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**INSTITUTIONAL REPRESENTATIVENESS OF TRADE UNIONS AND  
EMPLOYERS' ORGANISATIONS IN THE INDUSTRIAL CLEANING SECTOR**

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## ABBREVIATIONS

CEC:	European Confederation of Executives and Managerial Staff
CEPA:	European Confederation of Pest control Association.
CESI:	European Confederation of Independent Trade Unions
EFCl :	European Federation of Cleaning Industries
EFBWW:	European Federation of Building and Woodworkers
EFFAT:	European Federation of Food, Agriculture and Tourism Trade Unions
EMCEF:	European Mine, Chemical and Energy Workers' Federation
EMF:	European Metalworkers' Federation
EPSU:	European Federation of Public Service Unions
ESCHFÖ:	European Federation of Chimney Sweeps
ETF:	European Transport Workers' Federation
ETUC:	European Trade Union Confederation
ETUF:TCL:	European Trade Union Federation of Textiles, Clothing and Leather
ETWF:	European Transport Workers' Federation
Eurocommerce:	Association of Commerce of the European Community
FIDEN:	International Association of Building Services Contractors
FIET:	International Federation of Commercial Clerical, Professional & Technical Employees
FIDER:	International Association of Building Services Contractors
FITM:	International Federation of World Workers
FSC:	Forest Steward Council
ICA:	International Co-operative Alliance
ICEM:	International Federation of Chemical, Energy, Mine and General Workers' Unions
ICFTU:	International Confederation of Free Trade Unions
ICU:	International Confederation of Chimney Sweepers Trade Union
IFBWW:	International Federation of Building and Wood Workers
IFWEA:	International Federation of Workers Education Associations
IMF:	International Metalworkers' Federation
IOE:	International Organisation of Employers
IUF:	International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations
ITF:	International Transport Workers' Federation
ITGLWF :	International Textile, Garment and Leather Workers' Federation

NTF:	Nordic Transport Workers' Union
PSI:	International Trade Union Federation Public Services International
UEAPME:	European Association of Craft, Small and Medium-Sized Enterprises
UNI:	Union Network International
UNI-Europa:	Union Network International - Europa
UNICE:	The Union of Industrial and Employers' Confederations of Europe
WCL:	World Confederation of Labour
WFBC:	World Federation of Building Service Contractors

# INTRODUCTION

This report was drawn up within the framework of a study on the institutional representativeness of the social partners in the European Union UE15 and the situation of trade unions and employers' organisations in the new member States and in the candidate countries. The study is carried out by the Institut des Sciences du Travail de l'Université catholique de Louvain (IST) at the request of the European Commission's DG Employment and Social Affairs (Call for tenders No. VT/2002/83).

This report aims to examine the process of social dialogue and the representativeness of the social partners participating in that dialogue in the industrial cleaning sector in the countries of the European Union UE15. The study focuses on social dialogue and organisations in the countries member of the European Union before the 1<sup>st</sup> of May 2004.

## Context of the study

This study takes place in the context of the European Commission's promotion of social dialogue at Community level.

The question of the representativeness of European organisations emerged within the framework of the promotion of social dialogue at Community level. In a Communication published in 1993<sup>1</sup>, the European Commission set out three criteria determining the access that employers' and workers' organisations had to the consultation process under Article 3 of the Agreement on Social Policy. According to the terms of this communication, the organisation 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 partners 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.* In 1996, the Commission adopted a consultation document<sup>2</sup>, with the objective of launching as wide as possible a debate in order to find ways to promote and strengthen European social dialogue. Given the fact that the social partners, at European level, were (and still are) in the process of restructuring and accepting new members, the European Commission launched, at that time, a study on the representativeness of inter-professional and sector organisations in the European Union. In a new Communication published in 1998<sup>3</sup>, the European Commission set out the means it intended to use to adapt and promote social dialogue at European level. On this occasion, it specifically reasserted the three criteria, laid down in the Communication of 1993, for European organisations to be recognised as representative in terms of the consultation process under Article 3 of the Agreement on Social Policy. The organisations must: *(1) be related to specific sectors or categories and organised at European level; (2) consist of organisations which are themselves an integral and recognised part of Member States' social partner structures and with the capacity to negotiate agreements, and which are representative of several Member States; (3) have adequate resources to ensure their effective participation in the consultation process.* Lastly, in 2002 the European Commission reasserted its commitment to reinforcing the European social dialogue in its Communication *The European social dialogue, a force for innovation and change*<sup>4</sup>. In the respect of the three criteria set up by the Commission, as had been observed in previous studies<sup>5</sup>, *the changes focus on the disappearance of demands relating to the inter-sector nature of organisations and on the fact that they are established in all Member States; the new rules have not been formulated in a very restrictive manner, they only require employers' and workers' organisations*

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<sup>1</sup> COM(93) 600 final of 14 December 1993, Communication from the Commission concerning *the application of the Protocol on Social Policy*.

<sup>2</sup> COM(96) 448 final of 18 September 1996, Communication from the Commission on *the development of social dialogue at Community level*.

<sup>3</sup> COM(98) 322 final of 20 May 1998, Communication from the Commission on *adapting and promoting the social dialogue at Community level*.

<sup>4</sup> COM(2002) 341 final of 26 June 2002, Communication from the Commission: *The European social dialogue, a force for innovation and change* (summary).

<sup>5</sup> Spineux A., Walthery P. et al., *Report on the representativeness of European social partners organisations*, Report coordinated by the Institut des Sciences du Travail of the Université catholique de Louvain, for the European Commission, Directorate General for Employment, Industrial Relations and Social Affairs, Louvain-la-Neuve, 1998.

to represent "several" Member States. This relaxation of the implementation condition might pose a demarcation problem in the sense that there is no criterion setting out a minimum number of Member States to activate it.

Against this background, it is clear that one of the main issues at the moment, for the Commission, is the enlargement of the European Union and its impact on the process of social dialogue at Community level. The development of social dialogue, therefore, formed part of the *acquis communautaire*: *The Treaty requires that social dialogue be promoted and gives additional powers to the social partners. The candidate countries are, therefore, invited to confirm that social dialogue is accorded the importance required and that the social partners are sufficiently developed in order to discharge their responsibilities at EU and national level, and to indicate whether they are consulted on legislative drafts relating to the taking over of the employment and social policy acquis... Therefore, the development not only of tripartite structures but also of autonomous, representative bipartite social dialogue is an important aspect for the future involvement of the candidates countries' social partners in the social dialogue activities developed at European and national level*<sup>6</sup>. Enlargement will have consequences on social dialogue, both at inter-sector and at sector levels. In particular, it will have consequences on the European social partners and their institutional representativeness. Social dialogue, and employers' organisations and trade unions in the new member states (and in the candidate countries) have not been touched on in this study. The question of the representativeness of the European organisations is consequently limited to the 15 states member of the European Union before the enlargement of the 1<sup>st</sup> May 2004.

## Research approach and comments on methodology

For the purposes of this study, a network of University researchers throughout the 15 European Union Member States taken into account was set up. These researchers are independent of both the European Commission and employers' and workers' organisations. Each researcher was charged with drawing up a report based on a common template. A questionnaire tailored to the specific realities of the public sector was elaborated to that effect (cf. annex). The IST took charge of coordinating the study and drawing up the summaries. The IST wishes to stress its independence with regard to the political consequences and decisions which may be made on the basis of this study.

The research process, in its design, comprises a phase of collection of quantitative and qualitative data on the players and the social dialogue in which they participate, but also an *active approach embracing the building of a consensus, which is an integral part of the process of social dialogue itself*. Thus, whereas in a good number of cases the data collected do not permit total objectification of the role played by the organisations, the contacts made during the data collection and the discussions with the different players concerned should be an *integral part of a process of mutual recognition*<sup>7</sup>. The main sources used within the framework of this study were thus the social players themselves.

As regards delimitation of the scope of the study, the main criteria defined *a priori* with a view to determining the organisations to be taken into account are their role in the negotiation processes in the sector collective bargaining.

The interviews with the organisations and the drafting of the national reports took place during February-June 2004.

Lastly, a few words on the consultation process involving the European social partners. The following organisations have been consulted (they also elected to send us their comments, and those of their members, on the draft report): EFCI and UNI-Europa. This consultation took place during the months of October and November 2004. We accordingly received comments on the national summaries, and we have tried to include as many as possible. These observations have been incorporated in different ways, depending on the kind of information received: the comments have been inserted in the form of footnotes or in the main body of the text, depending on the kind of information received.

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<sup>6</sup> *Enlargement of the European Union. Guide to the negotiations. Chapter by chapter*, European Commission, DG Enlargement, June 2003.

<sup>7</sup> *Reply to Call for Tenders VT/2002/83. Studies on the representativeness of the social partners at sector level in the European Union and monographs on the situation of the social partners in the candidate countries*, Institut des Sciences du Travail, UCL, 2002.

## The national summary reports

The national summary reports presented in this report depict the situation in the 15 European Union Member States, under the following headings:

- For each country, delimitation of the range of activities included in the sector of industrial cleaning
- Description of the general characteristics of the sector (employment, enterprises)
- Overview of the social dialogue at the sector level: structures, collective agreements, principal topics of negotiation, and players.
- Description of the trade union organisations and of the employers' organisations that operate in the social dialogue in the cleaning sector: representativeness and recognition of the organisations; participation in collective bargaining; national, European and international affiliations.

# THE INDUSTRIAL CLEANING SECTOR IN THE EU15

## Delimitation of the industrial cleaning sector in the EU15

The sector of industrial cleaning may be basically limited to the cleaning services provided by specialised contractors. It corresponds to the *NACE classification – REV. 1, section K, division 74, group 74.7: industrial cleaning*.

This class includes :

- interior cleaning of buildings of all types, including offices, factories, shops, institutions and other business and professional premises and multiunit residential buildings
- window cleaning
- chimney cleaning and cleaning of fireplaces, stoves, furnaces, incinerators, boilers, ventilation ducts and exhaust units

This class also includes:

- disinfecting and exterminating activities for buildings, ships, trains, etc.
- cleaning of trains, buses, planes, etc.

This class excludes:

- agricultural pest control, see 01.41
- steam-cleaning, sand blasting and similar activities for building exteriors, see 45.45
- cleaning of new buildings after construction, see 45.45
- carpet and rug shampooing, drapery and curtain cleaning, see 93.01
- activities of domestics, see 95.00

However, other activities are carried out by cleaning contractors, such as waste management services, chimney sweeping, façade cleaning or maintenance of areas around buildings. This enlargement of cleaning companies' activities reflects a general trend towards multi-service contracting registered in the industry<sup>8</sup>.

Besides this general delimitation, it is worth noting that the sector is delimited from different ways in each country and different systems of classification of activities exist in all countries. Furthermore, the sector may sometimes be described differently according to the point of view taken into account: the statistical delimitation may be different from the collective bargaining structuring of the sector. The table below presents the propositions of delimitation of the industrial cleaning sector in each country. In summary, we have endeavoured to respect as far as possible the national realities and delimitations. Following on from the foregoing comments, it should be emphasised that carrying out a number of comparisons between countries may lead to problems of methodological order.

### *Delimitation of industrial cleaning by country*

Country	Delimitation of the industrial cleaning sector
<b>Austria</b>	The sector is divided into three sub-sectors, reflecting three distinct vocations: Cleaning; chimney cleaning; and disinfection and exterminating activities.
<b>Belgium</b>	<u>NACE-BEL Code 74.70</u> includes the following activities: cleaning inside buildings of all types; window-cleaning; sweeping chimneys; cleaning fireplaces, furnaces, incinerators in boilers, and ventilation shafts; and devices for getting rid of smoke; cleaning industrial machinery; cleaning bottles; disinfection and killing insects; cleaning the insides of road and sea tankers; cleaning trains, buses, planes, ships etc. <u>In terms of industrial relations</u> , the sector is delimited as follows: classical cleaning; the environment (waste processing); sweeping chimneys; industrial cleaning; disinfection.
<b>Denmark</b>	The Danish cleaning sector includes the following activities: 747010: ordinary cleaning (vacuum-cleaning and washing); 747020: specialised cleaning (the cleaning of nuclear and chemical installations); 747030: window cleaning; 747040: sweeping chimneys; 747050: disinfection and extermination activities.
<b>Finland</b>	The industrial cleaning sector in Finland corresponds to the NACE classification: NACE 74.7.
<b>France</b>	The Code 74.7 in the French Nomenclature of Activities; basic cleaning in premises of all kinds, cleaning collectively

<sup>8</sup> *The cleaning industry in Europe. An EFCI survey*, EFCI, July 2003, p.3.

	<p>used facilities, cleaning public transport vehicles and window cleaning; specialist cleaning; sweeping chimneys, rat extermination, pest control, and disinfection.</p> <p><u>In terms of collective bargaining:</u> the "cleaning activity" (Code 74.7 Z) the "laundrying and industrial dry-cleaning" (Code 93.0 A); the National Railway Maintenance and Related Activities covers the cleaning of SNCF and Paris underground platforms and carriages, and the loading and unloading of freight at dispatch centres; the disinfection, pest control, rat extermination and sweeping chimneys.</p>
<b>Germany</b>	<p>According to the NACE definition 74.7 "industrial cleaning" covers six areas: disinfection and extermination services, window cleaning services, traditional cleaning services, specialist cleaning services, furnace and chimney cleaning services and other cleaning services. In Germany, a slightly different definition of the sector is used: Furnace and chimney cleaning services are excluded and waste management, catering, green area care, laundry services and security services are added.</p>
<b>Greece</b>	<p>The sector includes general cleaning of buildings of all types, window cleaning, chimney sweeping, cleaning of air conduits, burners, boilers and furnaces, disinfections, fumigations, and cleaning of the means of transport. Cleaning services provided at home, as well as cleaning based on the use of steam or sandblasting, are excluded from the sector.</p>
<b>Ireland</b>	<p>The following sub-sectors are included in the cleaning sector: Industrial cleaning of outdoor premises, factory and building yards, sites; Facade cleaning of the exterior of buildings; Carpet and textile cleaning; Cleaning of interiors of buildings as contract cleaning and as direct hire; Window cleaning using specialised equipment; Waste / cleaning activities</p>
<b>Italy</b>	<p><u>Article 1<sup>st</sup> of Law No. 82 of 25 December 1994:</u> cleaning, disinfecting, exterminating, and sanitation provided by cleaning companies.</p> <p>The last <u>National Collective Industry-wide Agreement (25 May 2001)</u> includes, in addition, several maintenance services, such as façade cleaning and maintenance of areas around buildings, and a variety of administrative services, as well as services related to transport and catering. However, it does not include sewage and refuse disposal, street cleaning and cleaning services related to agriculture.</p>
<b>Luxembourg</b>	<p><u>Classification 420-11:</u> cleaning and treatment of the outer surfaces of buildings and monuments; cleaning, disinfection, dusting and treatment of surfaces, floors, walls and ceilings, of windows, lamps, domestic technical installations, sanitary, heating and air-conditioning installations, and decorative objects; cleaning of sports pavilions and premises, exhibitions halls, hospitals, means of transport and road signs.</p> <p>The scope of these activities appears to have been <u>extended</u> a few times recently, as they now also include maintaining the area around dwellings and clearing car parks and pavements during the winter.</p>
<b>Netherlands</b>	<p><u>Dutch classification system (Standaard Bedrijfsindeling, SBI):</u></p> <p>SBI 7470.1: Cleaning of buildings: the cleaning of Building interiors, window cleaning, chimney sweeping, the cleaning of house fronts, and cleaning after fires</p> <p>SBI 7470.2: Cleaning of Transportation and other cleaning: is made of housekeeping, textile cleaning, and all industrial cleaning such as the cleaning of tanks in ships and trucks, of transportation, of industrial installations, of garbage containers, etc.</p>
<b>Portugal</b>	<p>74700 in the <u>National Classification of Economic Activities:</u> cleaning activities of all kinds of buildings in varied ways. It also includes the cleaning of all kinds of transports. The disinfection and extermination of pests in buildings and transports is also included. However, the cleaning of tankers and tank-trucks, and the disinfection and extermination work are not traditionally included in the statistics. On the other hand, gardening activities are included in the statistics.</p>
<b>Spain</b>	<p><u>Instituto Nacional de Estadística (2003):</u> all kinds of buildings, including offices, factories, businesses, official organisations and other business and professional establishments, as well as residential buildings; glass and window cleaning, chimneys, fireplaces, ovens, incinerators, boilers, ventilation channels and extractor fans. Disinfection and rodent control and disinfection of buildings, ships and trains...and cleaning of trains, buses, planes, etc. It does not include fighting agricultural and livestock plagues, steam cleaning, water jet cleaning and other similar activities for cleaning up facades, recent built buildings, carpet and tapestry cleaning, cleaning of curtains and wall hanging pieces and domestic services</p>
<b>Sweden</b>	<p>The industrial cleaning includes: 74.701: Cleaning companies; 74.702: Disinfection companies; 74.703: Chimney sweeps.</p>
<b>United Kingdom</b>	<p>The industrial cleaning industry includes the group of employees employed by specialised firms and corresponds to the NACE code 74.7.</p>

Source: national reports

## Characteristics of the industrial cleaning sector

### Market developments

According to an EFCI survey<sup>9</sup>, the total turnover achieved by cleaning and support services contractors in 2002 reached EUR 39,987 million in the 17 European countries covered (including Norway, Czech Republic, Hungary, Slovakia; excluding Greece and Ireland), which represents a net increase of 3.21%<sup>10</sup> with regard to the previous year. The cleaning industry ranks second in terms of importance within the sector of services, after temporary work agencies, and before security and catering services.

In this context, France, Germany, Italy and the UK remain the largest markets. Together they represented, in 2002, almost 70% of the total turnover in Europe. Quite spectacular was the dynamism of the Swedish market during the year 2002. Four countries (Luxembourg, Finland, Belgium and the UK) have registered an increase above the EU, while the growth in France and Portugal has been relatively limited.

In terms of activity, "office cleaning" remains the most important segment of the industry. It represents 57% of the total turnover. However, cleaning contractors are also active in more specific segments:

- On the one hand, the services connected to office cleaning, such as window cleaning, façade cleaning and industrial cleaning are an important part of the sector
- On the other hand, the specialised cleaning services, such as hospital cleaning, cleaning of schools, cleaning of public transports, retail and services to individuals are more and more increasing.

In this respect, one important feature of the development of the cleaning industry in the last years is the diversification and specialisation of activities, especially towards multi-service contracting. The proportion of office cleaning has progressively decreased over the years in favour of more specialised activities. As a consequence, the industry has evolved towards a more professional activity, with specific competences required to workers. It is worth noting that, during the year 2002, the share of office cleaning seemed to be increasing, to the detriment of these new activities.

#### *Breakdown by market segment, 2001 and 2002*

Year	2001	2002
Office cleaning	51.70%	57%
Industrial cleaning (agri-food, factories, etc.)	10.10%	11.2%
Specialised cleaning (hospitals, etc.)	10.20%	7.1%
Schools	4.60%	3.9%
Public transports	3.70%	4.1%
Windows	5.9%	4.7%
Retail	3.90%	0.5%
Services for individuals	1.60%	1.2%
Others (façade cleaning, leisure facilities, etc.)	2.70%	6.8%
Related services (waste collecting, catering, etc.)	5.60%	3.5%

Source: *The cleaning industry in Europe. An EFCI survey*, EFCI, July 2003, p.9; *The cleaning industry in Europe. An EFCI survey*, EFCI, October 2004, p.6.

Next to this, the cleaning industry is highly competitive and the main strategies of companies are based on prices and on costs. However, the quality criteria of services provided by companies, accompanied by an increasing respect for environmental and social norms, seems to be assuming greater importance. This topic constitutes one of the main stakes for European social partners (see the section European social dialogue).

<sup>9</sup> *The cleaning industry in Europe. An EFCI survey*, EFCI, October 2004, p.4-7.

<sup>10</sup> Hungary and Slovakia have been excluded from this calculation since no figure were available in 2001.



Lastly, it should be noted that there is a high degree of undeclared or partially declared work in the industrial cleaning market. This undeclared work is typical of both individuals and companies. Firms which avoid paying tax and social security contributions, are intensifying the intense and unfair competition that is the current characteristic of the sector.

## Companies

### *Number of companies*

According to the EFCI survey<sup>11</sup>, the total number of companies in Europe (including Norway, Czech Republic, Hungary, Slovakia; excluding Greece and Ireland) exceeded 81,500 in 2002. On a comparative geographical basis, this represents more than a 2% increase with regard to the previous year<sup>12</sup>. In the last 13 years, the average annual increase of the number of companies was more than 6.6%.

### *Types of companies*

The cleaning industry is dominated by a majority of small or micro-enterprises. On the other hand, a few large companies, of which multinational companies, represent a large part of the turnover and the employment of the sector: almost ¾ of companies employ fewer than 10 people. However, about 3% of companies, employing more than 500 people, account for almost half of the turnover of the industry.

The number of medium-sized companies (50-500 workers, family-owned businesses) seems to have remained at a relatively stable level since the end of the 1990s. However, a significant part of them have recently been integrated into bigger groups<sup>13</sup>.

### *Companies by size, 2001*

Number of workers	% of companies
< 10 workers	74%
10-49 workers	12%
50-499 workers	11%
> 500 workers	3%

Source: The cleaning industry in Europe. An EFCI survey, EFCI, October 2004, p. 9.

Note: These figures include Norway, the Czech Republic, Hungary and Slovakia; they excluding Greece and Ireland.

### *Companies by country*

Country	Number of companies	
Source	EFCI Survey <sup>14</sup> – data 2002	National reports
Austria	1,900	1,541 (Statistik Austria, 2000)
Belgium	1,566	886 establishments (NACE-BEL 74.70; ONSS, 2002)
Denmark	6,652	6,643 (Danmarks Statistik 2003)
Finland	2,609	2,610 (Statistics Finland)
France	12,496	12,496 (INSEE, 2001)
Germany	6,652	6,652 (BIV, 2002)
Greece	ND	ND
Ireland	606 (data 2001)	320 companies (CSO, 1998) 333 companies (FÁS, 2000)
Italy	16,000	25,000 (ISTAT, 2001)
Luxembourg	63	80 (Chamber of Craft Trades, 2004)
Netherlands	5,000	5,850 (SBI 7470.1; CBS, 2002)
Portugal	1,549	791 (DETEFP, 2000) 1,450 (INE, 2001)

<sup>11</sup> *The cleaning industry in Europe. An EFCI survey*, EFCI, October 2004, p. 8.

<sup>12</sup> Hungary and Slovakia have been excluded from this calculation since no figure were available in 2001.

<sup>13</sup> *The cleaning industry in Europe. An EFCI survey*, EFCI, July 2003, p.13; *The cleaning industry in Europe. An EFCI survey*, EFCI, October 2004, p.9.

<sup>14</sup> *ibidem*, p. 9.

Spain	6,500	15,486 (INE, 2003)
Sweden	4,793	5,910 (SCB, 2003)
United-Kingdom	8,500	10,633 (Annual Business Inquiry, Office for National Statistics, 2002)

Note: The differences between the data proposed in this table are due to the different time periods and to the definitions, concepts and methodologies used in the different sources. For more details, see the national summaries.

## Employment

According to EFCI, more than 2.7 million people were employed in the cleaning industry in 2002 (including Norway, Czech Republic, Hungary, Slovakia; excluding Greece and Ireland). It represented an increase of 1.64% with regard to the previous year, against 3.9% in 2001. On average, the annual employment growth over the last 14 years is close to 3%. Germany is the largest employer in the cleaning industry, followed by the United Kingdom, France, Spain and Italy<sup>15</sup>.

### *Employment in the industrial cleaning by country*

Country	Number of employed people	
Source	EFCI Survey – data 2002 <sup>16</sup>	National reports
Austria	48,000	38,061 employees (WKÖ, 2001)
Belgium	43,555	39,000 (NACE-BEL 74.70, ONSS, 2002) 45,000 (IR Definition; ABSU-UGBN, 2003)
Denmark	59,000	58,131 workers 42,196 salaried workers (Danmarks Statistik 2003)
Finland	32,600	25,000 people (NACE 74.7) + 5,000 cleaners in other sectors, of which 22,000 SW
France	353,180	251,548 employees (INSEE, 2001) 225,000 employees (FEP)
Germany	685,000	685,000 (BIV, 2002)
Greece	ND	ND
Ireland	30,000 (data 2001)	Between 16,000 and 31,000 according to the sources
Italy	292,000	339,574 workers; 303,593 SW (ISTAT, 2001)
Luxembourg	4,235	5,053 SW (Chamber of Craft, 2004)
Netherlands	200,000	About 170,000 workers (estimate, 2004)
Portugal	45,600	45,051 workers (DETEFP, 2000) 49,358 workers (INE, 2001)
Spain	348,402	360,000 workers; 350,000 SW (INE, 2003)
Sweden	45,000	45,500 workers; 41,000 SW (SCB, 2003)
United Kingdom	400,000	421,000 (total employment, Annual Business Inquiry, Office for National Statistics, 2002)

Note: The differences between the data proposed in this table are due to the different time period and to the definitions, concepts and methodologies used in the different sources. For more details, see the national summaries.

SW: salaried workers, employees

### *Characteristics of employment*

Employment in the industrial cleaning sector is mainly composed of operational cleaning staff (blue-collar workers). Technical and administrative staff, and managers and executives represent a small part of the workforce. About 86.2% of the workforce in 2002 were blue-collar workers<sup>17</sup>. Traditionally, women constitute the majority of the workforce since they accounted for about 76% of the workforce in the European Union in 2002<sup>18</sup>. The workforce in this sector is also characterised by a high presence of employees of non-national origins: migrant workers or their descendents, ethnic minorities, etc. If we take into

<sup>15</sup> *Ibidem*, pp. 11-14.

<sup>16</sup> *Ibidem*, p. 12.

<sup>17</sup> *Ibidem*, p. 18. This figure takes into account the following countries : Austria, Belgium, Denmark, Germany, France, Luxembourg, the Netherlands, Portugal, Slovakia, Sweden and the United Kingdom.

<sup>18</sup> *Ibidem*, p. 17. This figure includes Austria, Belgium, Czech Republic, Germany, Denmark, Spain, Finland, France, Italy, Luxembourg, the Netherlands, Portugal, Slovakia, Sweden and the United Kingdom.

account the following countries: Austria, Belgium, France, Ireland, Luxembourg, the Netherlands and Portugal, immigrant employees are estimated to be 32%<sup>19</sup>. Generally, the workforce is low-skilled and earns low salaries. In this respect, it is worth noting that there are some differences between the various sub-sectors and activities: for example, unskilled workers are frequent in traditional cleaning, whereas the chimney sweeping sub-sector is characterised by a skilled workforce. Furthermore, this situation is generally changing in the entire sector, due to the professionalisation of the sector, and the diversification and the specialisation of cleaning activities (with the appearance of new techniques and new technologies). Consequently, new training and education programmes are being set up in the sector.

In Europe, more than 2/3 of the cleaners carry out their activities on a part-time basis. The average duration of work is close to 20 hours per week. This results in the fact that cleaning activities are mainly performed at times when the users of the premises are not there. Cleaning activities are generally performed either late in the afternoon or early in the morning. Night work is generally limited to specific situations, such as cleaning of certain industrial premises, airports, etc. Day-cleaning remains limited (with the exception of Denmark and Sweden)<sup>20</sup>. However, the development of day-cleaning is one aspect of the development of the profession. This would lead to the increasing of the number of people in full-time employment. The sector is also characterised by significant staff turnover, caused, in some countries, by a high level of temporary work and short fixed-term contracts, but also, in all countries, by the importance of clandestine or partially declared work.

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<sup>19</sup> *Ibidem*, p. 17.

<sup>20</sup> *Ibidem*, p.16 and *The cleaning industry in Europe. An EFCI survey*, EFCI, July 2003, p.22-23.

# SOCIAL DIALOGUE IN THE INDUSTRIAL CLEANING SECTOR

## Collective bargaining in the Member States (UE15)

### Characteristics of collective bargaining

The various systems of collective bargaining in the 15 UE countries taken into account in this study may be structured in different ways:

- The structuring of collective bargaining may be vertical, i.e. national, regional, local;
- It may be functional, namely by sub-sectors, by activities;
- In some ways, the structuring also depends on the different categories of employees;
- In many cases, the organisation of collective bargaining in the cleaning sector combines several of these criteria.

### *Structuring of collective bargaining by country*

<b>Austria</b>	Collective bargaining takes place exclusively at sector level. The structuring is influenced by employees' categories, by sub-sector affiliations (chimney sweeping sub-sector, others) and, in some cases, by regional divisions (some collective agreements are limited to some regional areas).
<b>Belgium</b>	In Belgium, collective bargaining takes place mainly at sector level within the Joint Committee for Cleaning and Disinfection Enterprises (121) and the National Joint Committee for White-collar Workers (218). The first committee covers blue-collar workers of the cleaning sector, whereas the second one covers white-collar workers of many sectors.
<b>Denmark</b>	The Danish model of collective bargaining is characterised by centralised decentralisation. Some elements, such as personal pay supplements, are settled at enterprise level, but pay rates are usually fixed by a standard wage agreement that is covered by sector collective agreements.
<b>Finland</b>	Collective bargaining functions mainly at sector level but is also influenced by national tripartite negotiations. One of the current stakes is to build a pattern of negotiation functioning at company level.
<b>France</b>	There are, in France, three different collective agreements: one for the Cleaning ( <i>Propreté</i> ) branch, one for the national railways maintenance and related activities, and one for disinfection, pest control and rat extermination. The sector level is the most important and negotiations take place within Joint Collective Agreement Committees. Enterprise and workplace levels are very weak and almost inexistent in small enterprises.
<b>Germany</b>	In Germany, collective bargaining takes place at national level (framework agreements: pay scales, statutes, etc.), at regional level (pay level, pay increase, etc.) and at company level.
<b>Greece</b>	In Greece, there are three collective agreements concerning cleaners: the commerce sector collective agreement, the provision of services collective agreement and the manufacturing industry cleaners' agreement.
<b>Ireland</b>	In Ireland, one part of the cleaning industry is covered by law. For the remainder, a voluntary framework of centralised or national collective bargaining is available: one part of employees is covered by the Employment Regulation Orders (contract cleaning of interiors of premises and buildings) and another part is covered by a voluntary agreement (other industrial, janitorial and cleaning activities).
<b>Italy</b>	In Italy, collective agreement is structured as well by levels as according to the type of companies: at national levels, there are two national industry wide agreements (CCNL): there is a collective agreement for cleaning companies, disinfecting, exterminating and sanitation, and another one for craft cleaning companies (there is also one agreement, very marginal, covering small firms and co-operatives' employees). Furthermore, there are regional and provincial collective agreements.
<b>Luxembourg</b>	One collective agreement covers blue-collar workers in the cleaning sector.
<b>Netherlands</b>	In the Netherlands, a collective agreement for workers in the cleaning sector (SBI 7470.1) is concluded within the Council for Labour Relations in the (window) cleaning sector. Another one covers the cleaning of transportation and other cleaning (SBI 7470.2).
<b>Portugal</b>	In Portugal, two collective agreements are concluded at sector level between the employers' organisation AEPSSLAS and different trade unions. Collective agreements are also negotiated at company level; they deal with the increasing of remuneration and with working hours.
<b>Spain</b>	Collective bargaining in the Spanish cleaning sector takes place mainly at autonomous community and province levels. Each autonomous community and province has its own collective agreement. National level negotiations are limited to the National Agreement for Continuous Training. Some unions are now bargaining for the first General Framework Agreement for the sector. Unification of collective bargaining within a national framework is one important issue for companies that operate in different territories.
<b>Sweden</b>	In Sweden, there is one collective agreement for cleaning and sanitation companies and another for chimney sweeping companies.

<b>United Kingdom</b>	As is the norm in the United Kingdom, when pay bargaining takes place, it does so at the level of the individual employer.
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Source: national reports

In many countries, sector collective agreements cover a large percentage of employees in the sector: in Belgium, all enterprises covered by the Joint Committee 121 are covered by the collective agreement; in the same way, all enterprises and employees of the sector are covered by collective agreements concluded in Luxembourg, in Finland, in Germany and in Spain. In the Netherlands, there is an extension procedure permitting the coverage of almost all employees of the sector. In Portugal, 100% of enterprises and employees are also covered due to the publication of the CCT Decree Law. In Italy, there is an "erga omnes" practice of extension of collective agreements and, even if it is difficult to estimate exactly, most employees in the sector are covered. Lastly, in Sweden, about 85 to 90% of employees are covered by collective agreements (cleaning and sanitation companies sub-sector).

## Main issues of social dialogue

There are, in Europe, issues and concerns that are common to all national social dialogues. The main themes that are discussed are the following:

- The improving of purchasing power in order to make the sector more attractive: salary increases, bonuses, holiday benefits, etc.
- Working hours, part-time employment, evening and night working hours
- Precariousness of employment, fixed-term contracts, agency work
- Overtime payments, Sunday working pay
- The transfer of undertakings and the protection against dismissals
- Combating unfair competition (clandestine work, economically dependent workers, cascade of subcontracting, etc.)
- Access to vocational training for employees
- Health and hygiene safety

Other issues are also touched on, such as time-credit schemes, pension schemes, job classifications, transport costs, leaves of absence, contracts, sick pay schemes, maternity leave, etc.

## The social dialogue at European level

### Introduction

Generally speaking, it can be said that the cleaning industry is a sector in rapid and constant evolution. The trends affecting the sector are influencing social dialogue at European level. The main form of the outcomes of this social dialogue are, on the one hand, recommendations and work programmes and, on the other hand, practical tools such as guides and training tools. Social dialogue at European level was set up at the beginning of the 1990s. A sector social dialogue committee was then established in 1999 under the aegis of the European Commission. The partners who participate in the social dialogue at European level and sit in this committee are the European Federation of Cleaning Industries (EFCI) on the one hand and UNI-Europa - Property Services Sector on the other hand. It is worth noting that Union Network International (UNI) was established in 2000 by the merger of four international trade union organisations. Before this merger, the workers of the cleaning sector were represented in European social dialogue by Euro-FIET.

For the European social partners, the main issues for the cleaning industry are the improvement of the sector's image, the professionalisation of the industry and the creation of career perspectives for employees in the sector, the development of an "employee loyalty" (*fidélisation*) with the transition from part-time work to full-time work and the transition towards day-cleaning, the fight against unfair competition and health and safety at work. Furthermore, enlargement and organisation of social dialogue in the new member States involves the participation and the support of the European social partners.

The joint texts and joint initiatives presented below show how these issues are addressed in the European social dialogue.

## Joint texts worked out at European level

### *Recommendation by EFCI and Euro-FIET on the application of certain provisions of the Directive on the organisation of working time, 17 December 1993*

This recommendation expressed the reaction of both social partners in the respect of the Community Directive on the organisation of working time<sup>21</sup>. They considered that the granting of daily rest periods of 11 consecutive hours and of weekly rest periods of 35 consecutive hours did not facilitate the organisation of employment in the sector, access to full-time work or the development of professionalism or of the accompanying training. Thus, a derogation was proposed by social partners for companies and employees of the sector, in exchange for compensatory rest periods or, if not possible, for financial compensation for workers<sup>22</sup>.

### *Guidelines on vocational training adopted by EFCI and Euro-FIET, 9 February 1995*

The aim of this text was to promote the conditions for a general introduction of training in the cleaning industry by providing considerations that could be taken up by individual countries according to their needs and preoccupations: *EFCI and Euro-FIET stress the importance of training in the cleaning sector and its key role in developing professionalism, improving the quality of the service for the client and the quality of employment for workers in the sector.* The reflection was structured in two parts:

- The first one deals with training.
- The second one deals with other elements such as acquisition by migrant workers of the language of the host country, health and safety protection for employees as an integral part of vocational training, access to Community funding and support for the setting up of training programs in the industrial cleaning sector, and sector-specific evaluation of job-creation potential<sup>23</sup>.

### *Joint Memorandum by EFCI and Euro-FIET on new sources of employment, 21 October 1996*

The aim of the Joint Memorandum worked out in 1996 was to contribute to the improvement of job opportunities in the sector. In their opinion, cleaning services for private individuals could represent a major source of new jobs. The current situation, at that time, was that cleaning services did not reach private individuals because of the costs / prices of these services and because of the existence of an underground economy in this area. EFCI and Euro-FIET thus proposed to work together to :

- Help to meet new or unsatisfied cleaning needs of private individuals
- Contribute to the creation of skilled jobs
- Improve the image of the cleaning profession and of the firms and people providing cleaning services to private individuals

They also suggested that public authorities grant financial support to help fund the demand of private individuals for cleaning services, providing a deterrent to clandestine work<sup>24</sup>.

### *Common declaration from EFCI and Euro-FIET on undeclared work, A contribution from the European Social partners of the Cleaning Industry to the 1999 Employment Guidelines, 4 December 1998*

EFCI AND Euro-FIET expressed their support, in this text, for the fight against undeclared work, in the context of the initiative launched in this respect by the European Commission in the 1999 Employment Guidelines.

