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Institut des Sciences du Travail



**Annual Report on Social Concertation and Collective Bargaining
Project V/001/97**

**Sectoral Unions and Employers Organisations
in the EU Hairdressing and other Beauty Treatments
sector**

Final Report

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Remarque importante

Le contenu de la présente publication ne reflète pas nécessairement l'avis de la Direction Générale de l'Emploi et des Affaires sociales de la Commission européenne. Cette étude a été réalisée par des experts indépendants et son contenu n'engage en rien la responsabilité de la Commission. Par ailleurs, les organisations européennes concernées ont eu la possibilité de faire des remarques sur le contenu de l'étude avant sa version définitive.

Disclaimer

The contents of this publication do not necessarily reflect the opinion or position of the European Commission, Directorate-General Employment and Social Affairs. This study has been carried out by independent experts. It therefore does not involve the Commission's responsibility in any way. The European organisations subject of this study have had the opportunity to comment on the content of this study before its final approval.

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1. Introduction

This document is the 17th report arising out of the study commissioned from the Institut des Sciences du Travail (IST) at the Catholic University of Louvain by the European Commission services, DGV, following call for tenders No V/001/97. This report seeks to provide the Commission with empirical data that will facilitate an assessment of the *institutional representativeness* of European employers' and employees' organisations in the Hairdressing in the 15 Member States of the EU. To the extent that these activities are developed as such, it will also deal with '*other Beauty Treatment*' activities.

It follows on from other research in the same field, that focused ie particularly on organisations recognised as 'social partners' in the intersectoral level in each EU country, organisations affiliated to the CEC¹ and to Eurocadres, and organisations that sign collective agreements in the construction, textiles and commerce sector, as well as road haulage and agriculture.

The context

In a Communication² published in 1993, the European Commission set out three criteria determining the access that employers' and employees' organisations had to the consultative process under Article 3 of the Agreement on Social Policy. According to the terms of this Article, organisations must '*1. be cross-industry or relate to specific sectors or categories and be organised at European level; 2. consist of organisations which are themselves part of Member States' social partner structures and with the capacity to negotiate agreements, and which are representative of all Member States, as far as possible; 3. have adequate resources to ensure their effective participation in the consultation process*³'.

A subsequent Communication published in 1998⁴, introduced the concept of '*Sectoral Dialogue Committees*'; these were intended to replace the existing *Joint Committees* and *informal working groups* that had hitherto been the *locus* of sectoral relations between employers and employees at a European level. The role of these latter bodies at the present time is, without prejudging its future extension, essentially consultative, as happened at intersectoral level. As regards an extension to their competence, each Committee '*(a) shall... be consulted on developments at Community level having social implications, and develop and promote the social dialogue at sectoral level*⁵'.

It follows that the setting up of these Committees is an extension of the process of social dialogue at European sectoral level, albeit relying on an existing system. Before the Communication from the Commission was published, there were 9 Joint Committees and 11 informal groups in existence. By 1 February 1999, 21 applications from employers' and employees' organisations had been forwarded to the

¹ Confédération Européenne des Cadres.

² COM(93) 600 final of 14 December 1993, Communication from the Commission concerning the application of the Protocol on Social Policy presented by the Commission to the Council and the European Parliament, Luxembourg, Office for Official Publications of the European Communities, §24.

³ For a more in-depth discussion of these criteria, we refer the reader to the first study, which focused on employers' and employees' organisations at an 'intersectoral' level.

⁴ Communication from the Commission concerning the application of the Protocol on Social Policy presented by the Commission to the Council and the European Parliament *Adapting and promoting the social dialogue at Community level* COM(98)-322 of 20 May 1998, Luxembourg, Office for Publications of the European Communities Annex II.

⁵ Op cit §2.

Commission⁶: they came from sectors as varied as agriculture, road transport, postal services, commerce, and hotels, restaurants and cafés.

The conditions of membership for the employers' and employees' organisations that might be encouraged to join these Committees, and/or file a joint application for one to be set up, are linked, as at the intersectoral level, to the notion of representativeness, and are broadly similar to the those articulated above in the 1993 Communication. The criteria governing Social Dialogue Committees state that:

(a) they shall relate to specific sectors or categories and be organized at European level;

(b) they shall consist of organizations which are themselves an integral and recognized part of Member States' social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States;

(c) they shall have adequate structures to ensure their effective participation in the work of the Committees.⁷

As may be observed, the changes focus on the disappearance of demands relating to the intersectoral nature of organisations and on the fact that they are established in all the Member States; the new rules have not been formulated in a very restrictive manner, they only require employers' and employees' organisations to represent *several* Member States. This relaxation of the implantation condition might eventually pose a demarcation problem in the sense that there is no criterion setting out a minimum number of Member States to activate it. For a more in-depth discussion of these criteria and of the problems that they may pose, we refer the reader to the first study carried out as part of this research⁸.

However, we wish to make it clear that the framework of the IST report will only examine the *institutional consequences* that flow from the recognised or unrecognised representative status of members affiliated to a European organisation. Furthermore, on a theoretical plane, with regard to the various national traditions in this field, representative status – or, more accurately, *recognition of the legitimacy of a social partner organisation* to negotiate collective agreements or take part in the development of social or labour market policies – may be interpreted in any number of ways ranging from the ability to mobilise the activist grass roots effectively, through systems of mutual recognition (in the strict sense of the phrase, in which no criterion is defined), to quantitative thresholds linked to the outcomes of trade union elections. These various systems of recognition, and the extent of the problems of definition that they can pose within each country, will be the subject of a specific analysis.

The approach

In this context, therefore, the research aim as far as existing sectoral committees are concerned will be mainly to provide empirical data that will make possible an assessment of the institutional representativeness of the organisations that sit on them, and on the basis of the three afore-mentioned

⁶ Source: Weber T, *New era in sectoral social dialogue takes shape*, in EIRO online, Dublin, European Foundation for the Improvement of Living and Working Conditions, 1998 (<http://www.eiro.eurofound.ie/1999/02/features/eu9902150f.html>).

⁷ COM(98)322 of 20 May 1998, §1.

⁸ Spineux A., Walthéry P. et al, *Report on the representativeness of European social partner organisations*, Report coordinated by the Institut des Sciences du Travail of the Catholic University of Louvain, for the European Commission Directorate-General for Employment, Industrial Relations and Social Affairs, Louvain-la-Neuve, 1998, pp.3-7.

criteria. More specifically, this report will examine employers' and employees' organisations active in the hairdressers and beauty care sector. At a national level, in order to take account of the diversity of the various recognition mechanisms, we will only consider organisations that *participate in collective bargaining*, and which therefore one way or another have *ad hoc* recognition in the sectors referred to. The only exception to this rule concerns organisations that are affiliated to one or other of the European federations that are directly the focus of our research.

However, it is important to bear in mind that in some countries, the sectoral is not mainly, or not at all, the main level of collective bargaining; this structure has accordingly had to be adjusted. In the United Kingdom, and to a lesser extent in Ireland, most bargaining takes place at enterprise level. In Ireland, though, the existence of *Joint Industrial Councils* and *Joint Industrial Committees* that fix minimum conditions of employment and pay for certain categories of enterprise and employee (their members are the main employers' and employees' organisations which also coordinate enterprise-level negotiations) makes it possible to get round the problem by giving indications about the importance of the recognition that they enjoy. In the UK, much wider scope has been given to teams of researchers to assess the main organisations that coordinate enterprise-level bargaining. Lastly, in Greece, sectoral bargaining has a much shorter history with professional (i.e. job category-based) and/or local levels playing a dominant role. However, an institutional framework does exist, and collective agreements have been negotiated at sectoral level since the early 1990s; this makes it possible to identify the leading actors at this level, even if it is still marginal. With the exception of the above, organisations, irrespective of their importance, that do not sign collective agreements are NOT covered in this report.

On the other hand, the list of organisations that are studied is not limited to members of European bodies that have presented joint demands for the setting up of Sectoral Social Dialogue Committees. Within reason, and on the basis of available information, we address all collective bargaining actors in the sectors under examination, as this enables us to draw a collective bargaining 'map' for each of the Member States.

The research design

For the purposes of this research, a network has been established of 15 European university researchers⁹ who were independent of both the European Commission and the social partners. The network was given the task of drawing up a report based on a common structure of organisations matching the above criteria in each of the Member States. The IST coordinating team then collated information that had been gathered for the purposes of comparative analysis. Ongoing collaboration is planned between the coordinating team and the national experts. The aim of the process is simultaneously to carry out a 'top-down' approach at European level and a 'bottom-up' approach at Member State level; the IST will also directly collate information about each of the European organisations studied. Lastly, the report will undergo a double check by the Commission's services, and by the European organisations that are themselves being studied, before it is approved.

It is worth noting that the IST team with responsibility for coordinating the work and for editing the summaries and comparative analyses, and the 15 national experts wish to stress their complete independence as to the political consequences and the decisions that might be reached from this study. Their role is limited to contributing as much data as possible, with a view to both making the three criteria of representativeness defined by the European Commission intelligible and documenting them.

⁹ See list above.

The structure of the report will then proceed as follows: firstly, we will give consideration to aspects of the sector, and to differences with regard to collective bargaining that might exist from one EU country to another; then, we will present characteristics of members affiliated to the two organisations being studied by examining each of them in respect of:

Quantitative aspects of representative status

- *Employers' organisations*: number of affiliated organisations; number of enterprise members; staff employed in these enterprises, and the rate of affiliation calculated on the basis of employee numbers; if necessary, the detailing of particular characteristics of the organisation and its members.
- *Employees' organisations*: number of affiliated organisations; number of employee members; rate of affiliation; types of employee affiliated (e.g. white-collar/blue-collar, managers and skilled workers).

