

# Agreed guidelines for the use of COPSOQ III

**COPSOQ**

INTERNATIONAL NETWORK



# **AGREED GUIDELINES FOR THE USE OF COPSOQ III**

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# 1. WHAT IS COPSOQ?

**An international instrument designed for the assessment and improvement of psychosocial conditions in workplaces and for research purposes**

COPSOQ is an instrument for research, for the assessment of psychosocial conditions and health promotion at workplaces. It was developed by a group of researchers lead by Tage S Kristensen and Vilhelm Borg at the Danish National Research Centre for the Working Environment (1995-2007). From 2007, its development has been coordinated in a cooperative manner under the principles of action-oriented research by the *International COPSOQ Network* (<http://www.copsoq-network.org>). The international network is responsible for regular updating and adaptation to labour market changes and scientific progress.

COPSOQ appears in hundreds of references in indexed international scientific journals on *Medline*<sup>1</sup>. It is available in more than 25 languages<sup>2</sup> which allows comparison between countries. COPSOQ is one of the most widely used psychosocial risk assessment methods and it is cited as a reference in documents of international organizations such as the World Health Organization<sup>3</sup>, International Labour Organization<sup>4</sup> and it is recognized as an example of good practice by the EU Occupational Safety and Health Agency<sup>5</sup>.

The COPSOQ questionnaire allows for operationalization of the most prominent work environment theories

including most relevant psychosocial domains (e.g. demand-control-social support, effort-rewards, job demands-resources, work-family conflict, social capital, vitamin, socio-technical). The COPSOQ core dimensions (see section 2) cover the most accepted psychosocial dimensions. Given the considerable scientific evidence on their relation with health, these dimensions are needed for risk assessment purposes.

**An assessment instrument for use at workplaces of any size and sector, which provides for comparisons and benchmarking by using reference values**

COPSOQ is designed as a tool for workplace psychosocial risk assessment and for organizational development. It is a generic tool, which can be used for all kind of jobs, in any industry and for workplaces of different sizes (private or public). From an operational perspective, it provides useful information for the prioritization of risk factors and to prompt preventive actions in workplaces.

Another significant aspect is the ability to apply the same psychosocial metric across different occupations and economic sectors. The ultimate goal of addressing psychosocial hazards is to achieve safe and healthy working conditions for all workers regardless of tasks, job, or any other social condition. By using the same measurement tool it is possible to provide the same standard of risk assessment for workers regardless of whether they work in poor working conditions or, in the more privileged occupational sectors.

<sup>1</sup> <http://www.ncbi.nlm.nih.gov/pubmed>

<sup>2</sup> Catalan; Chinese; Danish; Dutch (Belgium; Netherlands); English (Canada; Australia); Euskera; French (France; Belgium, Canada); Farsi; Galician; German; Hungarian; Italian; Polish; Portuguese (Brazil, Portugal); Romanian; Spanish (Argentina, Chile, Peru, Spain); Swedish; Turkish.

<sup>3</sup> Leka S, Jain A. (2010). Health Impact of Psychosocial Hazards at Work: An Overview. Geneva: World Health Organization: [http://www.who.int/occupational\\_health/publications/hazardopsychosocial/en/](http://www.who.int/occupational_health/publications/hazardopsychosocial/en/)

<sup>4</sup> ILO. (2016). Workplace Stress: A collective challenge. Geneva: International Labour Organization: [http://www.ilo.org/wcmsp5/groups/public/---ed\\_protect/---protrav/---safework/documents/publication/wcms\\_466547.pdf](http://www.ilo.org/wcmsp5/groups/public/---ed_protect/---protrav/---safework/documents/publication/wcms_466547.pdf)

<sup>5</sup> Eurofound and EU-OSHA (2014), Psychosocial risks in Europe: Prevalence and strategies for prevention, Publications Office of the European Union, Luxembourg. <https://osha.europa.eu/en/tools-and-publications/publications/reports/psychosocial-risks-eu-prevalence-strategies-prevention/view>

Since there are no accepted standards for worker exposures to psychosocial risk factors, comparing the COPSOQ results to general population reference values is an appropriate and recognized way to classify the significance of such exposures. This information will help inform the decision of which factors are to be modified in order to improve workers’ health and wellbeing. General population reference values may represent a manageable short-term exposure goal for companies. Repeated administrations of the survey will allow a workplace to benchmark their psychosocial risk prevention performance and track their progress.

## 2. COPSOQ III QUESTIONNAIRE

### 2.1. Structure

International COPSOQ III structure is composed by items and scales labelled CORE, MIDDLE and LONG (See *Scales and Items in International COPSOQ III* document in Annex 1) from which national adapted versions have to be developed according to following criteria:

The structure of COPSOQ versions follows two criteria:

#### 2.1.1 Comparability

#### 2.1.2 Use

**SHORT and MIDDLE** are COPSOQ versions of different length for risk assessment and organizational development purposes at the workplace. They both must include at least all **CORE** items. According to the adaptation and validation of COPSOQ in any particular country and language, these versions may also include other items – from the COPSOQ middle and long version. Additionally, both short and middle version can be used for research purposes if desired.

The **LONG** version is mainly intended for research purposes and for providing opportunities for national adaptations depending on what is needed in the context.

### 2.2. International and national versions

In order to guarantee international and longitudinal comparability, *COPSOQ International Network* is responsible for reaching a consensus regarding the definitions, dimensions, items and criteria for the use of COPSOQ. In any case, COPSOQ will be a free and public instrument.