EFCI and Euro-FIET expressed their willingness to follow-up, regularly and in concrete terms, the situation in the cleaning industry at European, national and local levels, in co-operation with the authorities concerned, in order to detect problems, to

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<sup>21</sup> Council Directive 93/104/EC of 23 November 1993, *concerning certain aspects of the organisation of working time.*

<sup>22</sup> *Cleaning industry. European social dialogue*, EFCI, UNI-Europa, 2001.

<sup>23</sup> *Ibidem.*

<sup>24</sup> *Ibidem.*

solve them and to record the progress achieved. They also wished to undertake regular campaigns on this subject, addressed to their members or affiliated associations, as well as to public administrations. They outlined the role of vocational training in order to develop the quality and the qualifications of the companies and employees. They also called upon the European Commission and the national governments for positive and effective measures to support the creation of qualified jobs and for measures favouring declared work (tax policies for example)<sup>25</sup>.

***Agreement between EFCI and Euro-FIET on establishing a committee for social dialogue in the cleaning sector, 18 December 1998***

This Agreement formed the joint desire of EFCI and Euro-FIET to pursue social dialogue at European level by establishing a sector committee. This committee would be the place for exchanging information, setting up joint projects, promoting joint initiatives with European institutions, drawing up declarations and common positions and participating in joint consultations in the context of the procedure for consultation of European Social partners laid down in Articles 3 and 4 of the Agreement on Social Policy (Article 118a of the Treaty).

In terms of content, the common objectives of this social dialogue would be the following:

- A better consistency and continuity between the European and the national levels
- Developing actions intended to improve the sector's professionalism, image and status
- Establishing the conditions for promoting and exploiting the sector's employment potential
- Continuing and improving work that promotes vocational training in order to improve skill levels, salaries, the quality of the services provided and workers' career opportunities
- Discussions on the integration of employees into the sector
- Developing social dialogue on the constraints and developments in the organisation of work, the flexibility of working time, on the problems and characteristics of the sector (part-time work, flexi-time, market constraints, etc.)
- Promoting a positive framework for developing a competitive cleaning industry, with healthy conditions and equitable working conditions
- Establishing contacts with sector social partners in Central and Eastern countries<sup>26</sup>.

***Joint declaration EFCI / UNI-Europa. The social partners of the cleaning and the EU enlargement towards the Central and Eastern European Countries (CEECs), 1 January 2001***

This declaration wished to contribute to the process of enlargement. Concerning the particular sector of the cleaning industry, they proposed these measures, as necessary for the harmonious development of the industry in Europe:

- The organisation of the industry in the CEECs
- Support in setting up of employers' and employees' independent representative organisations
- The support to the development, between these players, of an articulated social dialogue
- The creation of close links between these players and EFCI and UNI-Europa
- The participation of these social partners in the work lead at European level by EFCI and UNI-Europa
- The development and the support from European Union of professionalisation and working conditions in the industry, in the CEECs, as well as its structuring and the improvement of its image<sup>27</sup>.

***Report on the study into key issues of the industrial cleaning sector in Europe. EFCI and UNI-Europa joint conclusions, 31 January 2001***

On the basis of the conclusions of a survey carried out by Pye-Tait on the industrial cleaning sector in Europe, EFCI and UNI-Europa decided to promote a positive image of the cleaning industry at European, Member State and local level. They

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<sup>25</sup> *Ibidem*.

<sup>26</sup> *Ibidem*.

<sup>27</sup> *Ibidem*.

wished to encourage public authorities and other clients not to take into account only financial criteria during the awarding of contracts regardless of the social, economic and human costs that can arise from this, such as social dumping, false self-employment and black market. They focused on improving working conditions, promoting equal opportunities, the professionalism of the industry and the competences of employees with the aim improve the image of the sector and to make the quality criteria of the services in awarding contracts<sup>28</sup>.

#### ***Joint contribution on employment, 20 February 2001***

In the context of the guidelines for employment in 2001 (European Council), EFCI and UNI-Europa recognised the importance to implement policies that aim to develop a stable and quality employment and protect environment. In order to favour employment in the cleaning sector, UNI-Europa and EFCI had endeavoured to:

- Promote the sector professionalisation by developing vocational training, developing real career prospects for employees in the sector and promoting, if possible, full-time employment and day-cleaning
- Establish conditions which allow new employment opportunities to be developed, such as, among others, cleaning services to individuals, involving the creation of health competition between companies, the fight against undeclared work and para-fiscal measures as incentives for the creation of jobs
- Improve the sector's image through the promotion of the quality of services provided and encourage clients to take into account the quality of services as a criterion for awarding cleaning contracts<sup>29</sup>

#### ***Common recommendations of the European social partners for the cleaning industry, 1 March 2004***

The EFCI and UNI-Europa set up in March 2004 common recommendations for the cleaning industry in order to formalise fundamental principles which have guided their work for over 10 years of European social dialogue. These recommendations are addressed to cleaning companies, employees, clients (public and private) and to public authorities (European, national, local). This document focuses on the following points:

- Promoting professionalism of cleaning companies and their employees (with the fundamental role of vocational training), and the recognition by purchasers and users of this professionalism.
- Encouraging the development of healthy competition in the sector: using the quality criterion of the services (and not the lowest price" criterion), combating unfair competition and illegal and unprofessional practices, etc.
- Employee retention and rendering the sector more attractive, by the promotion of full-time work, the promotion of daytime work, by improving the health and safety of employees
- Promote social integration (by, among other means, cooperation between the social partners and public authorities responsible for employment, and initiatives in the area of literacy / language skills if immigrant populations) and combat discrimination (based on gender, ethnic and national origin, etc.)

The first step of implementing these common recommendations is the adoption of a European Social Dialogue Committee work programme, which proposes a more concrete framework of actions and initiatives (see below)<sup>30</sup>.

#### ***The framework programme of the social dialogue committee in the cleaning industry, 1 March 2004***

The Framework programme adopted by the European social partners in the cleaning industry in March 2004 is articulated in five themes:

- Knowledge of national systems: Given the diversity of national systems in Europe, reinforced by the enlargement of the European Union, the EFCI and UNI-Europa would like to develop a comparative survey of national systems, including an analysis of the systems of collective bargaining and an analysis of the systems of vocational training in the industry.

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<sup>28</sup> *Ibidem*.

<sup>29</sup> *Ibidem*.

<sup>30</sup> *Common recommendations of the European Social Partners for the cleaning industry*, EFCI, UNI-Europa, 1 March 2004.



- Vocational training: The EFCI and UNI-Europa would consider the development and the promotion of vocational training as a priority and they would like to continue their work and reflection in this area. In particular, they aim at setting up practical training tools related to specific activities or functions and meeting the needs expressed by their respective members; anticipating the needs of the profession regarding professional skills.
- Health and safety at work: The social partners would like to continue their work in this area and develop additional preventative tools aimed at specific activities or situations. Among other activities, they will start by editing a manual on Ergonomics in cleaning activities.
- Development and recognition of the profession: In this respect, EFCI and UNI-Europa have launched a series of initiatives, amongst which the guide on selecting best value in public procurement. The social partners will ensure the promotion of this guide and its transposition into national legislations. Furthermore, EFCI and UNI-Europa also consider that the recognition of the industry implies promoting the development of full-time work and of increased contractual hours for part-timers, as well as of daytime work.
- Anticipation and management of change: Given the fact that the industry is changing (diversification of the activities, changes in market forces and structures, flexibility, etc.), the EFCI and UNI-Europa wish to address these issues in the social dialogue, to make joint diagnostics and to find possible solutions allowing anticipation and preparation of the future<sup>31</sup>.

***The joint declaration on best value and against electronic auctions in the framework of public procurements, adopted on 17 September 2004***

Adopted in March 2004, the European directive relating to the procedures for the award of public services, works and supply contracts must now be transposed into the legal systems of the Member States of the European Union. In this context, the EFCI and UNI-Europa, European social partner representatives of the cleaning industry sector, have decided to call upon the local, regional, national and European contracting authorities, to base their selection procedures for service providers on the economically most advantageous tender, rather than the lowest price tender. In order to promote the quality of services and to professionalise the sector, the EFCI and UNI-Europa have published a guide designed for contracting authorities. It serves as a practical tool aiming to guide authorities through the different phases of analysing and awarding public contracts by offering an objective system of quality criteria. The EFCI and UNI-Europa are also particularly concerned about the development toward the award of public procurements by way of electronic auction and they call upon the national and European public authorities to exclude cleaning services from the procedures of calls for tenders by electronic auction<sup>32</sup>.

### **Joint projects<sup>33</sup>**

Besides these joint declarations and texts, the EFCI and UNI-Europa – Property Services have also been working on joint projects such as the setting up of research projects or studies with the aim of reporting the situation with regard to some issues particular to the sector, to draw up recommendations concerning these issues and to circulate information to the different parties and levels concerned. The studies carried out are the following:

- A joint study on the legal and contractual provisions relating to the organisation of working time in the cleaning sector (data collected for 12 countries, 1993)
- A research project on "forecasts for the evolution of qualification and training in the industrial cleaning sector" (recommendations concerning the professional profiles and the corresponding vocational training)
- A study on new sources of employment intended to explore the possibilities of extending industrial cleaning to new markets, in particular that of domestic cleaning

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<sup>31</sup> *The framework programme of the social dialogue committee in the cleaning industry*, EFCI, UNI-Europa, 1 March 2004

<sup>32</sup> <http://www.union-network.org/uniproperty.nsf/2e5f682eae37a587c1256b3c00484a79/0d26eafda332a6cdc1256f24002c886c?OpenDocument>

<sup>33</sup> See *Cleaning industry. European social dialogue*, EFCI, UNI-Europa, 2001 ; consultation of EFCI, October-November 2004.

- A guide concerning domestic cleaning services (recommendations for setting up training programmes on the basis of a comparative analysis of the national situation in four countries)
- The "Pye-Tait" report on the cleaning sector in Europe (covering five themes of interest for the sector: public procurement contracts, "false" self-employed people, undeclared labour, sub-contracting and equal opportunities)

The two organisations have also been working on the elaboration of tools such as:

- A training kit for basic cleaning techniques (manual including eight training modules)
- A health and safety training manual for workers in the cleaning sector (information and training tool for employees)
- "Selecting best value", a guide for those in charge of awarding contracts for cleaning services.

Lastly, a European conference was organised on 17 September 2004 on best value in public procurement, which was aiming at launching the Guide published in 2003 and which is followed up by 8 national round tables on the same issue (they are organised by national employers' and trade unions' organisations).

# THE EUROPEAN EMPLOYERS' AND EMPLOYEES' ORGANISATIONS AND THEIR AFFILIATES

## Methodological remarks

Caution is called for as regards to the numerical data presented in this study. We have previously touched on the differences that exist between the delimitations of the sector at national level and the differences of counting methodologies from one country to another. This can cause difficulties in comparing data of the fifteen countries taken into account. For more details concerning definitions and methodologies used for each country, refer to the national reports.

## The European Federation of Cleaning Industries (EFCI)

The European Federation of Cleaning Industries (EFCI) was founded in 1988 and brings together the national professional associations representing the cleaning industries in Europe.

### The operating structure of the EFCI

- The General Assembly is the governing body responsible for all policy matters. It meets twice a year and is open to all members.
- The Board of Directors is charged with the implementation and follow-up of its major policy lines. It meets on an average of five times a year.
- The work is prepared in Committees and in working groups.
- The Secretariat is responsible for co-ordinating all the work and is composed of a director, an adviser and an administrative assistant

### Objectives and activities of the EFCI

The objectives of the organisations are the following:

- Establishing, at Community level, a general framework and conditions favourable for the development of the economic and social potential of the cleaning sector in Europe;
- Implementing an active policy to improve the profession's image at Community level;
- Developing and facilitating the professionalisation of the cleaning sector, in particular through exchanges of best practices and the transfer of experiences between its members, including at company level.

The activities of the organisation focus on three main areas:

- The development of markets and activities: the Committee for Economic Affairs is charged with identifying and monitoring potential developments in the sector, in particular through the annual collection of quantitative data and statistical indicators; it is also responsible for defining the conditions that are necessary for the smooth functioning of procurement contracts; and it is responsible for supervising and studying the development of new activities offered by companies.
- The development of services: the EFCI Technical and Quality Committee is involved in drawing up a Community standard concerning the controls on the quality of cleaning services; it has a responsibility for monitoring the changes related to new techniques and new products and providing the member federations and cleaning companies with tools and practical guides to enable them to successfully integrate these new developments.
- The management of human resources: the EFCI Social Affairs Committee is responsible for monitoring European social policy developments and ensuring that the interests of employers are taken into consideration. In this respect, social

dialogue plays an important role and addresses questions, which, among others are fundamental with regard to the professionalisation of the sector<sup>34</sup>.

### Elements of representativeness of the organisation

EFCI has members in 13 of the 15 countries taken into account in this study. EFCI has no affiliated member in Ireland and in Greece<sup>35</sup>. Generally speaking, the organisation members of EFCI include the main or some of the main employers' organisations in the sector. All of these organisations take part in collective bargaining for the cleaning sector. In the United Kingdom, the member of EFCI does not take part in collective bargaining, but there are no collective negotiations at sector level. Furthermore, the organisations member of EFCI generally represent a relatively high density of the employment in the sector. In the most cases, they represent particularly the large companies of the national cleaning industries.

It is also worth noting that, in many cases, the other organisations that are not members of EFCI often represent a more minor sub-sector (such as chimney sweeping; rail and air maintenance; disinfection, extermination and pest control), employers' organisations that negotiate for a minor category of employees (white-collar workers), or a particular category of enterprises (SMEs, co-operatives).

For more details, see the table below and the national reports.

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<sup>34</sup> *Cleaning industry. European social dialogue*, EFCI, UNI-Europa, 2001.

<sup>35</sup> In addition, the organisation mentions that it has members in new member States (Czech Republic - CAC, Hungary – Matisz, Slovakia – SAC). These countries are not covered by this study.

*Affiliated organisations in the European Union Member States*

Country	Organisation	Covered sector	Companies	SW	Density companies	Density SW	CB	National affiliations	European and international affiliations
Austria	BIC (The Federal Organisation of the Chemical Crafts)	Cleaning, disinfection, extermination + craft production of pharmaceuticals, perfumes and toilet preparations, chemical laboratories	Total: 1,014 NACE 74.7: about 787	Total: 38,061 NACE 74.7: about 32,000	100% of the sub-sectors covered	100% of the sub-sectors covered	Yes		EFCI, CEPA
Belgium	UGBN/ABSU (Belgian Federation of Cleaning Contractors)	Cleaning, disinfection, industrial cleaning, sweeping chimneys, waste processing.	207	About 34,200 blue-collar workers	13%	76% of the blue-collar workers	Yes	FEB	EFCI, WFBS
Denmark	SBA (Association of Service Sector Employers)	Ordinary cleaning, specialised cleaning, disinfection and extermination activities	86	22,000	NACE 74.70: 1.3% Sub-sectors covered: 1.6%	NACE 74.70: 52.1%	Yes	HTS Indirectly: DA	EFCI Indirectly: UNICE
	VPA (Association of Window Cleaning Employers)	Window cleaning	50	800	NACE 74.70: 0.8% Sub-sectors covered: 4.1%	NACE 74.70: 1.9%	Yes	HTS Indirectly: DA	EFCI Indirectly: UNICE
Finland	Kiinteistöpalvelutry (Property Maintenance Association)	Cleaning, special cleaning, property maintenance, technical maintenance	2,610	22,000	13%	75%	Yes	PT	EFCI, Indirectly: UNICE
France	FEP (The Federation of Industrial Cleaning Companies)	Basic cleaning, specialist cleaning, cleaning rugs and carpets	1,800	ND	15.5% (of the sub sector covered)	About 70% (Estimate; of the sub sector covered)	Yes	MEDEF, CGPME	EFCI, Fédération Mondiale du Nettoyage Industriel
Germany	BIV (Federation of Guilds in the Building-Cleaning Trade)	All	2,500	ND	38%	87%	Yes	BFH Indirectly: ZDH, BDA	EFCI, FIDEN Indirectly : WFBS,
Italy	ANIP (National Association of Cleaning firms)	Cleaning	About 300	ND	1.2%	9.9%	Yes	FISE, Confindustria	Indirectly: EFCI through FISE, UNICE
Luxembourg	FLEN (Luxembourg Federation of Enterprises in the Buildings Cleaning Sector)	Cleaning	54	ND	67.5%	ND	Yes	Federation of Small and Medium-sized Enterprises	EFCI
Netherlands	OBS (The Business Confederation)	Cleaning (SBI 7470.1)	650	140,000	11%	About 82% of the sub sector covered	Yes	VNO-NCW	EFCI

<b>Portugal</b>	AEPSLAS (Association of Enterprises Providing Cleaning and Related Services)	Cleaning and similar services	70	27,000	Between 4.8 and 8.9%	Between 54.7 and 59.9%	Yes	CCP	EFCI, FIDER, WFBSC
<b>Spain</b>	ASPEL (The Professional Association of Cleaning Companies)	All	14	110,000 <sup>36</sup>	0.1%	31.4%	Yes	CEOE	EFCI Indirectly: UNICE
	FENAEL (The National Federation of Employers Associations of Building and Establishments Cleaning) <sup>37</sup>						No	-	-
<b>Sweden</b>	Almega tjansteförbunden (The Almega Service associations)	Cleaning companies, disinfecting	760	40,000	14% (of the sub sector) 35% (companies with SW in the sub sector)	About 90%	Yes	Svenskt Näringslivs Confederation of Swedish Enterprises	EFCI Indirectly: UNICE
<b>United Kingdom</b>	The Cleaning and Support Services Association	Cleaning and support services	ND	ND	ND	ND	No*		EFCI

Companies: number of cleaning companies affiliated

SW: salaried workers working in the companies affiliated

Density companies: number of companies affiliated / total number of companies in the sector

<sup>36</sup> This data is much debated: ASPEL firstly mentioned a membership of 170,000 workers. AFELIN disagreed with this number and the actors came to an agreement with the figure of 110,000 workers (March 2004). The ASPEL now contests this figure and declare that its membership consists of 136,000 workers (30% of the sector).

<sup>37</sup> According to the ASPEL (EFCI consultation, October-November 2004), the FEL and the FENAEL do not exist anymore. The data collected for this report are based on interviews realised in February and March 2004. At this moment, the author mentioned that FENAEL was on a dissolution process and that the FEL showed an uncertain future as a representative organisation. The report reflects the situation of this period.

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

\* There is no collective bargaining at sector level

## UNI-Europa – Property Services Sector

UNI-Europa is the European regional organisation of Union Network International (UNI). It was established on 1 January 2000 by the merger of four international trade union organisations. Responsibility for the cleaning sector comes under the jurisdiction of the Property Services sector within the organisation<sup>38</sup>.

### The operating structure

UNI-Europa is structured as follows :

- The highest governing body of UNI-Europa is the Regional Conference, which takes place every four years and where all affiliates are represented.
- The Regional Executive Committee is responsible of the UNI-Europa's matters during the periods between the Regional Conferences. This Executive Committee meets once a year. The Executive Committee is empowered to appoint sub-committees to assist it in its work.
- The Regional Management Committee is appointed by the Executive Committee; its responsibility is to "assist in the management of the region in between Regional Executive meetings". The President, the Vice-President and the Regional Secretary are members of the Regional Management Committee<sup>39</sup>.

In the UNI-Europa Property Services sector, representatives from affiliated unions meet generally on an annual basis to discuss issues and policy directly related to the cleaning sector. The sector also elects a President who leads the day-to-day running of the sector, in close co-operation with the Secretariat.

### Objectives and activities

The tasks of the UNI-Europa Property Services Sector are the following:

- To act as a co-ordinating body for affiliates in the cleaning industry
- To assist affiliates in the overall goal of increasing trade union membership in the industry
- To facilitate an exchange of information between national affiliates
- To work to improve and facilitate social dialogue with the recognised employers' organisation at European level
- To facilitate and assist the development of social dialogue at company level through European Works Councils
- To provide affiliates with a voice at European institutions
- To exchange information on developments in collective bargaining in the industry

Thanks to these tasks, UNI-Europa seeks to improve the sector's image in the public perception, to improve basic training levels of the cleaning industry employees, to improve and develop the professional health and safety standards in the sector, to professionalise the industry and allow its employees to real career structures and personal advancement, to inform decision-makers of the importance of the industry, to insure that decent social standards are maintained in all European countries and to combat the undeclared work carried out in the industry<sup>40</sup>.

### Elements of representativeness of the organisation

UNI-Europa represents, for the cleaning industry, organisations active in the 15 countries taken into account. It can be considered as the main European trade union in the sector. In many cases, UNI-Europa represent several trade unions in the same country. All the members of UNI-Europa participate in collective bargaining (in Austria, this participation is indirect; in the United Kingdom, this participation takes place at company level since there are no collective negotiations at sector

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<sup>38</sup> *Cleaning industry. European social dialogue*, EFCI, UNI-Europa, 2001.

<sup>39</sup> *UNI-Europa. Statuts*, Articles 6-10.

<sup>40</sup> *Cleaning industry. European social dialogue*, EFCI, UNI-Europa, 2001.



level). In several cases, the organisations that are not members of UNI-Europa represent specific category of workers (minor branch, white-collar workers, public employees, managers). For more details, see the table below and the national reports.

*Affiliated organisations in the European Union Member States*

Country	Organisation	Type of SW	Members	Members working in the sector	Density	CB	National affiliations	European and international affiliations
Austria	GHGPD (The Union of the Blue-collar Workers of Hotels, Restaurant and Personal Services)	Blue-collar workers; hotels, restaurants, personal services	50,131	ND	Between 30-40% of the employees covered (estimate)	Via ÖGB	ÖGB	EFFAT, UNI-Europa, UNI
	GPA (The Union of the White-collar Workers of the Private Sector)	White-collar employees; private sector	284,633	ND	About 10% of the employees covered (estimate)	Via ÖGB	ÖGB	UNI-Europa, UNI
Belgium	General Federation (FGTB)	Blue-collar workers	307,000	16,721	37%	Yes	FGTB	UNI-Europa, UNI Indirectly : ETUC
	CSC-AS (the Food and Services Section of the CSC)	Blue-collar workers	213,000	ND	ND	Yes	CSC	UNI-Europa, UNI Indirectly : ETUC
Denmark	SID (National Union of General Workers)	Window cleaning, disinfection.	325,250	325	0.8%	Yes	LO	ETUC, UNI-Europa, UNI
	KAD (National Union of Female Workers)	Cleaning	74,000	37,000	83%	Yes	LO	ETUC, UNI-Europa, UNI
	DFF-S (Danish Clerical Union) Sanitørernes fagforening (Cleaners' Union)	Cleaning	DFF-S: 22,000 Cleaners' union: 3,000	3,000	7.1%	Yes	LO	ETUC, UNI-Europa, UNI
Finland	Palvalulojenammaatiliitto PAM (Service Union United)	Salaried workers; Blue-collar	202,000	10,100	34%	Yes	SAK, Cleaning Sector Union	SUN, UNI-Europa, UNI
	Toimihenkilöunioni, TU (Union of Salaried Employees)	Salaried workers, clerical employees	122,000	1,800	7%	Yes	STTK	UNI-Europa, UNI
France	Service Federation - CFDT	All	70,000 in services	6,000-7,000 in the cleaning ( <i>propreté</i> ) branch	Between 2.5 and 3% (of the sub sector; estimate)	Yes	CFDT	UNI-Europa, UNI Indirectly : ETUC, IUF
	Equipment, Environment, Transport and Services Federation - CGT-FO	All	ND	ND	ND	Yes	CGT - FO	UNI-Europa, ETF, UNI Indirectly : ETUC, IUF, ITF
	Commerce, Services and Sales Federation - CFTC	All	ND	2,000	0.8%	Yes	CFTC	UNI-Europa, UNI Indirectly : ETUC, IUF
	FNES - CGC	Managers	ND	ND	ND	Yes	CFE - CGC	UNI-Europa, UNI Indirectly : ETUC, CEC, IUF

<b>Germany</b>	IG BAU (Construction, Agricultural and Environmental Workers Union)	All	500,000	48,000	7%	Yes	DGB	EFBWW, EFFAT, UNI-Europa, IFBWW, FSC, IUF, UNI
<b>Greece</b>	The Greek Federation of Private Sector Employees (OIYE)	Sales workers, workers employed in the provision of services, private security, cleaning, etc.	69,835 registered members 28,167 voting members	ND	ND	Yes	GSEE	UNI-Europa, UNI
<b>Ireland</b>	SIPTU (The Services Industrial and Professional Trade Union)		200,000	7,400	40%	Yes	Irish Congress of Trade Unions	UNI-Europa, UNI Indirectly: ETUC, ICFTU
<b>Italy</b>	FILCAMS (Italian Federation of Trade, Hotels, Canteen and Services Workers)	Trade, hotels, canteen and services workers	About 295,000	About 50,000	16.5%	Yes	CGIL	Indirectly: UNI-Europa, ETUC, EFFAT, UNI, ICFTU, IUF
	FISASCAT (Italian Federation of Trade, Services and Tourism Workers)	Trade, services, tourism workers	162,566	40,517 (2001)	13.3%	Yes	CISL	Indirectly: UNI-Europa, ETUC, UNI, ICFTU, IUF
	UIL Trasporti (Union of Italian Transport Workers)		104,512	About 18,000	5.9%	Yes	UIL	Indirectly: UNI-Europa, ETUC, UNI, ICFTU
<b>Luxembourg</b>	Trade Federation	Mainly blue-collar workers		640	12.6%	Yes	LCGB	UNI-Europa, ETUC, UNI
	Private Sector Cleaning Services Union	Mainly blue-collar workers	1,650	1,650	32.6%	Yes	OGB-L Indirectly: CGT-L	UNI-Europa, ETUC, UNI
<b>Netherlands</b>	FNV Bondgenoten (FNV Confederates)	Cleaning sector		12,000	7%	Yes	FNV	UNI-Europa, UNI
<b>Portugal</b>	SLEDA (Free Trade Union of Workers from cleaning, Reception Desk, Surveillance, Beneficence, Domestic and other similar services)	Low-skilled workers; mainly women workers	15,000	100	About 0.20%	Yes	UGT	UNI-Europa, ETUC, UNI, ICFTU
	SITese (Trade Union for Office, Trade, Services and New Technology Workers)		ND	ND	ND	Yes	UGT, FETese	UNI-Europa, ETUC, UNI, ICFTU
	FeS-UGT (Services State Federation of General Workers' Union)	All	100,000	35,000	10%	Yes	UGT	UNI-Europa, UNI Indirectly: ETUC, ICFTU
	ELA-ZERBITZUAK (Basque Workers' Solidarity)	Basque and Navarre countries	26,357	4,152	Spain: 1.2%; Navarre: 13%; Basque country: 34%	Yes	ELA	UNI-Europa, UNI Indirectly: ETUC

<b>Sweden</b>	Fastighetsanställdas Förbund F (The Swedish Building Maintenance Union)	Building maintenance workers, cleaners	39,802	12,968	About 32%	Yes	LO-S	UNI-Europa, UNI, ICFTU Indirectly : ETUC
	HTF (The Salaried Employees' Union)	White-collars, office employees, executives	158,000	1,920	About 5%	Yes	TCO	ETWF, NTF, UNI-Europa, UNI Indirectly : ETUC, Eurocadre
<b>United Kingdom</b>	TGWU (Transport and General Workers' Union)	All	Services sector: 900,000	ND	ND	Yes*	TUC	UNI-Europa, UNI Indirectly : ETUC
	GMB	All	700,000 members	5,000	ND	Yes*	TUC	UNI-Europa, UNI Indirectly : ETUC
	PCS (PCS Public & Commercial Services Union)	Civil services + privatised areas	310,000 members	ND	ND	Yes*	TUC	UNI-Europa, UNI Indirectly : ETUC

Companies: number of cleaning companies affiliated

SW: salaried workers working in the companies affiliated

Density companies: number of companies affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

\* At company level

## **TRADE UNIONS AND EMPLOYERS' ORGANISATIONS NOT AFFILIATED TO EFCI AND UNI-EUROPA IN THE MEMBER STATES**

You will find in the tables below employers organisations and trade unions that operate in the cleaning sector in the European Union member states and that are not affiliated to EFCI and UNI-Europa.

In spite of the objection made by EFCI during the consultation stage, we maintained the integrity of this list, insofar as these organisations play a part, even if a minor part, in the sector social dialogue. Indeed, on the one hand, these organisations may cover only a specific segment of the sector or, on the other hand, their main activity do not come within the specific scope of the cleaning sector (their membership domain is broader). However, they take part in social dialogue for the cleaning sector.

For more details on the organisations and their role in social dialogue, see the national reports.

*Employers' organisations that are not affiliated to EFCI*

Country	Organisation	Covered sector	Companies	SW	Density companies	Density SW	CB	National affiliations	European and international affiliations
Austria	BIR (The Federal Organisation of Chimney Cleaning)	Chimney cleaning	826	2,636	100% of the sub sector covered0	100% of the sub sector covered	Yes		ESCHFÖ
Belgium	FEB (The Belgian Federation of Employers)	All sectors; negotiate with employers for white-collar workers agreements	ND	ND	ND	ND	Yes		UNICE
Denmark	RSBA (Association of Cleaning services)	Ordinary cleaning; specialised cleaning; window cleaning; disinfection and extermination activities.	145	4,750	NACE 74.70: 2.2% Sub-sectors covered: 2.2%	NACE 74.70: 11.3%	Yes	DFSME	UEAPME
	Skorstensfejerlauget af 11. februar 1778 (Association of Chimney Sweeps)	Chimney Sweeping enterprises	169	500	NACE 74.70: 2.5% Sub-sectors covered: 100%	NACE 74.70: 1.2% Sub-sectors covered: 100%	Yes	DFSME	UEAPME
France	SAMERA (The Rail and Air Upkeep and Maintenance Union)	Cleaning SNCF and Paris underground platforms			About 98% (of the sub sector covered)	ND	Yes		
	CS3D (The Disinfection, Rat, Extermination and Pest Control Industry Chamber)	Disinfection, rat extermination and pest control	88	ND	ND	ND	Yes		
Greece	PASEP (The Pan-Hellenic Association of Cleaning Firms for indoors and outdoors, Waste Management and Protection of Environment)	Services, including cleaning firms	65	Around 3,000	ND	ND	Yes		
	GSEVEE (The General Confederation of Greek Small Business and Trades)	Commerce and manufacturing sector	(69 federations + 1,359 associations with 101,883 registered members)*	(About 203,000)*	ND	ND	Yes		

	ESEE (The National Confederation of Hellenic Commerce)	Commerce sector	(14 federations + 185 associations = about 50,000 enterprises)*	(About 125,000 employees)*	ND	ND	Yes		
	SELPE (The Association of Retail Business)	Commerce sector	ND	ND	ND	ND	Yes		
	SESME (The Association of Super-Market Companies)	Commerce sector	ND	ND	ND	ND	Yes		
	SEV (The Federation of Greek Industries)	Manufacturing sector	(560 companies + affiliated indirectly)*	(About 95,000 employees)*	ND	ND	Yes		
Ireland	IBEC (The Irish Business and Employers Confederation)	Contract Cleaning	19	14,000	6%	78%	Yes		UNICE, UEAPME, IOE
	At European level, it is a member of EFCI	Contract Cleaning	22	14,000	6%	78%	No	IBEC	
Italy	Unionservizi (National Union of Cleaning Companies)		About 700	About 40,000	2.8%	13.2%	Yes	Confapi	Indirectly: UEAPME
	ANCST (National Association of Service and Tourism Co-operatives)		495	66,436	2%	21.9%	Yes	Legacoop	Indirectly: ICA
	Federlavoro e Servizi (National Federation of Co-operatives of Labour and Production)		ND	ND	ND	ND	Yes	Confcooperative	Indirectly: ICA
	AGCI (AGCI Production and Labour Services Division)		448	21,334	1.8%	7%	Yes	AGCI	Indirectly: ICA
	FNIP (National Federation of Multi-Service Cleaning Companies)		About 350	About 30,000	1.4%	9.9-11.5%	Yes	Confcommercio	Indirectly: Eurocommerce
	Assopulizie (National Cleaners' Association)		ND	ND	ND	ND	Yes	CNA	Indirectly: UEAPME
	ANISP (National Association of Cleaning Entrepreneurs)		4,349	ND	17.3%	ND	Yes	Confartigianato	Indirectly: UEAPME
	CASA (Independent Confederation of Artisans' Organisation)		About 1,800	About 3,000	7.2%	1%	Yes		Indirectly: UEAPME
	CLAAI (Confederation of Italian Free Craft Associations)		ND	ND	ND	ND	Yes		

	CNAI (National Union of Entrepreneurs' Associations)		ND	ND	ND	ND	Yes		
<b>The Netherlands</b>	SITO (The Employers' Association in Ship-, Industrial-, Environment-, and Technical Maintenance Activities)	SBI 7470.2	ND	1,600	ND	About 47% of the sub sector covered	Yes	VNO-NCW	
<b>Portugal</b>	ANEL (National Association of Cleaning Contractors)		ND	ND	ND	ND	No		
<b>Spain</b>	AFELIN (The Federated Associations of National Cleaning Industries)	All	1,000	10,000	10%	28.6%	Yes	-	-
	FEL (The Cleaning Spanish Federation) <sup>41</sup>	All	39	12,500	0.3%	4%	No	-	-
<b>Sweden</b>	Sveriges Skorstensfejaremästares Riksförbund (SSR) (The Swedish Federation of Chimney Sweeps)	Chimney Sweeping	280	1,200 FTE Approx.: 1,700	About 85% (of the sub sector) About 95% (of enterprises with SW in the sub sector)	95%	Yes	-	ESCHFÖ

Companies: number of cleaning companies affiliated

SW: salaried workers working in the companies affiliated

Density companies: number of companies affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

FTE: Full-time equivalent

\* Data for all the members of the organisations and the employed people in these companies; not specific to the cleaning sector

***Trade unions that are not affiliated to UNI-Europa***

Country	Organisation	Type of SW	Members	Members working in the sector	Density	CB	National affiliations	European and international affiliations
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<sup>41</sup> According to the ASPEL (EFCI consultation, October-November 2004), the FEL and the FENAEL do not exist anymore. The data collected for this report are based on interviews realised in February and March 2004. At this moment, the author mentioned that FENAEL was on a dissolution process and that the FEL showed an uncertain future as a representative organisation. The report reflects the situation of this period.