Recognition

- Does the organisation participate in collective bargaining, consultation (with the government) and the joint management of sectoral funds?
- Challenges to representativeness: in the event of particular developments (e.g. the emergence of new organisations that challenge those already established in the sector, or a significant fall in membership), the expert will give a brief description of what has happened, the issues and current trends.

National and European affiliations

- List of higher-level, national associations to which the organisation is directly or indirectly affiliated.
- List of European associations to which the organisation is directly or indirectly affiliated.

Lastly, in respect of each Member State, we will present a summary of the bargaining structures, the organisations established there, and a more detailed description of their characteristics.

2. The EU hairdressing and beauty treatment sector

2.1 Activities included in the sector

The sector examined in this study is to be found in NACE category 93.02; it embraces hairdressing and other beauty care activities. Beauty care itself includes activities performed by beauticians, make-up artists, pedicurists, manicurists and staff carrying out related activities. However, as we shall see in due course, this range of activities is unevenly developed in collective bargaining terms in the EU.

These various activities should not be seen solely in the restrictive framework of the performance of any one of them in a place reserved for occupational activity: indeed, we look at all hairdressing and beauty care activities carried out in such places and in the home.

The nature of companies in the sector varies significantly from large international chains to small, usually family-run, salons. For the most part, however, firms are usually small or very small: there is also a very large number of self-employed workers, and firms employing more than 50 people are extremely rare.

In 1999, there were over 1 million people working in the hairdressing sector, and some 155,000 salons across the whole of the European Union¹⁰. It should also be borne in mind that it is hard to obtain quantitative information of any type for the sector.

2.2 Categories of employee

The most widely represented category of employee in the sector is that of *blue-collar staff* (90%); the sector also has a large number of female employees (over 80-85%). Many of them work part-time and only stay in the sector for quite short periods of time. The parallel and informal economies probably account for a substantial proportion of economic activity in the sector in the sense that it is easy to do this work part-time at home 'on the quiet', or in the 'back room'. It is likely that a large number of workers in some countries try to boost the family income in this way without properly entering the labour market.

2.3 Collective agreements

For a full understanding of the variety of national situations, we refer the reader to the national summaries: these define the level(s) at which collective bargaining takes place in each country. In fact, apart from some traditional features of collective bargaining that are specific to Member States, it is also important to focus on certain characteristics linked to the existence of collective bargaining solely for hairdressing, or for the beauty care sector as well.

Member countries of the European Union may be placed in one of two categories depending on the existence or otherwise of sectoral collective agreements. In countries where there is sectoral collective bargaining, it is also possible to identify situations where sectoral bargaining leads to more specific (e.g. sub-sectoral and regional) agreements, with the latter taking the form of sectoral negotiations or complementing them when they already exist at national level. In Belgium and Italy, and in Finland (where only hairdressing is affected), there are collective agreements for the whole of the sector. In other countries, collective bargaining leads to various collective agreements that refer to sub-sector (France) or type of employee (Austria), or are negotiated regionally (Germany and Spain). Collective bargaining can

¹⁰ Source: European Foundation for the Improvement of Living and Working Conditions, Social dialogue takes shape in the European hairdressing sector, 1999 (<http://www.eiro.eurofound.ie>)

sometimes be accompanied by agreements concluded directly with enterprises (Denmark, Germany and Sweden).

There is also a small group of countries (Ireland, Greece, Luxembourg and the United Kingdom) where there is no sectoral bargaining: in Ireland and the United Kingdom, negotiations are conducted at enterprise level; in Luxembourg and Greece, there is no collective bargaining in the sector at all.

It is noteworthy that a few countries (Austria, Belgium, France, Italy and Portugal) have organisations that deal with one or both branches in the sector (i.e. hairdressing and beauty care), and are involved in the collective bargaining process.

2.4 The Sectoral Social Dialogue Committee

Two organisations are recognised as official partners on the Sectoral Social Dialogue Committee in the hairdressing and health care sector: Union Network International-Europa, and its sectoral organisation, UNI-Europa Hair and Beauty Care, for the trade unions; and the *Confédération Européenne des Organisations Patronales de la Coiffure* (CIC-Europe – European Confederation of Employers' Associations in Hairdressing) for the employers.

It is immediately clear that representation on the employers' side mostly covers the 'hairdressing' side of the sector's activities; furthermore, current discussions on the Sectoral Social Dialogue Committee similarly only deal with hairdressing. The main obstacle to enlargement is therefore the non-participation of a representative employers' association for the beauty care sector. We will use this report to see whether it is possible to identify a valid actor that meets the criteria of the 1998 Communication on social dialogue. As we finalise this report, we have only been able to collate information on one other organisation, the *Confederation européenne des esthéticiennes cosméticiennes* (EPEC – European Confederation of Beauticians and Make-up Artists).

Discussions and joint work on the Sectoral Dialogue Committee have resulted in a range of outcomes including the signing on 26 June 2001 of a code of conduct for the hairdressing sector.

2.5 Methodological observations

We draw the reader's attention to the quantitative data and the wide range of sources. In addition to the figures supplied by our network of national experts, there is information provided by national and European organisations and other bodies, and estimates made by the IST on the basis of available data. These estimates need to be viewed with considerable caution, and should only be used to develop a more global view of employment, and of trade union membership at sectoral level.

As far as this statistical data is concerned (and with the exception of the density calculation, which is the outcome of our own calculations), we prefer to use figures that have been sent to us by our national experts. However, when a significant difference is identified between the data notified to us by experts and by other sources such as European organisations (either directly, or indirectly via the questionnaire that they had to complete as part of setting up the Sectoral Dialogue Committee), we refer to the alternative figures sent to us by these organisations in a footnote.

We use *density* as a tool to estimate the quantitative importance of trade unions and employers' associations in the sector. Density is calculated as the total of members (trade unions) or of employees in member companies (employers' associations), divided by the number of employees throughout the sector. In the absence of data relating to the number of employees, total employment figures are used, and self-

employed workers are therefore included. However, these figures must be used with the greatest of caution:

- total membership should, unless otherwise stated, be understood to mean *the number of workers in the sector concerned who are members of the union*. It is not, therefore, as far as non-specific trade unions in the agriculture sector are concerned, the total number of members in that union;
- given the large number of self-employed workers in the sector, the use of data relating to employment in the density calculation should be viewed with considerable caution. The results of these calculations have a significant tendency to underestimate the actors' importance;
- in different cases, density calculations have been carried out using an extra method than the standard manner and therefore should not be used in cross-national comparisons: in Sweden and in the Netherlands, density has been calculated using the two methods (by sector and by sub-sector/occupation). The reason was to take account of the comments of experts. According to the Swedish expert, such a sub-sectoral density calculation provides a more reliable picture of real membership levels in the country concerned;
- in the case of certain countries like Italy, no overall sectoral density calculations have been carried out, as there are no global data for the sector;
- an organisation's effective importance is not necessarily directly linked to its level of membership; for example, even though membership is low in France and Spain, trade unions enjoy considerable legitimacy there.

Different typefaces distinguish and clarify the origins of all the data:

- **BOLD**: data from national experts

- ***BOLD ITALICS***: data provided by European organisations or other bodies

- *ITALICS*: estimates based on available data

The 'employees' column to be found in all tables next to the 'country' column gives the number of employees throughout the sector.

The word *employees* refers to dependent workers, except where stated otherwise in national summaries, and thereby excludes owners, self-employed workers and working family members.

3. The actors

3.1 Employees: UNI-Europa

3.1.1 General features

Union Network international-UNI-Europa, is the outcome of a merger in 2000 between the *International Federation of Commercial, Clerical, Professional and Technical Employees (FIET)*, the *Communications International (CI)*, the *Media and Entertainment International (MEI)* and the *International Graphical Federation (IGF)*. It brings together about 165 trade unions in 45 countries, and represents about 7 million workers worldwide. It covers trade unions whose members work in a range of sectors including banking, insurance, telecommunication, tourism, graphic art and commerce. The internal structure is organised according to the various sectors. For the purposes of this study, we are dealing with the 'Hair and beauty care' sector.

Structure

UNI-Europa consists of:

- a Regional Conference, the organisation's supreme decision-making body, which is charged with determining general policies, electing delegates, and ratifying the decisions of the Regional Executive Committee. It meets at least once every four years, and is made up of delegates from member organisations elected *pro rata* on the basis of paid-up membership. It elects the Regional Secretary of UNI-Europa¹¹;
- a Regional Executive Committee which is chaired by the President (or the Vice-President, if appropriate), who are elected by Regional Conference from among Executive Committee members: Its task is to *'manage the affairs of UNI-Europa in between Regional Conferences'*¹². The Regional Executive Committee meets once a year and is empowered to appoint sub-committees to assist it in its work, with a member of the Regional Executive Committee acting as Chair;
- a Regional Management Committee appointed by the Executive Committee from among its members, *'to assist in the management of the region in between Regional Executive Committee meetings'*¹³. The President, the Vice-President and the General Secretary are *ex officio* members of the Management Committee.

Regional organisations may develop sectoral activities, set up working parties, and organise such meetings as are necessary in order to advance the sectoral interests of members. These activities may be undertaken on a single-sector basis, or when common issues are involved, carried out in cooperation with other sectors.