In each country, the Network will recognize a “*national COPSOQ team*” i.e. the team who adapted and validated COPSOQ to the country and language. This team shall be

Table 1. Structure of COPSOQ III	
Version	Included scales & items
Short	At least all items labelled CORE
Middle	At least all items labelled CORE and as many items labelled MIDDLE as possible along with any relevant items from the LONG version
Long	All scales and items relevant in the national context

See *Scales and items in COPSOQ III* document (in Annex 1).

The mandatory inclusion of **CORE** items in all national versions of COPSOQ will allow comparisons internationally and longitudinally (across time).

responsible to decide national versions and their actual lengths so that they may vary across countries and languages, however, each version should include the

CORE items. These national COPSQ teams may also decide the specific national criteria and conditions for the use of the short and middle versions for risk assessment and organizational development purposes in workplaces according to the specific context, provided that the guidelines described in point 3 are observed.

The network emphasizes the importance of validation studies supporting national versions of the instrument. Additionally, it is of great significance to underline the importance of keeping only one national short, middle and long version for each country and language making clear what COPSQ is in each country.

### **3. AGREED GUIDELINES FOR THE USE OF COPSQ AS AN INSTRUMENT FOR THE PREVENTION OF PSYCHOSOCIAL RISKS AND A TOOL FOR ORGANIZATIONAL DEVELOPMENT IN WORKPLACES**

As an instrument for the assessment and prevention of psychosocial risks and organizational development, COPSQ needs to be adjusted to the context and specific conditions of different countries, and the questionnaires must be validated. Its application at the workplaces should conform to the terms and conditions of use here exposed. Failure to conform would represent an unsanctioned use of the questionnaire.

#### **3.1. Preventive and health promoting purpose**

COPSQ is an assessment tool designed for the prevention of psychosocial hazards, organizational development and the general promotion of workers' health and well-being. It identifies, locates and measures psychosocial risk factors, factors relating to organizational efficacy and facilitates the design and implementation of measures aiming at improvement of working conditions.

Results of COPSQ implementation should be regarded as opportunities to improve work organization and development. Risk assessment is the first step to achieve sound and effective risk prevention by changing unhealthy working conditions and address organizational working environment.

*The purpose of the COPSQ questionnaire is to be used as tool to reduce psychosocial risk, improve working conditions, and achieve a healthier work organization.*

#### **3.2. Full participation of the workplace parties**

Participation involves both social and technical processes. From this perspective, COPSQ as a tool for risk assessment and organizational development works best when management, workers' representatives and staff work together, with the technical support of competent professionals when needed (i.e. designated workers or OH&S professionals according to the specific national regulations and workplace contexts).

Ideally, COPSQ should only be implemented with the full agreement and participation of managers and workers' representatives. COPSQ implementation involves workplace parties participation throughout all the stages of the process (from preparatory work for psychosocial risk assessment to the proposal, implementation and monitoring of preventive interventions). Workers' active participation is an indispensable condition for success since COPSQ assessment is based on the workers' responses to the questionnaire.

*COPSQ questionnaire for risk assessment and organizational development at workplaces should include the active participation of workers and their representatives in all stages of the process.*

### 3.3. Anonymity and confidentiality

Anonymity and data confidentiality must be guaranteed for workers' active participation. All data and information accessed by internal or external parties must strictly comply with all legal and ethical standards intended to guarantee the protection of privacy, data and personal information.

*COPSOQ questionnaire for risk assessment at workplaces is to always be used in strict observation of anonymity and data confidentiality.*

### 3.4. Non modification

Wording, items and definitions of psychosocial dimensions included in COPSOQ's questionnaires for risk assessment are decided by the *national COPSOQ team* and they will always include CORE dimensions decided by the *international COPSOQ network*. All CORE items should be included in the administration of the COPSOQ and the integrity of the national validated version of the questionnaire should be respected.

*The content of the COPSOQ questionnaire for workplace risk assessment and organizational development as decided by the COPSOQ International network and national COPSOQ team should be respected.*

### 3.5. Soft guidelines

1. Never start a psychosocial risk assessment unless there is a clear intention of taking action if indicated.

2. Answering the questionnaire is voluntary; however a response rate below 60% may indicate a lack of worker engagement in the process.
3. All respondents and their responses must be kept anonymous.
4. All the employees have the right to see and discuss the results they have contributed to.
5. Workers, workers' representatives, supervisors and managers should participate actively during the whole process.
6. There are no standard solutions to problems. Solutions should be developed in a participatory, context-specific manner, and integrated with the other processes in the organization.
7. It is important to distinguish between what can, and what cannot be changed. Do not try to change what cannot be changed, and do not accept what should be changed.
8. If interventions are made, it is recommended to repeat the survey after 1-2 years in order to see if the intended improvements have been achieved.
9. The risk assessment results should be seen as a tool for dialogue.
10. Risk assessment should be seen as part of the overall concept of the learning organization and organizational development.

## 4. AGREED GUIDELINES FOR THE USE OF COPSOQ AS A RESEARCH INSTRUMENT

To the above statement in section 2.1, it should be added that, when using any COPSOQ scale for research purposes, the wording, response categories and scoring system of the specific validated national version should be respected.

Cooperation is expected from COPSOQ-users in the research field. They should cooperate among each other and not establish different versions in the same language and country but rely on the validated version if existent and, provided there is no validated version, cooperate so that it exists.

COPSOQ has no specific rules or guidelines for its use as a research instrument other than the applicable ethical requirements for conducting research involving humans, such as the European Charter for Researchers, and any specific national legal requirements and professional ethical codes.

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This document was prepared by a working group made of Clara Llorens, Juan Pérez-Franco and John Oudyk after presentation and discussion in the COPSOQ International Network workshops of Paris (2015) and Santiago de Chile (2017) and so it's assumed and signed by the Steering Committee on behalf of the entire network.

**COPSOQ International Network**

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