<b>Austria</b>	GBH (The Union of the Blue-collar Workers of the Construction Industry and the Wood construction, Woodworking, Wood processing Industry)	Blue-collar workers; construction, woodworking, wood processing, chimney cleaning	158,065	ND	Between 10-15% of the employees covered	Via ÖGB	ÖGB	EFBWW
<b>Belgium</b>	CNE-GNC (the General Federation of White-Collar Workers-National Managers' Group)	White-collar workers	About 135,000 (2004)	About 250	ND	Yes	CSC	Indirectly: ETUC
	LBC-NVK (the General Federation of White-Collar Workers-National Managers' Union)	White-collar workers	About 255,000 (2004)	ND	ND	Yes	CSC	Indirectly: ETUC
	SETCa (the Belgian Union of White-Collar Staff, Technicians and Managers)	White-collar workers	311,251 (2002)	ND	ND	Yes	FGTB	Indirectly: ETUC
	CGSLB (the Federation of Liberal Trade Unions of Belgium)	White-collar workers	About 220,000 (2004)	ND	ND	Yes	-	ETUC
<b>Denmark</b>	FOA (National Union of Public Employees)	Cleaning	188,431	- 6,000 cleaning /blue collar - 200 white collar	NACE 74.70: 14.7%	Yes	LO	ETUC
	Blik og Rørforbundet (Danish Plumbers' Union)	Plumbing and sweeping chimneys	10,000	500	NACE 74.70: 1.2%	Yes	LO	ETUC
<b>Finland</b>	Valtion ja erityispalvelujen ammattiliitto, VAL (The Finnish National Union of State Employees and Special Services)	Salaried workers; blue-collar workers	27,000	1,450	5%	Not for private sector	VTY, Cleanijg Sector Union, FIPSU Indirectly: SAK	SUN, EPSU, PSI
	The Cleaning Sector Union		ND	ND	ND	Yes	ND	ND
<b>France</b>	Port and Docks Federation - CGT	All		20,000 (estimate, 2001)	10% (estimate, 2001)	Yes	CGT	ETF, Organisme Mondial pour les activités portuaires Indirectly : ETUC, ITF
<b>Italy</b>	UGL Igiene Ambientale (UGL Environmental Hygiene)		About 20,000	About 18,000	5.9%	Yes	UGL	
	FENASALC (National Federation of Autonomous Trade Unions of Trade Employees)		ND	ND	ND	Yes	CISAL	CESI

<b>The Netherlands</b>	CNV BedrijvenBond (CNV Business Confederation)	All	ND	2,700 in 7470.1 ND for 7470.2	1.6% in 7470.1 ND for 7470.2	Yes	CNV	Indirectly: ETUC, WCL
<b>Portugal</b>	SITESC (Trade Union for Office Workers, Services and Trade)		15,500	ND	ND	Yes	UGT	ETUC, ICFTU, FITM, IFWEA, FIET
	STAD (Trade Union for Caretakers, Watchmen, Cleaners and Similar Professions and Varied Activities)	Non-skilled workers; occupational qualifications	16,000	7,000	Between 14% and 15.5%	Yes	CGTP-IN, FEPCES	-
<b>Spain</b>	Services Federation of the Interunionist Confederation of Galicia	All (Galicia)	ND	3,500	Spain: 1% Galicia: 70%	Yes	CIG	-
	Services Area of Workers' Trade Unionist Union (USO)	All	7,923	2,500	0.7%	Yes	USO	Indirectly: WCL
	FAADD-CCOO (Diverse Activities Federation of Workers' Commissions)	All	55,000	35,187	10%	Yes	CCOO	Indirectly: ETUC, ICFTU
<b>Sweden</b>	Kommunal (The Swedish Municipal Workers' Union)	Cleaners and chimney sweepers	595,000	4,700	About 12%	Yes	LO-S	EPSU, EFFAT, EFT, European Confederation of Chimney Sweepers Trade Unions, PSI, IUF, ITF Indirectly: ETUC, ICU
	LEDARNA (The Swedish association for managerial and professional staff)	White-collar, middle management, executives and managerial staff	65,000	750	About 2%	Yes		CEC
<b>United Kingdom</b>	Unison – Ancillary and Maintenance section	Ancillary and maintenance staff	Unison: 1.3 million Ancillary and maintenance: 70,000	ND	ND	Yes*	TUC	ETUC
	USDAW	Varied	335,000	ND	ND	ND		

Companies: number of cleaning companies affiliated

SW: salaried workers working in the companies affiliated

Density companies: number of companies affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining

\* At company level

# AUSTRIA

## 1. Description of the sector

### Delimitation and scope of activities in the sector

In Austria, the more reliable statistics refer to the demarcation of the Federal Organisations (*Bundesinnungen*) of the Austrian Chamber of Business (*Wirtschaftskammer Österreich, WKÖ*). There are two federal organisations, which are relevant in this respect:

- The Federal Organisation of Chimney Cleaning (*Bundesinnung des Rauchfangkehrer, BIR*) covers the field of chimney cleaning.
- The Federal Organisation of the Chemical Trades (*Bundesinnung der Chemischen Gewerbe, BIC*) covers all fields of disinfection, extermination activities and cleaning (with the exception of chimney cleaning). It also includes the craft production of pharmaceuticals, perfumes and toilet preparations as well as the chemical laboratories.

### Socio-economic features of the sector

In 2000, this sector included 1,541 companies, with a total employment of 35,595, which includes 34,469 employees (Statistik Austria 2002).

Figures on company size, on blue- and white-collar employees and on employment by gender are available only for 1996. These statistics (see the tables below) follow the domains of the WKÖ's Federal Organisations.

Employment trends have been positive over recent years. As regards chimney cleaning, the number of employees increased from 2,201 in 1998 to 2,636 in 2001. The number of employees covered by the BIC expanded from 34,017 in 1998 to 38,061 in 2001 (Wirtschaftskammer Österreich n.d.).<sup>42</sup>

#### *Company size in 1996*

			Number of companies by firm size					
All companies			1-9	10-19	20-99	100-299	300-499	500 and more
Chimney cleaning	Number	719	695	E	E	0	0	0
	%	100.0	96.7	E	E	0	0	0
Chemical trades	Number	1,059	700	135	153	57	7	7
	%	100.0	66.1	12.7	14.4	5.4	0.7	0.7
Total		1,778	1,395	ND	ND	57	7	7

E: Embargoed because of the few number of cases

Source: Wirtschaftskammer Österreich (1997)

#### *Blue-collar and white-collar employees in 1996*

		All employees	Blue-collar employees	White-collar employees
Chimney cleaning	Number	2810	2170	640
	%	100.0	77.2	22.8
Chemical trades	Number	29216	25849	3367
	%	100.0	88.5	11.5

Source: Wirtschaftskammer Österreich (1997)

#### *Employees by gender in 1996*

		All employees	Male	Female
Chimney cleaning	Number	2810	2078	732
	%	100.0	74.0	26.0
Chemical trades	Number	29216	7838	21378
	%	100.0	26.8	73.2

Source: Wirtschaftskammer Österreich (1997)

<sup>42</sup> For methodological reasons, these figures are not strictly comparable with those documented in the Tables presented below.

The sector is divided into three sub-sectors, reflecting three distinct activities: Cleaning; chimney cleaning; and disinfection and extermination activities. Cleaning and chimney cleaning are opposite business activities in terms of their economic properties. Disinfection and extermination activities have a profile in between these two extremes. Cleaning is characterised by intensified competition over costs and prices. There is a considerable variation in firm size in that numerous micro-firms co-exist with rather large companies, employing up to 4,000 to 5,000 employees. Virtually all blue-collar workers are unskilled and female. The majority of them are immigrant workers. Furthermore, part-time work prevails. In contrast to this, chimney cleaning enjoys a territorial cartelisation (i.e. the *Gebietsschutz*<sup>43</sup>), which suppresses the competition between firms. Firm size does not much vary, as most companies are very small. The sector's blue-collar workers are generally skilled in that they have undergone vocational training for chimney cleaning and thus have the leaving certificate for this activity. Blue-collar workers are normally male. As is the case of cleaning, there are usually more blue-collar workers than white-collar workers in chimney cleaning.

## 2. Social dialogue at sector level

Social dialogue in the cleaning sector is purely bipartite and collective bargaining takes place exclusively at sector level. In several cases, the scope of the sector agreements is limited to certain regional areas. Collective wage agreements are concluded for a one year's validity. In addition, "umbrella agreements" (*Rahmenkollektivverträge*), that regulate issues such as working time, bonuses, severance pay and period of notice, are usually fixed for a period longer than one year.

Three trade unions participate in collective bargaining for the cleaning sector:

- The Union of the Blue-collar Workers of the Construction Industry and the Woodworking and Wood-processing Industry (*Gewerkschaft Bau-Holz*, GBH) represent the blue-collar workers of chimney cleaning
- The Union of the Blue-collar Workers of Hotels, Restaurants and Personal Services (*Gewerkschaft Hotel, Gastgewerbe, Persönlicher Dienst*, GHGPD) organises the blue-collar workers for the rest of the sector
- The Union of the White-collar Workers of the Private Sector (*Gewerkschaft der Privatangestellten*, GPA) represents white-collar workers.

The two Federal Organisations of the WKÖ act as employer organisations in the sector:

- The BIR covers the chimney cleaning sub-sector
- The BIC represents the rest of the cleaning sector (including disinfection and extermination) plus the craft production of pharmaceuticals, perfumes and toilet preparations as well as the chemical laboratories.

The structuring of collective bargaining is thus influenced by employees categories (blue- and white-collar workers) on the one hand, and by sub-sector affiliations on the other hand (chimney, others). Furthermore, several collective agreements are regionally differentiated.

### *The pattern of regularly concluded collective agreements*

Bargaining parties	Purview of collective agreements			Type of agreement
	Sector	Categorical	Territorial	
GBH and BIR*	Chimney cleaning	Blue-collar workers	Separate for each land: Federal:	Wages Umbrella
GHPD and BIC*	Other cleaning	Blue-collar workers	Jointly for 7 Länder: Separate for each Upper Austria and Salzburg: Jointly for 8 Länder: Separate for Salzburg:	Wages Umbrella Umbrella
	Desinfection and exterminating activities	Blue-collar workers	Federal: Federal:	Wages Umbrella
GPA and 35 Federal	Cross-sector (including NACE 74.7)	White-collar workers	Federal:	Combined (i.e. wages and umbrella)

<sup>43</sup> *Gebietsschutz* means that a certain local area is exclusively allocated to one of the distinct companies.

Organisations**				
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\* In the case of Land-level collective agreements, the bargaining party for the employers is the respective Land-level subunit of the BIR and BIC.

\*\* Including the BIR and BIC; the number of Federal Organizations refers to 2004.

Altogether, the collective agreements cover all employees and employers belonging to NACE 74.7. Since all employer associations are based on mandatory memberships, the coverage rate of collective bargaining is 100%.

Collective bargaining is characterised by a high degree of stability and a cooperative climate.

### 3. Employers' organisations and trade unions

#### Employers' organisations

All employers' organisations dealing with the cleaning sector (NACE 74.7) belong to the WKÖ's Federal Organisations.

The membership unit of the WKÖ's Federal Organisations is the business licence. It does not correspond to the number of companies. Indeed, companies often have more than one licence because each business activity can be conducted by a company if this company has the corresponding business licence. Thus, the membership of the Federal Organisations normally exceeds the number of members companies if its sector domain embraces more than one licence.

Membership of Federal Organisations is mandatory. Every company licensed to carry on a business, falling within the scope of the membership domain of a Federal Organisation, is legally obliged to be a member of this Organisation. Density in terms of employers and employees is thus always 100%.

Each Federal Organisation is an employer organisation with the capacity to conclude collective agreements. The WKÖ and its sector sub-units have this capacity *ex lege*, in contrast with the other employers' organisations, which have voluntary membership, for which a special recognition procedure is required. In the cleaning sector, only the WKÖ Federal Organisations takes part in collective bargaining, since there are no other employers' organisations. Thus, each federal Organisation has a *de facto* bargaining monopoly in its respective area.

Federal Organisations are not really affiliated to the WKÖ, they are a part of the WKÖ.

#### *The Federal Organisation of the Chemical Crafts (Bundesinnung der Chemischen Gewerbe, BIC)*

The membership domain of the BIC covers the craft production of pharmaceuticals, perfumes and toilet preparations, the chemical laboratories, disinfection and exterminating activities, and all fields of cleaning but not chimney cleaning. The BIC thus covers most parts of NACE 74.7 and also includes a notable range of business activities outside this sector. In 2001, the BIC recorded 1,014 member companies, with a total number of 38,061 employees. For 2000, statistics on the number of companies and employees are available with regard to the classification according to both NACE and the Federal Organisations. About 77.6% of the member companies and 84.1% of the employees under the umbrella of the BIC belong to NACE 74.7. Hence, this sector represents the stronghold of the membership of the BIC.

The BIC and its Land-level sub-units regularly conduct collective bargaining on behalf of the employers of two sub-sectors of NACE 74.7: cleaning (with the exception of chimney cleaning) and disinfection and exterminating activities. Special collective agreements regarding blue-collar workers are concluded for each of these two sub-sectors.

The BIC is a member of the European Federation of Cleaning Industries (EFCI) and of the European Confederation of Pest control Associations (CEPA).

#### *The Federal Organisation of Chimney Cleaning (Bundesinnung des Rauchfangkehrer, BIR)*

The BIR organises chimney cleaning within the WKÖ. In 2001, the BIR had 826 member companies, which employed a total number of 2,636 employees. The BIR and its Land-level subunits act as employer associations on behalf of chimney cleaning. Regarding the sub-sector's blue-collar workers, the BIR negotiates the umbrella agreements, while the Land-level subunits are engaged in collective bargaining over wages. The BIR is a member of the European Federation of Chimney Sweeps (ESCHFÖ, *Europäische Schornsteinfegermeister Föderation*).

## Trade unions

All trade unions dealing with NACE 74.7 are member unions of the Austrian Trade Union Federation (*Österreichischer Gewerkschaftsbund, ÖGB*).

The ÖGB and its unions are voluntary associations financed by voluntary dues paid by their members.

The domain of the member unions are demarcated by sector and employee categories' criteria.

It is worth noting that it is extremely difficult to estimate the density ratio of both the member unions and certain member subgroups, since the membership domains of the unions crosscut conventional statistical definitions. Therefore, the density ratios reported below should be understood as very rough estimates.

As a voluntary association, ÖGB obtains legally granted recognition as a bargaining party. Only the ÖGB (in contrast to its member unions) has the legal right to conclude collective agreements. In practice, the autonomous unions negotiate the collective agreements for their members, but the agreements are signed in the name of ÖGB. The ÖGB (and its members) has a monopoly in terms of collective bargaining in the sector. ÖGB participates in formal consultations, and its member unions also take part in consultations with sector matters.

### *The Union of the Blue-collar Workers of the Construction Industry and the Woodworking and Wood processing Industry (Gewerkschaft Bau-Holz, GBH)*

The GBH's domain comprises all blue-collar workers employed in the area of construction, woodworking and wood-processing. As regards NACE 74.7, this includes the blue-collar workers of chimney cleaning. In 2001 the GBH recorded a total of 158,065 members. An estimate of the GBH's overall density may be made on the basis of the 1996 employment figures (Wirtschaftskammer Österreich 1997). Accordingly, 243,169 blue-collar employees worked within the domain of the GBH. In the same year, the GBH had 175,825 members, which implies an estimated density ratio of about 72.3%. The level of unionisation of the blue-collar workers of chimney cleaning is much lower, since union officials estimate the density in this area to be in between 10% and 15%.

The GBH conducts collective bargaining for all employees belonging to its domain. As far as NACE 74.7 is concerned, special collective agreements for chimney cleaning are regularly concluded.

The GBH is a member of the European Federation of Building and Woodworkers (EFBWW).

### *The Union of the Blue-collar Workers of Hotels, Restaurants and Personal Services (Gewerkschaft Hotel, Gastgewerbe, Persönlicher Dienst, GHGPD)*

The GHGPD organises the blue-collar workers in the area of hotels, restaurants and personal services. This includes the blue-collar workers of NACE 74.7 with the exception of chimney cleaning. In 2001 the GHGPD's total number of membership was 50,131. No data on employment are available which correspond with the GHGPD's domain. Likewise, membership files for NACE 74.7 but chimney cleaning do not exist. However, union officials estimate density of this area to be in between 30% and 40%.

The GHGPD is the representative of the blue-collar workers of its domain, when it comes to collective bargaining. It also concludes the collective agreements for the blue-collar employees of NACE 74.7 with the exception of chimney cleaning.

The GHGPD is a member of UNI and of the European Federation of Food, Catering, Agriculture and Tourism and allied branches (EFFAT).

### *The Union of the White-collar Workers of the Private Sector (Gewerkschaft der Privatangestellten, GPA)*

The GPA represents the white-collar employees in the entire private sector and thus organises also white-collar employment of NACE 74.7. In 2001 the GPA's total number of members was 284,633. Precise data on the number of white-collar employees working within the GPA's domain do not exist. Hence, only a rough estimate can be made, which yields an overall density of approximately 30 % within the GPA's domain. In the case of NACE 74.7 the estimated density is somewhat below 10% of the sector's white-collar employees according to union officials.

The GPA negotiates the collective agreements for the private-sector white-collar workers. This includes the white-collar workers of NACE 74.7, which are incorporated into a cross-sector type of collective agreement for most areas of craft production.

The GPA is a member of Union Network International (UNI).

## Organisations

### *Employers' organisations*

NB: the densities are calculated on the basis of the sub-sectors covered by the organisations

Employers' organisations	Sub-sectors covered	Companies affiliated	SW	Density Companies	Density SW	CB	National affiliations		European affiliations		International affiliations	
				(%)	(%)		Yes/No	Direct	Indirect	Direct	Indirect	Direct
BIR (The Federal Organisation of Chimney Cleaning)	Chimney cleaning	826	2,636	100% of the sub-sector covered	100% of the sub-sector covered	Yes			ESCHFÖ			
BIC (The Federal Organisation of the Chemical Crafts)	Cleaning, disinfection, extermination + craft production of pharmaceuticals, perfumes and toilet preparations, chemical laboratories.	Total: 1,014 NACE 74.7: about 787	Total: 38,061 NACE 74.7: about 32,000	100% of the sub-sectors covered	100% of the sub-sectors covered	Yes			EFCE, CEPA			

Companies affiliated: number of cleaning companies affiliated

SW: salaried workers

Density companies: number of companies affiliated / total number of companies in the sub-sector covered

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sub-sector covered

CB: Does the organisation take part in collective bargaining?



*Trade unions*

NB: the densities are calculated on the basis of the areas covered by the organisations

Organisation	Type of SW	Members	Members in the sector	Density members	CB	National affiliations		European affiliations		International affiliations	
		Total number	Number	%	Yes/No	Direct	Indirect	Direct	Indirect	Direct	Indirect
GBH (The Union of the Blue-collar Workers of the Construction Industry and Wood-processing Industry)	Blue-collar workers; construction, woodworking, wood-processing, chimney cleaning	158,065	ND	Between 10-15% of the employees covered (estimate)	Via ÖGB	ÖGB		EFBWW			
GHGPD (The Union of the Blue-collar Workers of Hotels, Restaurants and Personal Services)	Blue-collar workers; hotels, restaurants, personal services	50,131	ND	Between 30-40% of employees covered (estimate)	Via ÖGB	ÖGB		EFFAT, Uni-Europa		UNI	
GPA (The Union of the White-collar Workers of the Private Sector)	White-collar employees; private sector	284,633	ND	About 10% of the employees covered (estimate)		ÖGB		UNI-Europa		UNI	

SW: salaried workers

Density members: number of salaried workers affiliated to the organisation / total number of salaried workers in the area covered by the organisation

CB: Does the organisation take part in collective bargaining?

# BELGIUM

## 1. Description of the sector

### Industrial cleaning under the NACE Code

NACE-BEL Code 74.70 includes the following activities:

- cleaning inside buildings of all types, including offices, factories, workshops, premises housing social institutions, and other premises used for commercial and professional purposes such as blocks of flats;
- window-cleaning;
- sweeping chimneys; cleaning fireplaces, furnaces, incinerators in boilers, and ventilation shafts; and devices for getting rid of smoke;
- cleaning industrial machinery;
- cleaning bottles;
- disinfection and killing insects in buildings, ships, trains etc;
- cleaning the insides of road and sea tankers;
- cleaning trains, buses, planes, ships etc.

On the basis of this definition, the sector employed almost 39,000 people in 2002. Blue-collar workers accounted for 93% of employed staff; of these, 65% were women.

#### *Workers in the sector:*

Size of enterprises	Blue-collar workers	Non-manual workers	Total
1-4	1,381	172	1,553
5-9	1,292	187	1,479
10-19	1,830	229	2,059
20-49	3,833	457	4,290
50-99	3,124	295	3,419
100-199	3,832	343	4,175
200-499	7,380	359	7,739
500-999	6,071	208	6,279
1000 and over	7,630	355	7,985
Total	36,373	2,605	38,978

Source: ONSS, 2002

In 2002, there were 1,548 establishments and 1,183 employers in the sector

#### *Establishments and employers:*

Size of enterprises	Number of establishments	Number of employers
1-4	886	675
5-9	232	189
10-19	163	127
20-49	146	110
50-99	53	36
100-199	31	24
200-499	26	13
500-999	8	3
1000 and over	3	6
Total	1,548	1,183

Source: ONSS, 2002

## The sector in the industrial relations structure in Belgium

An examination of the structure of industrial relations in Belgium shows that the terminology employed is not the same. The sector known as 'industrial cleaning' in Belgium is only a small cleaning sub-sector. To describe the cleaning sector, a distinction needs to be drawn between the following sub-sectors:

- classical cleaning: cleaning offices, hospitals, factories, social establishments, shops, laboratories, schools, underground stations etc;
- the environment: waste processing;
- sweeping chimneys;
- industrial cleaning: high-pressure cleaning, chemical cleaning, the cleaning and upkeep of reservoirs and sewers, working in toxic environments, asbestos stripping etc;
- disinfection: protection from, and the elimination of, vermin, and the maintenance of collectively used facilities such as kitchens and sanitary installations.

Although this definition is very similar to the one set out above, it triggers significantly different statistical data based on the sources employed<sup>44</sup>. If this definition is used, more blue-collar workers are employed in the sector:

### *Blue-collar workers in the sector:*

Activities	Number of blue-collar workers	%
Classical cleaning	42,828	95.17
Environment	922	2.05
Sweeping chimneys	40	0.09
Industrial cleaning	1,080	2.40
Disinfection	134	0.30
Total for the sector	45,004	100.00

Source: Social partners. Based on ABSU-UGBN data. May 2003

### General characteristics of the sector:

Generally speaking, the sector is characterised on the one hand by an overwhelming majority of small, even very small, enterprises, and on the other by the presence of some large enterprises belonging to international groups. The ten largest enterprises in the sector account for 51.82% of turnover and employ 55.61% of the blue-collar workers. The sector is going through a period of substantial growth, cleaning enterprises having achieved a turnover of nearly EUR 984 million in 2001.

In terms of employment, 65% of the workforce in 2002 were women, 68% of contracts were part-time contracts, workers' levels of qualifications were generally low, and there was a large number of non-native Belgian workers (about 60%). It is also worth noting that there is a considerable amount of clandestine and partly declared work in the sector. The sector has a large number of workplace accidents: 3,269 workers were injured in accidents at work during 2000.

Lastly, the sector is marked by very strong competition between enterprises: this takes place mainly on the basis of price.

## 2. Social dialogue

The negotiation of collective agreements in the cleaning sector is mostly conducted at sector level.

Sector social dialogue in the cleaning sector is mainly carried out under the umbrella of the Joint Committee for Cleaning and Disinfection Enterprises (Joint Committee 121), which covers blue-collar workers employed in the sector. White-collar staff comes under the National Joint Committee for White-Collar Workers (Joint Committee 218).

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<sup>44</sup> The differences observed appear to derive less from a problem of definitions than from the methods of counting jobs and enterprises and the data used. The statistics employed in the field of industrial relations are not based on the NACE code, but on the existence of a code special code used by the cleaning sector's Joint Committee.

It is interesting to note a will on the part of certain actors within the trade union movement to bring blue-collar and white-collar workers in the cleaning sector together within a single Joint Committee. This aim comes under the heading of unifying blue- and white-collar statuses in Belgium.

### **Joint Committee 121**

Joint Committee 121 covers 'enterprises that are exclusively or mainly engaged in cleaning activities (not involving repairs) and/or in disinfection'. It consists of six employers' representatives and six workers' representatives.

All enterprises and all workers in the cleaning sector are covered by collective agreements concluded on Joint Committee 121.

Fourteen collective agreements within the scope of Joint Committee 121 were deposited during 2002 and 2003. They dealt with such matters as the time-credit scheme, the half-time pre-pension at 55, the extension of the sector pre-pension scheme, job classifications, conditions for payment, working hours, overtime, night working, financial contribution to transport costs, and the status of the union delegation.

After the most recent inter-professional agreement was concluded, sector negotiations in cleaning led to an agreement covering the period 2003-2004. In particular, this agreement provides for salary increases, and measures for bringing the status of blue-collar workers into line with that of white-collar workers.

Generally speaking, sector bargaining over the last few years has focused on the following issues:

- making conditions of employment more attractive, particularly in terms of purchasing power;
- making the conditions arising out of transfers of undertakings (e.g. extending the qualification period for seniority, and reducing job security in workplaces with fewer than three workers) more flexible;
- combating unfair competition (e.g. clandestine work, economically dependent workers, and cascade sub-contracting). A partnership agreement on this subject was signed by the social partners and the Public Employment, Labour and Social Consultation Service in 2003

### **Joint Committee 218**

Joint Committee 218 covers white-collar workers whose employers are not attached to any particular Joint Committee. It currently deals with 30 sub-sectors, 50,000 enterprises, and 350,000 workers. White-collar workers employed in cleaning account for a very small minority (less than 1%) of all staff covered by this Joint Committee.

## **3. Employers' organisations and trade unions**

### **Employers' organisations**

*The Belgian Federation of Cleaning Contractors (L'Union Générale Belge du Nettoyage / Algemene Belgische Schoonmaak Unie, UGBN / ABSU)*

The UGBN/ABSU is the umbrella body for professional enterprises in the field of cleaning, disinfection, heavy-duty industrial cleaning, waste processing and the sweeping of chimneys, and holds all the seats allocated to employers on Joint Committee 121.

It has 207 members, or 13% of the enterprises active in the field covered by Joint Committee 121. Member enterprises account for 76% of the sector's blue-collar workforce.

The UGBN/ABSU aims to correct the sector's image and, to this end, has established the Cleaning Quality Label (CQL), which offers a guarantee in terms of complying with employment law and current legislation in the field, including the non-use of certain sub-contractors and economically dependent workers, and even in terms of staff training.

At national level, the federation is a member of the Belgian Federation of Employers (*Fédération des Entreprises de Belgique / Verbond van Belgische Ondernemingen, FEB/VBO*), and at European level, it belongs to the European Federation of

Cleaning Industries/Fédération Européenne du Nettoyage Industriel (EFCI/FENI). At international level, the UGBN/ABSU is also a member of the World Federation of Building Service Contractors (WFBSA).

***The Belgian Federation of Employers (Fédération des Entreprises de Belgique / Verbond van Belgische Ondernemingen, FEB/VBO)***

The FEB Represents employers in negotiations concerning white-collar workers in cleaning.

## **Trade unions**

Seats earmarked for workers' representatives on Joint Committee 121 are occupied by the General Federation (*Centrale Générale*, CG) of the Belgian General Federation of Labour (*Fédération Générale du Travail de Belgique / Algemeen Belgisch Vakverbond*, FGTB/ABVV) and by *CSC Alimentation et Services*, the Food and Services Section of the Confederation of Christian Trade Unions (*Confédération des Syndicats Chrétiens / Algemeen Christelijk Vakverbond*, CSC/ACV). Each of the occupational centres has three seats. The Federation of Liberal Trade Unions of Belgium (*Centrale Générale des Syndicats Libéraux de Belgique / Algemene Centrale der Liberale Vakbonden van België*, CGSLB/ACLVB) has recently sought membership of Joint Committee 121, but the application has been turned down. The CGSLB/ACLVB accounts for 5.57% of benefits paid out by the cleaning sector social fund<sup>45</sup>.

At 92%, blue-collar union membership is very high. High union density in the sector may partly be explained by the existence of additional payments reserved for unionised workers; these include trade union benefits, and supplementary allowances payable, for example, in the event of unemployment and workplace accidents.

Seats on Joint Committee 218 reserved for employers' representatives are taken by the Belgian Federation of Employers. Seats earmarked for workers' representatives are allocated to the following trade unions:

- the General Federation of White-Collar Workers-National Managers' Group (*Centrale Générale des Employés – Groupement National des Cadres*, CNE-GNC) of the Confederation of Christian Trade Unions (CSC/ACV) (about 250 members in the cleaning sector);
- the General Federation of White-Collar Workers-National Managers' Union (*Landelijke Bedienden Centrale – Nationaal Verbond voor Kaderpersoneel*, LBC-NVK) of the Confederation of Christian Trade Unions (CSC/ACV);
- the Belgian Union of White-Collar Staff, Technicians and Managers (*Syndicat des Employés, Techniciens et Cadres de Belgique*, SETCa) of the Belgian General Federation of Labour (FGTB/ ABVV);
- the Federation of Liberal Trade Unions of Belgium (CGSLB/ ACLVB).

The CSC/ACV and the FGTB/ABVV each have five seats; the CGSLB has one.

### ***The General Federation (Centrale Générale)***

The General Federation had almost 307,000 members in 1999. It recruits and represents workers in 'green' sectors (e.g. agriculture and horticulture), industry (e.g. wood, quarries, cement works, concrete production, ceramics, printing, the cinema industry, and glassware), construction, services (e.g. caretaking, temporary-employment business work, cleaning, hairdressing and beauty care) and the non-market sector (e.g. private education, private hospitals and socio-cultural activities).

The General Federation estimates that 16,721 of its (blue-collar) members are employed in the cleaning sector. It accounts for 43.98% of the benefits paid out by the cleaning sector social fund<sup>46</sup>.

The General Federation is a member of Union Network International, and of its European branch, UNI-Europa.

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<sup>45</sup> Although there are no formal rules covering membership, custom prescribes that a trade union must represent 10% of the workers in a sector in order to sit on a relevant Joint Committee.

<sup>46</sup> This figure is based on the sums of money disbursed, and not on the number of benefits paid out. It is not possible, therefore, to calculate the number of members.

*The Food and Services Section of the Confederation of Christian Trade Unions (CSC Alimentation et Services/Voeding en Diensten)*

The CSC-AS is active a range of sectors including industry, the food sector, cleaning and disinfection, 'green' sectors, hotels/restaurants/cafés, caretaking, and the film industry. It claims a total of 213,000 members. It is likely that the CSC-AS will eventually recruit white-collar workers in the cleaning sector.

The CSC-AS accounts for 42.62% of benefits paid out by the cleaning sector social fund.

The CSC-AS is a CSC federation at national level. It is a member of UNI and UNI-Europa at international level.

## Organisations

### *Employers' organisations*

Organisation	Sub-sectors covered	Companies	SW	Density Companies	Density SW	CB	National affiliations		European affiliations		International affiliations	
		number	number	%	%	yes/no	Direct	Indirect	Direct	Indirect	Direct	Indirect
UGBN / ABSU (Belgian Federation of Cleaning Contractors)	Cleaning, disinfection, industrial cleaning, sweeping chimneys, and waste processing	207	About 34,200 blue-collar workers	13	76% of blue-collar workers	Yes	FEB		EFCI		WFBSC	
FEB (The Belgian Federation of Employers)	All sectors. Represents employers in negotiations concerning white-collar workers in cleaning.								UNICE			

SW: salaried workers

Density companies: number of companies affiliated / total number of companies in the sector

Density SW: number of salaried workers in affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

### *Trade Unions*

Organisation	Type of SW	Members	Members working in the sector	Density	CB	National affiliations		European affiliations		International affiliations	
	Type	Number	Number	%	yes/no	Direct	Indirect	Direct	Indirect	Direct	Indirect
General Federation (FGTB)	Blue-collar	307,000	16,721	37%	Yes	FGTB		UNI-Europa	ETUC	UNI	
CSC-AS (the Food and Services Section of the CSC))	Blue-collar	213,000	ND	ND	Yes	CSC		UNI-Europa	ETUC	UNI	
CNE-GNC (the General Federation of White-Collar Workers-National Managers' Group)	White-collar	+/- 135.000 (2004)	About 250	ND	Yes	CSC			ETUC		
LBC-NVK (the General Federation of White-Collar Workers-National Managers' Union)	White-collar	+/- 255.000 (2004)	ND	ND	Yes	CSC			ETUC		
SETCa (the Belgian Union of White-Collar Staff, Technicians and Managers)	White-collar	311.251 (2002)	ND	ND	Yes	FGTB			ETUC		
CGSLB (the Federation of Liberal	White-collar	+/- 220.000	ND	ND	Yes	-		ETUC			

Trade Unions of Belgium)		(2004)									
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SW: salaried workers

Density: number of salaried workers affiliated to the organisation / number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?



# DENMARK

## 1. Description of the sector

### Delimitation of the cleaning industry

The Danish cleaning sector includes the following activities in NACE code 74.7:

- 747010: ordinary cleaning, that is to say mainly vacuum-cleaning and washing (5,039 enterprises, 75.8% of enterprises in the sector);
- 747020: specialised cleaning, that is to say the cleaning of nuclear and chemical installations (159 enterprises, 2.4% of enterprises in the sector);
- 747030: window cleaning (1,210 enterprises, 18.2% of enterprises in the sector);
- 747040: sweeping chimneys (163 enterprises, 2.45% of enterprises in the sector);
- 747050: disinfection and extermination activities (72 enterprises, 1.1% of enterprises in the sector).

It is worth noting that:

- activities such as handling waste and industrial laundry are not included in code 74.7 in Denmark (waste management comes under a different NACE code);
- employment in posts such as kitchen assistant is registered together with cleaning activities because people who do this work have to clean the kitchen after the cooking has been completed (such data will be kept separate in this study as cleaning in these circumstances is a secondary activity);
- people who maintain areas around buildings are usually employed as porters, and typically fall into categories such as waste managers;
- people employed in disinfection and extermination activities are hard to categorise, and it is difficult to find statistical records that relate to them. Extermination is frequently a public sector activity. Other people employed in disinfection and extermination activities are included in the cleaning sector;
- other employed people are referred to as service assistants, and are often employed in hospitals and residential homes for elderly people. They do some cleaning, but also have other duties. During the last ten years, the public sector (e.g. hospitals and rest homes) has outsourced a lot of jobs such as cleaning to the private sector.

### Socio-economic features of the sector

A total of 6,643 registered **enterprises** are listed under NACE code 74.7. The sector is characterised by small companies (mainly self-employed workers), and by a few large companies that employ around 40% of workers in the cleaning sector.

#### Companies

Sub-sectors	Number of Companies	% companies without SW (+ number)	% companies with < 10 SW	% Companies 10-100 SW	% companies with > 100 SW
Ordinary cleaning	5,039 <sup>47</sup>	71.8% (3,620)	21.7% (1,095)	3.4% (171)	0.3% (18)
Specialised cleaning	159 <sup>48</sup>	54.7% (87)	28.8% (46)	12.5% (20)	1.2% (2)
Window cleaning	1,210 <sup>49</sup>	80.1% (969)	17.3% (212)	0.6% (8)	
Chimney cleaning	163 <sup>50</sup>	14.7% (24)	81.6% (133)	1.2% (2)	

<sup>47</sup> 135 are registered as unknown. The number of small cleaning companies has fallen by 600 since 2000. This is largely explained by the fact that the Danish government has reduced financial support under the so-called "home service" (*hjemmeserviceordning*) arrangement whereby the government used to pay 40% of the salary. This support was designed to minimise moonlighting.

<sup>48</sup> 4 are registered as unknown

<sup>49</sup> 21 are registered as unknown

<sup>50</sup> 4 are registered as unknown

Disinfecting and exterminating activities	72 <sup>51</sup>	58.3% (42)	30.5% (22)	7.0% (5)	1.4% (1)
Total of the sector	6,643	% (4,742)	1,508	206	21

SW: salaried workers

Source: Danmarks Statistik 2003

47,359 **people work** in the cleaning sector, with cleaning as their primary job (1.7% of the total labour force). Of these, 4,977 are self-employed, and 297 assist their spouses. There are 42,196 salaried workers. This figure for the cleaning sector rises to 58,137 if we take into account people who do cleaning as a second job.

61.3% of the workforce in this sector are women, but the number of men increases if we include workers for whom cleaning is a second job: for them, cleaning is more of a temporary job until they can find employment in their primary area.

Most people employed in the cleaning sector have not had a prolonged education; the exceptions are chimney sweeps, whose apprenticeships last four years.

### Workers

Sub-sectors	Number of workers*	Number of SW	Number of workers / number of workers in the country (%)	Number of SW / number of SW in the country (%)
Ordinary cleaning	54,015	ND	1.9%	ND
Specialised cleaning	683	ND	0.02%	ND
Window cleaning	2,151	ND	0.08%	ND
Sweeping chimneys	781	ND	0.03%	ND
Disinfection and extermination	507	ND	0.018%	ND
Total in the sector	58,137	42,196	2.1%	1.65%

\* Including self-employed workers and people employed in secondary jobs

SW: salaried workers

Source: Danmarks Statistik 2003

The following observations may be about **changes** that have taken place in the sector:

- as has already been stated, the public sector (e.g. hospitals and rest homes) has outsourced a lot of jobs to the private sector, and as a result, people like service assistants have kept their main jobs, but acquired different employers. This has led to confusions relating to duties to be performed, and services to be provided, and to which trade unions should organise these employees;
- many jobs in the cleaning sector, such as window cleaning and cleaning in private homes, are performed by moonlighters; in 1994, the Social Democratic government sought to address this problem through the introduction of the "home service" arrangement, which aimed to provide financial support for this work. The scheme was amended by the Liberal-Conservative Government In 2001: financial support is now restricted to work carried out in households where one person must have reached the age of 65, or have taken early retirement. This restriction has consequences for small companies, and could lead to a reduction in the number of jobs in the sector.

## 2. Social dialogue at sector level

The Danish model of collective bargaining is characterised by centralised decentralisation. Some elements, such as personal pay supplements, are settled at enterprise level, but pay rates are usually fixed by a standard wage agreement that is covered by sector collective agreements.

One employers' organisation, the Danish Chamber of Commerce (HTS), has signed collective agreements with the National Union of Female Workers (KAD), the National Union of General Workers (SiD), the Danish Clerical Union - Serviceforbundet (DFF-S) and the National Union of Public Employees (FOA). The collective agreements cover 44,475 employed workers.

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<sup>51</sup> 2 are registered as unknown

The other employers' organisations, the Association of Cleaning Services (RSBA) and the Association of Chimney Sweeps, have signed collective agreements with the National Union of Female Workers (KAD), the National Union of General Workers (SiD), the Danish Clerical Union - Serviceforbundet (DFF-S), and the Danish Plumbers' Union (*Blik og Rørforbundet*).

### 3. Employers' organisations and trade unions

#### Employers' organisations

##### *The Association of Service Sector Employers (Servicebranchens arbejdsgiverforening, SBA)*

This association has traditionally organised the largest companies in the cleaning sector; it covers most of the sector's professional areas. The largest cleaning companies in Denmark, like ISS Denmark, are represented by this organisation. The SBA has 86 members; these enterprises employ 22,000 workers. The SBA signs collective agreements. The SBA is a member of the Danish Chamber of Commerce (Handel, Transport og Serviceerhvervene, HTS). At European level, it is a member of the EFCL.