¹¹ Articles 6 and 7, UNI-Europa Statutes.

¹² Article 9, UNI-Europa Statutes.

¹³ Article 10, UNI-Europa Statutes.

3.1.2 Representative base

Membership data

Country	Employees	Name	Membership	Density	CB	National affiliation	European affiliations (except UNI-Europa) – indirect
Austria	22,814	GHGPD	NA	NA	Yes	ÖGB	ETUC
Belgium	6,276	CG	1,114	18%	Yes	FGTB-ABVV	ETUC
		SETCa ¹⁴	282	4.5%	Yes	FGTB-ABVV	ETUC
		CCMECC	(2,281) ¹⁵	36%	Yes	CSC-ACV	ETUC
Denmark	14,168	DFKF	5,500	39%	Yes	-	-
Finland	3,500	PAM	2,500	71%	Yes	SAK	ETUC
France	122,238	FFOCO	NA	NA	Yes	FO	ETUC
		FETCAM-CFTC	NA	NA	Yes	CFTC	ETUC
		FdS-CFDT	NA	NA	Yes	CFDT	ETUC
Germany	256,524	Ver.di	NA	NA	Yes	DGB	ETUC
Greece	About 30,000	OYE	NA	NA	Yes**	-	ETUC
Ireland	NA	-	-	-	-	-	-
Italy	187,776	FISACAT	NA*	NA	Yes	CISL	ETUC
		FILCAMS-CGIL	NA*	NA	Yes	CGIL	ETUC
		UILTuCS	NA*	NA	Yes	UIL	ETUC
Luxembourg	1,318	ÖGB-L	NA-	NA	No	-	-
Netherlands	24,500	Dienstenbond CNV	1,140	NA	No**	CNV	ETUC
		Kapperbond FNV	9,761	40%	Yes	FNV	ETUC
Portugal	18,000 ¹⁶	SITSESE	NA	NA	Yes	UGT	ETUC
Spain	50,000	FeS-UGT	527	1%	Yes	UGT	ETUC
		FEAD-CC.OO	NA	NA	Yes	CC.OO	ETUC
Sweden	4,140	HANDELS	2,000	49%	Yes	LO-S	ETUC
United Kingdom	NA	USDAW	NA	NA	No	TUC	ETUC
		GMB	NA	NA	No	TUC	ETUC

Note: For more information, please consult the national summaries. * Figures are not available for the hairdressing and beauty care sector. ** Only for beauticians.

3.1.3 Recognition

The UNI-Europa sectoral organisation for hairdressing and beauty care has 18 affiliated trade unions in 11 of the 15 member countries of the European Union.

In all countries that do not benefit from UNI-Europa cover, there is no collective bargaining for the sector, either because the level of negotiations is other than sectoral (Ireland and the United Kingdom), or because there is no collective bargaining at all in this sector (Luxembourg), or because it is only now in the process of coming into being (Greece).

¹⁴ The SETCa is affiliated to UNI-Europa for other branches of activity, and not specifically for hairdressing and beauty care.

¹⁵ This figure includes all members in the sector who belong to the CSC-ACV.

¹⁶ This figure should be treated with great caution.

It is difficult to put an accurate figure on the number of employees that UNI-Europa represents across Europe: workers in the sector are often included in total union membership figures, with no breakdown of members in branches specific to the sector (e.g. Italy); sometimes, figures are just not available (e.g. France).

All trade union members of UNI-Europa are also indirectly affiliated to the ETUC via national affiliations.

All trade unions affiliated to UNI-Europa are involved in negotiating collective agreements in the sector (with the exception of *CNV Dienstenbond* - see Dutch national summary for more details).

Representativeness challenged

There are trade unions other than those affiliated to UNI-Europa that are also involved in collective bargaining. There are only seven of them. These organisations not in UNI-Europa membership are not covered by any other European sectoral organisation. They represent a tiny minority of employees in the sector, and UNI-Europa's representativeness cannot be said to suffer as a result of the failure of these few trade unions to join.

Non-UNI-Europa member organisations involved in negotiating agreements

Country	Employees	Name	Membership	Density	CB	National affiliation	European affiliations
Belgium	6,276	CGSLB	317	5%	Yes	CGSLB-ACLVB	CESI
Ireland	NA	SIPTU	NA	NA	Yes*	ICTU	ETUC
		ATGWU	NA	NA	Yes*	-	-
Netherlands	24,500	CNV Bedrijvenbond	1,500	6.1%	Yes	CNV	UNI-Europa, ETUC
Portugal	18,000	SINDPAB	12,500	70%	Yes	-	-
Spain	50,000	FETA-ELA	200	0.4%	Yes	ELA/STV	EFFAT, ETUC

* The SIPTU and the ATGWU are included in this table despite the fact that there is no collective bargaining at sectoral level in Ireland (see national summary).

UNI-Europa and its Hairdressing and Beauty Care section therefore enjoy a virtual monopoly of employee representation at European sectoral level through the organisations that take part in these sectoral negotiations. Its representativeness cannot be in any doubt.

The employers

3.2 CIC-Europe¹⁷

3.2.1 General characteristics

CIC-Europe was founded in 1998 as an association under French law (Law of 1901), and is the European Union section of the CIC. The aim of CIC-Europe is *'to promote the interests of member organisations in its capacity as a confederation of national organisations of hairdressing artisans and employers'*¹⁸.

All national organisations of hairdressing artisans and employers that are European members of the *International Confederation of Hairdressing (Confédération Internationale de la Coiffure – CIC)* may join the Association as active or associate members. Active members may also be organisations of hairdressing artisans and employers based in European countries used to determine the area covered by CIC-Europe¹⁹.

Structure

CIC-Europe is made up of:

- **a Board of Directors:** *'Unless otherwise specified in the Articles of Association, the Board of Directors shall be charged with Association management... The Board of Directors shall report on its activities to the General Assembly. The Board of Directors shall meet at least twice a year'*²⁰. The Board of Directors has a minimum of five members and maximum of nine members, including a President, a Vice-President and a Treasurer. Functions may be held concurrently, but a single person is not entitled to hold more than two. The President and the General Secretary of the *International Confederation of Hairdressing (CIC)* may at all times attend, and take the floor at, Board Meetings. They may not be members of the Board of Directors and are not entitled to vote;
- **a General Assembly**²¹: the General Assembly has full powers vis-à-vis the Association except those vested expressly in the Board of Directors by law, the Articles of Association and the regulations. At least one General Assembly has to be held at a place, date and time fixed by the Board of Directors every year. Resolutions of the General Assembly are only valid if at least half of all active members are present or represented. Each active member has one vote at the General Assembly. Resolutions are adopted by an absolute majority of duly cast votes. An absolute majority is defined as half plus one of duly cast votes. Abstentions, blank votes and void votes are not taken into account when counting votes;
- **an Executive Secretariat of the Association**²²: the Executive Secretariat of the Association is in principle managed by the organisation of the President's home country. The conduct of the Secretariat's activities is the responsibility of the President. The General Assembly may appoint another Executive Secretariat, and assign responsibility for the activities carried out by

¹⁷ The *Confédération Européenne des Organisations Patronales de la Coiffure – Europe*.

¹⁸ Article 5, CIC-Europe Regulations.

¹⁹ Article 6§3, CIC-Europe Regulations.

²⁰ Article 12§1, CIC-Europe Regulations.

²¹ Articles 15 and following, CIC-Europe Regulations.

²² Article 21, CIC-Europe Regulations.

the Secretariat to a Board member other than the President. The Executive Secretariat coordinates its activities with the Association's statutory registered office;

- **Commissions:** at the suggestion of the Board of Directors, the General Assembly may set up commissions to prepare recommendations, studies and proposals for the Board of Directors of the General Assembly.

3.2.2 Representative base

Membership figures

Country	Employees	Name	Companies	Membership	Density	CB	National affiliation	European affiliations (except CIC-Europe) – indirect
Austria	22,814	BIF	5,834	19,681	86%	Yes	WKÖ	UEAPME
Belgium	6,276	FNCB-NVBH	NA	NA	NA	Yes	-	-
		NKV	783	NA	NA	Yes	-	-
Denmark	14,168	DF	4,300	5,300	37%	Yes	SAMA, DA	UNICE
Finland	3,500	SH ²³	1,400	2,000	57%	Yes	-	-
France	122,238	FNC	9,815	NA	NA	Yes	CNAMS, UPA, CAPEB, CGAD, MADEF, CNC, CFMA	UNICE, UEAPME
Germany	256,524	ZDF ²⁴	32,000	116,000	45.22%	Yes	ZDH	UEAPME
Greece	NA	ASKOKKKE	NA	NA	NA	No	-	-
Ireland	NA	-	-	-	-	-	-	-
Italy	187,776	-	-	-	-	-	-	-
Luxembourg	1,318	FDC-GDL ²⁵	195	NA	NA	No	FA	UEAPME
Netherlands	24,500	ANKO	6,000	NA	NA	Yes	VNO-NCW	UNICE
Portugal	18,000*	APBCIB	4,300	12,900	NA	Yes	CCP	Eurocommerce
Spain	50,000	ANEP	27,566	NA	NA	Yes	CEPYME	UEAPME
		FEPPS ²⁶	7,733	NA	NA	Yes	CEOE	UNICE
Sweden	4,140	SFF	6,000	4,100	99%	Yes	Företagarnas Riksorganisation	UEAPME
United Kingdom	NA	NHF ²⁷	5,350	NA	NA	No	CBI	UNICE

Note: For more information, please consult the national summaries.

