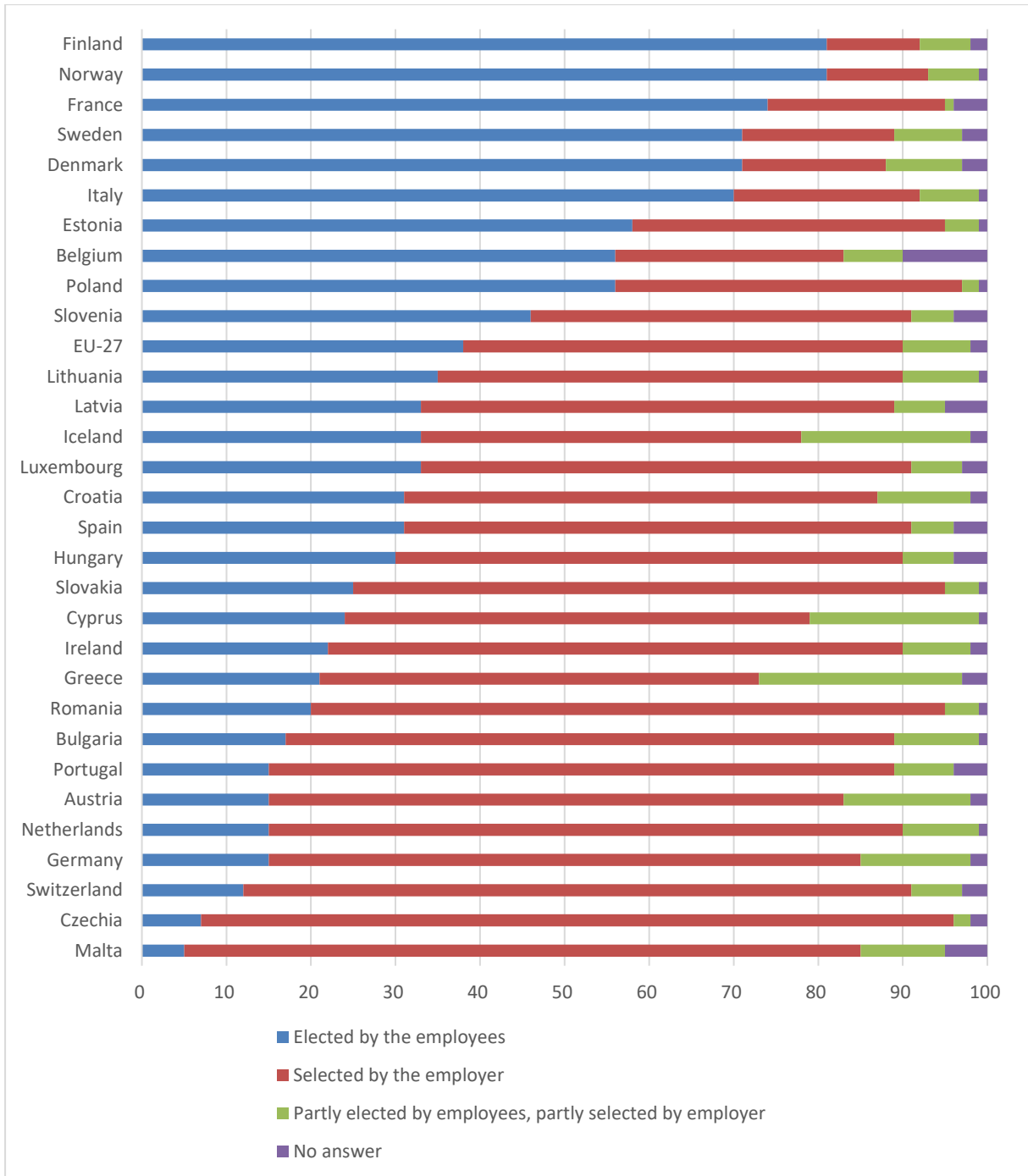
Table 2. No forms of employee representation, by country (% establishments), 2024.

Country	%	Country	%
Greece	73	Sweden	27
Portugal	65	Malta	27
Latvia	65	Czechia	27
Slovenia	59	Slovakia	26
Hungary	58	Estonia	25
Poland	56	Luxembourg	25
Cyprus	46	Croatia	24
Belgium	45	Ireland	24
France	43	Austria	18
Spain	43	Germany	17
Switzerland	41	Lithuania	15
Iceland	38	Bulgaria	15
Netherlands	37	Italy	12
Finland	32	Romania	8
EU-27	31	Norway	7
Denmark	29		

Base: all establishments, all 30 countries — size depending on national thresholds for these representation forms, ESENER 2024.

- ESENER 2024 asked establishments about the appointment of the health and safety representatives and the findings reveal a very diverse picture across countries, in reflection of the different national frameworks (Figure 11).
- More than half (52%) of establishments surveyed in the EU-27 report having the health and safety representative selected by the employer, with the highest shares corresponding to Czechia (89% of establishments) and Malta (80%), as opposed to Finland (11%) and Denmark (17%).
- More than a third of the surveyed establishments (38%) pointed out that health and safety representatives are elected by the employees, with the shares being highest in Finland (81%), France (74%), and Sweden and Denmark (71%). As many as 24% of establishments in Greece and 20% in Cyprus report that they are partly elected by the employees and partly selected by the employer

Figure 11. Appointment of health and safety representatives, by country (% establishments), 2024.



Base: establishments reporting the presence of a health and safety representative, all 30 countries.

Survey methodology

- Interviews were conducted between May and October 2024 in establishments with five or more employees from both private and public organisations across all sectors of economic activity except for private households (NACE T) and extraterritorial organisations (NACE U).
- Thirty countries were covered: all 27 EU Member States, Iceland, Norway and Switzerland.
- In total, 41,458 establishments were surveyed — the respondent being ‘the person who knows best about health and safety in the establishment’. By country, the reference samples ranged from about 450 in Malta to 2,250 in France, Germany, Italy⁴, Poland and Spain (see national sample sizes at www.esener.eu).
- The national reference samples were boosted — funded by the respective national authorities — in four countries: Austria (+300), Germany (+900), Italy (+450) and Slovenia (+300).
- Data were collected mainly through computer-assisted telephone interviewing, or CATI. There was an option to complete the survey online for those who declined to be interviewed over the telephone.

- Fieldwork was carried out by Ipsos NV and its network of fieldwork centres in each country.
- Samples were drawn according to a disproportional sample design that was later redressed by weighting.
- Efforts were made to build samples that provide the necessary quality and ensure cross-national comparability.
- The questionnaire was developed by a team comprising experts in survey design and in OSH, together with EU-OSHA staff.
- More information on the methodology of ESENER: www.esener.eu.

Further information

This report is only a first look into the ESENER 2024 findings and conclusions should be interpreted with caution. More detailed results and analyses will in the future be available at www.esener.eu. As for ESENER 2009, 2014 and 2019, the ESENER 2024 dataset will be accessible via [GESIS](#) in 2025.

Further analyses will be carried out in 2025 and 2026 and will be published in 2026 and beyond.

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More information on the European Union is available on the Internet (<http://europa.eu>).

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⁴ This figure does not include the sample boosts – see next bullet point.

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