##### *The Association of Window Cleaning Employers (Vinduespolerernes Arbejdsgiverforening, VPA)*

This VPA only covers the largest companies. It has 50 members; they employ 800 workers. The VPA signs collective agreements. The VPA is a member of the Danish Chamber of Commerce. At European level, it is a member of the EFCL.

##### *The Association of Cleaning Services (Rengøringssekskabernes Brancheforening, RSBA)*

The RSBA represents 145 companies, which in turn employ 4,750 workers. The RSBA is a member of the Danish Federation of Small and Medium-Sized Enterprises (*Håndværksrådet*, DFSME). At European level, it is a member of the UEAPME.

##### *The Association of Chimney Sweeps (Skorstensfejerlauget af 11. februar 1778)*

This organisation has 169 members, which employ 500 people. The Association of Chimney Sweeps is a member of the Danish Federation of Small and Medium-Sized Enterprises. At European level, it is a member of UEAPME.

#### Trade unions

The main actors on the employees' side are the National Union of Female Workers (KAD), the National Union of General Workers (SiD), the National Union of Public Employees (FOA), the Danish Plumbers' Union (*Blik og Rør*), and of the umbrella organisation, the Danish Clerical Union - Serviceforbundet (*Dansk Funktionærforbund – Serviceforbundet*, DFF-S), which also covers the Cleaners' Union (SF).

According to the Cleaners' Union, many men only take temporary employment in the cleaning sector, or else they do cleaning as a second job. This may explain why men do not join the union. By contrast, women tend to join in much larger numbers. According to the KAD, 64.0% of women employed in the cleaning sector are union members.

The SiD and KAD trade unions are on the point of merging. With 370,000 members, the new organisation, which will be called the KAD-SiD, will be the largest union in Denmark.

##### *National Union of Female Workers (Kvindeligt Arbejderforbund, KAD)*

The KAD has 35,000 members in the cleaning sector. The KAD membership is female. 12% of the members have ethnic backgrounds other than Danish, and this makes the KAD the Danish trade union with the largest number of immigrants. Most of these women are employed in the private cleaning sector.

##### *The National Union of General Workers (Specialarbejderforbundet i Danmark, SiD)*

This body organises not only people who work in ordinary and specialised cleaning, but also those employed in disinfection and window cleaning. The union has a total of 325,250 members, of which 325 in the cleaning sector.

***The Cleaners' Union (Sanitørernes Fagforening)***

This organisation has 3,000 members employed in the cleaning sector (only men), out of a potential of estimated 12,000 men working in the sector (i.e. within the membership domain of this union). According to the Cleaners' Union, many men only take temporary employment in the cleaning sector, or else it is their second job. This may explain why men do not join the union.

***The National Union of Public Employees (Forbundet af Offentligt Ansatte, FOA)***

This union organises 6,000 blue-collar workers and 200 white-collar workers in the sector.

***The Danish Plumbers' Union (Blik og Rørforbundet)***

This trade union organises chimney sweeps. The union has 500 chimney sweeps in membership, representing 64% union density in this sub-sector.

## Organisations

### *Employers' organisations*

NB : The densities are calculated on the basis of the whole sector, and when it possible, on the basis of the membership domain of the organisation.

Organisation	Sub-sectors covered	Companies	SW	Density Companies	Density SW	CB	National affiliations		European affiliations		International affiliations	
		Number	Number	%	%		Yes/no	Direct	Indirect	Direct	Indirect	Direct
SBA (Association of Service Sector Employers)	747010 747020 747050	86	22,000	74.70: 1.3% MD*: 1.6%	74.70: 52.1% MD*: ND	Yes	HTS	DA <sup>52</sup>	EFCI	UNICE		
VPA (Association of Window Cleaning Employers)	747030	50	800	74.70: 0.8% MD*: 4.1%	74.70: 1.9% MD*: ND	Yes	HTS	DA	EFCI	UNICE		
RSBA (Association of Cleaning services)	747010 747020 747030 747050	145	4,750	74.70: 2.2% MD*: 2.2%	74.70: 11.3% MD*: ND	Yes	Håndværks-Rådet (DFSME)		UEAPME			
Skorstensfejerlauget af 11. februar 1778 (Association of Chimney Sweeps)	747040	169	500	74.70: 2.5% MD*: 100%	74.70: 1.2% MD*: 100%	Yes	DFSME		UEAPME			

SW: salaried workers

Density companies: number of companies affiliated / total number of companies in the sector; \*MD: Density calculated on the basis on the membership domain of the organisation

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector; \*MD: Density calculated on the basis on the membership domain of the organisation

CB: Does the organisation take part in collective bargaining?

### *Trade Unions*

NB : The densities are calculated on the basis of the whole sector, and when it is possible, on the basis of the membership domain of the organisation.

Organisation	Type of SW	Members	Members working in the sector	Density	CB	National affiliations		European affiliations		International affiliations	
	Type	Number	Number	%		yes/no	Direct	Indirect	Direct	Indirect	Direct

<sup>52</sup> DA: Dansk arbejdsgiver-forning – Danish Employers' Confederation

SID (National Union of General Workers)	Window cleaning (747030)	325,250	747030: 250	747030: 0.6%	Yes	LO		ETUC		UNI	
	Disinfection (747050)		747050: 75	747050: 0.2%				UNI-Europa			
			74.70: 325	74.70: 0.8%							
KAD (National Union of Female Workers)	Cleaning (747010; 747020)	74,000	35,000	747010 + 747020: ND	Yes	LO		ETUC		UNI	
				74.70: sector: 83%				UNI-Europa			
DFF-S (Danish Clerical Union)  Sanitørernes fagforening (Cleaners' Union)	Cleaning (747010; 747020)	22,000	3,000	747010 + 747020: ND	Yes	LO		ETUC		UNI	
		3,000		74.70: 7.1%				UNI-Europa			
FOA (National Union of Public Employees)	Cleaning (747010; 747020)	188,431	- 6,000 cleaning /blue collar - 200 white collar	747010 + 747020: ND	Yes	LO		ETUC			
				74.70: 14.7%							
Blik og Rørforbundet (Danish Plumbers' Union)	Plumbing and sweeping chimneys (747040)	10,000	500	747040: ND	Yes	LO		ETUC			
				74.70: 1.2%							

Density: number salaried workers affiliated to the organisation / number of salaried workers in the sector; when it is possible, densities are also calculated on the basis of the membership domain.

CB: Does the organisation take part in collective bargaining?

# FINLAND

## 1. Description of the sector

### Delimitation

The industrial cleaning sector in Finland corresponds to NACE classification: NACE 74.7.

### Employment

In 2003, the industrial cleaning sector (NACE 74.7) in Finland employed about 25,000 people: 22,300 cleaners (89%) and 2,700 supervisors (11%). There are also about 5,000 cleaners in other sectors (i.e. other than in NACE 74.7) working in a range of property maintenance companies, such as firms offering staircase cleaning and maintenance services. The number of people working in the industrial cleaning companies rose quite steadily during the 1990s, and has nearly doubled in the past decade.

### Companies

A little over 2,600 firms are currently operating in the sector. The number of companies has increased by about 400 in the last decade. Annual net growth has been quite high at about 4-5% per year. Growth in the cleaning sector has been stronger than in associated sectors in real estate services.

The companies are now bigger than they used to be, but most are still very small: about 60% employ only one person, and only 1% (14 companies) employ 100 employees and more. These 14 companies, however, employ 64.8% of all employees of the sector.

#### Companies

Sub-sectors	Number of Companies	% companies without SW	% companies with <10 SW	% Companies 10-100 SW	% companies with > 100 SW
NACE 74.7	2,610	0%	93%	6%	1% (14 companies)

SW: salaried workers

Source: The register for enterprises and place of business, Statistics Finland (Yritys- ja toimipaikkarekisteri, Tilastokeskus)

#### Workers

Sub-sectors	Number of workers	Number of SW	Number of SW/number of SW in the country (%)	Number of SW in companies <10 SW/number of SW in the sector (%)	Number of SW in companies 10-100 SW/number of SW in the sector (%)	Number of SW in companies >100 SW/number of SW in the sector (%)
NACE 74.7	30,000	22,000 <sup>53</sup>	1.1%	21%	12%	65%

SW: salaried workers

Source: The register for enterprises and place of business, Statistics Finland (Yritys- ja toimipaikkarekisteri, Tilastokeskus)

### Characteristics

There are many reasons for growth in the industrial cleaning sector, but the most important of all is the rise in public sector outsourcing. The public sector used to employ permanent civil servants who were employed, for example, as cleaning ladies, doormen and attendants (i.e. outside NACE 74.7), but these services are now purchased from private firms: about 52-55% of all cleaners are currently employed in the private industrial cleaning sector (private firms, NACE 74.7). The remainder are mostly employed in the public services, but there are also small numbers in some manufacturing sectors and in hotels and catering, the wholesale and retail sectors, and the transport, storage and communication sector.

Other factors include a massive building programme, the fact that starting a cleaning business is quite cheap and easy, the growing demand for new services, and the creation of these new services for the industrial and private consumer market.

<sup>53</sup> There are also 5,000 cleaners in other sectors (other than NACE 74.7). See above.

## 2. Social dialogue

The collective agreement policies of the private industrial cleaning sector have become clearer during the period 2000-2002, one of the reasons being that the actors have reorganised. The employers are now represented by the Property Maintenance Association (*Kiinteistöpalvelut ry*), which was founded in 2002. Employees are represented in collective bargaining by three employee organisations: the Service Union United (PAM), the Finnish National Union of State Employees and Special Services (VAL) (indirectly through the Cleaning Sector Union), and the Union of Salaried Employees (*Toimihenkilöunioni*, TU). The PAM and the VAL are both affiliated to the Cleaning Sector Union, which takes part into collective bargaining process.

There are two collective agreements for the industrial cleaning sector: one for the cleaners themselves, which is signed by the Property Maintenance Association and by the Service Union United and the Cleaning Sector Union, and one for supervisors and clerical employees, which is signed by the Property Maintenance Association and the Union of Salaried Employees (TU). These agreements bind all employers and employees working in the sector. Some collective agreements that are also concluded for the property maintenance sector include sections linked to the cleaning sector.

The general tripartite income policy agreement also covers the private industrial cleaning sector. It is a binding agreement. Employers' and employees' representatives are directly or indirectly party to it.

The employers' organisation focuses on developing collective terms and conditions of employment and a coherent wage system for all employees in real estate service sector: the wage system will need to be fair and attractive to secure the availability of skilled labour in the future.

The employees' representatives' main objective is to achieve the best possible terms and conditions of employment and the best possible wage levels. Other objectives include a general attempt to raise appreciation of the service sector. The Union of Salaried Employees also emphasises the need to realise the scope of the changing real estate service sector and to build a functioning negotiating system at company level. The VAL also stresses problems of the new wage system and the fair use of skill level assessment. Another current concern is the increasing use of part-time work.

Generally speaking, all the parties think that the atmosphere in the labour market is good: new services are being developed, while the maintenance of property is becoming more technical and the demand for property repair services is increasing. At the same time, industry is making new demands for special skills in the cleaning industry. The demand for consumer services is also set to increase.

## 3. Employers' organisations and trade unions<sup>54</sup>

### Employers' organisations

#### *The Property Maintenance Association (Kiinteistöpalvelut ry)*

The Property Maintenance Association was founded in 2002. Its founding members were the Property Maintenance Management Association (KIPA), the Property Employers (KITA), the Finnish Maintenance Company Association (KIHO) and the Association of Finnish Cleaning Enterprises (SSLL). All the employers' negotiating rights were transferred to the new organisation. It has 350 industrial cleaning sector companies in membership: these include all the largest companies in the field. The member companies employ about 22,000 employees in the cleaning sector. The Property Maintenance Association represents about 13% of the companies in the sector. These companies employ about 81% of cleaners salaried workers. This organisation is a member of the Employers' Confederation of Service Industries (PT) at national level, and through this affiliation, it is affiliated to the UNICE. It is also a member of the EFCI.

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<sup>54</sup> All The densities have been calculated on the basis of 27,000 salaried workers (22,000 in NACE 74.7 + 5,000 in other sectors).



### *Other organisations*

The Service Branch Association (*Palvelualojen Toimialaliitto ry*) also has some small industrial cleaning companies as members. Some are transferring to the Property Maintenance Association as the sector continues to organise.

### **Trade unions**

Employees are represented by three employees' associations in collective bargaining: the Service Union United PAM, the Finnish National Union of State Employees Special Services VAL (indirectly through the Cleaning Sector Union) and the Union of Salaried Employees (*Toimihenkilöunioni*, TU). The PAM and the VAL are affiliated to the Cleaning Sector Union, which takes part into collective bargaining process.

#### *The Service Union United (Palvelualojenammattiliitto, PAM)*

The Service Union United was founded in 2001 by four member organisations of the Cleaning Sector Union. The founding unions were the Union of Commercial Employees (*Liikalan ammattiliitto*), the Hotel and Restaurant Workers' Union (*Hotelli- ja ravintolatyöntekijöiden liitto*), the Union of Technical and Specialist Occupations (*Teknisten- ja erikoisalojen liitto*) and the Caretakers' Union (*Kiinteistötyöntekijöiden liitto*). The PAM has 202,000 members, 10,100 of whom are employed in the private cleaning sector. It represents about 37% of salaried cleaners. The PAM is member of the Central Organisation of Trade Unions (SAK). The cleaning and property maintenance section of the Service Union United is also affiliated to the Nordic Organisation SUN. The PAM is affiliated to UNI and UNI-Europa.

#### *The Finnish National Union of State Employees Special Services (Valtion ja erityispalvelujenammattiliitto, VAL)*

The VAL's membership stands at 27,000; 1,450 of them work in the private industrial cleaning sector. It represents about 5% of salaried cleaners. The VAL is a member of the Central Organisation of the Trade Unions (SAK) and of the Nordic SUN. It is affiliated to the Public Services International (PSI) and to EPSU and FIPSU.

#### *The Union of Salaried Employees (Toimihenkilöunioni, TU)*

Like the Service Union United, the Union of Salaried Employees was founded in 2001 following the merger of four unions: the Union of Technical Employees (*Teknisten Liitto*, TL), the Union of Salaried Employees in Industry in Finland (*Suomen Teollisuustoimihenkilöiden Liitto*, STL), the Federation of Private Building Employees (RAL), and the Swedish Association of Technicians and Foremen in Finland (STAF). Toimihenkilöunioni represents clerical employees and supervisors. It has 122,000 members, of whom 1,800 are in the private industrial cleaning sector (7% of salaried workers in the sector). The Union of Salaried Employees is member of the Finnish Confederation of Salaried Employees (STTK). At a European level, it is affiliated to UNI-Europa, UNI-IBITS-Norden, EMCEF, EMF, ETF, EFBWW, EFFAT and ETUF:TCL, and at international level, to UNI, IMF, ICEM, ITF, IFBWW, IUF and ITGLWF.

#### *The Cleaning Sector Union*

The Cleaning Sector Union was founded by the Central Organisation of Finnish Trade Unions (SAK) in 1996, and was accepted as a negotiation party in 1997. One new organisation, a business trade union, joined the Cleaning Sector Union later on. Four of these organisations merged into the Service Union United PAM when it was founded in 2001.

## Organisations

### *Employers' organisations*

NB: All The densities have been calculated on the basis of 27,000 salaried workers (22,000 in NACE 74.7 + 5,000 in other sectors).

Organisation	Sub-sectors covered	Companies	SW	Density Companies	Density SW	CB	National affiliations		European affiliations		International affiliations	
		number	number	%	%	yes/no	Direct	Indirect	Direct	Indirect	Direct	Indirect
Kiinteistöpalvelutry (Property Maintenance Association)	Cleaning, special cleaning, property maintenance, technical maintenance	350	22,000	13%	81%	Yes	Employers' Confederation of Service Industries (PT)		EFCI	UNICE		

SW: salaried workers

Density companies: number of companies affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

### *Trade Unions*

NB: All The densities have been calculated on the basis of 27,000 salaried workers (22,000 in NACE 74.7 + 5,000 in other sectors).

Organisation	Type of SW	Members	Members working in the sector	Density	CB	National affiliations		European affiliations		International affiliations	
	Type	Number	Number	%	yes/no	Direct	Indirect	Direct	Indirect	Direct	Indirect
PAM (Service Union United)	Salaried workers / blue-collar	202,000	10,100	37%	Yes	Central Organisation of Trade Unions (SAK), Cleaning Sector Union		SUN UNI-Europa		UNI	
TU (Union of Salaried Employees)	Salaried workers / clerical employees	122,000	1,800	7%	Yes	Finnish Confederation of Salaried Employees (STTK)		UNI-Europa		UNI	

VAL (National Union of State Employees and Special Services)	Salaried workers / blue-collar	27,000	1,450	5%	Not in the private sector (only indirectly via SAK)	VTY, Cleaning Sector Union	Central Organisation of Trade Unions (SAK)	SUN EPSU		Public Services International (PSI)	
Cleaning Sector Union		ND	ND	ND	Yes	ND	ND	ND		ND	

SW: salaried workers

Density: number salaried workers affiliated to the organisation / number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

# FRANCE

## 1. Description of the sector

### Industrial cleaning under NACE nomenclature

Under NACE nomenclature, industrial cleaning activities (Code 74.7 in the French Nomenclature of Activities) comprise:

- basic cleaning in premises of all kinds (e.g. blocks of flats, offices and shops), cleaning collectively used facilities (e.g. stadiums, fairs, exhibitions, roads, road signs, road furniture and car parks), cleaning public transport vehicles and window cleaning;
- specialist cleaning (i.e. catering for important locations such as operating theatres and IT suites);
- sweeping chimneys, rat extermination, pest control, and disinfection

#### *Number of enterprises and distribution of employees in the sector*

Sub-sectors	Number of enterprises	Number of FTE employees	Number of employees
Basic cleaning	10,272	214,981	222,256
Specialist cleaning	1,389	23,088	24,005
Sweeping chimneys, rat extermination, pest control and disinfection	835	4,591	5,288
<b>Total</b>	<b>12,496</b>	<b>242,660</b>	<b>251,548</b>

FTE: full-time equivalent

Source: INSEE, Enquête annuelle d'entreprise dans les services, 2001

#### *Distribution of enterprises by size*

	Number of enterprises	% of individual enterprises	Not included	% of enterprises with 0-9 employees	% of enterprises with 10-99 employees	% of enterprises with 100 or more employees
Industrial cleaning	12,496	53% (*)	1.17% (**)	75.06%	19.89%	3.88%

Source: INSEE, Enquête annuelle d'entreprise dans les services, 2001, except (\*\*)

Source (\*): SIRENE 2000

(\*\*): All enterprises that are in the process of being set up, where there is a work stoppage, that do not have any employees, or which have negative added value or extremely high added value per person.

#### *Distribution of employees by size of enterprise*

	Number of employees	Number of FTE employees	Number of people working in enterprises with 0-9 employees/number of employees (%)	Number of people working in enterprises with 10-99 employees/number of employees (%)	Number of people working in enterprises with 100 or more employees/number of employees (%)
Industrial cleaning	251,548	242,660	10.42%	18.07%	71.42%

FTE: full-time equivalent

Source: INSEE 2001

### The sector according to the collective bargaining structure

The industrial cleaning sector is structured in a number of ways in terms of collective bargaining. Enterprises and employees in the sector are mainly covered by three collective agreements:

- the National Cleaning (*Propreté*) Enterprises Collective Agreement applies to employers and employees engaged in cleaning classified in Code 74.7 Z ("cleaning activity"), and to employers and employees in enterprises involved in the domestic cleaning of fitted carpets, rugs, dry-cleaning and curtains (Code 93.0 A : "laundry and industrial dry-cleaning");

- the National Railway Maintenance and Related Activities Collective Agreement covering the cleaning of SNCF and Paris underground platforms and carriages, and the loading and unloading of freight at dispatch centres;
- the Disinfection, Pest Control and Rat Extermination Collective Agreement covering sweeping chimneys, disinfection, rat extermination and pest control.

The collective agreements dealing with building and automobile services are also involved, but to a very much smaller extent.

***Employees and enterprises classified according to the main collective agreements***

Sub-sectors	Number of enterprises	Number of employees
National Cleaning ( <i>Propreté</i> ) Enterprises Collective Agreement	12,496	225,000 (*)
National Railways Maintenance and Related Activities Collective Agreement (**):		
- cleaning activities		5,000
- maintenance activities		7,000
- Total	50	12,000
Disinfection, Pest Control and Rat Extermination Collective Agreement (***)	835	4,591

Source (\*): Federation of Cleaning (*Propreté*) Enterprises

Source (\*\*): Rail and Air Upkeep and Maintenance Workers' Union, 2004

Source (\*\*\*) : INSEE, Enquête annuelle d'entreprises dans les services

**Socio-economic characteristics of the sector**

Service enterprises in France (300,000 altogether) have a combined turnover of EUR 244 billion, or 10% of French GDP. The industrial cleaning sector, which now has 12,500 enterprises, generates a turnover of EUR 7 billion. Three quarters of industrial cleaning enterprises have fewer than 10 employees. However, the work is extremely concentrated with the 240 enterprises with over 200 employees generating more than 60% of the sector's turnover. The sector experienced considerable concentration during the 1990s, and leading enterprises in the market, such as ONET, PENAUILLE POLYSERVICES and ISS, have carried out a large number of acquisitions, although this trend is now stabilising. These groups are involved in all cleaning activities, including the cleaning of trains and of SNCF and Paris underground platforms.

The cleaning sector currently employs 9% of employees in business services. The workforce has grown faster than average: between 2000 and 2002, the average annual growth rate was 5.6% in cleaning and 2.9% for all sectors, although the railway maintenance branch tended to lose jobs.

Cleaning is traditionally a labour-intensive sector with 91% employed as operatives, 3.8% as team leaders, 2% as supervisors, 1.3% as white-collar employees, 0.4% as administrative employees, and 1% as managers. It is worth noting that the rat extermination, disinfection and pest control branch has fewer employees at operative level than the cleaning (*propreté*) sector. The sector is highly feminised, with two out of every three employees women, compared with 45% in all business services. Over half the employees in the sector work part-time. Although office cleaning is still concentrated outside office hours, supermarket practices are changing, and cleaning is increasingly being carried out during the day. The low skills level of employees who are frequently employed part-time is the reason why average pay in the sector is almost half what is paid in the business services sector as a whole.

Certain changes in terms of activities and services have been taking place recently in the sector. These are becoming increasingly complex, and include growth in specialist work in dangerous places such as hospitals and nuclear establishments. Services of this type call for specially designed, and often innovative, technology. This development has led to a higher level of skills in the sector, and the appearance of new jobs such as sales representatives and quality controllers. There is also evidence of growth in continuing training in enterprises and the establishment of national diplomas.

Generally speaking, price is the decisive criterion when choosing a service provider in the cleaning sector. Quality of service is also becoming an important criterion in cases of specialist work.

Furthermore, clients are becoming key actors insofar as they are involved in fixing market prices. They can also guide movements in the sector's labour costs and employee relations. It is true that there is heavy price competition, but some attention is also given to the notion of "treating staff well" in relation to salaries, training costs and accident prevention. The notion of treating staff well may also influence the choice of service provider.

## 2. Social dialogue

### Characteristics of social dialogue

#### *The cleaning (propreté) branch*

The cleaning (*propreté*) branch has only been structured recently, when 1994 National Cleaning (*Propreté*) Enterprises Collective Agreement replaced the National Buildings Cleaning Enterprises Collective Agreement concluded in 1981.

The most important bargaining level in the cleaning sector is the sector itself. The sector collective agreement plays a central role, and lays down the minima that are applied in enterprises. A survey carried out by the DARES (Direction de l'Animation de la Recherche, des Etudes et des Statistiques, or Research, Studies and Statistics Management Directorate) for employers in the cleaning (*propreté*) branch in 1998 showed that in 99% of cases, the classification system used in enterprises was defined in the branch collective agreement, that 89% of enterprises used the National Collective Agreement to calculate the length-of-service bonus, and that 92% used it to determine salary hierarchies. Lastly, 88% of employers considered branch recommendations to be "of paramount importance" when deciding on salary reviews at establishment level<sup>55</sup>. Branch agreements are negotiated on the Joint Collective Agreement Committee.

Enterprise level is seen as rather weak. It has to be satisfied with compulsory annual negotiations in large groups, and is almost non-existent in small enterprises. It is worth noting that agreements can also be concluded at workplace level (the level below that of the establishment), but they continue to be marginal.

At branch level, it is also worth noting the roles of the National Hygiene and Industrial Cleaning Institute (INHNI), an initial and continuing training body, and the Cleaning (*Propreté*) Sector Training Insurance Fund (FAF), which administers training funds in the sector; both of these bodies are managed on a joint basis. The Action Fund for Reinsertion and Employment (FARE) and the Joint Monitoring Committee are two more institutions where social actors in the cleaning sector meet.

#### *Other branches*

Preparations for branch negotiations in railway maintenance are carried out by the social partners before the negotiations proper take place on a Joint Committee chaired by a representative of the state. Enterprise-level agreements are very close of branch negotiations.

Joint meetings also take place in the rat extermination, disinfection and pest control branch in the presence of a representative of the state.

### The content of collective agreements

#### *The cleaning (propreté) branch*

The chief negotiating issues in the cleaning (*propreté*) branch are the amount of part-time working and the phenomenon of multiple employers. Several agreements accordingly seek to improve the status of part-time employees (e.g. by fixing a minimum number of hours every month, giving priority to part-timers when offering full-time employment, and paying allowances to employees working under 200 hours in a three-month period), and to reduce precariousness of employment in the branch. There is also emphasis on giving part-time employees and those with several employers access to training. The trade unions say that the cleaning (*propreté*) sector must be characterised by a proper professional status capable of

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<sup>55</sup> Results from the "employer" questionnaire in the REPOSE survey carried out by the DARES in 1998, quoted by Annette Jobert, "Quelles dynamiques pour la négociation collective de branche ?", *Travail et Emploi*, No 95, July 2003.

protecting employees from forms of precariousness that typify the sector. Salary negotiations in the cleaning (*propreté*) sector are strongly marked by tensions at both branch and enterprise level.

Agreements concluded in 2002 and 2003 dealt *inter alia* with such matters as transport allowances, night working and job classifications.

#### ***Other branches***

An agreement on night working was concluded in the railway maintenance in 2002. No agreements have been signed in the rat extermination, disinfection and pest control branch.

### **3. Employers' organisations and trade unions**

It should be noted from a methodological point of view that the densities set out below are calculated on the basis of the sector or sub-sector covered by the organisation (and not on the basis of the entire sector) when the organisation does not cover the whole sector.

#### **The cleaning (*propreté*) branch**

The Federation of Cleaning (*Propreté*) Companies and Associated Services (*Fédération des Entreprises de Propreté et Services Associés, FEP*) is the only representative employers' organisation in the cleaning (*propreté*) sector<sup>56</sup>.

The representative trade union federations are as follows:

- Fédération Ports and Docks (Ports and Docks Federation) (CGT);
- Fédération des Services (Services Federation) (CFDT);
- Fédération de l'Équipement, de l'Environnement, des Transports et des Services (Equipment, Environment, Transport and Services Federation (CGT-FO);
- Syndicat National des Cadres, Techniciens et Assimilés du Nettoyage (CGC);
- Fédération du Commerce des Services et de la Force de Vente (National Commerce, Services and Sales Union) (CFTC).

#### **Other branches**

The representative employers' organisation in the disinfection, rat extermination and pest control branch is the Disinfection, Rat Extermination and Pest Control Industry Chamber (CS3D). The trade unions involved in negotiations are the CGT, CGT-FO, CFDT, CFTC and CGC.

The representative employers' organisation in the railway maintenance branch is the Rail and Air Upkeep and Maintenance Union (SAMERA). The trade unions that take part in collective bargaining are the Ports and Docks Federation (CGT), the Equipment, Environment, Transport and Services Federation (CGT-FO), the General Transport and Equipment Federation (CFDT), the CGC and the CFTC<sup>57</sup>.

#### **Employers' organisations**

##### ***The Federation of Cleaning (Propreté) Companies (La Fédération des Entreprises de Propreté, FEP)***

The Federation of Industrial Cleaning Companies was founded in 1966. It is the only representative employers' organisation in the branch. The FEP federates nine regional employers' association, and one association representing large multi-regional enterprises. It is managed by a Board of Directors, which receives reports from specialist committees: the Social Committee, the Training and Skills Committee, the Economic Committee, the Technical Committee and the Communications Committee.

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<sup>56</sup> We should also mention SN Pro, a non-representative organisation that is active in the sector, and mainly in SMEs. According to the FEP, it has fewer than 100 members.

<sup>57</sup> The Sud trade union is beginning establish itself in this branch through Sud Rail, but it is not recognised as representative.

The FEP has 1800 members, including the most important large groups in the field, that is to say about 15% of enterprise in the branch, which in turn employ about 70% of the branch's total workforce. The FEP belongs to the Movement of French Enterprises (*Mouvement des Entreprises de France*, MEDEF) and the General Confederation of SMEs (*Confédération Générale des Petites et Moyennes Entreprises*, CGPME). It is also a founder member of the Group of Business Services Professionals (*Groupement des professionnels de services*).

***The Rail and Air Upkeep and Maintenance Union (le Syndicat des Auxiliaires de la Manutention et de l'Entretien pour le Rail et pour l'Air, SAMERA)***

SAMERA is a representative body for the railway maintenance and associated activities branch, and for the maintenance and cleaning at airports in the Paris Region branch. It estimates that 98% of enterprises in the branch are in membership. All enterprises with more than 100 employees and 98% of SAMERA members are also members of the FEP. The SAMERA works with the FEP on all matters relating to training in the branch.

***The Disinfection, Rat Extermination and Pest Control Industry Chamber (La Chambre Syndicale des Industries de la Désinfection, Dératisation, Désinsectisation, CS3D)***

The CS3D was founded in 1946 and is a representative organisation in the disinfection, rat extermination and pest control branch. It has 88 members, most of them SMEs, and is an umbrella body for the overwhelming majority of enterprises in the branch. Non-affiliated enterprises are involved in this kind of work at a secondary, or even marginal, level. The CS3D is a founder member of the Confederation of European Pest Control Associations (CEPA).

## Trade unions

***The Ports and Docks Federation – CGT (Fédération des Ports&Docks - CGT)***

The Ports and Docks Federation took over responsibility for the cleaning sector in 1975, the enterprises active in cleaning being the same as those working in maintenance and cleaning (*propreté*). The Federation estimates it has 20,000 members in the cleaning (*propreté*) enterprises branch, that is to say about 10% of the branch workforce (2001 estimate). It is mainly established among operational staff in large enterprises from operatives up to supervisors. A recent survey carried out in the cleaning (*propreté*) sector put the CGT in the lead with 47% of votes in workplace-level elections<sup>58</sup>. The Federation also covers the railway maintenance branch. The disinfection, rat extermination and pest control branch comes under the CGT's Services Federation (*Fédération Services de la Confédération Générale du Travail*).

***The Equipment, Environment, Transport and Services Federation - CGT-FO (Fédération de l'Équipement, de l'Environnement, des Transports et des Services - CGT-FO)***

This Federation of the CGT-FO (*Confédération Générale du Travail-Force Ouvrière*) covers the transport infrastructure sectors (except for roads and railways) and business services (cleaning (*propreté*) and accident prevention), and also the railway maintenance and disinfection, rat extermination and pest control branches. It says it is hard to estimate membership numbers because CGT-FO members sometimes organise themselves in enterprise unions (like the Paris underground and hospitals) that use sub-contractors.

***The Services Federation - CFDT (Fédération des Services - CFDT)***

The Services Federation of the CFDT (*Confédération Française Démocratique du Travail*) in the area of business services and services for private individuals. It has 70,000 members, of whom about 6,000 or 7,000 are in cleaning (*propreté*), most of them employed in large enterprises. The Federation estimates it is the second largest trade union in the sector after the CGT. It also covers the disinfection, rat extermination and pest control branch. Railway maintenance comes under the CFDT's General Transport and Equipment Federation.

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<sup>58</sup> See Annette JOBERT, *Op. cit.*



### *The Commerce, Services and Sales Union CFTC (Fédération Commerce, Services et Force de Vente - CFTC)*

The federation of the CFTC (*Confédération Française des Travailleurs Chrétiens*) has 2,000 members in cleaning (*propreté*) sectors, and estimates that it has another 2,000 members in the railway maintenance branch. It also covers the disinfection, rat extermination and pest control branch.

### *The National Management, Commerce and Services Federation – CGC (La Fédération Nationale de l'Encadrement, des Commerces et des Services - CGC)*

The Federation of the CGC (*Confédération Générale des Cadres*) is established at managerial level, although the sector has exceptionally few managers (only 1% of the workforce).

### *Sud Rail*

This trade union estimates it has about 1,000 members in the railway cleaning sector. It is very established in certain workplaces, where it also has elected representatives. Sud has initiated a procedure in an attempt to achieve recognition as a representative organisation in the sector<sup>59</sup>.

## Details of results of workplace-level elections

The following table sets out the percentage votes obtained by the various lists at employee representative and Works Council elections in some cleaning enterprises in 2000/2001, all electoral colleges combined. The sample is based on 788 electoral colleges. The turn-out on which this estimate is based was 42,267, and the number of registered voters was 117,177 (out of 251,548 employees in the sector). The DARES survey shows that it is not possible to produce statistics covering the whole sector. It follows that the table below contains general trends.

	CGT	CFDT	CFTC	CGC	FO	Other trade unions	Non-union lists
% of votes obtained	34.57	19.93	4.29	0.2	13.22	2.78	25
% of seats won	31.51	18.13	3.5	0.55	11.85	2.18	32.2

Source: Details supplied by the DARES

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<sup>59</sup> UNI-Europa and EFCI members wished for deleting every mention of this organisation (European consultation, October-November 2004). The aim of the study is to present the situation of the sector including conflicts or emergent actors. This organisation does not take part in collective bargaining but initiated a procedure in an attempt to achieve recognition.

## Organisations

It should be noted from a methodological point of view that the densities set out below are calculated on the basis of the sector or sub-sector covered by the organisation (and not on the basis of the entire sector) when the organisation does not cover the whole sector.

### *Employers' organisations*

NB: The densities are calculated on the basis of the branches covered by the organisations

Organisation	Sub-sectors covered	Companies	SW	Density Companies	Density SW*	CB	National affiliations		European affiliations		International affiliations	
		number	number	%	%	Yes/No	Direct	Indirect	Direct	Indirect	Direct	Indirect
FEP (The Federation of Industrial Cleaning Companies)	Basic cleaning, specialist cleaning, cleaning rugs and carpets	1,800		14.5% (1)	+ or – 70% (2)	Yes	MEDEF CGPME		EFCI		WFBS	
SAMERA (The Rail and Air Upkeep and Maintenance Union)	Cleaning SNCF and Paris underground platforms	ND	ND	+ or – 98% (3)	ND	Yes						
CS3D (The Disinfection, Rat Extermination and Pest Control Industry Chamber)	Disinfection, rat extermination and pest control	88	ND	About 10.5%								

SW: salaried workers

Density companies: number of companies affiliated / total number of companies in the branch covered by the organisation

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the branch covered by the organisation

The densities are calculated on the basis of the sector or sub-sector covered by the organisation (and not on the basis of the entire sector) when the organisation does not cover the whole sector

CB: Does the organisation take part in collective bargaining?

(1): Source: FEP

(2): Estimate by the FEP

(3): Source: SAMERA

## Trade Unions

NB: The densities are calculated on the basis of the branches covered by the organisations

Organisation	Type of SW	Members	Members working in the sector	Density	CB	National affiliations		European affiliations		International affiliations	
	Type	Number	Number	%	Yes/ No	Direct	Indirect	Direct	Indirect	Direct	Indirect
Ports and Docks Federation – CGT	All categories; branch <i>propreté</i>		20,000 (1)	10% (1)	Yes	CGT		ETF	ETUC	Organisme mondial pour les activités portuaires	ITF
Services Federation - CFDT	All: <i>propreté</i> , disinfection, rat extermination, pest control	70,000 in services	6,000-7,000 in the cleaning ( <i>propreté</i> ) branch	<i>Propreté</i> : Between 2.5% and 3% (3)	Yes	CFDT		UNI-Europa	ETUC	UNI	IUF
Equipment, Environment, Transport and Services Federation - CGT-FO	All categories; <i>propreté</i> , railway maintenance, disinfection, etc.		ND	ND	Yes	CGT-FO		UNI-Europa ETF	ETUC	UNI	IUF ITF
Commerce, Services and Sales Federation - CFTC	All categories, <i>propreté</i> , railway maintenance, disinfection, etc.		<i>Propreté</i> : 2,000 (2) Railway maintenance : 2,000	<i>Propreté</i> : 0.8%; Railway maintenance : 16.5%	Yes	CFTC		UNI-Europa	ETUC	UNI	IUF
FNES - CGC	Managers		ND	ND	Yes	CFE-CGC		UNI-Europa	ETUC, CEC	UNI	IUF

SW: salaried workers

Density: number of salaried workers affiliated to the organisation / number of salaried workers in the sector. The densities are calculated on the basis of the sector or sub-sector covered by the organisation (and not on the basis of the entire sector) when the organisation does not cover the whole sector

CB: Does the organisation take part in collective bargaining?