* This figure should be viewed with considerable caution.

3.2.3 Recognition

According to information at our disposal, CIC-Europe has 15 members in 13 of the 15 member countries of the European Union. Through its national affiliates, CIC-Europe occupies a central position on the European collective bargaining stage in the hairdressing sector, but overall figures for employees in member enterprises of employers' associations affiliated to the organisation are hard to estimate. In fact, for some of these organisations, we only have the number of affiliated enterprises, the number of workers

²³ SH: our acronym for the *Suomen hiusyrittäjät*.

²⁴ ZDF: our acronym for the *Zentralverband des Deutschen Friseurhandwerks*.

²⁵ FDC-GDL: our acronym for the *Fédération des Patrons Coiffeurs du Grand-Duché de Luxembourg*.

²⁶ FEPPS: our acronym for the *Federación Española de Peluqueros y Peluquerías de Señora*.

²⁷ NHF: our acronym for the National Hairdressers' Federation.

in a sector, or the broader totality of activities of which the organisation is the representative. We rarely have accurate figures.

The overwhelming majority of national employers' associations in CIC-Europe membership are involved in collective bargaining. Only the UK member of CIC-Europe does not participate directly in collective bargaining; that is because of the bargaining process that obtains in that country. Nor does a Greek organisation (ASKOKKKE) take part in collective bargaining; the reason here is that no such negotiations take place in that country. The only major weakness worth mentioning in CIC-Europe's representativeness is the absence of Italian affiliations.

3.3 CEPEC – European Confederation of Beauticians and Make-up Artists²⁸

3.2.1 General characteristics

The main aim of the CEPEC is to represent the profession of beauticians at European level, to promote and develop the profession in their respective countries, and to help to set up and promote national federations in countries where no such organisation exists. The CEPEC is currently present in eight European countries, six of which are member countries of the European Union.

Membership

National associations and federations of beauticians may apply for membership of the CEPEC.

Structure²⁹

- **A General Assembly:** the General Assembly is the Confederation's lead body. It meets once a year, elects the Executive Committee, and determines the CEPEC's general policy. It also elects a Board of Directors consisting of the President, one or two Vice-Presidents, the Secretary and the Treasurer. The General Assembly is made up of one representative for each association in membership of the CEPEC; each representative has one vote. Where a country is represented by two or more national associations or federations, all countries have the same number of votes as that country. New members must wait for three years before they can go on the Executive Bureau.
- **An Executive Bureau:** the Executive Bureau has five members. It is elected by the General Assembly, and holds office for three years. The Executive Bureau consists of a President, two Vice-Presidents, a Secretary and a Treasurer.
- **The President:** the President is the Confederation's representative: s/he calls, and chairs, meetings of federations, and democratically oversees the functioning of the Confederation together with the General Secretary. The President may not be re-elected for more than two consecutive terms of office.
- **The General Secretary:** the General Secretary works with the President, and implements his/her decisions. [S/he also manages the offices and services and, with the Treasurer, has responsibility for the administration of the Confederation;
- **Working Parties:** standing and temporary Working Parties may be set up under CEPEC rules. Decisions relating to the tasks of Working Parties and the appointment of Coordinators are the responsibility of the General Assembly. Checking on the activities of Working Parties and adherence to tasks assigned to them is the responsibility of the Executive Bureau;
- **An Extraordinary General Assembly:** the President of the CEPEC may call an Extraordinary General Assembly if necessary. Such a request may also be made by three member associations of the CEPEC. The Statutes may only be amended by an Extraordinary General Assembly called with at least 21 days' notice. The decisions of such an Assembly are reached by a simple majority.

²⁸ Confédération Européenne des Professionnels de l'Esthétique Cosmétique

²⁹ Our translation from CIC statutes

3.2.2 Representative base

Membership figures

Country	Employees in the sector	Name	Companies	Membership	Density	CB	National affiliation	European affiliations (except CIC-Europe) – indirect
Belgium	6,276	UPETBB	NA	NA	NA	No	-	-
France	122,238	FNGAE	NA	NA	NA	Yes	CNAMS, UPA	UEAPME
Greece	About 30.000	OSEDAE	NA	NA	NA	-	-	-
Italy	187,776	Federestetica	4.000	NA	NA	Yes	CNA	UEAPME
Netherlands	24,500	ANBOS	NA	NA	NA	Yes	-	-
United Kingdom	NA	FHT	NA	NA	NA	-	-	-

3.2.3 Recognition

According to information in our possession, the CEPEC has members in 6 of the 15 countries of the European Union; of these, three effectively negotiate collective agreements. We have not been able to obtain information on the precise numbers of employees that they represent.

Countries where separate employers' associations for the beauty care sector play some role in collective bargaining, and are not represented by the CEPEC; they are Austria, Belgium Italy (Confartigianato Estetica), Luxembourg and Portugal.

Elsewhere, hairdressing and beauty care are dealt with by the same organisations; in some cases, they are affiliated to CIC-Europe (see table below).

Organisations of employers in the beauty care and hairdressing sector

	Employees	Employers	Sub-sector	Companies	Employees	Density	CB	National affiliation	European affiliation - indirect
Austria	22,814	BIF	Hairdressing	5,834	19,681	86.3%	Yes	WKÖ	CIC-Europe, UEAPME
		BKFM	Beauty care	3,135	3,133	13.7%	Yes	WKÖ	UEAPME
Belgium	6,276	CRCB/KKKB ³⁰	Hairdressing	100	NA	NA	Yes	-	-
		FNBC/NVHB	Hairdressing	NA	NA	NA	Yes	-	CIC-Europe
		NKV	Beauty care	783	NA	NA	Yes	-	CIC-Europe
		UNEB/NUBE ³¹	Beauty care	NA	NA	NA	Yes	UCM - UNIZO	UEAPME
		BBEK ³²	Beauty care	NA	NA	NA	Yes	-	-
Denmark	14,168	DF	All	4,300	5,300 ³³	37%	Yes	SAMA, DA	CIC-Europe, UNICE
		KL	Hairdressing	-	20	0.1%	Yes	-	CEMR
Finland	3,500	SH	Hairdressing	1,400	2,000	57%	Yes	-	CIC-Europe
France	123,280	FNC	Hairdressing	9,815	NA	NA	Yes	CNAMs, MEDEF, UPA,	CIC-Europe, UNICE, UEAPME
		FNGEA	Beauty care	NA	NA	NA	Yes	CNAMs, UPA	CEPEC, UEAPME
Germany	256,524	ZDF ³⁴	Hairdressing	32,000	116,000	45.22%	Yes	ZDH	CIC-Europe, UEAPME
Greece	NA	ASKOKKKE	Hairdressing	NA	NA	NA	No	-	CIC-Europe
Ireland	NA	IBEC	All	7	NA	NA	Yes	IBEC	UNICE
		SFA	All	5	NA	NA	No	IBEC	UEAPME
		ISME	All	< 10	NA	NA	No	-	-
		IHF	Hairdressing	320	NA	NA	No	-	-
Italy	187,776	Conf. A	Hairdressing	NA	NA	NA	Yes	Confartigianato	UEAPME
		Conf. E	Beauty care	4,200	NA	NA	Yes	Confartigianato	UEAPME
		Fed Con CNA	Hairdressing	25,200	NA	NA	Yes	CNA	UEAPME
		Fed Est CNA	Beauty care	4,000	NA	NA	Yes	CNA	CEPEC, UEAPME
		CASA	All	NA	NA	NA	Yes	-	-
		FEDERNAS	All	NA	NA	NA	Yes	CLAAI	-
Luxembourg	1,318	FPCGDL ³⁵	Hairdressing	195	NA	NA	No	FA	CIC-Europe, UEAPME
		FDSEGDL ³⁶	Beauty care	48	NA	NA	No	FA	UEAPME
Netherlands	24,500	ANKO	Hairdressing	6,000	NA	NA	Yes	VNO-NCW	CIC-Europe, UNICE
Portugal	18,000	ANSCSCC	All	650	1,900	-	No	CCP	Eurocommerce
		ACP ³⁷	All	1,300	7,500	-	Yes	CCP	Eurocommerce
		ANEP	Beauty care	3,500	NA	-	No	CIP	UNICE
		APBCIB	All	4,300	12,900	-	Yes	CCP	CIC-Europe, Eurocommerce
Spain	50,000	ANEP	All	27,566	NA	NA	Yes	CEPYME	CIC-Europe, UEAPME
		FEPPS	All	7,733	NA	NA	Yes	CEOE	CIC Europe, UNICE
Sweden	4,140	SFF	Hairdressing	6,000	4,100	99%	Yes	FR	CIC-Europe, UEAPME
United Kingdom	NA	NHF	Hairdressing	5,350	NA	NA	No	CBI	CIC-Europe, UNICE

³⁰ our acronym for the *Cercle Royal des Coiffeurs de Belgique/Koninklijke Kring Der Kappers van België*.

³¹ our acronym for the *Union Nationale des Esthéticiennes de Belgique/ Nationale Unie Der Belgische Esthéticiennes*.

³² our acronym for the *Beroepsvereniging voor Bio-Esthetiek en Kosmetologie*.

³³ This figure includes both skilled workers and apprentices.

³⁴ our acronym for the *Zentralverband des Deutschen Friseurhandwerks*.