(1) Estimate: CGT 2001

(2) Source: CFTC

(3) Estimate: CFDT

# GERMANY

## 1. Description of the sector

### Delimitation and scope of activities in the sector

According to the NACE definition 74.7 "industrial cleaning" covers six areas: disinfection and extermination services, window cleaning services, traditional cleaning services, specialist cleaning services, furnace and chimney cleaning services and other cleaning services. In Germany, a slightly different definition of the sector is used: Furnace and chimney cleaning services are excluded and waste management, catering, green area care, laundry services and security services are added<sup>60</sup>.

For practical purposes, a division of the cleaning sector into the following six sub-sectors seems more useful<sup>61</sup>:

- offices (59% of total turnover in the cleaning industry in 2002)
- windows (17%)
- factories etc. (12%)
- hospitals (6.7%)
- transport (1%)
- and others (4.3%)

### Socio-economic features of the sector

#### *Companies*

The German cleaning sector is the largest, in terms of turnover, in Europe: the companies in the sector produced a turnover of EUR 6,678,507,000<sup>62</sup> in 1995<sup>63</sup>. Between 1996 and 1998, the turnover in the German cleaning sector decreased by 0.5-1% per year.

In 2002, the cleaning market included 6,652 companies<sup>64</sup>. This figure refers to the number of handicraft companies (*Handwerksbetriebe*), meaning companies of self-employed craftsmen that have been trained in an apprenticeship (*Ausbildung*). The definition of companies can be broadened if we include all enterprises that are liable for taxation and produce a turnover above EUR 16,306 (that would also include self-employed cleaners with a trade license and similar enterprises). According to this broader definition, the sector included 14,487 companies in 1999. However, it is the narrower definition that is used within this study.

Medium-sized businesses prevail in the German cleaning sector. But there are also large companies with up to 40,000 employees.

#### *Companies by number of employees*

Number of companies	% companies with < 20 SW: 798	% companies with 20-50 SW: 665 (10%)	% companies with 50- 500 SW: 3.526 (53%)	% companies with > 500 SW: 1.663 (25%)

<sup>60</sup> Pye Tait (1999), *A report for EFCI and Euro-FIET on a survey to investigate key issues within the European Cleaning Industries*, [http://www.union-network.org/uniproperty.nsf/0/2287a23c121de1bdc1256c76003b517d\\$FILE/finalreport.EN.doc](http://www.union-network.org/uniproperty.nsf/0/2287a23c121de1bdc1256c76003b517d$FILE/finalreport.EN.doc), p. 9-10 (Pye Tait's information originates from a survey including several European countries. For Germany only one employers' organisation, the *Bundesinnungsverband des Gebäudereiniger-Handwerks – BIV*, responded. So all the information provided by PYE TAIT about Germany represents the opinion of that organisation.)

<sup>61</sup> *Ibidem*, p. 12.

<sup>62</sup> Source: Bundesinnungsverband des Gebäudereiniger-Handwerks – BIV

<sup>63</sup> Due to the incompatibilities between different surveys, the *Statistisches Bundesamt* has not published any absolute numbers for turnover in the sector after 1995.

<sup>64</sup> Source: Bundesinnungsverband des Gebäudereiniger-Handwerks – BIV

6,652 (2002)	12% (2002)	10% (2002)	53% (2002)	25% (2002)
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Sources: BIV; EFCI/FENI, 2004

SW: salaried workers

### Workers

In 2002, 685,000 salaried workers were employed in the sector<sup>65</sup>. Between 1996 and 1998, the number of employees decreased by 2-3% per year<sup>66</sup>. 80% of employees in the German cleaning sector worked part-time in 1999<sup>67</sup> and the average working time was 4 hours per day in 1997. The workforce consisted of 88% of blue-collar workers, 8% of technical staff and 4% of administrative staff in 1997<sup>68</sup>. Female employees form the majority (79%) of the German cleaning sector<sup>69</sup>. Around 30% of employees in the sector were migrant employees in 1997<sup>70</sup>. In 2002, 3,545 employees in the cleaning sector were being trained in apprenticeships. The number of apprenticeships offered by the companies in the sector has generally increased over the last few years.

### Workers

Number of workers	Number of SW	Number of SW/number of SW in the country (%)	Number of SW in companies <10 SW/number of SW in the sector (%)	Number of SW in companies 10-100 SW/number of SW in the sector (%)	Number of SW in companies >100 SW/number of SW in the sector (%)
ND	685,000 (2002)	2.1 %	ND	ND	ND

SW: salaried workers

### Evolution and stakes

There is not much more potential for turnover in the industrial cleaning German market in the future: 79% of the maintenance cleaning performed in companies has already been outsourced. The same is true for 92% of window cleaning<sup>71</sup>. For the total market the market penetration rate of cleaning contractors<sup>72</sup> is 68%<sup>73</sup>. Therefore, the main competitive strategy adopted by the firms is diversification: Companies offer more services, such as additional infrastructural services (like delivery, catering or janitor services) or even complete facility management.

Another area that offers more potential to companies is the public sector. Here, many cleaning services have not been outsourced yet, especially in hospitals. And currently, there seems to be a tendency towards using the services offered by cleaning companies to a greater extent, as these companies can in many cases provide the required services more professionally and at a lower cost<sup>74</sup>.

## 2. Social dialogue at sector level

### Collective agreements

Collective bargaining takes place at three levels:

<sup>65</sup> Due to the incompatibilities between different surveys, the *Statistisches Bundesamt* has not published any absolute numbers for salaried workers in the sector after 1995.

<sup>66</sup> Source: Bundesinnungsverband des Gebäudereiniger-Handwerks – BIV

<sup>67</sup> Graber, Martin (2001), *Gebäudereinigung in Deutschland. Der Facility-Manager*, p. 6-8.

<sup>68</sup> EFCI/FENI (1999), *The Cleaning Industry in Europe 1997. A statistical Survey by EFCI/FENI*, Brussels.

<sup>69</sup> Pye Tait (1999), *A report for EFCI and Euro-FIET on a survey to investigate key issues within the European Cleaning Industries*, [http://www.union-network.org/uniproperty.nsf/0/2287a23c121de1bdc1256c76003b517d\\$FILE/finalreport.EN.doc](http://www.union-network.org/uniproperty.nsf/0/2287a23c121de1bdc1256c76003b517d$FILE/finalreport.EN.doc), p. 11.

<sup>70</sup> EFCI/FENI (1999), *The Cleaning Industry in Europe 1997. A statistical Survey by EFCI/FENI*, Brussels.

<sup>71</sup> Source: Bundesinnungsverband des Gebäudereiniger-Handwerks – BIV

<sup>72</sup> The market penetration rate is the share of the total potential market contracted out to cleaning companies; among other things estimated on the basis of sales of cleaning products and material.

<sup>73</sup> EFCI/FENI (1999), *The Cleaning Industry in Europe 1997. A statistical Survey by EFCI/FENI*, Brussels.

<sup>74</sup> Source: Bundesinnungsverband des Gebäudereiniger-Handwerks – BIV

- At the national level, framework agreements (*Rahmentarifverträge*) are concluded. They lay down the pay scales.
- Wage levels, pay increase and other issues are negotiated at regional level
- At company level, a number of larger companies have concluded their own collective agreements (*Haustarifverträge*). According to IG BAU (*IG Bauen Agrar Umwelt*), 17 company agreements in 11 companies are in place at this moment.

There is, in Germany, an extension procedure that is also applied to the cleaning sector. In 2004, the framework agreement at national level was declared as binding for all employees in the sector, irrespective of whether the employer has joined the employers' organisation. Furthermore, 9 valid regional-level collective agreements were declared generally binding (Baden-Württemberg, Bavaria, Berlin, Brandenburg, Bremen/Hamburg/Lower Saxony/Schleswig-Holstein, Hessen, Northrhine-Westfalia, Rhineland-Palatine/ Saarland, and Thuringia).

### Issues of social dialogue

According to IG BAU, three issues are particularly controversial between the social partners:

- Agency work
- Working time flexibility
- Company pension schemes

### 3. Employers' organisations and trade unions

There are two players that operate in social dialogue for the cleaning sector:

- The Federation of Guilds in the Building-Cleaning Trade (*Bundesinnungsverband des Gebäudereiniger-Handwerks, BIV*) on the employers' side
- The Construction, Agricultural, and Environmental Workers Union (*IG Bauen Agrar Umwelt, IG BAU*), on the trade union's side

All the collective agreements are concluded by these two organisations.

Two potential players can be mentioned:

- The Employers' Federation Service Industry (*Arbeitgeberverband Dienstleistungsunternehmen*), a newly founded employers' organisation, mentions cleaning as an industry it wishes to organise. No employer in the cleaning industry, however, is a member of the organisation.
- The Christian Union Mining, Chemical and Energy (*Christliche Gewerkschaft Bergbau Chemie Energie, CGBCE*), a Christian trade union, seeks to organise workers in the cleaning industry (among other sectors), but at the moment, they do not have a collective agreement in place that covers any workers in the cleaning industry.

### Employers' organisations

*The Federation of Guilds in the Building-Cleaning Trade (Bundesinnungsverband des Gebäudereiniger-Handwerks, BIV)*

The BIV is both a trade association and an employer organisation (in many other industries in Germany, trade associations and employer organisations are separate entities). The BIV was founded in 1934. Its direct members are 41 regional guilds (*Innungen*), the regional trade associations of the cleaning sector. Cleaning is organised as a *Handwerk*, a handicraft industry, implying some regulations that differ from industrial sectors. In particular, firms must enrol in the regional trade associations. However, the cleaning sector is not a heavily regulated handicraft in which individual companies must employ a works manager with a certificate as *Meister*. The regional guilds, in turn, organize some 2,500 individual companies. Since according to official statistics, some 6,650 companies are engaged in the sector, the density rate in terms of company membership is at 38%. The BIV itself claims to organise 87% of workers engaged in the industry<sup>75</sup>.

<sup>75</sup> <http://www.gebaeudereiniger.de/index.htm>, press report *Das Gebäudereiniger-Handwerk – Zahlen, Daten, Fakten*

## Trade unions

### *The Construction, Agricultural, and Environmental Workers Union (IG Bauen-Agrar-Umwelt, IG BAU)*

The IG BAU is one of the nine member trade unions affiliated to the large German union umbrella organisation *Deutscher Gewerkschaftsbund (DGB)*. In its present form, it came into being when the two unions *IG Bau-Steine-Erden (IG BSE)* and the *Gewerkschaft Gartenbau, Land- und Forstwirtschaft (GGLF)* merged in 1996<sup>76</sup>. In addition to the cleaning industry, the trade union IGB BAU organises workers in various other industries: construction; agriculture; forestry and related industries; business services; the roofer, work on scaffolding, and mason crafts; the house painter, glazier, and heating installation crafts; and the building material industry<sup>77</sup>. IG BAU reports a total membership of some 500,000 workers, of which some 48,000 are in the cleaning industry. The IG BAU gives an estimated density rate of 7% in the cleaning sector. 2% of members hold the status of *Angestellter* (employment status of a white-collar worker). There is a negligible number of self-employed members. 70% of members are unskilled or semi-skilled, and 77.5% of members are women.

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<sup>76</sup> <http://www.igbau.de/db/v2/frameset.pl>

<sup>77</sup> <http://www.igbau.de/db/v2/frameset.pl>

## Organisations

### *Employers' organisations*

Employers' organisations	Sub-sectors covered	Companies affiliated	SW	Density companies	Density SW	CB	National affiliations		European affiliations		International affiliations	
				(%)	(%)		Yes/No	Direct	Indirect	Direct	Indirect	Direct
BIV (Federation of Guilds in the Building-Cleaning Trade)	All	2,500	ND	38%	87%*	Yes	BFH <sup>78</sup>	ZDH <sup>79</sup> , BDA <sup>80</sup>	EFCI, FIDEN		WFBSC	

Companies affiliated: number of cleaning companies affiliated

SW: salaried workers

Density companies: number of companies affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

\* Source: BIV

### *Trade Unions*

Trade Unions	Types of SW	Members	Members in the sector	Density members	CB	National affiliations		European affiliations		International affiliations	
		Total number	Number	(%)		Yes/No	Direct	Indirect	Direct	Indirect	Direct
IG BAU (Construction, Agricultural, and Environmental Workers Union)	All	500,000	48,000	7%	Yes	DGB <sup>81</sup>		EFBWW, EFFAT, UNI-Europa		IFBWW, FSC, IUF, UNI	

SW: salaried workers

Density members: number of salaried workers affiliated to the organisation / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining

<sup>78</sup> *Bundesvereinigung der Fachverbände des deutscher Handwerks* (German Association of Skilled Crafts Confederations)

<sup>79</sup> *Zentralverband des deutschen Handwerks* (German Confederation of Skilled Crafts)

<sup>80</sup> *Bundesvereinigung der deutschen Arbeitgeberverbände* (Confederation of German Employers Associations)

<sup>81</sup> *Deutscher Gewerkschaftsbund* (German Trade Union Federation)



# GREECE

## 1. Description of the sector

### Delimitation and scope of activities in the sector

The cleaning industry sector in Greece includes all activities classified under NACE 747, namely the general cleaning of buildings of all types, window cleaning, sweeping chimneys, the cleaning of air conduits, burners, boilers and furnaces, disinfection, fumigation, and the cleaning of the means of transport. Cleaning services provided at home, and cleaning based on the use of steam or sandblast, are excluded from the sector.

### Socio-economic features of the sector

#### *Companies*

It is hard to determine how many firms there are in the cleaning industry in Greece. Officially, there are 524 such firms registered in the local Chambers, and of these, 10% are located in the Athens Metropolitan Area. However, there is an unspecified number that operate in the informal economy and which are not registered, and there are also firms that operate legally but which are invisible in the statistics. According to the estimates of the employers' organisation PASEP, there are around 300 cleaning firms operating in the Greater Athens Area, and over 1,500 firms spread around the country as a whole.

The legal statuses of these enterprises range from stock companies (*ανώνυμη εταιρία* - *anonymos eteria* (AE) and limited liability companies, to one-person firms. Similarly, the size of firms engaged in cleaning activities also ranges from large international enterprises to micro-firms with very small numbers of employees, although they are mostly firms employing between 10 and 50 employees. Most cleaning sector firms offer their clients a wide range of services in addition to cleaning and disinfection: these include technical support, building maintenance, refuse management, tree cutting, transport, supplying liquid fuel for heating purposes, plumbing, and waste disposal.

#### *Employees*

It is impossible to determine how many cleaning workers there are as they fall into several occupational categories and turnover is high, but it is thought that most cleaners come under the 3-digit occupational category STEP 913 ("home helpers", cleaners, launderers/laundresses, and other similar occupations": 13,445 employees come into this category; "window cleaners" are classified under STEP 914, which also includes building supervisors and other similar occupations, and accounts for 791 employees. The cleaning industry is a highly feminised sector: It is estimated that most cleaning workers are documented or unauthorised migrant women.

The employment status of workers in the cleaning sector varies considerably, depending on the employer:

- cleaners in manufacturing industry have stable jobs, full employment and social security rights, and contracts of indeterminate duration;
- cleaners working in the public sector (recruited in the past) are either tenured (permanent) personnel or are employed on contracts of indeterminate duration;
- cleaners in state schools are employed on fixed-term contracts (usually of ten months' duration) that are renewed annually;
- cleaners in cleaning firms and in private firms generally have contracts of indeterminate duration or fixed-term contracts;
- a small number of cleaners are employed through temporary work agencies;
- an unknown number of cleaning workers are undeclared or unauthorised workers.

#### *Developments and key issues*

The cleaning industry in Greece is undergoing rapid expansion with cleaning services being increasingly contracted out to private firms or individuals in order to cut wage bills and reduce the number of permanent cleaning staff employed in firms

and organisations in both the private and the public sectors; many ministries, hospitals, schools, banks and hotels, for example, are outsourcing cleaning activities to private companies.

The major problems facing the cleaning industry in Greece include:

- intense and unfair competition from firms failing to pay taxes and social security contributions;
- low-cost strategies related to public procurement policies whereby contracts are awarded to the lowest bidder;
- a complicated and diversified legal framework covering participation in invitations to tender;
- a lack of certification and entry criteria for firms providing cleaning services;
- the very low degree of collective organisation and representation of sector business interests.

## 2. Social dialogue at sector level

### *Players*

Representation by employers' sector organisations is fragmented.

The Panhellenic Association of Cleaning Firms (PASEP), along with another 14 employers' organisations, negotiates the collective labour agreement that covers employees (including cleaning staff) working in the provision of services.

The following employers' organisations are also signatory parties to the collective labour agreement for the commerce sector: the General Confederation of Greek Small Business and Trades (GSEVEE), the National Confederation of Hellenic Commerce (ESEE), the Association of Retail Business (SELPE) and the Association of Supermarket Companies (SESME).

Lastly, the Federation of Greek Industries (SEV) and the General Confederation of Greek Small Business and Trades (GSEVEE) sign the collective agreement for cleaners employed in manufacturing industry.

On the employee side, cleaning workers employed under contracts of indeterminate duration and fixed-term contracts in the private and public sectors are represented exclusively by the Greek Federation of Private Sector Employees (OIYE). All of the above agreements are negotiated and signed by this organisation on behalf of the trade unions.

### *Social dialogue issues*

The main problems facing cleaning workers in Greece are low pay, poor working conditions and precarious employment status. A large proportion of workers in the cleaning sector are undeclared workers, and most of them are undocumented migrants. As a result, wages are forced downwards while employers avoid paying social security contributions. The main demands from the trade unions on behalf of cleaning workers therefore include:

- improved pay rates (cleaners continue to be amongst the lowest-paid workers);
- improved working conditions;
- improved employment status (i.e. changing precarious or temporary employment into stable jobs).

### *Collective agreements*

Cleaning workers are covered by three distinct sector collective labour agreements:

- the commerce sector collective agreement;
- the provision of services collective agreement;
- the manufacturing industry cleaners' agreement.

## 3. Employers' organisations and trade unions

### **Employers' organisations**

*The Panhellenic Association of Indoor and Outdoor Cleaning Firms, Waste Management and Protection of the Environment (PASEP)*

The provision of services collective agreement.

PASEP was established in 2002. With 65 members, it is the largest professional association in the cleaning sector. There are other associations in the cleaning sector. These associations do not collaborate. PASEP is the only employers' organisation in the cleaning industry that has the right to negotiate and conclude collective labour agreements on behalf of cleaners working in the provision of services. PASEP is recognised by the Greek Federation of Private Sector Employees (OIYE). It is not affiliated to any higher-level organisation at national, European or international level.

#### *Other employers' organisations*

In the commerce sector, the employees' organisation signs the collective agreement with the following employers' organisations: the General Confederation of Greek Small Business and Trades (GSEVEE), the National Confederation of Hellenic Commerce (ESEE), the Association of Retail Business (SELPE), and the Association of Supermarket Companies (SESME). The last agreement was concluded in 2002.

The manufacturing industry cleaners' agreement covers cleaners working as employees in manufacturing firms. It is concluded for the employers by the Federation of Greek Industries (SEV) and the General Confederation of Greek Small Business and Trades (GSEVEE). The most recent agreement was signed in 2002 for a two-year period.

## **Trade unions**

### *The Greek Federation of Private Sector Employees (OIYE)*

The OIYE is the second largest workers' federation in the private sector. It has a total of 69,835 registered members and 28 167 voting members<sup>82</sup>. The OIYE is an umbrella union that represents a wide range of private sector employees including sales staff, and workers employed in the provision of services, in private security and in lawyers' offices. 182 unions are affiliated to the OIYE; of these, 34 are school cleaners' unions<sup>83</sup>. It represents about 2,891 workers in these cleaning sector unions, and all of them are school cleaners. We have no figures for the number of workers represented by the OIYE in the cleaning sector as a whole. The OIYE signs the three collective agreements that cover cleaning staff in Greece. At national level, it is affiliated to the Greek General Confederation of Labour (GSEE), and at European and international level, to UNI-Europa and UNI.

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<sup>82</sup> Data provided at the Federation's 33<sup>rd</sup> Congress.

<sup>83</sup> School cleaners constitute a special category of cleaning staff who are employed on ten-month fixed-term contracts that are always renewed. About 10,000 women work as school cleaners.

## Organisations

### *Employers' organisations*

Organisation	Sub-sectors covered	Companies	SW	Density Companies	Density SW	CB	National affiliations		European affiliations		International affiliations	
		number	number	%	%	yes/no	Direct	Indirect	Direct	Indirect	Direct	Indirect
Panhellenic Association of Indoor and Outdoor Cleaning Firms, Waste Management and Protection of the Environment (PASEP)	Services, including cleaning firms	Cleaning companies: 65	Cleaning sector: around 3,000	ND	ND	Yes			No	No		

SW: salaried workers

Density companies: number of companies' affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

### *Other employers' organisations*

The General Confederation of Greek Small Business and Trades (GSEVEE)	Commerce and manufacturing sector	(69 federations + 1,359 associations with 101,883 registered members)*	(About 203,000)*	ND	ND	Yes						
The National Confederation of Hellenic Commerce (ESEE)	Commerce sector	(14 federations + 185 associations = about 50,000 enterprises)*	(about 125,000 employees)*	ND	ND	Yes						
The Association of Retail Business (SELPE),	Commerce sector	ND	ND	ND	ND	Yes						
The Association of Supermarket Companies (SESME)	Commerce sector	ND	ND	ND	ND	Yes						
The Federation of Greek Industries (SEV)	Manufacturing sector	(560 companies + affiliated indirectly by sector / regional organisation)*	(about 95,000 employees)*	ND	ND	Yes						

SW: salaried workers

Density companies: number of companies' affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

\* Data for all the members of the organisation and the employed people by these members (broader than the cleaning sector)

**Trade Unions**

Organisation	Type of SW	Members	Members working in the sector	Density	CB	National affiliations		European affiliations		International affiliations	
	Type	Number	Number	%	yes/no	Direct	Indirect	Direct	Indirect	Direct	Indirect
The Greek Federation of Private Sector Employees (OIYE)	Sales workers, workers employed in the provision of services, private security, cleaning, lawyers' offices, etc.	69,835 registered members; 28,167 voting members	ND	ND	Yes	GSEE		UNI-Europa		UNI	

SW: salaried workers

Density: number salaried workers affiliated to the organisation / number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

# IRELAND

## 1. Description of the sector

### Delimitation and scope of cleaning activities in the sector

#### *Activities generally included in the sector*

Companies in the cleaning sector include building facade cleaning, indoor cleaning, outside cleaning in services and manufacturing, specialised and general waste disposal, building site waste removal and management and pest control, window cleaning.

For some large companies, employing several thousands workers, contract cleaning of the interiors of buildings and offices is one of the several services offered. An increasing amount of cleaning activity is also specialised and involves, for example, "clean rooms" used in medical and electronics services, manufacturing and laboratories. Some cleaning activities are undertaken in "secure" environments such as banks and commercially sensitive environments. Other cleaning sectors have an environmental or conservation management dimension. Lastly, it is worth noting that there is, outside the corporate sector, an unknown amount of informal or family based local economic activity in industrial cleaning, window cleaning and office or house cleaning.

#### *Activities included from a statistical point of view*

As regards the NACE code for cleaning services in Ireland, several remarks can be made:

- The Irish statistical data in the services sector is usually amalgamated with security services
- Some environmental or waste management companies operate in proximity to the construction industry and are classified accordingly within the manufacturing sector
- Small partnerships, informal cleaning operations and micro-enterprises in the sector will not necessarily appear in NACE categories since the business surveys by the Central Statistics Office (CSO) usually exclude enterprises with five or less employees<sup>84</sup>
- Some overseas workers, including migrant workers, may undertake legal industrial cleaning activities under an approved work permit during the day and undertake a second "job" at night cleaning in a private self-employed capacity<sup>85</sup>.
- Cleaning of domestic residences is excluded from the statistics.

#### *Subdivisions of the sector and consequences for collective bargaining*

Within the cleaning industry, there are distinct specialities or sub sectors, such as:

- Industrial cleaning of outdoor premises, factory and building yards, sites
- Facade cleaning of the exterior of buildings
- Carpet and textile cleaning
- Cleaning of interiors of buildings as contract cleaning and as direct hire
- Window cleaning using specialised equipment
- Waste / cleaning activities

As a consequence, collective bargaining is fragmented across a range of sub sectors with little relation to each other. Cleaning workers will belong to trade unions but can be represented by different branches of the same trade unions. However, this fragmentation is partially counterbalanced by centralised collective bargaining. Employees have the option of

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<sup>84</sup> Central Statistics Office Notes to the Annual Services Surveys.

<sup>85</sup> Observations from Conroy P. and Brennan A. (2003), *Migrant Workers and their Experiences*, Equality Authority, Dublin.

joining a trade union. Employer estimates puts trade membership at 15% (2004) while trade union estimates membership at 41% (2004).

## Socio-economic features of the sector

### *Companies*

The industry has been undergoing rapid expansion and change since the late 1990s. A high proportion of cleaning service activity has been marketed. The cleaning sector is a heterogeneous sector. Enterprises range from small localised family operations to multinational multi-services facilities management companies. According to the CSO, there are 320 enterprises under the NACE code 74.70. A 1998 study<sup>86</sup> of the contract cleaning sector, published in 2000, identified about 333 enterprises. This figure is very close to the figure of 320 enterprises identified in the NACE code 74.70. The form which the enterprises took in the 1998 study was as follows:

- 60% were Private Limited Companies
- 38% were sole traders or partnerships
- 2% were Public Limited Companies

At the time of this study, in the late 1990s, the contract cleaning sub sector was dominated by ten large companies who accounted for 80% of turnover in the contract cleaning sector. These large companies include multinationals, that have been expanding by acquisition and taken over some small Irish cleaning companies. It is the case of the Danish multinational ISS.

Some companies are developing some specialisations such as facade cleaning of old buildings, textile and carpet cleaning, which involves new chemical and techniques.

The public sector is also a major player in the economy in the procurement of cleaning services for civil service and public services bodies in their extensive offices and in the sector.

### *Workers*

According to the CSO, 16,356 people are engaged in the cleaning sector (NACE 74.70), of which 16,176 employees.

The occupation of cleaners and domestics appear in a residual category of occupations in the Irish Census, and are classed under "other gainful occupations". This category includes domestic workers in household as well as public domain/non-households employment. The cleaning occupation is growing for both male and females. The occupation grew by about 12% in the six years period between 1996 and 2002. In 1996, 76% of the cleaners / domestics were women and 24% were male. In 2002, 82% of cleaners / domestics were female and 18% were male. There is an increase in the feminisation of the occupation.

### *Occupation of cleaners and domestics in Census 1996 and 2002 (Code 968).*

Years	People	Male	females
1996	20,142	3,007	17,135
2002	22,595	4,137	18,468

Source: CSO (2003) Census 2002, Vol. 6 Occupations, Table 8.

Note : the Census data includes cleaners and domestic workers in private households.

The numbers describing themselves as "cleaners" in the Census seems to be less than those presented in some employment / training surveys.

The Census data includes cleaners and domestic workers in private households. Window cleaners are not included in the occupation cleaners / domestics section. The Code 955 represents window cleaners and car park attendants. In 2002, 656 were recorded in both occupations.

In 1999, FÁS<sup>87</sup> (the State Training Authority) estimated that there were 26,500 workers in contract cleaning and 14,000 in direct hiring, making a total of 40,500 employed in the cleaning industry. According to FÁS in 2001<sup>88</sup>, there were 31,000

<sup>86</sup> FÁS (2000), *Developing Human Resources in the Irish Contract Cleaning Industry*, Circa Group Europe, 1999.

<sup>87</sup> FÁS (2000), Annual Report 1999, Appendix 5(f).

employed in contract cleaning and a further 14,000 employed in direct hiring. This would make a total of 45,000 people employed in the cleaning sector in 2001.

***Estimated numbers of employed in the cleaning sector 1998-2001***

Years and sources	(Contract) cleaners	Other cleaners
1998 Circa study fieldwork	25,000	
1999 FÁS	26,500	14,000, directly hired
2001 FÁS	31,000	14,000, directly hired
2001 CSO NACE 74.70 Cleaning services	16,538 engaged 16,131 employees	
2003 IBEC	18,000 covered by the Joint Labour Committee, excluding white-collar workers	

Note: The hired workers are those workers hired by individual companies or enterprise as cleaners. For example, schools, hospitals and nursing homes will often hire their own cleaners.

The employment estimate used in this study for contract cleaning sector is between 18,000 and 20,000. This figure is for workers only and excludes administrative, managerial and clerical staff.

According to the CIRCA study (data 1998), employment was estimated at 25,000, of which 91% were in part-time jobs. In more recent surveys (IBEC survey), it appears that there is a tendency for contract cleaning to increasingly attract full-time employment.

***Employment in full-time to part-time ratios and gender in selected contract cleaning companies 2003***

Employees	%
Male full-time	13.6
Male part-time	14.9
Female full-time	7.1
Female part-time	64.3
Total	(99.9)

Source: IBEC Survey

Furthermore, the former image of the industry as one where there are few or no promotion prospects has been begun to be addressed since the late 1990s, with the setting up of training programmes. In 1997, a Cleaning Sector Advisor Training Committee was established by the Board of FÁS, the national training authority.

***Developments***

The following factors could be mentioned as impacting on the cleaning industry in the future:

- There is a tendency for outsourcing of cleaning, catering, security services to increase in Ireland
- The market share of some larger contract cleaning companies has developed through the acquisition of other small companies
- European labour market developments, such as the Directive on the Transfer of Undertakings, have influenced behaviour in the contract cleaning sector. Other European developments have impacted on the treatment of waste and health and safety.

## 2. Social dialogue

### Basic features of the social dialogue

A part of the cleaning industry has its wage and some working conditions fixed by law. For the remainder of the industry, a voluntary framework of centralised or national collective bargaining is available:

Cleaning sector	Type of dialogue	Outcomes
Contract cleaning of interiors of premises and buildings	Tripartite: employers, trade unions, State. Joint Labour Committee - National level	Employment Regulation Orders as Statutory Instruments of Law

<sup>88</sup> FÁS (2002), Annual Report 2001, Appendix 5 Sector Developments.



Other industrial, janitorial and cleaning activities	Tripartite - Centralised collective bargaining at national level	Voluntary Agreement Currently: <i>Sustaining Progress 2003-2005</i>
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Employment Regulation Orders are generally made annually and cover named geographical areas such as Dublin City and County or the whole Country excluding Dublin City and County. In terms of activities, it covers indoor cleaners working inside premises. It excludes external cleaning of yards, roofs, machinery, building exteriors, or building facades. Two Employment Regulation Orders were negotiated and adopted in 2003 for the Contract Cleaning Industry. It also excludes workers directly hired by companies without the use of intermediary contract / agency companies. The 2003 Employment Regulation Orders include issues such as pay, annual holidays, sick pay schemes, minimum notice requirement, grievance procedures, disciplinary procedures, maternity leave and overtime.

The Sustaining Progress Agreement is negotiated between representative bodies of employers and trade unions, and is facilitated or supported by the State, through the department of the Prime Minister. It is a form of voluntary social pact. It covers the part of the industry not covered by Employment Regulation Orders.

## Players and their positions

On the employees' side, the Services Industrial and Professional Trade Union (SIPTU) operates in social dialogue for the cleaning sector. On the employers' side, the Irish Contract Cleaning Association (ICCA) represents employers of the cleaning sector but does not participate in collective bargaining. The ICCA is a member of the Irish Business and Employers' Confederation (IBEC), as a business sector. The IBEC participates in negotiations on behalf its members. Generally speaking, social dialogue in the cleaning sector was characterised, in the last period, by many tensions between the parties:

- Employers are experiencing considerable pressure on their prices in the market and are worried about any factor raising labour costs. They are finding difficult to keep abreast of the increasingly detailed regulation of the working environment, especially in relation to atypical forms of work.
- SIPTU consider the work that was done through vocational training to lift the image of the industry in the late 1990s was unfortunately discontinued. Furthermore, they wish to improve the standing and status of workers who often occupy jobs which are classed as unskilled.
- The payment of overtime to part-time workers after their contract hours was one of the main issues of social dialogue recently. A dispute developed in this respect was (raised at the Labour Court in 2003-2004).
- The employment of migrant workers from outside the European Union in cleaning work by some employers at below the minimum wage, without overtime payment or other social and economic benefits has also attracted negative commentary from trade unions. This practice is proactively discouraged by employer members of ICCA and IBEC, both of whom advise their members on the correct treatment of migration issues.

## Collective agreements

In 2002 and 2003, the following agreements were concluded:

- 2002 Employment Regulation Orders Contract Cleaning: two agreements
- 2003 Employment Regulation Orders Contract Cleaning: two agreements
- Programme for Competitiveness and Fairness 2002: one national agreement
- Sustaining Progress Agreement 2003-2005: one national agreement

The Employment Regulation Orders cover all manual workers in the contract cleaning industry or about 18,000 workers (about 93% of the sector covered since 6% of employment in the sector is non-manual). It applies to all companies in this sector.

The coverage for other cleaning workers in windows, waste, building façades, factory and floor cleaning, building industry contractors, has not been calculated.

### 3. Employers' organisations and trade unions

#### *Employers' organisations The Irish Contract Cleaning Association, ICCA*

The ICCA was formed in 2000 and is affiliated as a business sector to the Irish Business and Employers Confederation (IBEC). The ICCA is an industry association promoting social and economic initiatives and developing training standards for the sector. The ICCA *does not* represent its members in their relations with trade unions and *does not* take part in collective bargaining. This role is undertaken by the IBEC (see below). Some ICCA members are also members of IBEC.. On the other hand some companies are affiliated directly to IBEC and are not members of ICCA. The ICCA membership is 22 contract cleaning companies employing about 14,000 workers (about 78% of the employment within the contract cleaning sector<sup>89</sup>). The members of ICCA are specialised cleaning companies, facilities management companies and a small representation of international companies.

#### *The Irish Business and Employers Confederation, IBEC*

IBEC is a confederation of more than 7,000 companies and associations. It is the leading umbrella body acting as a voice for industry in Ireland. About 50% of ICCA members are also members of IBEC. Some companies are also affiliated directly to IBEC and are not members of ICCA. In total 19 contract cleaning companies are members of IBEC. These companies employ about 14,000 workers in total (About 78% of the employment within the contract cleaning sector<sup>90</sup>). IBEC takes part in collective bargaining for those cleaning companies who are members of IBEC (some of whom are also ICCA members).. IBEC is affiliated to UNICE, UAPME and to WOE.

### Trade unions

#### *The Services Industrial and Professional Trade Union, SIPTU*

SIPTU is the largest trade union in Ireland and represents workers in the private and public sector. Cleaners are represented in several forms:

- Contract cleaners are represented in the Contract Cleaning Branch of the trade union SIPTU.
- Cleaners directly hired by individual companies and bodies are represented by other branches of SIPTU (for example the Health Services Branch)
- Other industrial cleaning workers, such as workers employed in pest control or waste industry sectors, are to be found in different branches of SIPTU

SIPTU represents 200,000 members in all sectors, of which about 7,200 workers in the contract cleaning sector (estimate). This corresponds to 40% of workers in the sector (based on an estimate)<sup>91</sup>. SIPTU is recognised formally as a member of the Joint Labour Committee for Contract Cleaning and has the capacity to sign agreements at company and sector levels. SIPTU is affiliated to the Irish Congress of Trade Unions at national level. Through the Irish Congress of Trade Unions, SIPTU is indirectly represented at European level by the ETUC.

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<sup>89</sup> The density is calculated on the basis of the 18,000 workers covered by the Employment Regulation Orders for contract cleaners.

<sup>90</sup> Ralaheen Interviews, 2004.

<sup>91</sup> ICCA disagree with this figure (EFCO consultation, October-November 2004).

## Organisations

### *Employers' organisations*

Organisation	Sub-sectors covered	Companies	SW	Density Companies	Density SW	CB	National affiliations		European affiliations		International affiliations	
		Number	Number	%	%	yes/no	Direct	Indirect	Direct	Indirect	Direct	Indirect
ICCA (The Irish Contract Cleaning Association)	Contract Cleaning	22*	ND	ND	ND	No	IBEC					
IBEC (The Irish Business and Employers Confederation)	Contract Cleaning	19	14,000	6%	78%	Yes			UNICE UEAPME		IOE	

SW: salaried workers

Density companies: number of companies affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector. The densities are calculated on the basis of the 18,000 workers covered by the Employment Regulation Orders for contract cleaners.

CB: Does the organisation take part in collective bargaining?