³⁵ our acronym for the *Fédération des patrons coiffeurs du Grand-Duché de Luxembourg*.

³⁶ our acronym for the *Fédération des diplômés en soins esthétiques du Grand-Duché de Luxembourg*.

³⁷ our acronym for the *Associação dos Cabeleireiros de Portugal*.

4. National summaries

4.1 Austria

Contextual data

Precise data on employment do not exist for the NACE 93.02 sector. However, some data are available for hairdressers on the one hand and for cosmeticians, pedicurists and masseurs on the other hand. 5384 businesses were registered as hairdressers in 1996. Among these, 4685 were employers with 19681 employees. Among these, 3.4% were white collars and 96.6% blue collars. The businesses without employee (or self-employed professionals) were 699.

As far as cosmeticians, pedicurists and masseurs, 3135 businesses were registered of which 2018 were self-employed professionals and 1117 were employers having 3133 employees. 24.2% of these employees were white-collar workers and 75.8 %, blue-collar workers.

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
7.820	35 %	70 %	0 %	22.814	75 %	0 %	100 %

There are four associations which are entitled to conclude collective agreements. On the side of employers, the Federal Organization of Hairdressers (*Bundesinnung der Friseure* - BIF) and the Federal Organization of Cosmeticians, Pedicurists and Masseurs (*Bundesinnung der Kosmetiker, Fußpfleger und Masseure* - BKFM) each together with their Länder subunits (i.e.the Landesinnungen) have the right to conduct collective bargaining. Since both the BIF and the BKFM rely on obligatory membership, employer density is 100% in their sub-sector.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirecte
Bundesinnung der Friseure - BIF	Hairdressers	5.834	19.681	100% in the sub-sector	Yes	WKÖ	CIC-Europe, UEAPME
Bundesinnung der Kosmetiker, Fußpfleger und Masseure - BKFM	Cosmeticians, pedicurists and masseurs	3.135	3.133	100% in the sub-sector	Yes	WKÖ	UEAPME

On the side of labour organisations, two unions exist: the Union of the White-Collar Workers of the Private Sector (*Gewerkschaft der Privatangestellten* - GPA) and the Union of the Blue-Collar Workers of Hotels, Restaurants and Personal Services (*Gewerkschaft Hotel, Gastgewerbe, Persönlicher Dienst* - GHGPD). However only the former is relevant in the framework of this study.

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - <i>indirecte</i>
<i>Gewerkschaft Hotel, Gastgewerbe, Persönlicher Dienst</i> - GHGPD	Blue collars	NA	NA	Yes	ÖGB	UNI-Europa, ETUC

The bargaining system is structured in a way echoing the associational domains of the four parties to collective bargaining. Accordingly, bargaining is differentiated by employee status (i.e. referring to the distinction between white- and blue-collar workers), by subsector (i.e. hairdressers on the one hand, cosmeticians, pedicurists and masseurs on the other), and by territory. Collective agreements are normally concluded at the subsectoral Länder level. No single-employer settlement exists. In terms of bargaining actors, the system is stable because the associational domains are defined in a complementary way in the case of both labor and business. No rivaling association exists.

The two subsectors significantly differ in their collective bargaining coverage. In the case of hairdressers, coverage comes close to 100 % due to obligatory membership in the employer representative, the BfF. Concerning cosmeticians, pedicurists, and masseurs, the BfFM and its Landesinungen terminated all wage agreements for the blue-collar workers during the first half of the 1990s and have refused to enter negotiations over new agreements since that time. There is, however, an agreement for the white-collar workers of Vienna. Precise data on coverage do not exist. Given the low share of white-collar employment, coverage of this subsector is certainly below 20 %.

There are no data on union density, because the domain of both the GPA and the GHGPD transcends the sector and membership files disaggregated by sectors are not available.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector

Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.2 Belgium

Contextual data

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
23.500	75%	99%	0%	6.276	9.452*	0	100%

*This figure is for employment (it includes employees, self-employed professionals, firm owners and family members).

According to INSS statistics (1999), 23.500 businesses were registered as hairdressers and beauty salons in 1996. Among these, 5.800 were employers. The businesses without employee (or self-employed professionals) were 17.700.

According to ONSS statistics, 11.402 people worked in this sector in 1999. Among these, 5.126 were employers. 90% of the employees were blue collars.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - <i>Indirecte</i>
Cercle Royal des Coiffeurs de Belgique/Koninklijke Kring Der Kappers van België	Hairdressers	100	NA	NA	Yes	-	-
La Fédération Nationale des Coiffeurs de Belgique – FNCB / Nationaal Verbond Haarappers van België – NVHB**	Hairdressers	NA	NA	NA	Yes	-	CIC-Europe
National Kamer der Belgische Kappers – NKV	Beauticians	783	NA	NA	Yes	-	CIC Europe
Union Nationale des Esthéticiennes de Belgique/ Nationale Unie Der Belgische Esthéticiennes	Beauticians	NA	NA	NA	Yes	UCM - UNIZO	UEAPME
Beroepsvereniging voor Bio-Esthetiek en Kosmetologie	Beauticians	NA	NA	NA	Yes	-	-

**The FNBC is a federation of professional organisations and has no individual members

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - indirecte
FGTB	Centrale Générale- CG	1.144	1.8%	Yes	FGTB – ABVV	UNI-Europa, <i>ETUC</i>
	SETCa	282	4.5%	Yes	FGTB – ABVV	UNI-Europa ³⁸ , <i>ETUC</i>
CSC	CCMECC ³⁹	2.261	36%	Yes	CSC – ACV	<i>ETUC</i>
CGSLB	'liberal' workers	317	5%	Yes	CGSLB – ACLVB	CESI

Collective bargaining take place within a joint committee (*Commission Paritaire* 314) for hairdressing and other beauty treatment sector. Collective agreements are regularly concluded.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

³⁸ The SETCa is affiliated to Uni-Europa but not to the specific branch of Hair and Beauty Care

³⁹ Centrale Chrétienne des Mines de l'Énergie, de la Chimie et du Cuir

4.3 Denmark

Contextual data

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employment in companies >100 employees	Coverage
6.692	65.48%	98.15%	0%	14.168	0	NA

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - <i>indirecte</i>
Dansk Frisør- og Kosmetikerforening – DF	Hairdressers and beauty salons	4.300	5.300 ⁴⁰	37%	Yes	SAMA, DA	CIC-Europa, UNICE
Kommunernes Landsforening - KL	Public hairdressers	-	20	0.1%	Yes	-	CEMR

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - <i>indirecte</i>
Dansk Frisør- og Kosmetiker Forbund - DFKF	Hairdressers, cosmeticians	5.500	39%	Yes	-	UNI-Europa

Collective bargaining takes place between *Dansk Frisør- og Kosmetiker Forbund-DFKF* and *Dansk Frisør- og Kosmetikerforening-DF*. The result is several collective agreements that are in force. DFKF also negotiates with the public employer *Kommunernes Landsforening-KL* (The National Association of Local Authorities in Denmark), although it concerns a very small number of employees (20 hairdressers are employed in the public sector). DFKF and DF have a collective agreement and in the public sector the hairdressers are part of the broad agreement for workmen, the so-called "*Håndværkeroverenskomst*".

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

⁴⁰ This figure both includes skilled workers and apprentices

4.4 Finland

Contextual data

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employees (% full employment)	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
8.415	70%	100%	0%	3.500	30%	3.500	0	95%

The total number of hairdressers is 12.000. Most of them are self-employed or are working with one or two employees. There are about 3.500 employees and 8.500 employers or self-employed professionals. Employees are unionised into the *Palvelualan Ammattiitto* - PAM (the Service Union United), which is a member of the SAK. Employers are organised into *Suomen hiusrittäjät* (the Finnish Hairdressers Association).

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirecte
Suomen hiusrittäjät	Hairdressing companies	1.400	2.000	57%	Yes	-	CIC-Europe

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - indirecte
Palvelualojen Ammattiitto - PAM	Hairdressers	+/-2.500	71%	Yes	SAK	UNI-Europa, ETUC

There is only one national collective agreement in the hair dress sector. It is concluded between the Finnish Hair Dresses Association and the Service Union United. Unionisation level for employees is about 70 % and employers about 20 %. The collective agreement is generally binding and covers about 95 % of hairdressers.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector

Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.5 France

Contextual data

Statistics mentioned in the table below are related to NACE 93.02 activities. In the hairdressing sector, the total amount of companies is composed of 52.800 salons and 5452 other companies (without salons). 123.280 employees are working in this sector.

Sub-sector	Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
Hairdressers	58.250	34.57%	95.7%	0.15%	115.200	NA	NA	100%
Other beauty treatment	3.223	NA	99%	0%	7.038	6.618	0	100%

These figures, except for the total amount of employees, do not take into account of the 5.044 hairdressers (of which 1.043 are employees) who work at home.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirecte
Fédération Nationale de la Coiffure Française – FNC	Hairdressings salons	9.815	NA	NA	Yes	CNAMs, UPA, CAPER, CGAD, MEDEF, CNC, CFMA	CIC-Europe, UNICE, UEAPME
Fédération Nationale des Groupements Artisans de l'Esthétique – FNGAE	Beauty salons	NA	NA	NA	Yes	CNAMs, UPA	CEPEC, UEAPME

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - indirecte
Fédération Force Ouvrière de la Coiffure - FFOCO	All	NA	NA	Yes	FO	UNI-Europa, ETUC
FETCAM-CFTC	Christian workers	NA	NA	Yes	CFTC	UNI-Europa, ETUC
CGT	All	100	0.1%	No	CGT	ETUC
Fds-CFDT	All	NA	NA	Yes	CFDT	UNI-Europa, ETUC

Collective agreements are concluded by these organisations in the hairdressing sector and in the beauty treatment sector.

- Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector **Bold = data from the national expert, Bold italic = data from the European organisation, Italic = our estimates**

4.6 Germany

Contextual data

Collective bargaining only covers hairdressers and no relevant data on other personal services is available. Therefore we will focus on the hairdressing sector. Approximately 360.000 persons work in the entire sector, of which 256.524 are employees. On average, each company employs five employees.

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employees (% full employment)	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
54.940	19,66 %	72,8 %	0,17 %	256.524	70 %	176.482	+/-10.000	> 60 %

The *Zentralverband des Deutschen Friseurhandwerks* (Central Association of German Hairdressers) represents the economic and political interests of employers in the hairdressing sector on a national level. It is involved in collective bargaining over the framework agreements for the entire sector. On the national level, it is affiliated to the *Zentralverband des Deutschen Handwerks – ZDH* (German Confederation of Skilled Crafts). The Central Association of German Hairdressers has 18 regional affiliations, the State Guilds (*Landesinnungsverbände*), which are involved in collective bargaining at the regional level. They again head 383 Guilds (*Innungen*), which are responsible for employers' representation in 383 sub-regions.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirecte
Zentralverband des Deutschen Friseurhandwerks	Hairdressing companies	32.000	116.000	45,22 %	Yes	ZDH	CIC Europe, UEAPME

The *Vereinigte Dienstleistungsgewerkschaft - Ver.di* (Unified Service Sector Union), represents employees from various different sectors, including hairdressing. With nearly three million members, *Ver.di* is thought to be the largest union in the democratic world. Information about how many of those members are employed in the hairdressing sector was not available

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation – indirecte
<i>Vereinigte Dienstleistungs-gewerkschaft - Ver.di</i>	All	NA	NA	Yes	DGB	UNI-Europa, ETUC

In the hairdressing sector, working conditions are determined in a framework collective agreement (*Manteltarifvertrag*) for the entire sector, which is negotiated by the national representation of employers in the sector, the Central Association of German Hairdressers (*Zentralverband des Deutschen Friseurhandwerks*) and the Unified Service Sector Union (*Vereinigte Dienstleistungsgewerkschaft – Ver.di*). Wages are determined separately for each region in collective agreements negotiated by the regional employers' and workers' representatives.

The German law on collective agreements includes a mechanism which allows the legal impact of the agreements to be extended to employers and employees who are not members of the respective organisations: the general declaration of commitment (*Allgemeinverbindlichkeitsklärung*). To be extended, an agreement must at least covers 50% of the workers. Secondly, the extension must be in the public interest. This general declaration of commitment is frequently applied to regional collective agreements in the hairdressing sector. In at least 10 (out of 18) regions, the current collective agreement was declared to be generally binding for all employees in these regions.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.7 Greece

Contextual data

The hairdressing sector is an important activity in the service industry in Greece. It mainly consists of a large number of small and very small businesses. An important proportion of hairdressing service operates in the informal economy. According to a survey undertaken by OIYE in 1997 (see infra), there were 1581 small beauty salons and 284 “multiple” beauty centres. The average number of employees in the beauty centres was 22 persons, and 5 chains employed over 300 persons. By contrast, only 30% of small beauty salons employed personnel (with an average of 2 employees). According to the same survey, about 15.000 beauticians are the informal economy, (ie mostly hairdressers working at clients’ home). The total number of formal hairdressing businesses is estimated at 6.000 establishments (without taking account of the 4.000 estimated operators in the underground economy). The total regular employment in the hairdressing and aestheticians establishment is 29.949 people (year 2000).

Companies	Employees	Coverage
6.000	NA	-

There is one collective agreement for beauticians. At the time of drafting this report, no agreements are signed in the hairdressing industry. In the context of the recent shift of Greek industrial relations towards national sectoral collective agreements, the framework of collective bargaining in the sector is expected to change in the near future, with a newly established sectoral trade union, and three employers organisations qualifying as the main players. In the meantime, employees working in the hairdressing sector are covered by the minimum rates stipulated in the National General Collective Labour Agreement.

Management organisations negotiating collective agreements

There are three employers organisation acting in the sector : the *Supreme Union Artists’ Federation of Hairdressing and Barber Shops Owners of Greece* – ASKOKKKE (member of CJC-Europe) for hairdressers, the *Association of Beauty and Diet Centres for the beauticians sub-sector*. While only the latter has signed a collective agreement (see. above), developments are under way that could lead to collective agreements negotiated by both these organisations and the newly established trade union SYPIA and covering employees working in hairdressing saloons, barber shops and beauty institutes. No membership data were available.

Labour organisations negotiating collective agreements

While the main player in the sector remains OIYE – affiliated to UNI-Europa – the *Hellenic Federation of Private Employees* (gathering 11 trade unions), substantial changes were under way at the time of drafting this report. The Union of Beauticians – OYE, affiliated to UNI-Europa that signed the agreement for the Beauty services subsector is one of its member. A new sector-based union, the SYPJA, *association of Employees working in the Provision of Beauty & Slimming Services and Products* (“*Syλλogos Ypallion Parohis Ypiession & Proionton Aesthitis kai Adynatismatos*”) is expected to become the main player for workers in the sector (including beauticians, hairdressers, dieticians, physiotherapists, gymnasts, etc...). SYPJA, will become member of OIYE. The first elections are due in April 2002. However due to this process no agreement is expected before 2003 (Source : OIYE). No membership figures were available.

4.8 Ireland

Contextual data

According to the Central Statistics Office, the number of people employed in the occupation group 'Hairdressers and Barbers' stood at 11,500 at the end of May 2001 (CSO, Quarterly National Household Survey, 2001).

The most up-to-date data available for the number of enterprises in the 'Hairdressing and Beauty Parlours' comes from the Services Enquiry 1997, published by the Central Statistics Office. At the end of 1997, there were 3,145 enterprises in this sector. The CSO has stated that this figure may have risen slightly since 1997.

Companies	Employees	Coverage
3,145	NA	-

There exists no employers' organisation specific to the hairdressing sector in Ireland, thus a company in this sector may be affiliated to national, cross-sectoral employers' organisations.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - <i>Indirecte</i>
Irish Business and Employers Confederation – IBEC	All	7	NA	NA	Yes*	IBEC	UNICE
Small Firms Association – SFA	Small companies	5	NA	NA	No	IBEC***	UEAPME
Irish Small and Medium Enterprises – ISME	Small and medium companies	< 10	NA	NA	No	-	-
The Irish Hairdressing Federation**** – IHF	Hairdressing companies	320	NA	NA	No	-	-

**IBEC represents its members in negotiations with trade unions and in structures for negotiation at local level

*** Although it is formally part of IBEC, the SFA has an independent status

**** The IHF is a trade association

Only two trade unions represent employees in the hairdressing sector. These are the Amalgamated Transport and General Workers Union – ATGWU (it represents a total of 151 employees in the hairdressing industry) and the Services Industrial Professional and Technical Union - SIPTU that represents a small number of hairdressers working in the film industry.

Trade union density in this sector is very low. The ATGWU attribute this to a proliferation of independent hairdressing establishments and a lack of a culture of trade unionism.

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - indirecte
Amalgamated Transport and General Workers Union - ATGWU	Hairdressers	151	NA	Yes	-	-
Services Industrial Professional and Technical Union – SIPTU	Hairdressers in the film industry	NA (a few)	NA	Yes	ICTU	ETUC

Collective bargaining takes place in the context of the centralised national level agreements, which have been in place in Ireland since 1987. National agreements are negotiated and signed by IBEC, ICTU, the Government and a number of representatives from the voluntary and community sector. The agreements set out universally applicable pay increases, to be implemented at the local level by management and trade unions. Collective bargaining takes place with regard to the implementation of these pay increases at the company level in the hotels, restaurants and catering sector between management and trade union representatives.

SIPTU and ATGWU hold negotiating licenses and are therefore entitled to participate to collective bargaining with employer on implementation of wage agreements and conditions of employment for their members.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.9 Italy

Contextual data

The Hairdresser and beauty sector (NACE 93.02) is composed by a large number of small-scale firms, and many of them are artisanal firms (about 94%). It is worthwhile to note that more than 99% of firms has less than 10 employees. This - together with the high quote of artisanal firms - can help to explain the low relevance of decentralised bargaining and the low levels of unionisation that characterises this sector.

Companies	Of which % <10 employees	Of which % >100 employees	Employees	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
115.775	99.9%	0%	187.776	97.6%	0	NA

Source: Processed data from Istat database from the 1996 Census' archive

Workers' organisations haven't single federations that gather exclusively workers of H&B sector. On the contrary, there is specific artisan firms' federation, which represent firms in the HB sector. These organisations sign together with the industry wide agreement that regulates this sector.

The two main artisans' associations - CONFARTIGIANATO and CNA. Recent changes within Italian political system, as well as the decline of political cleavages, favour nowadays a wider autonomy and, therefore, approach the two associations. They co-operate since many years and in some areas instituted common services. There are also two other minor artisans' associations.: the CASA and the CLAI.