### *Trade Unions*

Organisation	Type of SW	Members	Members working in the sector	Density	CB	National affiliations		European affiliations		International affiliations	
	Type	Number	Number	%	yes/no	Direct	Indirect	Direct	Indirect	Direct	Indirect
SIPTU (The Services Industrial and Professional Trade Union)		200,000	7,400	41%	Yes	Irish Congress of Trade Unions			ETUC		

SW: salaried workers

Density: number salaried workers affiliated to the organisation / number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

# ITALY

## 1. Description of the sector

### Delimitation and scope of activities in the sector

The cleaning sector in Italy is defined by the Law No. 82 of 25 December 1994, Article 1, which includes the activities of cleaning, disinfecting, extermination, and sanitation provided by cleaning companies. The cleaning services market, though, is evolving in the direction of a "global service"<sup>92</sup> market. Collective bargaining has recently provided a detailed classification, corresponding to the NACE classification (K 74.7). Furthermore, the last National Collective Industry-wide Agreement (25 May 2001) includes, in addition to the conventional cleaning activities, several maintenance services, such as façade cleaning and maintenance of areas around buildings, and a variety of administrative services, as well as services related to transport and catering.

However, as it is the case in the majority of European countries, it does not include sewage and refuse disposal, street cleaning and cleaning services related to agriculture. In addition, both public and private companies providing waste collection and treatment adopt new strategies to differentiate their activities and, at present, their tasks figure in the list of "essential public services" and therefore are subject to special legislation and covered by different industry-wide agreements. In a similar way, other activities such as porters and domestic labour are excluded from the cleaning industry and are covered by specific legal protection and separate collective bargaining.

The cleaning sector is not clearly divided into sub-sectors. In contrast, there has been a growing tendency for cleaning companies to become global service companies. Consequently, collective bargaining in the cleaning sector is not divided into sub-sectors but into types of company. There is, for example, a separate collective agreement for craft cleaning companies (see the point on collective agreements).

### Socio-economic features of the sector

#### *Economic structuring of the sector*

There are, in the cleaning sector in Italy, 25,092 companies, employing 339,574 workers<sup>93</sup>. The Census gives the data by sub-sector, such as cleaning and extermination (the number of companies of extermination services is of a slight significance, about 300). But firms tend to adopt a competing strategy based on differentiation and are evolving into global service companies, offering integrated services.

#### *Type of companies in the cleaning sector*

Companies	Number of companies	Companies without SW	Companies with < 10 SW	Companies with 10-100 SW	Companies with > 100 SW
	(number, %)	(number, %)	(number, %)	(number, %)	(number, %)
Companies*	5,925 (100.0)	2,361 (39.8)	2,004 (33.8)	1,266 (21.4)	294 (5.0)
Co-operatives**	2,813 (100.0)	390 (13.9)	898 (31.9)	1,270 (45.1)	255 (9.1)
Craft companies*	16,132 (100.0)	8,126 (50.4)	6,901 (42.8)	1,105 (6.8)	0 (0.0)
Craft co-operatives**	110 (100.0)	22 (20.0)	52 (47.3)	36 (32.7)	0 (0.0)
Others	112 (100.0)	56 (50.0)	41 (36.6)	13 (11.6)	2 (1.8)
Total	25,092 (100.0)	10,955 (43.7)	9,896 (39.4)	3,690 (14.7)	551 (2.2)

Source: ISTAT, 8<sup>th</sup> National Statistical Census on Industry and Services, 2001 (definitive data)

SW: salaried workers

\* Companies include single/individual firms, joint-partner companies and stock companies

\*\* Co-operatives exclude social co-operatives

<sup>92</sup> In contrast to the definition given by UNI, in Italy such a term is used to refer to multi-service concerns.

<sup>93</sup> Non-profit organisations are excluded from the statistics but their number is insignificant.

Source of the data: 8<sup>th</sup> National Statistical Census on Industry and Services, ISTAT, March 2004.

Cleaning companies are mostly craft companies, with less than 15 employees (64.3%). Among them, the majority are single/individual firms and thus employ only 2.7% of the workforce of the sector. At the opposite, few large companies and co-operatives represent no more than 14.1% of the cleaning companies, but employ 62.4% of the sector's workforce. Cleaning companies employ an average of 13.5 workers and 12.1 employees per firm. They are, for the most part, SMEs. A significant growth in number of companies employing more than 3,000 workers has been observed during the last five years.

### *Characteristics of employment*

The number of workers employed in the cleaning sector is 339,574, of which 303,593 are salaried workers (89.4% of the workers). The majority of the workers are concentrated in larger (62.5%) and medium-sized companies, whereas only 4.5% are accounted for by individual or small craft companies.

### *Employment in the cleaning sector*

Companies	Number of workers	Number of SW	SW / SW in the country	SW in companies with < 10 SW	SW in companies with 10-100 SW	SW in companies with > 100 SW
			(%)	(number, %)*	(number, %)*	(number, %)*
Companies**	150,435	142,950	0.9	5,090 (1.7)	38,496 (12.7)	99,364 (32.7)
Co-operatives***	135,793	128,705	0.8	2,527 (0.8)	36,334 (12.0)	89,844 (29.6)
Craft companies**	51,479	30,461	0.2	13,809 (4.5)	16,652 (5.5)	0 (0.0)
Craft co-operatives***	908	655	0.0	148 (0.1)	507 (0.2)	0 (0.0)
Others	959	822	0.0	116 (0.0)	243 (0.1)	463 (0.1)
Total	339,574	303,593	1.9	21,690 (7.1)	92,232 (30.4)	189,671 (62.5)

Source: ISTAT, 8<sup>th</sup> National Statistical Census on Industry and Services, 2001 (definitive data)

SW: salaried workers

SW in the country: salaried workers employed in private companies are 15,993,000 (updated to January 2004)

\* The percentage is calculated on the ratio of SW in a particular class of companies to SW in the sector

\*\* Companies include single/individual firms, partnerships and joint-stock companies

\*\*\* Co-operatives exclude social co-operatives

Employment in the sector is characterised by middle-to-low skill, labour-intensive jobs, and the average wage is quite low. A relatively large number of temporary workers are to be found in co-operatives, medium-sized companies and small firms as well. The proportion of women to men is about two to one.

There are no data about the incidence of the undeclared employment in the sector. However, there is an increasing tendency on the part of cleaning entrepreneurs to employ low-skilled immigrants. According to some interviewees, the hidden economy represents about one third of the entire workload of the sector.

### *Developments and trends*

Between 1991 and 2001, there was a progressive and homogeneous increase in the number of both companies and employees within the cleaning sector. According to some trade union representatives, this growth is mainly due to the effects of outsourcing on the one hand, and to the emergence of hidden employment on the other hand.

The cleaning sector is very fragmented and there is no co-ordination between companies.

Generally, there is an increasing demand for specialisation, as a consequence of differentiation of activities.

These developments should induce an increase in individual working time and a decrease in workers' rights.

## **2. Social dialogue at sector level**

### **Basic features and issues of the social dialogue**

Traditionally, social dialogue in the cleaning sector has been underdeveloped and informal. Recently, however, a process of change has started. Since the cleaning services market has evolved into a complex arena, involving a variety of activities and different skills and competences, social dialogue has become increasingly important in order to manage these challenges. Social dialogue, at all levels, is an information system, characterised by bilateral talks.

At national industry-wide level, social partners meet once a year in order to facilitate dialogue on technological options, training programmes, contract work, etc. At regional and provincial level, there are periodic consultations on vocational training and on health and safety. At company level, talks on technological innovation, restructuring, vocational training, working conditions and over-time take place.

Furthermore, the National Collective Industry-wide Agreement of 25 May 2001 instituted a national joint body, ONBSI (set up in March 2004), with the aim of leading the parties to achieve a better control over issues concerning vocational training, health and safety, as well as the settlement of labour disputes.

Another joint body, EBINAS (set up by FNIP and the signatory trade unions, in September 2003), aims at promoting effective cooperation between companies and social organizations, in order to jointly address employment issues.

National and regional "observatories" were also set up by social partners for the case of craft cleaning companies. They are voluntary joint bodies, whose aim is to facilitate information exchange and transparency on economic trends, contract work, labour market issues, vocational training, technological innovation, with reference to the particular problems of the craft sector. They are also allowed to promote and carry out studies and research.

With regard to the structuring of collective bargaining, there is a first level of negotiation, the national collective industry-wide agreement (CCNL), and a decentralised one (regional or provincial). The national level provides minimum standards concerning pay, working time, working conditions and equal opportunities for women and men. The decentralised level aims at implementing the CCNL and is mainly concerned with defining variable pay and incentives.

## Collective agreements

There are, for the cleaning sector, two national collective industry-wide agreements.

The main CCNL, for employees of companies providing services of cleaning, disinfecting, extermination, and sanitation, was signed on 25 May 2001 and will be in force until 31 May 2005. Signatory organisations are:

- On the workers' side: FILCAMS, FISASCAT, and UIL Trasporti, namely the trade and service national associations of the three most representative confederations, CGIL, CISL, and UIL; UGL Igiene Ambientale, the sector association of UGL (ex CISNAL), one of the main traditional autonomous trade unions, signed it later and separately with FISE;
- On the employers' side: ANIP/FISE, Unionservizi, ANCST, Federlavoro e Servizi, and AGCI Produzione e Servizi Lavoro; FNIP put its signature later and separately.

This CCNL provides various elements:

- It provides a wider definition of the activities included in the sector;
- It institutes a national joint body (ONBSI);
- It provides a new personnel classification;
- It sets rules on contract work, wages, mobility, atypical work contracts (they cannot exceed a yearly average of 35% of regular employment in a firm), working time and rest periods (it introduces "multi-period" working time flexibility arrangements for full-time workers), over-time and part-time work, union rights, and health and safety;
- It institutes a voluntary integrative pension Fund for cleaning employees;
- Lastly, it includes a regulation code, setting limits on the right to strike for employees and companies carrying out services regarded as "essential public services", according to Law No. 146/1990.

Representatives of both employers' associations and trade unions expressed their satisfaction after the agreement was signed.

The first Industry-wide Agreement for employees of craft cleaning companies was signed on 12 July 1999 and it expired officially on 30 June 2003 without any renewal, so that, in practice, it is still in force. It was signed by FILCAMS, FISASCAT and UIL Trasporti, together with four craft associations, ANISP, Assopolizie, and the independent CASA and CLAAI.

Lastly, a more marginal agreement<sup>94</sup>, non-industry-wide, for employees of private small firms' and co-operatives' employees, is supposed to cover a small part of cleaning employees<sup>95</sup>. It was signed on 27 July 2001 by autonomous organisations, which are representative to some extent and are not recognized by the dominant players. Furthermore, the actual representativeness of the signatory organisations is also questioned by many experts and, in some cases, is even considered to be non-existent. The signatory organisations are UCICT and MCM<sup>96</sup>, coordinated by CNAI, on the employers' side, and FENASALC/CISAL<sup>97</sup> on the trade unions' side.<sup>98</sup>

As to the coverage rate of the national collective agreements, Italy's "*erga omnes*" practice of extension of collective agreements makes it difficult to calculate precise statistical data. The existence of two different industry-wide agreements applying to several types of company, and of a third agreement between autonomous associations, as well as the presence of 16 signatory organisations, make it much more complicated. In addition, small firms and co-operatives operating in other sectors, for instance private security, may also refer to the cleaning CCNL.

Nevertheless, the two industry-wide agreements above mentioned cover most employees. In particular, according to FNIP, the cleaning CCNL applies to about 9,000 private companies and 300,000 workers, whereas the Industry-wide Agreement signed on 12 July 1999 should apply to most of craft cleaning companies and co-operatives. The third one, non-industry-wide, is supposed to cover the rest, even though the actual representativeness of the signatory organisations is questioned by many experts and in some cases is even considered to be zero.

### 3. Employers' organisations and trade unions

Regarding to the recognition of the organisations, there is in Italy a contrast between constitutional principles and actual practice. Indeed, Article 39 of the Constitution states that only "registered" trade unions are allowed to sign collective agreements, but, in practice, mutual recognition is the only principle followed for the negotiation of CCNL, even though the courts usually recognise the most representative trade unions, especially for pay issues.

#### Employers' organisations

Large companies in the cleaning sector are mainly represented by the following organisations:

- ANIP - Associazione Nazionale Imprese di Pulizia e Servizi Integrati, *National Association of Cleaning Firms*. This organisation is part of FISE<sup>99</sup>, which is directly affiliated to Confindustria<sup>100</sup>, and represents 300 large firms, employing about 30,000 workers;

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<sup>94</sup> Included in the National Archive of Collective Agreements (*Archivio Nazionale dei Contratti e degli Accordi Collettivi*) of CNEL (*Consiglio Nazionale dell'Economia e del Lavoro* – National Council of Economy and Labour) and is classified under the category National Collective Bargaining - Various Sectors Minor Companies (*Contrattazione Nazionale - Settori Vari Imprese Minori*).

<sup>95</sup> The previous agreement, which was signed on 28 September 1996 by the same associations, applied expressly to cleaning companies (see Articles 1, 110-115), while the renewal of 27 July 2001, which did not refer explicitly to them, it is supposed to cover them indirectly.

<sup>96</sup> UNI-Europa wished for deleting every mention of these organisations (European consultation, October-November 2004). The aim of the study is to present the situation of the sector including conflicts or emergent actors.

<sup>97</sup> UNI-Europa wished for deleting every mention of these organisations (European consultation, October-November 2004). The aim of the study is to present the situation of the sector including conflicts or emergent actors.

<sup>98</sup> This collective agreement is not recognised by the dominant actors in the sector (EFCI and UNI-Europa consultation, October-November 2004). These organisations expressed their concern and warning about this collective agreement which, if it was recognised, "could be used to decreased workers' rights". However, this agreement, even if minor, is included in the National Archive of Collective Agreements (*Archivio Nazionale dei Contratti e degli Accordi Collettivi*) of CNEL (*Consiglio Nazionale dell'Economia e del Lavoro* – National Council of Economy and Labour).

<sup>99</sup> The Federation of Service Firms (*Federazione Imprese di Servizi*, FISE).

<sup>100</sup> The General Confederation of Italian Industry (*Confederazione Generale dell'Industria Italiana*, CONFINDUSTRIA).

- FNIP - Federazione Nazionale delle Imprese di Pulizia e Servizi per l'Ambiente Multiservizi, *National Federation of Multi-service Cleaning Companies*. It is the sector association of Confcommercio<sup>101</sup>, representing about 350 large companies, which employ about 30,000 workers.

The majority of SMEs and craft companies are represented by:

- The National Union of Cleaning Companies (*Unionservizi - Unione Nazionale delle Imprese di Pulizia, Confapi*<sup>102</sup>);
- The National Cleaners' Association (*Assopulizie - Associazione delle Imprese di Pulizia Artigiane, CNA*<sup>103</sup>);
- The National Association of Cleaning Entrepreneurs (Associazione Nazionale Imprenditori Imprese di Pulizia, ANISP, Confartigianato<sup>104</sup>);
- The Independent Confederation of Artisans' Organisations (*Confederazione Autonoma Sindacati Artigiani, CASA*);
- The Confederation of Italian Free Crafts Associations (*Confederazione Libere Associazioni Artigiane Italiane, CLAAI*).

There are three national associations of service co-operatives:

- The National Federation of Co-operatives of Labour and Production (*Federlavoro e Servizi - Federazione Nazionale delle Cooperative di Produzione e Lavoro, Confcooperative*<sup>105</sup>);
- The AGCI Production and Labour Services Division (*AGCI Produzione e Servizi Lavoro, AGCI*<sup>106</sup>);
- The National Association of Service and Tourism Co-operatives (*Associazione Nazionale Cooperative di Servizi e Turismo, ANCST, Legacoop*<sup>107</sup>).

Lastly, we find a player not recognised by the dominant players, but playing a role, even though a marginal one, in the professional relations within the sector:

- The National Union of Entrepreneurs' Associations (*Coordinamento Nazionale Associazioni Imprenditori, CNAI*). It is a group of 8 Christian associations, representing small firms and craft co-operatives. It has a conflictual relationship with the most representative trade union confederations and is claiming for an effective participation in national social dialogue.

## Trade unions

Trade unions in the cleaning sector are the following:

- The Italian Federation of Trade, Services and Tourism Workers (*Federazione Italiana Lavoratori Commercio Alberghi Mense Servizi, FILCAMS*);
- The Italian Federation of Trade, Services and Tourism Workers (*Federazione Italiana Sindacati Addetti Servizi Commerciali Affini e del Turismo Servizi, FISASCAT*);
- The Union of Italian Transport Workers (*UIL Trasporti - Unione Italiana Lavoratori Turismo, Commercio e Servizi*);
- The UGL Environmental Hygiene (*UGL Igiene Ambientale*).

Lastly, there is another player not recognised by the dominant players<sup>108</sup>, which is the counterpart of CNAI:

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<sup>101</sup> The General Confederation of Trade, Tourism, Services and Small and Medium-Sized Enterprises (*Confederazione Generale Italiana del Commercio, del Turismo, dei Servizi e delle PMI, CONFCOMMERCIO*).

<sup>102</sup> The Italian Confederation of Small and Medium-sized Industry (*Confederazione Italiana della Piccola e Media Industria, CONFAPI*).

<sup>103</sup> The National Confederation for the Craft Sector and Small and Medium Enterprise (*Confederazione Nazionale dell'Artigianato e della Piccola e Media Impresa, CNA*).

<sup>104</sup> The General Italian Confederation of Artisans (*Confederazione Generale Italiana dell'Artigianato, CONFARTIGIANATO*).

<sup>105</sup> The Confederation of Italian Cooperatives (*Confederazione Cooperative Italiane, CONFSCOOPERATIVE*).

<sup>106</sup> The General Association of Italian Cooperatives (*Associazione Generale Cooperative Italiane, AGCI*).

<sup>107</sup> The National League of Co-operatives (*Lega Nazionale delle Cooperative e Mutue, LEGACCOOP*).

<sup>108</sup> UNI-Europa wished for deleting every mention of these organisations (European consultation, October-November 2004). The aim of the study is to present the situation of the sector including conflicts or emergent actors.



- The National Federation of Autonomous Trade Unions of Trade Employees (*Federazione Nazionale Sindacati Autonomi Lavoratori Commercio*, FENASALC).

Signatory trade unions in the sector are the ones affiliated to the three most representatives confederations: CGIL<sup>109</sup>, CISL<sup>110</sup>, and UIL<sup>111</sup>. FILCAMS (CGIL) and FISASCAT (CISL) cover several sub-sectors in trade, tourism, and services, while UIL Trasporti (UIL) cover mainly the sector of transport. As for UGL Igiene Ambientale, it is the sector association of UGL<sup>112</sup>. These organisations are spread all over the country and have regional and local structures, workplace branches and representatives in works councils. Furthermore, FENASALC is an autonomous trade union covering the area of trade. It is a branch of CISAL<sup>113</sup>, a minor confederation affiliated to CESI.

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<sup>109</sup> The General Confederation of Italian Workers (*Confederazione Generale Italiana del Lavoro*, CGIL).

<sup>110</sup> The Italian Confederation of Workers' Union (*Confederazione Italiana Sindacati Lavoratori*, CISL).

<sup>111</sup> The Union of Italian Workers (*Unione Italiana del Lavoro*, UIL).

<sup>112</sup> The General Workers' Union (*Unione Generale del Lavoro*, UGL).

<sup>113</sup> The Italian Confederation of Autonomous Workers' Unions (*Confederazione Italiana Sindacati Autonomi Lavoratori*, CISAL).

## Organisations

### Employers' organisations

Employers' organisations	Companies affiliated	Density companies (%)	SW	Density SW (%)	CB	National affiliations ( <i>direct</i> )	European affiliations ( <i>indirect</i> )	International affiliations ( <i>indirect</i> )
ANIP (National Association of Cleaning Firms)	about 300	1.2	about 30,000	9.9	yes	FISE, Confindustria	EFCI, UNICE	WFBS
Unionservi (National Union of Cleaning Companies)	about 700	2.8	*about 40,000	13.2	yes	Confapi	UEAPME	
ANCST (National Association of Service and Tourism Co-operatives)** <sup>1</sup>	495	2.0	66,436	21.9	yes	Legacoop		ICA
Federlavoro e Servizi (National Federation of Co-operatives of Labour and Production)** <sup>2</sup>	n.a.d.	n.a.d.	n.a.d.	n.a.d.	yes	Confcooperative		ICA
AGCI (AGCI - Production and Labour Services Division)**	448	1.8	21,334	7.0	yes	AGCI		ICA
FNIP (National Federation of Multi-service Cleaning Companies)	about 350	1.4	*about 30,000	9.9-11.5	yes	Confcommercio	Eurocommerce	
Assopulizie (National Cleaners' Association)	n.a.d.	n.a.d.	n.a.d.	n.a.d.	yes	CNA	UEAPME	
ANISP (National Association of Cleaning Entrepreneurs)** <sup>3</sup>	4,349	17.3	n.a.d.	n.a.d.	yes	Confartigianato	UEAPME	
CASA (Independent Confederation of Artisans' Organisations)	about 1,800	7.2	about 3,000	1.0	yes		UEAPME	
CLAAI (Confederation of Italian Free Crafts Associations)** <sup>4</sup>	n.a.d.	n.a.d.	n.a.d.	n.a.d.	yes			
CNAI (National Union of Entrepreneurs' Associations)** <sup>5</sup>	n.a.d.	n.a.d.	n.a.d.	n.a.d.	yes			

Source: direct contacts with each organisation (data updated to 2003)

Companies affiliated: number of cleaning companies affiliated

SW: salaried workers in cleaning companies affiliated

Density companies: number of companies affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

\* In the opinion of several interviewees, data provided by Unionservi and FNIP seem to be evidently overestimated. In point of fact, no useful information has been found to confirm or refute these data

\*\* Data concerning SW employed in cleaning co-operatives include also working members (see Law no. 142 of 3 April 2001), which represent the most part of the total number of workers. For example, in the case of ANCST working members are 30,094, while in the case of AGCI Produzione e Servizi Lavoro they are 19,456

\*\*<sup>1</sup> The internal classification of co-operatives affiliated to ANCST is based on several activities, and therefore data refer to co-operatives whose main activity is providing cleaning services and integrated services. There are other 250-300 co-operatives affiliated to ANCST, carrying out also cleaning activities, in addition to their main activities, such as portering, catering, etc.

\*\*<sup>2</sup> Collecting data concerning cleaning companies affiliated and SW is particularly difficult in the case of Federlavoro e Servizi, which is an unstructured national federation, with no sector associations

\*\*<sup>3</sup> Disaggregated data are not available, because ANISP is currently dealing with general re-organization

\*\*<sup>4</sup> Autonomous organisations are often reluctant to provide data on representativeness

\*\*<sup>5</sup> CNAI is a group of 8 associations, including signatory organizations such as UCICT and MCM. As regards data provided by CNAI (about 2,000 companies affiliated and 40,000 SW), they must be regarded with suspicion, as they look evidently look clearly overestimated in comparison with those of the major employers' associations, and therefore they should not be taken into consideration

*Trade Unions*

Trade Unions	Members	Members in the sector	Density members (%)	CB	National affiliations ( <i>direct</i> )	European affiliations ( <i>indirect</i> )	International affiliations ( <i>indirect</i> )
FILCAMS (Italian Federation of Trade, Hotels, Canteen and Services Workers)	about 295,000	about 50,000	16.5	yes	CGIL	UNI-Europa, ETUC, EFFAT	ICFTU, IUF
FISASCAT (Italian Federation of Trade, Services and Tourism Workers)	162,566	*40,517	13.3	yes	CISL	UNI-Europa, ETUC	ICFTU, IUF
UIL Trasporti (Union of Italian Transport Workers)	104,512	about 18,000	5.9	yes	UIL	UNI-Europa, ETUC	ICFTU
UGL Igiene Ambientale (UGL Environmental Hygiene)	about 20,000	about 18,000	5.9	yes	UGL		
FENASALC (National Federation of Autonomous Trade Unions of Trade Employees)**	n.a.d.	n.a.d.	n.a.d.	yes	CISAL	CESI	

Source: direct contacts with each organisation (data updated to 2003)

Density members: number of members in the sector / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

\* Data updated to 2001

\*\* Autonomous organisations are often reluctant to provide data on representativeness

# LUXEMBOURG

## 1. Description of the sector

### Activities in the sector

The activities of cleaning enterprises authorised to operate in Luxembourg are clearly defined and determined by a Grand-Ducal Regulation of 1994<sup>114</sup>. These activities are as follows (Classification 420-11):

- cleaning and treatment of the outer surfaces of buildings and monuments;
- cleaning, disinfection, dusting and treatment of surfaces, floors, walls and ceilings, of windows, lamps, domestic technical installations, sanitary, heating and air-conditioning installations, and decorative objects;
- cleaning of sports pavilions and premises, exhibitions halls, hospitals, means of transport and road signs.

The scope of these activities appears to have been extended a few times recently, as they now also include maintaining the area around dwellings and clearing car parks and pavements during the winter.

### A statistical analysis of the sector

Data contained in the Luxembourg statistical annual (Statec, 2003) describe the cleaning sector on the basis of NACE code 74.7. They give the number of legal units<sup>115</sup>, the number of people employed and the number of salaried employees. Figures for the sector in 2002 include:

- 112 legal units;
- 5,502 employed people;
- 5,444 salaried employees.

If we take account only of those enterprises listed in the Chamber of Craft Trades register (registration is mandatory), we see that there were only 80 legal units on 5 April 2004. This difference may be explained by mergers and company closures. On the same date, the Chamber of Craft Trades listed 5,053 salaried employees in these enterprises: this figure was made up of 4,780 (94.5%) blue-collar workers and 273 (5.5%) white-collar workers and managers. Of these, 4,194 (83%) were women, and 859 (17%) were men.

#### *Enterprises by size*

Size of enterprises	Number	%
Enterprises with no data	2	2.5
Enterprises with no salaried employees	22	27.5
Enterprises with fewer than 10 salaried employees	26	32.5
Enterprises with 10-100 salaried employees	18	22.5
Enterprises with more than 100 salaried employees	12	15
Total	80	100

Source: Chamber of Craft trades

### Characteristics of the sector

The cleaning sector is characterised by a well developed clandestine economy. This holds true both for enterprises and for private individuals.

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<sup>114</sup> Grand-Ducal Regulation of 26 March 1994 defining the scope of the principal and secondary activities of the small and medium-sized enterprise sector, Mémorial A, No 27, 7 April 1994.

<sup>115</sup> It is important to note that in the case of complex enterprises, a legal unit is linked to other legal units that it normally controls through a majority shareholding.

The sector has also grown considerably in recent times. As far as enterprises are concerned, there have been acquisitions and mergers, and increased reliance on sub-contracting in response to a less favourable economic climate, followed by a reduction on the use of sub-contracting.

On behalf of the workers, the OGBL's Federation of Private-Sector Services has reported a lack of investment in training by the employers, and competition on the market leading to a reduction in the number of employees expected to perform the same volume of work.

## 2. Social dialogue

The collective bargaining actors in the cleaning sector in Luxembourg are the Luxembourg Federation of Enterprises in the Buildings Cleaning Sector on the employers' side, and the LCGB<sup>116</sup> Trade Federation (*Fédération commerce*) and the OGB-L<sup>117</sup> Private Cleaning Services Union (*Syndicat services privés de nettoyage*).

Collective agreements are generally mandatory, and all enterprises and workers are covered by the agreements concluded.

A collective agreement covering blue-collar workers in cleaning enterprises was signed on 14 December 1999 for a three-year period from January 2000 to December 2002; a new collective agreement for a further three-year period was being discussed in April 2004.

Negotiations aimed at renewing the agreements were marked by several stumbling-blocks. Several stumbling blocks appeared during the negotiations for the renewing of the agreement. These led to a consensus on the following issues:

- the establishment of a grid of incremental salary points;
- a linear increase in salaries;
- high pay according to seniority;
- an end-of-year bonus;
- a review of certain qualifications.

In addition to these issues, the agreement will contain the following matters:

- a doubling of the dirty-work bonus;
- Sunday working paid at a rate of 80% more than other days in the week;
- Night-working hours fixed at 10.00 p.m. to 6.00 a.m.;
- Stronger protection against dismissal.

## 3. Employers' organisations and trade unions

### Employers' organisations

*The Luxembourg Federation of Enterprises in the Buildings Cleaning Sector (Fédération luxembourgeoise des entreprises de nettoyage de bâtiments)*

Of the 80 enterprises listed in the Chamber of Craft Trades register, 54 were members of the Luxembourg Federation of Enterprises in the Buildings Cleaning Sector in April 2004. This represents an affiliation rate of 67.5%.

At national level, the Federation is affiliated to the Federation of Small and Medium-sized Enterprises (*Fédération des artisans*); at European level, it is affiliated to the Fédération européenne du nettoyage industriel/European Federation of Cleaning Industries (FENI/EFCI).

This employers' organisation takes part in collective bargaining, plays something of a coordinating role in negotiations, and participates in national consultations when asked to do so.

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<sup>116</sup> Luxembourg Confederation of Christian Trade Unions (*Confédération luxembourgeoise des syndicats chrétiens*, LCGB)

<sup>117</sup> Luxembourg Confederation of Independent Trade Unions (*Confédération syndicale indépendante du Luxembourg*, OGB-L)

## Trade unions

### *The Trade Federation – LCBG (La Fédération Commerce - LCBG)*

The Trade Federation has about 640 members, that is to say 12.6% of salaried employees listed. The members are mostly blue-collar workers; there are only two or three managers and white-collar workers.

The Federation takes part in collective bargaining, and in consultations with public authorities.

At national level, the Federation is affiliated to the LCBG, at European level, it is affiliated to Uni-Europa and the ETUC through the LCBG, and at international level, it is affiliated to UNI through the LCBG.

### *The Private-sector Cleaning Services Union - OGB-L (Syndicat services privés de nettoyage – OGB-L)*

The Private-sector Cleaning services Union has about 1,650 members. On the basis of the number of salaried employees currently listed, the affiliation rate is 32.6%. Most of the members are blue-collar workers. There are about 50 white-collar workers and about 20 skilled jobs.

The union takes part in collective bargaining and in consultations with the public authorities.

At national level, the Private-sector Cleaning Services Union is affiliated to the OGB-L and, through the OGB-L, to the CGT-L<sup>118</sup>.

At European level, the union is affiliated to UNI-Europa and the ETUC through the OGB-L. At international level, it is affiliated to UNI through the OGB-L.

### *Other factors relating to representativeness*

Social elections were held on 12 November 2003. The representativeness rate of trade unions in the cleaning sector, as based on figures provided by these organisations, is estimated to be as follows:

- LCBG: 21%;
- OGB-L: 56%;
- Others: 23%.

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<sup>118</sup> Luxembourg General Confederation of Labour (*Confédération Générale du Travail-Luxembourg*)

## Organisations

### *Employers' organisations*

Organisation	Sub-sectors covered	Companies	SW	Density Companies	Density SW	CB	National affiliations		European affiliations		International affiliations	
		<u>number</u>	<u>number</u>	<u>%</u>	<u>%</u>	<u>yes/no</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>
Luxembourg Federation of Enterprises in the Buildings Cleaning Sector	Cleaning	54	ND	67.5	ND	Yes	Federation of Small and Medium-sized Enterprises		EFCI			

SW: salaried workers

Density companies: number of companies affiliated / total number of companies in the sector

Density SW: number of salaried workers in affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

### *Trade Unions*

Organisation	Type of SW	Members	Members working in the sector	Density	CB	National affiliations		European affiliations		International affiliations	
	<u>Type</u>	<u>Number</u>	<u>Number</u>	<u>%</u>	<u>yes/no</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>
Trade Federation	Mainly blue-collar workers		640	12.6	Yes	LCGB			ETUC UNI-Europa		UNI
Private-sector Cleaning Services Union	Mainly blue-collar workers	1,650	1,650	32.6	Yes	OGB-L	CGT-L		ETUC UNI-Europa		UNI

SW: salaried workers

Density: number salaried workers affiliated to the organisation / number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

# THE NETHERLANDS

## 1. Description of the sector

### Delimitation and scope of activities in the sector

In the classification system used by the Dutch Central Statistics Office (CBS) (*Standaard Bedrijfsindeling*, SBI), cleaning is classified as follows:

SBI 74: Other Business services, including the cleaning of buildings and transportation etc. (SBI 747 (0):

- SBI 7470.1: Cleaning of Buildings;
- SBI 7470.2: Cleaning of Transportation and other cleaning.

**Cleaning of Buildings** (SBI 7470.1) accounts for over 90% of workers in the cleaning sector as a whole. This category refers to the cleaning of building interiors, window cleaning, chimney sweeping, the cleaning of house fronts, and cleaning after fires. This report will mainly focus on this part of the sector.

**Cleaning of transportation and other cleaning** (SBI 7470.2) is made up textiles cleaning, and all industrial cleaning such as the cleaning of tanks in ships and trucks, of transportation, of industrial installations, and of garbage containers. This sub-sector overlaps with others sectors because most companies engaged in industrial cleaning also specialise in other activities<sup>119</sup>.

### Socio-economic features of the sector

#### *Companies and employees*

In the **cleaning of buildings** (SBI 7470.1) in 2001, there were 5,840 companies employing 205,000 people (CBS reports). These figures refer to all people working for companies, and include the owners of firms, working family members, and people working via a temporary work agency. If we exclude the owners of firms, working family members and temporary employees, the figure for 2001 is 184,000. In 2002, the number of companies in the cleaning business was 5,850 (CBS figures).

It is estimated that there are about 170,000 people currently working in the cleaning sector<sup>120</sup>. In 2002, according to the National Federation of Christian Trade Unions (*Christelijk Nationaal Vakverbond*, CNV), there were 172,000 people working in this sector: 141,800 in "general cleaning", 6,600 in cleaning up after fires, and around 23,800 in the cleaning of house fronts and windows.

Around 70% of cleaners are women, and almost half of all cleaners are aged between 22 and 40. About a quarter of the people working in the sector are migrants, although this figure varies considerably from one part of the country to another. About 70% of the total number of cleaners have a poor standard of education. Lastly, approximately 80% of people employed in the cleaning sector work part-time.

Around 40% of the number of businesses in the cleaning sector are involved in the cleaning of offices, another 40% in window cleaning, and the remaining 20% specialise in areas such as the cleaning of house fronts and cleaning up after fires (Central Crafts Grouping, *Hoofdbedrijfschap Ambachten*, HBA) Yearbook).

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<sup>119</sup> Source: [http://www.cbs.nl/nl/standaarden/classificaties/sbi/sbi1993\\_2004.asp](http://www.cbs.nl/nl/standaarden/classificaties/sbi/sbi1993_2004.asp)

<sup>120</sup> The Employers' Association for Cleaning and Business Services (*Ondernemingsorganisatie Schoonmaak- en Bedrijfsdiensten* OSB) estimates there are 200,000. The actual figure is believed to be closer to 170,000, as developments in the sector closely follow economic trends. Given that the Netherlands has been experiencing an economic downturn since the start of the new millennium, it may be assumed that the number of workers in the cleaning sector has been declining over the last few years, and may now be moving towards 170,000. It is also hard to give exact figures as the sector is characterised by a high degree of short-term employment: there are many so-called "short-stayers" in the sector, such as students, who want to make quick money (FNV, interview).



About 3,400 people work in the **Cleaning of transportation and other cleaning** (SBI 7470.2).

### *Development within the sector*

Over the last decade, the number of cleaning businesses has steadily increased from 4,735 in 1994 to 5,850 in 2002, with a sharp rise in 1997, and a slight fall after 2000, when the Dutch economy experienced an economic downturn.

Overall, the cleaning sector in the Netherlands can be characterised by its process of "professionalisation". This consists of three main elements:

- improved training and education (a Foundation for Education in Cleaning Enterprises (*Stichting Scholing en Vorming Schoonmaakbedrijven- en diensten*, SVS) was set up 25 years ago);
- increased attention paid to improving working conditions in terms of health and safety through the drawing up of so-called "labour conditions covenants" (*arboconvenanten*);
- a big campaign to improve the sector's image and attract more people to work in cleaning.

The cleaning sector is also characterised by other developments: firstly, cleaning companies are increasingly profiling themselves as contractors for multi services and some larger companies are expanding services to catering, security and waste disposal.

Changes in the law over the last five years have impacted on the sector as follows:

- a legal provision to encourage low-paid employment has been done away with; this has had a negative impact on employers. A special scheme for reducing the taxation on low wages that employers had to pay for all employees they took on (known as the *specifieke afdrachtskorting*, SPAK) was abolished in 2001/2002 (the SPAK took the form of a reduction in tax payments when an employer hired someone who was long-term unemployed);
- an Act was passed in 2001 with the aim of improving the legal procedures during the first year of an employee's illness, and there were a number of new rules concerning such matters as sickness reporting, returning to work after sick leave, and the obligation to continue paying two years of employee's salary after the first day of illness. It is worth noting that illness absenteeism is quite high in the cleaning sector.

## **2. Social dialogue at sector level**

Employers' organisations and trade unions in the Netherlands participate in the work of public-law bodies (*publiekrechtelijke bedrijfsorganisaties*, PBOs). These PBOs, which are organised at product-group or industry level, aim to regulate certain business matters and give the government advice on the implementation of measures relating to the sector. They are supervised by the Social and Economic Council (*Sociaal Economische Raad*, SER) and by certain other government departments. The organisations involved in these activities have to be representative. The cleaning sector (**Cleaning of Buildings**, SBI 7470.1) falls within the scope of the Central Crafts Grouping (*Hoofdbedrijfschap Ambachten*, HBA), the trade organisation for crafts, whose aim is to encourage social and economic development, for example, in terms of employment, labour conditions and technological innovation in the sectors covered.

There is a collective agreement for workers in the cleaning sector (**Cleaning of Buildings**, SBI 7470.1). This agreement is concluded by the Employers' Association for Cleaning and Business Services (*Ondernemingsorganisatie Schoonmaak- en Bedrijfsdiensten*, OSB) for the employers, and by the National Federation of Christian Trade Unions (*Christelijk Nationaal Vakverbond*, CNV) and FNV Allied Unions (*FNV Bondgenoten*), a member of the social-democratic Dutch Trade Union Federation (*Federatie Nederlandse Vakbeweging*, FNV). The collective agreement for cleaners has been effective since 1 January 2004, and will run for a year. In accordance with the 2003 Social Accord at national level between the social partners and the Dutch government, this new agreement does not include a wage increase, but to meet the rises in pension contributions, employees have been awarded a once-and-for-all performance-related bonus; In addition, the holiday bonus is 8.5% instead of 8%. For the first time, the collective agreement applies not only to cleaners and their supervisors, but also (partly) to office staff, who were not previously covered by any collective agreement. The collective agreement was concluded on the Council for Labour Relations in the (Window) Cleaning Sector (*Raad voor Arbeidsverhoudingen Schoonmaak- en Glazenwassersbranche*, RAS). The RAS was founded in 1991; it is made up of representatives of the CNV

*BedrijvenBond* (Union of Workers in Industry, Transport and Food Industry), FNV Allied Unions, and OSB. The Council ensures that collective agreements are complied with, and carries out and coordinates certain activities that the Council itself develops. It also tables requests to the Department of Social Affairs and Employment for extensions to the cleaning sector collective agreement. Problems concerning compliance with the collective agreement have been reported by both employers' and employees' organisations.

*Coverage of collective labour agreement in the cleaning sector*

Collective agreement	General extension	Employees covered directly	Employees after general extension	% of workers employed by organised firms
Cleaning	Yes	140,000	170,000	82%

Source: FNV Allied Unions, CNV *BedrijvenBond* and the Ministry of Social Affairs and Employment websites.

In the late 1990s, the trade unions had to respond to a sharper increase in competition between companies in the cleaning sector as a result of the economic situation in the Netherlands. According to the unions, companies were cutting costs through reductions in working conditions, and cleaners were under greater pressure to work harder: there was the tendency on the part of the employers to cut the number of hours in which tasks had to be performed<sup>121</sup>.

The trade unions used collective agreements to improve the cleaners' working conditions and terms of employment security: changes have been negotiated and laid down in collective agreements, and occupational health and safety is receiving more and more attention.

Collective bargaining over the last ten years has become more difficult. The following issues have been discussed over the period:

- wage increases and bonuses;
- the creation of additional jobs for the long-term unemployed;
- training;
- working time and time spent working outside office hours;
- sick pay;
- employment security when a cleaning contract is taken over by another cleaning company;
- pension arrangements.

It is also worth noting that "labour conditions covenants" (*arbocovenanten*) have also been concluded with a view to bringing down the number of people on sick leave. The percentage of people in the cleaning sector who are absent through illness – it fluctuates between 10% and 17% – is one of the highest. The cause is believed to be the physical strain and pressure at work. The "covenant" for the cleaning sector will run until July 2006.

A collective agreement has been concluded in the **Cleaning of transportation and other cleaning** (SBI 7470.2) between the Shipping, Industry, Environmental and Technical Maintenance Employers' (*Vereniging van wergevers in the Scheeps-, Industrie-, Milieu- en Technische onderhoudsactiviteiten*, SITO), the Union of Workers in Industry, Transport and Food Industry (CNV *BedrijvenBond*) and FNV Allied Unions within the sector organisation, and the Maintenance and Cleaning in Shipping, Industry and Environment and Related Activities (*Onderhoud en reiniging in sheepvaart, industrie en milieu en aanverwante activiteiten*, *Orsima*). There is no general extension. The agreement covers 1,600 workers employed by industrial cleaning companies affiliated to SITO).

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<sup>121</sup> The Employers' organisation OSB contested this assertion (through the EFCI consultation, October-November 2004). However, this point of view was maintained by the national expert.

### 3. Employers' organisations and trade unions

#### Employers' organisations

##### *The Employers' Association for Cleaning and Business Services (Ondernemingsorganisatie Schoonmaak- en Bedrijfsdiensten, OSB)*

The employers' organisation, the OSB, is the largest business association in the cleaning sector (**Cleaning of Buildings** (SBI 7470.1)). The OSB has 650 members in the cleaning business: they represent around 60-70% of turnover and 80% of employment in the sector. To become a member of the OSB, an enterprise has to meet three requirements:

- it must have been in existence for at least three years;
- it must subscribe to the OSB code of conduct;
- the other members must approve its application.

The OSB structure consists of a 15-strong general management body which sets out the organisation's policy. Three of the general management body's members are chosen to make up the day-to-day governing body of the OSB. The President of the day-to-day governing body is also the director of the whole of the OSB.

The OSB is in three sections. They were put in place for the exchange of experiences and to propose project initiatives:

- the former General Employers' Organisation for Window Cleaning Businesses (*Algemene Werkgevers- Organisatie Glazenwassersbedrijven*, AWOG) (it has agreed to become a part of the OSB, and to be called Knowing All about Window Cleaning (*Alles Weten Over Glazenwassen*), thereby retaining its old acronym
- Cleaning Services for Private Individuals (*Schoonmaakdiensten voor Particulieren*, SVP);
- Cleaning in Industry, of House Fronts, and after Disasters (*Reiniging in de Industrie, aan Gevels en na Kalamiteiten*, IGK).

The OSB is affiliated to the Confederation of Netherlands Industry and Employers (*Vereniging Nederlandse Ondernemingen – Nederlandse Christelijke Werkgeversorganisatie*, VNO-NCW) and the European Federation of Cleaning Industries (EFCl).

##### *Shipping, Industry, Environmental and Technical Maintenance Employers' Association (Vereniging van wergevers in the Scheeps-, Industrie-, Milieu- en Technische onderhoudsactiviteiten, SITO)*

SITO has 28 affiliated companies in the **Cleaning of transportation and other cleaning** (SBI 7470.2) sub-sector. These companies employ 1,600 people. SITO is affiliated to the peak employers' organisation VNO-NCW.

#### Trade unions

Trade union density in the sector (it is under 10%) is quite low compared with the Dutch average of 25%. The two trade unions presented below are recognised as representative, and participate in collective bargaining.

##### *FNV Allied Unions (Bondgenoten)*

FNV Allied Unions have over 12,000 members in the **Cleaning of Buildings** (SBI 7470.1) sector; they account for 7% of workers in the sector. FNV Allied Unions sign collective agreements, and is recognised by the employers' organisation. At national level, it is affiliated to FNV; at European and international level, it is a member of UNI-Europa and UNI.

FNV Allied Unions also have members in the **Cleaning of transportation and other cleaning** (SBI 7470.2) sector.

##### *CNV Business Confederation (CNV BedrijvenBond)*

CNV has about 2,700 members in the cleaning sector (**Cleaning of Buildings** (SBI 7470.1)). This represents around 1.6% of workers in the sector. CNV signs collective agreements, and is recognised by the employers' organisation.

CNV also has members in the **Cleaning of transportation and other cleaning** (SBI 7470.2) sector.

## Organisations

### Employers' organisations

Organisation	Sub-sectors covered	Companies	SW	Density Companies	Density SW	CB	National affiliations		European affiliations		International affiliations	
		number	number	%	%	yes/no	Direct	Indirect	Direct	Indirect	Direct	Indirect
OSB (The Business Confederation)	Cleaning SBI 7470.1	650	140,000	11%	SBI 7470.1: About 82%	Yes	VNO-NCW <sup>122</sup>		EFCI			
SITO (Shipping, Industry, Environmental and Technical Maintenance Employers' Association)	SBI 7470.2	ND	1,600	ND	SBI 7470.2: About 47%	Yes	VNO-NCW					

SW: salaried workers

Density companies: number of companies' affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

### Trade Unions

Organisation	Type of SW	Members	Members working in the sector	Density	CB	National affiliations		European affiliations		International affiliations	
	Type	Number	Number	%	yes/no	Direct	Indirect	Direct	Indirect	Direct	Indirect
FNV Bondgenoten (FNV Allied Unions)	SBI 7470.1		12,000	7%	Yes	FNV <sup>123</sup>		UNI-Europa		UNI	
	SBI 7470.2		ND	ND	Yes						
CNV BedrijvenBond (CNV Business Confederation)	SBI 7470.1		2,700	1.6%	Yes	CNV <sup>124</sup>			ETUC		WCL
	SBI 7470.2		ND	ND	Yes						

SW: salaried workers

Density: number salaried workers affiliated to the organisation / number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

<sup>122</sup> The Confederation of Netherlands Industry and Employers (*Vereniging Nederlandse Ondernemingen – Nederlandse Christelijke Werkgeversorganisatie*, VNO-NCW)

<sup>123</sup> The Dutch Trade Union Federation (*Federatie Nederlandse Vakbeweging*, FNV).

<sup>124</sup> The National Federation of Christian Trade Unions (*Christelijk Nationaal Vakverbond*, CNV).

# PORTUGAL

## 1. Description of the sector at national level

### Delimitation and scope of activities in the sector

The industrial cleaning sector (classified 74700 in the national Classification of Economic Activities) covers cleaning activities in all kinds of buildings (e.g. factories, offices, shops, residential properties and schools) and different kinds of the cleaning (e.g. cleaning walls and floors, polishing floors, and cleaning windows, fireplaces, chimneys, furnaces, incinerators, boilers and ventilation shafts) It also embraces the cleaning of all means of transports (e.g. trains, airplanes, tankers and trucks), and the disinfection and extermination of dangerous animals in buildings and means of transport. However, the cleaning of tankers and trucks and disinfection and extermination work are not traditionally included in the statistics, although gardening activities are. The sector's main activities may be sub-divided as follows:

- transport (land transport, aircraft and airport terminals);
- hospital units, medical centres and health centres;
- large retail areas (hypermarkets, supermarkets, markets);
- factory units;
- urban cleaning (street cleaning and treatment of solid waste);
- hotel cleaning;
- office cleaning.

### Socio-economic features of the sector<sup>125</sup>

Most companies in the industrial cleaning sector are SMEs, and particularly micro-enterprises. In much the same way that enterprises generally are distributed in Portugal, most of the sector's enterprises are located in and around the capital, and in the north and in coastal regions. They are mostly private limited companies (69.91%) and independent entrepreneurs (26.8%).

#### *Companies according to size*

INE (data 2001)		DETEFP (data 2000)	
Enterprises <sup>126</sup>	People employed <sup>127</sup>	Enterprises <sup>128</sup>	People employed <sup>129</sup>

<sup>125</sup> The statistical data presented here have been published by the National Statistics Institute (INE) and the Statistics Department for Labour, Employment and Occupational Training (DETEFP) of the Ministry of Social Security and Labour

<sup>126</sup> INE takes the view that an enterprise is the whole legal entity (the natural or legal person) representing an organisational unit for the production of goods and services, and enjoying the benefits of a degree of decision-making independence, mainly regarding the use of current resources. An enterprise performs one or more activities in one or more locations, and represents the smallest combination of legal units, and may only represent one.

<sup>127</sup> People who have been involved in the enterprise's activity during the period of reference, irrespective of the length of this involvement, in the following conditions: a) people bound to the enterprise by a work contract, and receiving payment in exchange; b) people linked to the enterprise but not bound by a work contract, and not receiving regular payment for the time worked or work provided; c) people bound to other enterprises, but who work in the enterprise and are paid directly by this enterprise; d) people in the previous category, temporarily absent for a period of one month or less as a result of holidays, a labour dispute, vocational training or work-related illness or accident. The following are not considered to be 'people employed': workers referred to in a), b) and c) above who are temporarily absent for a period of more than one month, workers bound to the enterprise but working in other enterprises, where they are paid directly by the latter, workers working in the enterprise but who are paid by other enterprises (temporary workers), and independent workers such as service providers.

<sup>128</sup> Under DETFP criteria, an enterprise is a whole economic unit that undertakes a specific activity, and which consists of a Head Office and premises in various locations.

<sup>129</sup> The total number of people working for the company, irrespective of their contractual link, unpaid family workers, and the employer him/herself when carrying out work in the enterprise. People absent for more than to the reference period (i.e. the last week of October) are excluded.

TOTAL	1450		49358		TOTAL	791		45051	
Enterprise size					Enterprise size				
Up to 9 workers	1196	82.48	3615	7.32	Up to 9 workers	496	62.7	1778	3.95
10-19 workers	83	5.72	1389	2.81	10-19 workers	120	15.17	1613	3.58
20 + workers	171	11.79	44354	89.86	20-49 workers	80	10.11	2444	5.42
					50-99 workers	28	3.03	2029	4.5
					100-199 workers	24	3.29	3379	7.5
					200-499 workers	26	3.29	8864	19.67
					500 + workers	17	2.15	24944	55.37
					No workers	0	0	0	0

Sources: INE and DETEFP.

Note: The differences between the two tables are due to the different time periods, and to the different definitions, concepts and methodologies used the two organisations.

The sector is expanding, particularly at micro-enterprise level. According to the trade unions consulted, the enterprises' strategy is mainly based on economies of scale, specialisation in sub-sectors, presenting tenders with low prices, and cutting the number of staff/stepping up rates of work.

### **Turnover, gross added value, productivity**

INE (2001 data) Unit: 10 <sup>3</sup> €	
Turnover	460,223
Gross Added Value (market prices)	336,268
Productivity	6,813

Source: INE.

Most salaried workers in the industrial cleaning sector in large and medium-sized enterprises are women with low levels of education and on low pay. According to the trade unions consulted, atypical forms of work are frequent in this sector: these include short, fixed-term contracts, part-time working and temporary work.

### **Salaried workers<sup>130</sup>**

Enterprise size	DETEFP (2000 data)					
	Total 44260		Men 4488		Women 39772	
Up to 9 workers	1429	3.23	388	8.64	1041	2.62
10 - 19 workers	1496	3.38	352	7.84	1144	2.88
20 - 49 workers	2324	5.25	516	11.50	1808	4.55
50 - 199 workers	5347	12.08	670	14.93	4677	11.78
200 - 499 workers	8822	19.93	568	12.65	8254	20.75
500 - 999 workers	5327	12.03	405	9.02	4922	12.38
1000 + workers	19515	44.09	1589	35.40	17926	45.07
No workers	0	0	0	0	0	0

Source: DETEFP.

## **2. Social dialogue at sector level**

Collective Work Contracts in the cleaning sector are based on a document that was drawn up in 1974. Financial aspects of the agreement have been updated annually since then. The sector has two collective work contracts (CCTs), both of which are updated annually:

- the CCT concluded between the Trade Union for Caretakers, Watchmen, and Related Professions and Activities (STAD) and other unions affiliated to the General Confederation of Portuguese Workers, and the Association of Providers of Cleaning and Similar Services (AEPPLAS);
- the CCT concluded between the Federation of Trade Union of Service Workers (FETESE), representing the following affiliates: Free Trade Union of Workers from Cleaning, Reception Desk, Surveillance, Welfare, Domestic and other

<sup>130</sup> Salaried worker: a person who has a permanent job with an organisation based on a work contract, and who receives payment in kind or cash.

similar services (SLEDA), Trade Union for Workers in Offices, Commerce, Services and New Technology (SITESE), Trade Union for Office Workers, Services and Commerce (SITESC), Trade Union for Office, Commerce and Service Workers of the Autonomous Region of Madeira (SITAM), the Trade Union for Office, Commerce and Service Workers on the Islands of São Miguel and Santa Maria (SINDESCOM), the Trade Union for Commerce, Offices and Services (SINDCES/UGT), the Trade Union for Office and Commerce Workers in Angra do Heroísmo (Azores) (STECAH), the Sales Technicians' Union (STV), and the Association of Providers of Cleaning and Similar Services (AEPSLAS) for the employers.

Additional agreements were negotiated in the workplace in the 1980s and 1990s with the aim of raising pay levels and obtaining better working hours and shift subsidies.

The CCT has 100% coverage in the sector is 100% following publication of the CCT Decree Law.

The main bargaining issues are salary scales, other matters of a monetary nature, working hours, occupational health and safety, and workers' rights and guarantees. The bargaining difficulties that arise usually relate to the negotiation of salaries and working hours.

Social dialogue in the sector is seen as a dispute situation: the sector's trade union organisations expect disputes to continue between the trade unions and employers because of the approach taken by the employers' organisation, namely an aversion to change and a lack of commitment to effective social dialogue.

### 3. Employers' organisations and trade unions

#### Employers' organisations

*The Association of Providers of Cleaning and similar services (Associação de Empresas de Prestação de Serviços de Limpeza e Atividades Similares, AEPSLAS)*

AEPSLAS represents small and medium-sized enterprises in the cleaning sector, with 70 affiliated enterprises employing about 27.000 salaried workers (i.e. between 4.83% (INE, 2001) and 8.85% (DETEFP, 2000) of companies in the sector, and between 54.7% (INE, 2001) and 59.93% (DETEFP, 2000) of salaried workers employed in the sector). The association offers a range of support and information services to its members (e.g. legal support, and information on legal and fiscal obligations) and negotiates the Collective Work Contract (CCT). This organisation is affiliated to the Portugal's Commerce and Services Confederation (*Confederação do Comércio e Serviços de Portugal, CCP*) at national level, to the European Federation of Cleaning Industries (EFCI) at European level, and to the International Association of Building Services Contractors (FIDER) and the World Federation of Building Services Contractors (WFBSC) at international level.

*The National Association of Cleaning Entrepreneurs (Associação Nacional de Empresários de Limpeza, ANEL)*

One employers' association, the National Association of Cleaning Entrepreneurs (ANEL), has been recognised as a social partner by at least one trade union organisation. The directors of this association say they have not undertaken collective bargaining or participated in European committees in recent years.

#### Trade unions

*The Free Trade Union of Workers in Cleaning, Reception Desk, Surveillance, Welfare, Domestic and other similar services (Sindicato Livre dos Trabalhadores de Serviços de Portaria, Vigilância, Limpezas Domésticas e Profissões Similares, SLEDA)*

SLEDA represents 15,000 salaried workers, of whom 100 are salaried workers in the cleaning sector (about 0.2% of the salaried workers employed in the sector). These workers are usually low-skilled. At national level, SLEDA is affiliated to the General Workers' Union (*União Geral de Trabalhadores, UGT*). At European level, SLEDA is affiliated to UNI-Europa and the ETUC, and at international level, it is a member of UNI and the ICFTU.

***The Trade Union for Workers in Offices, Commerce, Services and New Technology (Sindicato dos Trabalhadores de Escritório, Comércio, Serviços e Novas Tecnologias, SITESE)***

SITISE takes part in collective bargaining in the cleaning sector, and participates in formal consultations covering the sector. It recruits all types of workers. At national level, it is a member of the General Workers' Union (*União Geral de Trabalhadores*, UGT) and the Federation of Service and other workers' Unions (*Federação dos Sindicatos dos Trabalhadores de Serviços e Outros*, FETESE), at European level, it is affiliated to UNI-Europa and the ETUC, and at international level, it is affiliated to UNI and ICFTU.

***The Trade Union for Office Workers, Services and Commerce (Sindicato dos Trabalhadores de Escritório, Serviços e Comércio, SITESC)***

SITESC represents 15,500 salaried workers, most of them technical and administrative workers. At national level, it is affiliated to the General Workers' Union (*União Geral de Trabalhadores*, UGT), at European level, it is affiliated to the ETUC, and at international level, it is a member of ICFTU, the International Federation of World Workers (FITM), the International Federation of Education Workers Associations (FIAET), and the International Federation of Employees and Technicians (FIET).

***The Trade Union for Caretakers, Watchmen, related professions and varied activities (Sindicato dos Trabalhadores de Portaria, Vigilância, Limpeza, Domésticas, Profissões Similares e Actividades Diversas, STAD)***

STAD represents 16,000 salaried workers, of whom 7,000 in the cleaning sector (i.e. 14-15% of salaried workers in the sector. It is the sector's most representative trade union. About 97% of its members are unskilled workers. At national level, it is affiliated to the General Confederation of Portuguese Workers (*Confederação Geral dos Trabalhadores Portugueses*, CGTP-IN) and to the Portuguese Federation of Commerce, Offices and Services (*Federação Portuguesa do Comércio, Escritórios e Serviços*, FEPCES). STAD takes part in collective bargaining.



## Organisations

### *Employers' organisations*

Organisation		Sub-sectors covered	Companies	SW	Density Companies		Density SW		CB	National affiliations		European affiliations		International affiliations	
<u>Original name</u>	<u>English name</u>		<u>number</u>	<u>number</u>	<u>%</u>		<u>%</u>		<u>yes/no</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>
					INE (2001)	DETEFP (2000)	INE (2001)	DETEFP (2000)							
AEPSLAS	Association of Enterprises Providing Cleaning and Related Services	Cleaning and similar services	70	27.000	4.83 %	8.85 %	54.7 %	59.93 %	Yes	CCP		EFCI		FIDER WFBSC	
ANEL	National Association of Cleaning Contractors		ND	ND	ND	ND	ND	ND	Not in recent years						

SW: salaried workers

Density companies: number of companies' affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

### *Trade Unions*

Organisation		Type of SW	Members	Members working in the sector	Density		CB	National affiliations		European affiliations		International affiliations	
<u>Original name</u>	<u>English name</u>	<u>Type</u>	<u>Number</u>	<u>Number</u>	<u>%</u>		<u>yes/no</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>
					INE (2001)	DETEFP (2000)							
SLEDA	Free Trade Union of Workers from Cleaning, Reception Desk, Surveillance, Welfare, Domestic and other similar services	Low-skilled workers. Mainly women workers on low salaries and with short-term or temporary contracts	15,000	100	0.20 %	0.22 %	Yes	UGT		Union Network - UNI-Europa ETUC		UNI ICFTU	
SITese	Trade Union for Office, Trade, Services and New		ND	ND	ND	ND	Yes	UGT FETESE		Union Network - UNI-Europa ETUC		ICFTU UNI	

	Technology workers												
SITESC	Trade Union for Office Workers, Services and Trade		15,500	ND	ND	ND	Yes	UGT		ETUC		ICFTU FITM FIAET FIET	
STAD	Trade Union for Caretakers, Watchmen, Cleaners and Similar Professions and Varied Activities	Workers with low levels of education and vocational qualifications.	16,000	7,000	14.18%	15.54%	Yes	CGTP-IN FEPCES		Has no European affiliations		Has no international affiliations	

SW: salaried workers

Density: number salaried workers affiliated to the organisation / number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

# SPAIN

## 1. Description of the sector

### Delimitation and scope of activities in the sector

The sector of cleaning or cleaning industry activities is covered by NACE 747, and normally includes "cleaning all kinds of buildings, including offices, factories, businesses, official organisations and other business and professional establishments, and residential buildings; the cleaning of glass and windows, chimneys, fireplaces, ovens, incinerators, boilers, ventilation channels and extractor fans; disinfection and rodent control, and the disinfection of buildings, ships and trains; and the cleaning of trains, buses, planes etc. It does not include fighting agricultural and livestock epidemics, steam cleaning, water jet cleaning, and other similar activities relating to the cleaning of façades and recently constructed buildings, carpet and tapestry cleaning, the cleaning of curtains and wall hangings, and domestic services"<sup>131</sup>.

The definition set out in collective agreements is usually more generic, with many stating that the scope is simply "cleaning services for buildings and establishments". The collective agreement for the Province of Barcelona, however, is slightly more detailed: it says that the scope covers "the cleaning, maintenance, preservation and cleaning of all kinds of buildings, establishments, industries, means of transport (land, air and sea), machinery, spaces, street furniture etc, irrespective of their legal form".

### Socio-economic features of the sector

#### Employment

According to data provided by the National Statistics Institute (*Instituto Nacional de Estadística*, INE), there are about 15,486 companies in the cleaning industry sector (2003 figures). These companies employ 360,000 workers, most of them salaried employees (96.7% of workers in the sector were salaried employees in 2001). However, according to some sources, there could be as many as 400,000 people working in the cleaning industry<sup>132</sup>. There is also the issue of undeclared work: this is significant, but it cannot be quantified.

#### Workers

Sub-sectors	Number of workers	Number of SW	Number of SW/number of SW in the country (%)	Number of SW in companies <10 SW/number of SW in the sector (%)	Number of SW in companies 10-100 SW/number of SW in the sector (%)	Number of SW in companies >100 SW/number of SW in the sector (%)
Total of the sector	360,000 <sup>133</sup>	350,000	2.8%	+/- 8-10%	+/- 20-25%	+/- 65-70%

SW: salaried workers

Source: Instituto Nacional de Estadística, INE

Employment rose by 25.4% between 1998 and 2001. According to the Federated Associations of National Cleaning Industries (*Asociaciones Federadas de Empresarios de Limpieza Nacionales*, AFELIN), 20,000 new jobs are created in the sector every year, many of them for women and immigrant workers.

Three out of four salaried workers are women, and there is a considerable amount of temporary work in the sector (46.9% of the employment in 2001). Similarly, part-time work and long working hours enabling workers to increase their wages are very common.

<sup>131</sup> Instituto Nacional de Estadística (INE) (2003), *Encuesta de servicios 2001*, Madrid: INE .

<sup>132</sup> [www.1a3soluciones.com](http://www.1a3soluciones.com), the website of professional cleaning enterprises in Spain.

<sup>133</sup> According to ASPEL, there are 350,000 workers in the sector (EFCI consultation, October-November 2004).

## Companies

The structure of the cleaning industry is highly fragmented: 38.5% of companies have no salaried workers, 31.3% have between 1 and 5 salaried workers, and 5.3% have 50 salaried workers or more. In 1999, according to K-buy data<sup>134</sup>, 15% of the market was in the hands of the five largest companies, while 85% was shared by more than 10,000 companies in the sector.

### Companies by numbers and percentages of employees

Number of SW	Number of companies		Distribution (2003)	Difference 1995-2003
	1995	2003		
0	4,993	5,959	38.5%	19.3%
1-5	3,597	4,840	31.3%	34.6%
6-9	818	1,228	7.9%	50.1%
10-19	852	1,825	11.8%	114.2%
20-49	734	812	5.2%	10.6%
50-99	313	343	2.2%	9.6%
100-199	188	228	1.5%	21.3%
200-499	131	166	1.1%	26.7%
500 or more	47	85 <sup>135</sup>	0.5%	80.9%
Total	11,673	15,486	100.0%	32.7%

SW: Salaried workers

Source: Instituto Nacional de Estadística, INE

The increase in the number of companies in the sector during the last year was characterised by the following processes:

- the acquisition of small companies by larger ones;
- the emergence of new companies started by former salaried workers who have become self-employed (it is relatively easy to start up new companies in the sector, for example through low capital investment);
- the arrival of new companies from other sectors (mainly from the building industry), and of multinational corporations;
- a rise in the number of companies in the cleaning sector as a result of increased outsourcing.

The activity of the cleaning industry is nationwide, but 31.4% of companies are based in the Madrid and Catalonia communities.

### Evolutions and stakes in the sector

As far as competitiveness is concerned, the most important factor in the sector is cost. According to the FeS-UGT Research Department (2002)<sup>136</sup>, strong price competitiveness has resulted in some companies paying wages below those laid down in collective agreements; although price continues to be the main factor in competitiveness, service quality is emerging as a new key element in company strategies. Environmental regulations are beginning to be introduced, and adaptation to customer's needs, and the specialisation and diversification of services are also becoming more important. Companies provide other services related to the preservation and maintenance of all kinds of buildings, and to this end, the vocational skills of workers and specialised technical training are additional important aspects that need to be developed.

<sup>134</sup> K-buy (2002), "La compra de servicios de limpieza", *Dossier No 10*.

<sup>135</sup> According to ASPÉL, there are 65 enterprises of more than 500 employees in the sector (data 2001). The figure 85 seems to be underestimated according to this organisation (EFCEI consultation, October-November 2004). The data presented in the table come from the National Institute of Statistics (INE).

<sup>136</sup> FeS-UGT Research Department (2002), *Análisis del sector de la limpieza* (Analysis of the cleaning sector).

## 2. Social dialogue at sector level

### *Levels and collective agreements*

Most collective bargaining in the cleaning sector takes place at autonomous community and provincial levels. All Spanish provinces and some autonomous communities have their own collective agreements, and these cover all companies in the cleaning sector in the relevant area.

As long as the employers' organisations and trade unions concerned represent more than 50% of the sector, any collective agreements concluded by them cover all workers and companies in the sector whether they belong to these bodies or not.

There is much less social dialogue at national level, but the main organisations have concluded agreements to sing up to the National Agreement for Continuing Training (*Acuerdo Nacional de Formación Continua*, 1997 and 2001)<sup>137</sup>. Some organisations are also negotiating a General Framework Agreement for the sector<sup>138</sup>; this could replace labour ordinances and set up the basis for a possible collective agreement at national level.

### *Actors*

The employers' organisations that take part in social dialogue are provincial-level bodies that negotiate collective agreements.

The employers' organisations that take part in social dialogue at national level are:

- the Federated Associations of National Cleaning Industries (*Asociaciones Federadas de Empresarios de Limpieza Nacionales*, AFELIN);
- the Professional Association of Cleaning Companies (*Asociación Profesional de Empresas de Limpieza*, ASPEL);
- the Spanish Cleaning Federation (*Federación Española de Limpiezas*, FEL);
- the Federation of Associations of Buildings and Premises Cleaning Entrepreneurs (*Federación Nacional de Asociaciones de Empresarios de Limpieza de Edificios y Locales*, FENAEL)<sup>139</sup>.

The organisations that represent the trade union side in social dialogue are the General Workers' Confederation (*Comisiones Obreras*, CCOO), the General Union of Workers (*Unión General de Trabajadores*, UGT), and the Galician Trade Union Confederation (*Confederación Intersindical Galega*, CIG). Other organisations that take part in social dialogue at provincial and autonomous community levels include the Workers' Trade Unionist Confederation (*Unión Sindical Obrera*, USO), the CIG in Galicia, and Basque Workers' Solidarity (*Euzko Langileen Alkartasuna – Solidaridad de Trabajadores Vascos*, ELA-STV) in the Basque Country and Navarra.

### *Issues of social dialogue*

Social dialogue at national level mainly focuses on vocational training, and on the agreement for replacing labour ordinances.

The main issues regulated by collective agreements are wages, working hours, time off, holidays, occupational classification, promotion, labour mobility, special leave, occupational health and safety, contracts, and representativeness rights.

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<sup>137</sup> The 1997 agreement was negotiated by FENAEL, UGT and CCOO, and the 2001 agreement was negotiated by AFELIN, ASPEL, FEL and FENAEL for the employers, and by CCOO, UGT and CIG for the trade unions.

<sup>138</sup> ASPEL and AFELIN are negotiating this General Framework Agreement with UGT and CCOO.

<sup>139</sup> According to the ASPEL (EFCI consultation, October-November 2004), the FEL and the FENAEL do not exist anymore. The data collected for this report are based on interviews realised in February and March 2004. At this moment, the author mentioned that FENAEL was on a dissolution process and that the FEL showed an uncertain future as a representative organisation. The report reflects the situation of this period. The FEL and the FENAEL took part in the negotiation of the last collective agreement at sector level (march 2004).

### 3. Employers' organisations and trade unions

#### Employers' organisations

The new organisations are undergoing restructuring: FENAEL is in a state of collapse and has almost closed down, AFELIN was only formed in 2000, and ASPEL and FEL in 2001. In December 2003, AFELIN and ASPEL reached a collaboration agreement whereby they will join forces to tackle the government and the trade unions.

#### *The Federated Associations of National Cleaning Industries (Asociaciones Federadas de Empresarios de Limpieza Nacionales, AFELIN)*

AFELIN was formed in 2000. The main employers' organisations at provincial and autonomous community level are affiliated to it: they take part in collective bargaining, and AFELIN assists them by collaborating with them and by playing an advisory role. AFELIN and ASPEL also take part in negotiations on the sector's framework agreement.

AFELIN acts as an umbrella body for around 1,000 companies, which in turn employ about 10,000 salaried workers in the cleaning industry.

AFELIN is a member of the Joint Committee for Continuing Training (*Comisión Paritaria de Formación Continua*).

#### *The Professional Association of Cleaning Companies (Asociación Profesional de Empresas de Limpieza, ASPEL)*

ASPEL was founded in 2001, and brings together 14 of the largest groups in the sector. Altogether, they employ about 110,000 workers<sup>140</sup>.

ASPEL takes part in collective bargaining at provincial level, and participates in negotiations on a framework agreement at national level.

ASPEL is a member of the Spanish Confederation of Employers' Organisations (*Confederación Española de Organizaciones Empresariales*, CEOE). ASPEL is also a member of the Joint Committee for Continuing Training (*Comisión Paritaria de Formación Continua*). At European level, it is a member of EFCI and it is indirectly affiliated to UNICE (via CEOE).

#### *The Spanish Cleaning Federation (Federación Española de Limpiezas, FEL)*

As AFELIN and ASPEL, FEL was constituted after the crisis process of FENAEL. However, FEL's activity has been a weak one and it shows an uncertain future as representative managers' organisation<sup>141</sup>. It brings together 39 medium-sized companies in the cleaning sector. These companies employ about 12,500 workers.

It signed up to the National Agreement for Continuing Training in 2001.

#### *The Federation of Associations of Buildings and Premises Cleaning Entrepreneurs (Federación Nacional de Asociaciones de Empresarios de Limpieza de Edificios y Locales, FENAEL)*

FENAEL was the only organisation at state level until recently. It is now in the process of being broken-up<sup>142</sup>. For the time being, it is not active in the field of employers' organisations. At European level, it is a member of EFCI.

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<sup>140</sup> This data is much debated: ASPEL firstly mentioned a membership of 170,000 workers. AFELIN disagreed with this number and the actors came to an agreement with the figure of 110,000 workers (March 2004). The ASPEL now contests this figure and declare that its membership consists of 136,000 workers (30% of the sector).

<sup>141</sup> According to the ASPEL (EFCI consultation, October-November 2004), the FEL and the FENAEL do not exist anymore. The data collected for this report are based on interviews realised in February and March 2004. At this moment, the author mentioned that FENAEL was on a dissolution process and that the FEL showed an uncertain future as a representative organisation. The report reflects the situation of this period. The FEL and the FENAEL took part in the negotiation of the last collective agreement at sector level (march 2004).

<sup>142</sup> Idem.

## Trade unions

### *The Multi-Activities Federation of the General Workers' Confederation (Federación de Actividades Diversas de Comisiones Obreras, FAADD-CCOO)*

FAADD-CCOO is the most representative trade union in the sector with 4,051 workers' representatives, that is to say 44.9% of the total number<sup>143</sup>. A total of 55,000 workers are members of the FAADD-CCOO; of these, 35,187 work in the cleaning industry.

The FAADD-CCOO takes part in negotiations on collective agreements in the sector at provincial and autonomous community levels, and in negotiations at national level. It also sits on the Cleaning of Buildings and Premises Joint Committee for Continuing, and is party to Local Agreements on the Employment Reintegration of Discriminated-against Groups (*Acuerdos Locales de Reinserción Laboral a Colectivos Discriminados*) and to Foundations for Health and Safety at Work (*Fundaciones para la Seguridad y la Salud en el Trabajo*).

FAADD-CCOO belongs to CCOO, and, indirectly to the ETUC and to the ICFTU.

### *National services Federation of General Workers' Union (Federación Estatal de Servicios de la Unión General de Trabajadores, FeS-UGT)*

The FeS-UGT recruits workers in the financial services, publishing and printing, insurance, cultural and sporting activities, industrial cleaning, media and other services. The union has about 100,000 members, 35,000 of whom work in the cleaning industry. The FeS-UGT has 3,396 delegates representing workers in the sector, and its representativeness therefore stands at 37.7%<sup>144</sup>.

FeS-UGT takes part in the bargaining of province and autonomous community collective agreements for the cleaning industry sector. It also takes part in negotiations on the sector's framework agreement and the agreement on continuing training, and in European social dialogue.

The FeS-UGT is part of the UGT. It is a member of Uni-Europa and UNI, and is indirectly linked to the ETUC and the ICFTU.