Sectoral organisations represent a minor part of the total number of firms represented by these organisations, and it is not easy to collect this kind of data. Nevertheless, it is possible to better understand the different role and weight of each single organisation looking at the membership of general association.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirecte
Confartigianato Acconciatori	Hairdressers, barbers	NA	420.000**	NA	Yes	Confartigianato	UEAPME
Confartigianato Estetica	Beauty salons	4.200		NA	Yes	Confartigianato	UEAPME
Federacconciatori CNA	Hairdressers, barbers	25.200		NA	Yes	CNA	UEAPME
Federestetica CNA	Beauty salons	4.000	364.700**	NA	Yes	CNA	CEPEC, UEAPME
Confederazione Autonoma Sindacati Artigiani – CASA	Artisans	NA	279.500**	NA	Yes	-	-
FEDERNAS	Artisans	NA	160.000**	NA	Yes	CLAI	-

** Figures for employees are for the general organisations (national affiliations and not sectoral)

The representation of workers' interests in Italy is mainly horizontal and not sectoral: sectoral federations are actually internal structures of general trade unions. Consequently, even if sectoral federations usually have autonomy in collective bipartite negotiation, they usually must behave according to interfederal strategies, especially in the field of social and IR policies. With regard to the territorial level, provincial intersectoral associations have a leading role at the local level in the Italian I.R. system. They are fully autonomous, both in legal and administrative terms.

In the case of the HB sector, the most important organisations which sign collective agreements are sectoral organisations for tourism, trade and services activities. They participate directly to the process of collective bargaining and sign collective agreement. These organisations, Flicams-CGIL, Fisascat-CISL and Uiltucs-Uil are the only organisations which sign the industry-wide agreement for this sector: thus, autonomous trade unions do not play any role in the process of collective bargaining in this sector. As we said above, this is a sector characterised mainly by small-scale firms, with non-unionized employees. For this reason the membership rate is in this sector quite low.

Labour organisations negotiating collective agreements

<i>Employees</i>	<i>Types of employees covered</i>	<i>Members**</i>	<i>Density*</i>	<i>CB</i>	<i>National affiliation</i>	<i>European affiliation - indirecte</i>
FISACAT	All	156.000	NA	Yes	CISL	UNI-Europa
FICALMS-CGIL	All	84.000	NA	Yes	CGIL	UNI-Europa
UILTuCS	All	58.400	NA	Yes	UIL	UNI-Europa

** data refers to the total membership of sectoral association without trade and distribution's workers. For this reason this data account not only for HB sector, but also for other kinds of services like tourism, etc.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.10 Luxembourg

Contextual data

Companies	Employees	Coverage
568	1.318	-

Source: Annuaire statistique du Luxembourg 2000

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirecte
Fédération des patrons coiffeurs du Grand-Duché de Luxembourg	Hairdressing companies	195	NA	NA (90%)**	No	FA	CIC-Europe, UEAPME
Fédération des diplômés en soins esthétiques du Grand-Duché de Luxembourg	Beauty salons	48	NA	NA (52%)**	No	FA	UEAPME

** Density rate is the number of employees' members of an organisation divided by the potential members in respective subsectors/occupations, estimated by the national expert.

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - indirecte
OGB-L	-	NA	NA	No		Uni-Europa
LCBC	-	NA	NA	No		

None of the two traditional trade unions have available data to communicate on this sector. However some employees (very low) of the sector should be affiliated to these unions.. There is no collective agreement in this sector.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector

Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.1.1 Netherlands

Contextual data

During the 1990s the number of hairdressers shops has strongly increased. It increased from 10,316 in 1990 to 13,005 in 1999. So, there are 12,228 companies in hairdressing. Most companies are small- and medium-sized companies. In 1997, 34,500 people were working in hairdressing, of which 10,500 were either firm owner or self-employed. In 1998 24,500 employees were working in hairdressing.

Companies	Employees	Employees (% full employment)	Coverage
12.228	24.500	71%	95%

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirecte
Koninklijke Algemene Nederlandse Kappersorganisatie (Royal General Dutch Hairdressers Organisation) - ANKO	Hairdressings shops	6.000	NA	NA	Yes	MKB-Nederland	CIC Europe, UNICE

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation – indirecte
Kappersbond FNV/FNV Schoonheidsverzorging	Hairdressers	9.761	40%	Yes	FNV	UNI-Europa, ETUC
CNV Bedrijvenbond (Working Group Hairdressers)	Hairdressers	1.140	6.1%	Yes	CNV	ETUC

Employers' association ANKO and the labour unions Kappersbond FNV and CNV Bedrijvenbond negotiate together collective agreement in the hairdressing sector. There is a collective wage agreement for the 24,500 employed hairdressers, which has been generally extended. No agreement exists for the sub-sector beauty treatment. CNV (CNV-Dienstenbond) wishes to conclude a collective wage agreement for this sector. Company agreements do not exist.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.12 Portugal

Contextual data

Companies	Employees	Coverage
>12.000	18.000*	40% ⁴¹ 90% ⁴²

* This figure includes employees, and self-employed professionals. It was given by the APBCIB and must be used with the greatest caution.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirecte
Associação Nacional do Sector de Comércio e Serviços de Cuidados Corporais - ANSCSCC	Hairdressing companies, beauty salons, spas	650	1.900	-	No	CCP	Eurocommerce
Associação dos Cabeleireiros de Portugal	Hairdressing companies, beauty salons	1.300	7.500	-	Yes	CCP	Eurocommerce
Associação Nacional do Esteticismo Profissional – ANEP	Beauty salons	3.500	NA	-	No	CIP	UNICE
Associação Portuguesa de Barbearias, Cabeleireiros e Institutos de Beleza - APBCIB	Hairdressing companies, beauty salons	4.300	12.900	-	Yes	CCP	CIC Europe, Eurocommerce

As there is no reliable data for the total amount of employees in the sector, it is not possible to estimate density rates

⁴¹ According to the SINDPAB

⁴² According to APBCIB (taking into account the rules of extension, except for the Porto area)

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation – indirecte
Sindicato dos Profissionais do Penteadado, Arte e Beleza – SINDPAB	All	12.500	70%	Yes	-	-
Sindicato dos Trabalhadores de Escritório, Comércio, Hotelaria e Serviços – SITESE ⁴³	All	NA	NA	-	UGT	UNI-Europa

*Density is the ratio between affiliates or employees members of an organisation and the total of employees and self-employed professionals
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

⁴³ According to SITESE, it has not a significant representativeness in the sector, however it is affiliated to Uni-Europa for this sector.

4.13 Spain

Contextual data

The hairdressing, beauty care and assimilated activities sector is highly fragmented in Spain. It is almost completely made up of very small companies. The presence of individual owner is also estimated to be very important, as well as the hidden activity. There are no statistics about employment in this sector. The results offered by the *Instituto Nacional de Estadística*, National Institute for Statistics in its 'Encuesta de Población Activa', Active Population Survey, referred to NACE 93 will serve to make an approximation. However, if an approximate figure for the sector be of 50,000 employees, this figure must be used with the greatest caution.

Companies	Of which % <10 employees	Of which % >100 employees	Employees	Employees (% full employment)	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
+/-25.000	99%	0%	+/-50.000	55%	+/-99-100%	0%	+95%

The two following organisations represents the interests of employers in the hairdressing sector:

The *Asociación Nacional de Empresas de Peluquerías de Caballeros* - ANEPC (National Association of Companies of Men's Hairdressing Salons) is one of the two important managers' federations in the sector. The ANEPC is made up by 25 managers' associations of provincial level, which cover an important part of the Spanish territory.

The *Federación Española de Peluqueros y Peluquerías de Señora* (Spanish Federation of Hairdressers and Women's Hairdressing Salons) is the other employers' organisation. It includes managers' organisations in the sector of 33 Spanish provinces

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirecte
Asociación Nacional de Empresas de Peluquerías de Caballeros – ANEPC	All	27.566	NA	NA	Yes	CEPYME	CIC-Europe, UEAPME
Federación Española de Peluqueros y Peluquerías de Señora	All	7.733	NA	NA	Yes	CEOE	CIC Europe, UNICE

Two main trade unions represent employees in the hairdressing sector with another smaller union dedicated to the Basque employees.

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation – indirecte
Federación de Servicios de UGT – Fes-UGT	All	527	1%	Yes	UGT	UNI Europe, ETUC
Federación Estatal de Actividades Diversas de CCOO	All	NA	NA	Yes	CCOO	UNI Europe, ETUC
Federación de Empleados, Técnicos y Alimentación de ELA – FETA-ELA	Basque workers	200	0.4%	Yes	ELA	EFFAT, ETUC

There is only one general collective agreement of state level, the '*Convenio Colectivo para Peluquerías, Institutos de Belleza, Gimnasios y Similares*' (Collective Agreement for Hairdressing Salons, Beauty Centres, Gym Centres and Similar Activities). It regulates the general working conditions not only in the activities corresponding to NACE 9302 but also to NACE 9304.

It is a framework collective agreement that exclusively regulates general working conditions. The agreement itself considers that concrete working conditions are kept for sectoral or sub-sectoral collective agreements. Thus, besides the general collective agreement of state level, the sector is regulated by different collective agreements at specific territorial levels; and in some cases, with different agreements for activity sub-sectors.

The signatory organisations of the National Collective Agreement are on the managers' side, the '*Federación Española de Peluqueros y Peluquerías de Señora*' and the '*Asociación Nacional de Empresas de Peluquerías de Caballeros*'. On the unions' side the '*Federación de Servicios de UGT*' and the '*Federación Estatal de Actividades Diversas de CCOO*'.^{*}

The same organisations are the signatories of the '*Acuerdo Nacional sobre Formación Continua en el Sector de Peluquerías, Salones de Belleza, Sauna, Gimnasios y Afines*' (National Agreement on Continuing Training in the Sector of Hairdressing Salons, Beauty Centres, Saunas, Gym Centres and Allied Activities). They also take part in collective agreements of a lesser territorial scope (provinces or autonomous communities), with the main exception for the Basque Country, where the '*Federación de Empleados, Técnicos y Alimentación de ELA*' also participates for the union's side in this autonomous community.

Collective bargaining (collective agreements) in the sector covers practically all workers under employment contract since it is of '*erga omnes*' applicability.

^{*} Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.14 Sweden

Contextual data

The figures mentioned below are related to the hairdressing activities (NACE 93.021).

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employees (% full employment)	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
13,032	87%	99,7%	0%	4.140	??	87%	0%	60-70%

There are one employers' organisation, the *Sveriges Frisörföretagare* – SFF (Hairdressing Salons Association), and one trade union organisation, the *Handelsanställda förbund*, *Handels*, in the hairdressing sector in Sweden. This trade union is the fourth largest federation within the LO-S - *Landsorganisation Sverige*. It represents employees of the trade sector and amongst them, the hairdressers.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirecte
Sveriges Frisörföretagare - SFF	Hairdressing salons	6.000 (2.254 with employees)	4.100	99% 60%**	Yes	Företagarnas Riksorganisation	CIC-Europe, UEAPME

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - indirecte
Handelsanställda förbund, Handels	Hairdressers	2.000	49%	Yes	LO-S	UNI-Europa, ETUC

These two organisations are the signatories of the collective agreement concluded recently and valid for a period of three years.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector

** Density rate is the number of affiliates or employees members of an organisation divided by the potential members in respective subsectors/occupations, estimated by the national expert. Let us stress that the national expert disagree with our way of calculating density.

Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.15 United Kingdom

Contextual data

Currently, there are around 30,000 hairdressing salons in the UK. The sector is highly fragmented and the great majority of salons are small, independent concerns. The Department of Trade Industry estimates that almost 70% of salons are single outlet businesses with no employees. According to the Labour Force Survey, 183,000 people are working in the hairdressers and related sectors, 149,000 in the hairdressers and barbers sector and 34,000 in the beauty care and related occupations. Since the abolition of the hairdressing wages council there has been no industry wide range wage regulation in this sector. Employees in this industry have benefited from the introduction of the national minimum wage in April 1999.

Companies	Employees	Coverage
30,000 hairdressing salons	NA	NA

The National Hairdressers Federation represents hairdressing and beauty salon business owners in the UK and self employed hairdressers in salons.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirecte
National Hairdressers Federation	Hairdressing salons	5,350 members (12,000 salons)	NA	NA	No	CBI	CIC-Europe, UNICE

Labour organisations negotiating collective agreements

There are no trade unions specifically for Hairdressers. However hairdressers could choose to join any trade union. Uni-affiliated GMB and USDAW trade unions claim members in the sector.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector

Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

5. Appendix

5.1 Acronyms mentioned in this report

Acronym	Country	Organisation
ACLVB - CGSLB	BE	Algemene Centrale van Liberale Vakbonden - Confédération Générale des Syndicats Libéraux de Belgique
ACV - CSC	BE	Algemeen Christelijke Vakverbond - Confédération des Syndicats Chrétiens
ANEP	PO	Associação Nacional do Esteticismo Profissional
ANEPC	SP	Asociación Nacional de Empresas de Peluquerías de Caballeros
ANKO	NL	Koninklijke Algemene Nederlandse Kappersorganisatie
ANSCSCC	PO	Associação Nacional do Sector de Comércio e Serviços de Cuidados Corporais
APBCIB	PO	Associação Portuguesa de Barbearias, Cabeleireiros e Institutos de Beleza
ASKOKKKE	GK	Supreme Union Artists' Federation of Hairdressing and Barber Shops Owners of Greece
ATGWU	EI	Amalgamated Transport and General Workers Union
BIF	AU	Bundesinnung der Friseure – BIF
BKFM	AU	Bundesinnung der Kosmetiker, Fußpfleger und Masseur
CAPEB	FR	Confédération de l'Artisanat et des Petites Entreprises du Bâtiment
CASA	IT	Confederazione Autonoma Sindacati Artigiani
CBI	UK	Confederation of British Industry
CC.OO	SP	Comisiones Obreras
CCP	PO	Confederação do Comercio Português
CEOE	SP	Confederación Española de Organizaciones Empresariales
CEPEC	EU	Confédération Européenne des Professionnels de l'Esthétique Cosmétique
CEPYME	SP	Confederación Española de la Pequeña y Mediana Empresa
CES	EU	Confédération Européenne des Syndicats
CFDT	FR	Confédération Française Démocratique du Travail
CFTC	FR	Confédération Française des Travailleurs Chrétiens
CG	BE	Centrale Générale
CGAD	FR	Confédération Générale de l'Alimentation du Détail
CGIL	IT	Confederazione Generale Italiana del Lavoro
CGT	FR	Confédération Générale du Travail
CIC-Europe	EU	Confédération Internationale de la Coiffure - Europe
CIP	PO	Confédération de l'Industrie Portugaise
CLAAI	IT	Confederazione Libere Associazioni Artigiane Italiane
CNA	IT	Confederazione Nazionale dell'Artigianato e delle Piccole Imprese
CNAM	FR	Confédération Nationale de l'Artisanat des Métiers et des Services
CNE	BE	Centrale Nationale des Employés
CNV	NL	Christelijk Nationaal Vakverbond
DA	DK	Dansk Arbejdsgiverforening
DF	DK	Dansk Frisørmesterforening
DGB	DE	Deutscher Gewerkschaftsbund
DFKF	DK	Dansk Frisør- og Kosmetiker Forbund
ELA-STV	SP	Euzko Langilleen Alkartasuna - Solidaridad de Trabajadores Vascos
ETUC	EU	European Trade Union Confederation
FA	LU	Fédération des Artisans
FdS	FR	Fédération des Services – CFDT
FeS-UGT	SP	Federación de Servicios de UGT
FETA-ELA	SP	Federación de Empleados, Técnicos y Alimentación de ELA
FFOCO	FR	Fédération Force Ouvrière de la Coiffure
FGTB - ABVV	BE	Fédération Générale du Travail de Belgique – Algemeen Belgisch Vakverbond
FNBC - NVHB	BE	Fédération Nationale des Coiffeurs de Belgique – Nationaal Verbond Haarkappers van België
FNC	FR	Fédération Nationale de la Coiffure Française
FNGAEC	FR	Fédération Nationale des Groupements Artisanaux de l'Esthétique
FNV	NL	Federatie Nederlandse Vakbeweging
FO	FR	Force Ouvrière
FR	SV	Företagarnas Riksorganisation
GHGPD	AU	Gewerkschaft Hotel, Gastgewerbe und Persönlicher Dienst
GPA	AU	Gewerkschaft des Privatangestellten
HANDELS	SV	Handelsanställda förbund
IBEC	IE	Irish Business and Employers Confederation
ICTU	IE	The Irish Congress of Trade Union
IHF	IE	Irish Hairdressing Federation
ISME	EI	Irish Small and Medium Enterprises
KL	DK	Kommunernes Landsforening
LCBG	L	Confédération des Syndicats Chrétiens du Luxembourg
LO-S	SV	Landsorganisationen i Sverige
NKV	BE	Nationale Kamer der Belgische Kappers
ÖGB	AU	Österreichischer Gewerkschaftsbund (Austrian Trade Union Federation)
OGB-L	L	Confédération syndicale indépendante - Luxembourg

PAM	FI	Palvelualojen Ammattiliito
SAK	FI	Suomen Ammattiliittojen Keskusjärjestö
SFA	EL	Small Firms Association
SFF	SW	Sveriges Frisörföretagare
SINDPAB	PO	Sindicato dos Profissionais do Penteadado, Arte e Beleza
SIPTU	IE	Services Industrial Professional Technical Union
SITese	PO	Sindicato dos Trabalhadores de Escritório, Comércio, Hotelaria e Serviços
SYPIA	GK	Syllogos Ypallilon Parohis Ypiression & Proionton Aesthitikis kai Adynatismatos
UCM	BE	Fédération Nationale des Unions de classes moyennes
UEAPME	EU	Union Européenne de l'Artisanat et des Petites et Moyennes Entreprises
UGT	SP	Unión General de Trabajadores
UNICE	EU	Union des confédérations de l'industrie et des employeurs d'Europe
UNI-Europa	EU	Union Network International - Europe
UPA	FR	Union Professionnelle Artisanale
Ver.di	DE	Vereinigte Dienstleistungs-gewerkschaft
VNO-NCW	NL	Vereniging Nederlandse Ondernemingen- Nederlands Christelijk Werkgeversverbond
WKÖ	AU	Wirtschaftskammer Österreich
ZDH	DE	Zentralverband des Deutschen Handwerks

5.2 Economic classification by activity NACE 4 / 93.0

Hairdressing and other beauty treatment sector
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93.0 Other services activities

93.01 - Washing and drycleaning of textile and fur products

93.02 - **Hairdressing and other beauty treatment**

93.03 - Funeral and related activities

93.04 - Physical well-being activities

93.05 - Other service activities n.e.c.