### *Services Federation of the Galician Trade Union Confederation (Federación deervizos de Confederación Intersindical Galega, Servizos-CIG)*

The Servizos-CIG trade union operates solely in the autonomous community of Galicia. It has 3,500 members in the cleaning sector; of these, 400 are technical and professional staff. It has 263 workers' delegates, and its representativeness therefore stands at 38% in Galicia, but only 2.9% for Spain as a whole<sup>145</sup>; this enables Servizos-CIG to participate in bargaining and social dialogue at national level.

Servizos-CIG takes part in negotiations on province collective agreements in Galicia, and on the national agreement for continuing training.

### *Services Area of the Workers' Trade Unionist Confederation (Área de Servicios de Unión Sindical Obrera, Área de Servicios-USO)*

This USO section has 7,923 members altogether; 2,500 of them work in the cleaning industry. It has 257 workers' representatives, and therefore 2.9% representativeness in the sector<sup>146</sup>.

The section also takes part in negotiations of some province and autonomous community collective agreements in a number of areas including Álava, the Balearic Islands, Cantabria, La Rioja and Zaragoza.

It belongs to the Workers' Trade Unionist Confederation of USO and, at international level, it indirectly takes part in the World Confederation of Labour (WCL) through the USO

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<sup>143</sup> Data supplied by the Ministry of Labour.

<sup>144</sup> Op cit.

<sup>145</sup> Op cit.

<sup>146</sup> Op cit.

*Basque Workers' Solidarity (Eusko Langileen Alkartasuna – Solidaridad de Trabajadores Vascos, ELA-ZERBITZUAK)*

ELA-ZERBITUAK is the ELA federation that covers the private, finance, trade, cleaning, offices, hotel, food and new emerging service sectors. It only has autonomous community coverage, and operates in the autonomous communities of the Basque Country and Navarra. ELA-ZERBITUAK has 26,357 members; 4,152 of them are in the cleaning industry. According to the Union, the density rate in the sector is 13% in Navarra and 34% in the Basque Country; according to the Ministry of Labour, it has 206 workers' representatives in the Basque Country and 36 in Navarra, and its representativeness therefore stands at 17.7% and 34.2% respectively, but at only 2.7% in Spain as a whole.

ELA-ZERBITZUAK belongs directly to ELA and Uni-Europa and UNI, and indirectly to the ETUC through ELA.



## Organisations

### *Employers' organisations*

Organisation	Sub-sectors covered	Companies	SW	Density Companies	Density SW	CB	National affiliations		European affiliations		International affiliations	
		number	number	%	%		yes/no	Direct	Indirect	Direct	Indirect	Direct
AFELIN (Federated Associations of National Cleaning Industries)	All	1,000	100,000	6.5%	28.6%	Yes	No		No		No	No
ASPEL (Professional Association of Cleaning Companies)	All	14	110,000 <sup>147</sup>	0.1%	31.4%	Yes	CEOE	No	EFCI	UNICE	No	No
FEL (Spanish Cleaning Federation) <sup>148</sup>	All	39	12,500	0.3%	3.6%	No	No	No	No	No	No	No
FENAEL (National Federation of Associations of Building and Premises Cleaning Entrepreneurs) <sup>149</sup>						No	No	No	EFCI	No	No	No

SW: salaried workers

Density companies: number of companies' affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

### *Trade Unions*

Organisation	Type of SW	Members	Members working in the sector	Density	CB	National affiliations		European affiliations		International affiliations	
	Type	Number	Number	%		yes/no	Direct	Indirect	Direct	Indirect	Direct
FAADD-CCOO (Multi-activities Federation of the General Workers' Confederation)	All	55,000	35,187	10.0%	Yes	CCOO	No		ETUC		ICFTU
FeS-UGT (National Services Federation of the General Workers' Union)	All	100,000	35,000	10.0%	Yes	UGT	No	Uni-Europa	ETUC	UNI	ICFTU

<sup>147</sup> This data is much debated: ASPEL firstly mentioned a membership of 170,000 workers. AFELIN disagreed with this number and the actors came to an agreement with the figure of 110,000 workers (March 2004). The ASPEL now contests this figure and declare that its membership consists of 136,000 workers (30% of the sector).

<sup>148</sup> According to the ASPEL (EFCI consultation, October-November 2004), the FEL and the FENAEL do not exist anymore. The data collected for this report are based on interviews realised in February and March 2004. At this moment, the author mentioned that FENAEL was on a dissolution process and that the FEL showed an uncertain future as a representative organisation. The report reflects the situation of this period.

<sup>149</sup> Idem.

Servizos-CIG (Services Federation of the Galician Trade Union Confederation)	All – in Galicia	ND	3,500	1% in Spain 70% in Galicia	Yes	CIG	No	No	No	No	No
USO (Services Area of Workers' Trade Unionist Union)	All	7,923	2,500	0.7%	Yes	USO	No	No	No	No	WCL
ELA-ZERBITZUAK (Basque Workers' Solidarity)	All – Basque Country and Navarre	26,357	4,152	Spain: 1.2% Navarra: 13% Basque Country: 34%	Yes	ELA	No	Uni-Europa	ETUC	UNI	No

SW: salaried workers

Density: number salaried workers affiliated to the organisation / number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

# SWEDEN

## 1. Description of the sector

### Sector structure and trends

In Sweden, industrial cleaning activities include the cleaning of industrial sites (factories, workshops), hospitals, schools, fairs and exhibitions, as well as window-cleaning, disinfection, extermination of rats, pest control, and the removal of graffiti.

From a statistical point of view, the sector includes the following activities:

74.70: Industrial cleaning:

- 74.701: Cleaning companies
- 74.702: Disinfection companies
- 74.703: Chimney sweeps

From the point of view of collective bargaining, the industrial cleaning sector is organised in two collective bargaining domains: cleaning and sanitation companies on the one hand and chimney sweeping companies on the other hand. Therefore, there two distinct branches in collective bargaining. These two branches will be presented below<sup>150</sup>.

### Socio-economic features of the sector

The industrial cleaning sector in Sweden has experienced steady development. Salaried employment has increased by over 30% during the period. On the other hand, the chimney sweeping sector has seen a reduction of activity.

#### *Companies*

According to the Swedish Statistics Institute (SCB), in 2003 there were about 5,900 companies in the industrial cleaning sector in Sweden. About 61% of these companies had no salaried workers (i.e. 3,529 companies). The proportion of companies with no salaried workers is significantly lower in the industrial cleaning sector compared to other sectors of the economy (61% versus 75% for the economy as a whole). The sector is dominated by 4 large enterprises with over 500 salaried workers.

#### *Companies according to their size*

Sub-sectors	Number of Companies	% companies without SW	% companies with <10 SW	% Companies 10-100 SW	% companies with > 100 SW
Cleaning Companies (74.701)	5,043	65%	27%	7%	1%
Disinfection (74.702)	538	37%	31%	16%	6%
Chimney Sweeping (74.703)	329	24%	58%	18%	0%
Sector Total (74.70)	5,910	61%	30%	8%	0.7%

SW: salaried workers

Source: Statistics Sweden (SCB), 2003

#### *Workers*

In 2003, the cleaning sector employed about 41,000 salaried workers. Between 1993 and 2003, salaried employment rose by about 38%. Companies with less than 50 workers represent about 35% of salaried employment. The large companies (with over 100 workers) represent almost 57% of total employment in the sector.

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<sup>150</sup> From the point of view of UNI-Europa (UNI-Europa consultation, October-November 2004), the chimney sweeping sector does not take part in social dialogue in the industrial cleaning sector in Sweden. Since this branch belongs to the industrial cleaning NACE classification (7470), we decided to present the two sectors, even if they are in two distinct domains from the collective bargaining point of view. This reflects the structuring of the social dialogue in Sweden.

### *Workers in the cleaning sector*

Sub-sectors	Number of workers	Number of SW	Number of SW/number of SW in the country (%)	Number of SW in companies <10 SW/number of SW in the sector (%)	Number of SW in companies 10-100 SW/number of SW in the sector (%)	Number of SW in companies >100 SW/number of SW in the sector (%)
Cleaning companies (74.701)	39,856	36,605	0.97%	12%	26%	62%
Disinfection (74.702)	3,824	3,625	0.1%	16%	56%	28%
Chimney Sweeping (74.703)	1,817	1,738	0.05%	45%	55 %	0%
Sector Total (74.70)	45,497	40,968	1.1%	13%	200 %	67%

SW: salaried workers

Source: Statistics Sweden (SCB), 2003

## 2. Social dialogue at sector level

In Sweden, the cleaning sector is organised in two collective bargaining domains:

- The first covers cleaning and sanitation companies
- The second covers chimney sweeping companies

### Cleaning and sanitation

The cleaning sector has one employers' organisation, Almega Tjänsteförbundet, and the following trade union organisations: FASTIGHETS, HTF, Kommunal and LEDARNA. Four collective agreements have been signed between Almega Tjänsteförbundet and its trade union counterparts: one with the FASTIGHETS federation, the second with HTF, the third with Kommunal, and the fourth with LEDARNA.

The coverage rate of the collective agreements is about 85-90%. The most recent collective agreements came into force in 2001 and were valid until March-June 2004.

### Chimney sweeping

In the chimney sweeping sector, a collective agreement has been concluded between the Swedish Federation of Chimney Sweeps (*Sveriges Skorstensfejaremästares Riksförbund*, SSR) and the trade union federation Kommunal. The duration of this collective agreement is for four years (April 2001 - March 2005).

### Issues

The collective agreements deal essentially with the following topics:

- Working conditions (dismissal notice, working time, paid holidays, overtime pay, rules for replacements and temporary contracts)
- The minimum salaries in the sector according to seniority or types of tasks carried out

As regards negotiation subjects, the employers' organisation Almega tends to press for a greater differentiation of salaries for blue-collar workers, whereas the trade union federations are reluctant to accept this. In the same way, Almega is in favour of greater flexibility of working time and greater flexibility in the management of fixed term employment contracts.

### 3. Employers' organisations and trade unions

#### Employers' organisations

##### *The Federation of Service Companies (AMELGA Tjänsteförbunden)*

AMELGA unites 8,750 service companies, employing a total of 350,000 salaried workers. These companies are members of 7 employers' organisations, which, together, form ALMEGA. The Federation of Service Companies (ALMEGA Tjänsteförbunden) has 3,900 member companies, employing about 131,000 salaried workers. In the cleaning sector, ALMEGA Tjänsteförbunden has 760 affiliated companies out of 3,200 companies with workers in the sector (and out of 2,052 companies with workers belonging to the collective bargaining domains "cleaning" (74.701) and "disinfection" (74.702)). These companies employ about 40,000 workers (26,000 full time equivalents). Therefore, AMELGA represents about 35% of the companies in the sector (companies with salaried workers in the collective bargaining domains 74.701 and 74.702)<sup>151</sup>, covering about 90% of workers in the sector. AMELGA has signed four collective agreements in the cleaning sector. ALMEGA is a member of the Swedish Confederation of Private Enterprise (*Svenskt Näringsliv*). ALMEGA Tjänsteförbunden is a member of the European Federation of Cleaning Industries (FENI/ECFI). Via ALMEGA, it is indirectly affiliated to UNICE.

##### *The Swedish Federation of Chimney Sweeps (Sveriges Skorstensfejaremästares Riksförbund, SSR)*

The Swedish Federation of Chimney Sweeps was created in 1897 and is an independent employers' organisation. In 2004, it had 280 affiliated companies, employing about 1,200 workers (full time equivalents). That corresponds to about 95% of the companies in the chimney sweeping branch and covers about 95% of workers in the sub-sector. It signed a collective agreement, for the chimney sweeping branch, with the federation Kommunal. The Swedish Federation of Chimney Sweeps is affiliated to the European Federation of Chimney Sweepers, ESCHFÖ.

#### Trade unions

The various trade union federations in the industrial cleaning sector cover a total of about 20,000 workers, corresponding to about 50% of salaried employment in the sector. The coverage rate of collective agreements is about 90% of workers in the sector, owing to the affiliation of all large companies in the sector to the employers' organisations ALMEGA Tjänsteförbunden and Swedish Federation of Chimney Sweeps. In addition, an extension procedure is also in force.

##### *The Swedish Building Maintenance Workers' Union (FASTIGHETS - Fastighetsanställdas Förbund, F)*

The Swedish Building Maintenance Workers' Union is one of the federations in the Swedish Confederation of Trade Unions LO-S (*Landsorganisation-Sverige*). It has 39,862 active members. In the cleaning sector, the 'F' Federation has about 12,970 members, corresponding to 33% of its members. The 'F' Federation has concluded a collective agreement, jointly with the Union of Service and Communication Employees (Facket för Service och Kommunikation, SEKO), with ALMEGA Tjänsteförbunden. SEKO, a member of the LO-S Confederation, organises 400 workers employed in public companies in the industrial cleaning sector. FASTIGHETS is a member of ETUC via LO-S. It is also a member of UNI and UNI-Europa.

##### *The Swedish Salaried Employees' Union (Tjänstemannaförbundet, HTF)*

This union of the Swedish Confederation of Professional Employees (Tjänstemännens Centralorganisation, TCO) had 158,000 active members in 2003. As regards the industrial cleaning sector, the Federation had about 1,920 active members in 2003. HTF has signed a collective agreement with ALMEGA Tjänsteförbunden in the industrial cleaning sector. HTF is a member of ETUC via TCO. It is also a member of UNI and UNI-Europa.

##### *The Swedish Municipal Workers' Union (Svenska Kommunalarbetareförbundet, KOMMUNAL)*

The Swedish Municipal Workers' Union had 595,000 members in 2003. It is a trade union in the LO-S Confederation. In the industrial cleaning sector, the union had about 4,700 active members in 2003 (including chimney sweeps). The union organises maintenance and cleaning personnel of schools and private clinics, as well as chimney sweeps in the chimney

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<sup>151</sup> If density is calculated based on all companies in the subsectors 74.701 and 74.702, AMELGA represents about 14% of companies.

sweeping branch. Kommunal has signed a collective agreement with ALMEGA Tjänsteförbunden for the cleaning sector as well as a specific agreement for chimney sweeping companies with the Swedish Federation of Chimney Sweeps. Kommunal is a member of ETUC via LO-S, as well as of EPSU and PSI. For the chimney sweeping sector, Kommunal is a member of the International Confederation of Chimney Sweeper Trade Unions (ICU) as well as of its European branch (European Confederation of Chimney Sweeper Trade unions).

***The Swedish Association for Managerial and Professional Staff (LEDARNA)***

The Swedish Association for Managerial and Professional Staff separated from the TCO Confederation in 1997. In 2003, LEDARNA had 65,000 members, of which 750 are in the industrial cleaning sector. LEDARNA has signed a collective agreement with ALMEGA Tjänsteförbunden. LEDARNA is affiliated to the European Confederation of Professional and Managerial Staff.

## Elements relating to the organisations

### Employers' organisations

Note: densities are calculated based on the sub-sectors covered by the employers' organisations (not on the totality of the sector).

Organisation	Sub-sectors covered	Companies	SW	Density Companies	Density SW	CB	National affiliations		European affiliations		International affiliations	
		number	number	%	%	yes/no	Direct	Indirect	Direct	Indirect	Direct	Indirect
Almega Tjänsteförbunden (The Almega Service Associations)	Cleaning companies, Disinfecting	760	40,000	About 35% (ES)** About 14% (TE)***	About 90%	Yes	Svenskt Näringslivs Confederation of Swedish Enterprise		ECFI	UNICE		
Sveriges Skorstensfejaremästares Riksförbund (SSR) (The Swedish Federation of Chimney Sweeps)	Chimney Sweeping	280	1,200 FTE* Approx.: 1,700	About 95% (ES)** About 85% (TE)***	95%	Yes	-	-	ESCHFO		-	

SW: salaried workers

Density companies: number of companies affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

Source: Employers' Organisations

\* FTE: Full time equivalent

\*\* ES: Density calculated on the basis of the number of companies with salaried workers in the sub-sectors taken into account

\*\*\* TE: Density calculated on the basis of the total number of enterprises in the sub-sectors taken into account

### Trade Unions

Organisation	Type of SW	Members	Members working in the sector	Density	CB	National affiliations		European affiliations		International affiliations	
	Type	Number	Number	%	yes/no	Direct	Indirect	Direct	Indirect	Direct	Indirect
Fastighetsanställdas förbund F (The Swedish Building Maintenance Workers' Union)	Building maintenance workers, cleaners	39.802	12.968	About 32%	Yes	LO-S		UNI-Europa	ETUC	ICFTU , UNI	

Kommunal (The Swedish Municipal Workers' Union)	Cleaners and chimney sweeps	595,000	4,700*	About 12%	Yes	LO-S		EPSU. EFFAT EFT European Confederation of Chimney Sweeper Trade unions	ETUC via LO-S	PSI, IUF, ITF,	ICU
HTF (The Salaried Employees' Union)	White collars, office employees, Executives	158,000	1,920	About 5%	Yes	TCO		ETWF, NTF, UNI-Europa	ETUC and Eurocadre via TCO	UNI	
LEDARNA (The Swedish association for managerial and professional staff)	White collars, middle management, Executives and managerial staff	65,000	750	About 2%	Yes			CEC			

SW: salaried workers. Density: number of salaried workers affiliated to the organisation / number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

\* Chimney sweeps included



# UNITED KINGDOM

## 1. Description of the sector

### Delimitation of the sector

The "industrial cleaning" industry (NACE 74.7) embraces an important part of the cleaning industry in the United Kingdom, mostly firms providing cleaning services on a contract basis to public or private organisations. Furthermore, a large number of workers are also to be found as employees of firms in other sectors, such as hotels and restaurants, health and educational services, and private industry. The employment location of many workers who are cleaners depends on whether their employer has chosen to employ them directly or to contract cleaning services out to specialised firms. There is also a large number of people employed in the cleaning of domestic households, many of whom are self-employed, or in the informal sector of the economy. Domestic cleaners are not included in the statistics below but are estimated at 650,000 in number.

The industrial cleaning industry includes the group of employees employed by specialised firms (NACE 74.700, 74.701 and 74.709).

### Socio-economic features of the sector

#### *The market*

In the UK, during the past twenty years, many formerly public sector cleaning jobs have been contracted out to private sector contract cleaning firms. The sector has seen a rapid growth in output, with a total value added in recent years growing by more than double the rate for the whole economy: +44% for the cleaning sector, compared to +19% for the whole industry (1998-2002)<sup>152</sup>, continuing a strong growth pattern from at least the mid-1990s. There has also been rapid growth in the number of enterprises.

#### *Companies*

The average employment size of firms in industrial cleaning is about 40-50, compared with around 13-15 for all-industry and services. There has been market decline in employment size of enterprises within the sector, suggesting the arrival of a number of new entrants, and therefore that the sector is a very competitive one. The sector is characterised by a high degree of restructuring.

#### *Employment*

Although average employment costs per person have risen for 1998-2002 faster than on the rest of economy, employment itself has remained fairly stable. Employment costs per person are among the lowest in the economy: in 2002, they were £6,126 (per year / per person) in the industrial cleaning compared to £15,775 (per year / per person) for the whole economy. This pattern is confirmed by the annual survey of employee earnings by the Office for National Statistics for 2003: weekly earnings of full-time adults in industrial cleaning being only 72% of those in the whole economy. There are also important differences within the industrial cleaning sector between the earnings of cleaning occupation and those of white-collar employees and managers.

The occupation is strongly divided on gender lines: most women employees are working in 'cleaners and domestics' and 'launderers, dry cleaners and pressers' occupations, whereas most men are employed either as "road sweeps" or in "refuse and salvage occupations".

Standard Industrial Classification	Year	Number of enterprises	Total employment - average during the year
74.7: industrial cleaning	1998	8,423	417,000
	1999	9,089	435,000

<sup>152</sup> Source: The Annual Business Inquiry

	2000	9,554	428,000
	2001	10,030	408,000
	2002	10,633	421,000

Source: Annual Business Inquiry, Office for National Statistics

### **Stakes**

The sector is one in which the informal economy has been relatively important, especially in domestic cleaning, but within much of industrial cleaning, there has been in recent years a consistent effort by social partners organisations and by trade associations to improve levels of regulations and training in order to maintain security of customers' property and to increase levels of skills. The sector's trade association, the CSSA (see below), has argued strongly that productivity and quality for customer organisations, and working conditions for cleaning staff can be improved in many cases by developing 'day time cleaning' instead of cleaning staff working on two or three jobs each day, as is common at present. This increases scope for training, and reduces absenteeism and travelling time between jobs, thus raising quality for the same costs. The CSSA argue that it is hard for client organisations and contractors to do this individually because of the risk of undercutting by competitors, but this can be achieved through the coordinating role of the CSSA, aiming for 'best value' rather than 'best price'. Thus, the CSSA has worked in conjunction with other organisations such as TELCO (see below) to improve service quality and working conditions in the sector.

## **2. Social dialogue in the sector**

As it is the norm in the United Kingdom, when pay bargaining takes place, it does so at the level of the individual employer, by site. It is worth noting, however, that in recent years, employers have worked together on issues such as training and regulation.

One of the key issues of concern to the unions has been the issue of contracting out services and joint ventures between the public and private sectors. Several unions have feared that such moves erode the coverage of collective bargaining in the public services. In the public sector, the GMB has run a campaign to "Keep public services public" and like other unions has campaigned against the growth of a "two-tier" workforce. The Government are still pressing ahead with the introduction of private sector management and finance into the NHS (National Health Services), Education, Local Authorities and Central Government. Nevertheless, the government introduced new legislation, effective from March 2003, to eliminate certain aspects of the 'two-tier' workforce in local government, which the GMB claimed was a victory for its campaign<sup>153</sup>.

Collective bargaining depends on the employer. Recognition for bargaining has generally been by site or location. Thus a large contractor may operate on many sites, but recognise unions for bargaining purposes on only a few of them. In recent years, the practice of contracting out cleaning services has meant that even in enterprises where there exists collective bargaining for other staff, those engaged in cleaning have increasingly been moved beyond its coverage. In an attempt to reverse this trend, a number of unions have joined forces with other local groups in order to persuade major employers to take responsibility for the pay levels of contracted out cleaning staff. In February 2004 and in June 2004, two major financial companies, Barclays and HSBC respectively, agreed to establish minimum pay and conditions for contracted-out cleaners. In neither case was the number of cleaners directly benefiting from these arrangements large, but it was widely seen as a first step in this direction. Both these landmark cases also reflect the efforts by employers to raise the standard of service delivery at Canary Wharf through the introduction of enhanced benefits packages for employees. This was agreed with the clients to go hand-in-hand with the introduction of more full time employment and "Daytime Cleaning". The CSSA believe that the on-costs of the packages will be made up by improved productivity through better staff retention and training opportunities.

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<sup>153</sup> "Keep Public Services Public" National Campaign, and An End to the 2 Tier Workforce A Victory For GMB, GMB website.

### 3. Employers' organisations and trade unions

#### Employers' organisations

##### *The Cleaning and Support Services Association, CSSA*

The main employer association in the industrial cleaning sector is the Cleaning and Support Services Association (CSSA), which defines itself as "a trade association" and "as the customers' guide to quality and reliability in the UK cleaning and support services market". This association dedicates to training, marketing and represents its members over a wide range of issues and provide them information and advice. However, it does not participate in social dialogue and has no bargaining function on behalf of its members. Pay negotiations take place with individual employers.

The main objectives of the association are the following:

- to enlarge the market for contract cleaning and support services and advance its members' interests by impressing customers with the integrity and credibility of its member companies
- to promote sector professionalism and excellence through superior training and development.
- to strengthen the competitiveness and profitability of its members by providing professional and management expertise
- to speak for the industry and safeguard its interests with EU, Government and other professional bodies
- to assist its members to recognise market place trends in order to meet their customers' needs more closely
- to provide advice on UK and European legislation, labour relations and other appropriate subjects
- to offer safeguards to customers, including a free and impartial conciliation and arbitration service in the event of a dispute arising with a member company.

Accordingly, in recent years, it has been active on a number of employment issues, including:

- The bid to form new Sector Skills Council
- Pressing for amendments and clarification of TUPE regulations on the transfer of undertakings;
- Health and Safety issues, including updating members of these,
- Information and advice on important employment law issues
- Representation of the sector to the National Low Pay Commission

According to the CSSA, its members represents 70% the turnover of the cleaning industry, although it does not state whether this is in relation to industry turnover, number of firms or employment.

This representation has no relation with collective bargaining coverage which remains the preserve of individual employers. Many of members of the Cass's members are small firms. The CSSA membership is believed to comprise companies significantly larger on average than in the other EU employer organisations in the sector.

The CSSA is a member of the European Federation of Cleaning Industries(EFCI) and sits on the European Social dialogue committee along with representation of the UK's GMB union. The UK currently holds the presidency of the EFCI, together with the Secretary Generalship. The CSSA is also a member of the World Federation of Building Service Contractors (WFBSC) and holds past presidency and current board membership.

#### Trade unions

Estimates of union density for 2001, which are published for the whole one-digit heading "Real estate and business services", which includes "Industrial cleaning", show it to be one of the sectors with the lowest density figures, at 11% overall, and down to 8% in the private sector, but much higher in the public sector. Similar percentages are shown for employees covered by collective agreements<sup>154</sup>.

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<sup>154</sup> Brook, K., *Trade union membership: an analysis of data from the autumn 2001 LFS*, Labour Market Trends, July 2002.

A number of trade unions are active in representing workers engaged in cleaning activities. The principal ones includes: the Transport and General Workers' Union (TGWU), Unison, the GMB and PCS. Recently, TELCO has emerged as an important campaigning organisation at the local level, working closely with the trade unions and the CSSA.

#### ***Transport and General Workers' Union, TGWU***

The TGWU has over 900,000 members in every type of workplace and is one of the UK's biggest general union. Within the services sector, the TGWU represents more than a quarter of a million members working in occupations across the public, private and voluntary sectors, including, among others, contract cleaning. Membership of the service sector is mainly made of women (one third), part-time workers, young people and black people. For this sector, 80 national agreements have been established, covering more than two million workers. The service sector is composed of four sub sectors: ACTS (insurance sector, betting and leisure industry, voluntary sector and security industry), Construction, General Workers and Public Services. Contract cleaning employees are included in the General Workers group.

Because negotiation rights have to be agreed with individual employers, the TGWU has focused a good deal of activity on campaigns for recognition: it wish to reach recognition agreements in order to ensure trade union representations and workers' coverage at enterprise level. These recognition agreements include minimum wages and conditions.

#### ***Unison***

UNISON is one of Britain's biggest trade unions, with almost 1.3 million members working across the public services.

The Ancillary & Maintenance Section of Unison has over 70,000 members working in ancillary and maintenance jobs within the UK. The largest group within this sector consists of cleaning staff working in the health service. This sector covers: cleaners, porters, caterers, sterile service assistants, laundry workers, maintenance staff.

UNISON has a national sector committee representing ancillary and maintenance members within the National Health Services. Furthermore, many of UNISON's members within the sector have been transferred out of the NHS to work for the increasing number of private contractors who have taken over the provision of cleaning, catering, maintenance services within hospitals and health centres. UNISON takes a twin track approach to private contractor, voicing strong opposition to contracting out these vital services, whilst trying to ensure that members who work for contractors receive fair treatment and trade union representation.

UNISON had an important role in bringing the campaign for a decent and fair living wage for ancillary and maintenance workers to a national audience. The eradication of low pay remains the key campaigning issue within the sector.

#### ***GMB***

The GMB is Britain's fourth largest trade union, with 700,000 members across a wide range of activities. In its Commercial Services Section, it represents nearly 70,000 members working in professional and service industries in the private sector. The GMB represents cleaners in some sectors, such as in the NHS, and has campaigned for better health and safety provisions for cleaners, and has also campaigned against the "two-tier" workforce associated with work that is contracted out by employers to other organisations which engage staff on different, and often inferior, pay and benefits. It has about 5,000 members in large industrial cleaning contractors (excluding waste management contractors), plus some members in smaller firms. The main occupations for which it represents employees in industrial cleaning include: cleaning, maintenance workers, craft workers and concierges. It has a framework recognition agreements for example with ISS, Service team, OCS, Mitie, Initial Cleaning, plus contract by contract agreements/bargaining.

#### ***PCS Public and Commercial Services Union***

PCS is the sixth largest trade union in the UK, with over 310,000 members. It organises membership in the civil services, including in areas of civil services that have been privatised. Where cleaning and facilities services have been contracted out, PCS has endeavoured to follow its membership. It also represents retired members.

### *USDAW*

USDAW is one of Britain's largest trade unions with over 335,000 members nationwide. It represents members working in a variety of occupations and industries.

## **Other organisations**

### *TELCO*

TELCO, the East London Communities Organisation, is not a trade union but an organisation composed of various institutions, such as churches, mosques, union branches, schools, etc. that are based in East London. has been actively campaigning for better pay and conditions for cleaners, and launched in April 2001 a "living wage" campaign in East London. The main thrust of the campaign has been to persuade institutions and employers to introduce Living wage clauses into contracting procedures for services. This campaign was supported by the TUC (Trade Union Congress), UNISON, GMB and TGWU, and the CSSA.

## Elements relating to the organisations

### *Employers' organisations*

Organisation	Sub-sectors covered	Companies	SW	Density Companies	Density SW	CB	National affiliations		European affiliations		International affiliations	
		<u>Number</u>	<u>number</u>	<u>%</u>	<u>%</u>	<u>yes/no</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>
The Cleaning and Support Services Association	Cleaning and support services	70	200,000	0.65	4%**	No*	BCC		EFCI		WFBSC	

SW: salaried workers

Density companies: number of companies affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

\* There is no collective bargaining at sector level

\*\* Estimate from the CSSA.

### *Trade Unions*

Organisation	Type of SW	Members	Members working in the sector	Density	CB	National affiliations		European affiliations		International affiliations	
	<u>Type</u>	<u>Number</u>	<u>Number</u>	<u>%</u>	<u>yes/no</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>
TGWU (Transport and General Workers' Union)	All	Services sector: 900,000	ND	ND	Yes*	TUC <sup>155</sup>		UNI-Europa	ETUC	UNI	
Unison – Ancillary and Maintenance section	Ancillary and maintenance staff	Unison: 1.3 million Ancillary and maintenance: 70,000	ND	ND	Yes*	TUC			ETUC		
GMB	All	700,000 members	5000	not known	Yes*	TUC		UNI-Europa, EPSU	ETUC	PSI & UNI	

<sup>155</sup> Trade Union Congress

PCS (PCS Public & Commercial Services Union)	Civil services + privatised areas	310,000 members	ND	ND	Yes*	TUC		UNI-Europa	ETUC	UNI	
USDAW	Varied	335,000 members	ND	ND	ND						

SW: salaried workers.

Density: number salaried workers affiliated to the organisation / number of salaried workers in the sector

CB: Does the organisation take part in collective bargaining?

\* At company level

# ANNEX 1 : QUESTIONNAIRE

## 1. Objective of the study

The aim of the study is to provide precise data and information concerning representativeness of employees and employers organisations in the sector of Cleaning. This means provide factual and quantitative data. Qualitative data will help to understand and feel the role of organisations in the system of professional relations.

## 2. Delimitation of the cleaning industry sector

In Europe, the cleaning services provided by specialised contractors are classified as followed in the NACE nomenclature: 74.7: industrial cleaning.

The sector can also include some other activities carried out by cleaning contractors such as waste management services, chimney sweeping, façade cleaning, or maintenance of areas around buildings. This enlargement of the cleaning companies' activities reflects a general trend registered in the industry towards multi-services contracting (Source : *The Cleaning industry in Europe*, an EFCI survey, July 2003).

According to the national traditions, the sector delimitation can differ from a country to another. Indeed, the structuring of the employers' organisations and trade unions as well as the organization of the social dialogue can cover sub-sectors or different building trades / professions. This European definition is thus given to you as an **indication**. Item 1 of the questionnaire will aim to delimit the sector at the national level.

## 3. Methodological remarks

A **national report in English** (about 10 pages) will be worked out by the national research team. This report will contain one section relating to the description of the sector and an other **detailing each organisation** present at the level of the sector social dialogue. The detailed questionnaire is proposed in point 3. To answer this questionnaire, the following stages will be carried out by the experts :

- Identification and the relevant players on the level of the sector;
- Interview of the representatives of the employers' organisations and the trade unions
- Collect of contextual data on the sector
- Compiling of sector analysis and short description of the basic parameters of social partners within the relevant sector
- Feedback of the social partners (contact, sending study, inclusion remarks)
- Reply to the possible additional queries of the co-ordinator

### Reminder of the deadline

National experts sending of final report to IST : **Wednesday March 31, 2004**

### Which organisations have to be included in the study ?

The national reports have to contain information about organisations :

- negotiating in the collective bargaining
- and/or
- members of the European organisations taking part in a sector dialogue committee

		Members of European organisations	
		Yes	No
Taking part in negotiations	Yes	X	X
	No	X	-



## Quantitative data

The Commission has reaffirmed the importance of the quantitative data allowing the assessment of social partners importance within the sector. This is the reason why we ask you to:

- precise when the quantitative data are not reliable
- provide membership estimates in the case of non-availability of data from the organisations.

Otherwise, the national experts are asked to notice **the sources of the different data collected** (because of the possible contestations from the organisations).

## 4. Questionnaire

### Description of the sector at national level

#### *Delimitation and scope of activities in the sector*

- Activities included in the sector from an economic and conventional point of view
- Possible divergences between the structuring of the activities in the sector and the standardised nomenclatures of the economic activities of type NACE
- Detail of the other activities included / excluded from these statistics.
- Possible subdivision of the sector in several branches and consequences for the collective bargaining

#### *Socio-economic features of the sector*

- Relative weight of the sector compared to the whole of the economy (in terms of share in the GDP, employment, the produced added value)
- Estimated importance of the underground economy
- Economic structuring of the sector (type of companies, size of the companies, geographical spreading) by sub-sector if necessary
- Type of competing strategy mainly adopted by the firms (by the costs, by the specialisation / differentiation)
- Number of workers in the sector (please distinguish the salaried workers and the others)
- Categories of salaried workers (staff/white-collar workers, manual/blue-collar workers, ...)
- Characteristics of the employment in the sector (in terms of qualifications level, wages, establishment of atypical work, gender repartition)
- Evolutions and trends: expansion or decline. Degree in process of privatisation. Change in the size of enterprises. Other significant evolutions

## 2. Social dialogue in the sector

#### *Basic features of the social dialogue*

- Description of the basic features of collective bargaining within the sector
- Models of social dialogue (bipartite, tripartite) and autonomy of the parties
- Levels of the collective bargaining, links between the different levels (state of the negotiations in enterprises / decentralisation)

#### *Players*

- Short description of the players, structure (identification of possible trusts of negotiation) and their activity
- Possible conflicts between players
- Positions of the players regarding the future evolutions of the social dialogue in the sector
- Identification of players not recognised (or partially recognised) by the dominant players but who have to be considered as playing a role in the professional relations within the sector

### *Issues of the social dialogue*

- Principal topics of negotiations, subjects of tensions
- Elements of contents specific to the sector in the negotiations

### *Collective agreements*

- Number of collective agreements signed for the years 2002 and 2003. Main signed collective agreements, identification of the signatories. Content of collective agreements.
- Coverage rate of the collective agreements in comparison with the total number of salaried workers and with the total number of companies
- Number and type of salaried workers covered by these collective agreements

## **3. Employers' organisations in the sector**

### *Identification of the organisation*

- Name of the organisation (original name, English name)
- Particular characteristics of the organisation (brief historic, way of funding of the organisation, sub-sectors covered by the organisations, etc.)
- Type of members (enterprises, SMEs, public enterprises, activity categories, sub-sectors, etc.)

### *Quantitative elements of representativeness for employers' organisations*

- Number of affiliated companies
- Number of salaried workers employed in these firms
- The number of companies affiliated in comparison with the total number of companies in the sector (%)
- The number of salaried workers in the affiliated companies in comparison with the total number of salaried workers in the sector (%)

### *Recognition : Capacity to negotiate collective agreements or to take part in formal consultation :*

- Are there formal or reciprocal recognition systems on the part of the social partners in the sector?
- Does the organisation sign or coordinate sector collective agreements ? Which one ?
- How many collective agreements have been signed by the organisation per sector or per company for the years 2002 and 2003?
- Participation in formal consultations at national, sector or company levels ?

### *National, European and international affiliations*

- List of national organisations at a higher level to which the organisation is affiliated either directly or indirectly
- List of European organisations at a higher level to which the organisation is affiliated either directly or indirectly
- List of international organisations at a higher level to which the organisation is affiliated either directly or indirectly

## **4. Trade unions in the sector**

### *Identification of the organisation*

- Name of the organisation (original name, English name)
- Particular characteristics of the organisation (brief historic, sub-sectors covered by the organisation, way of funding of the organisation, etc.)
- Type of workers affiliated: white collar / blue collar, executive or skilled occupations, etc.

### *Quantitative elements of representativeness for trade unions*

- Number of members (distinguish the type of affiliated: workers, others)
- Number of members working in the sector

- The number salaried workers affiliated to the organisation in comparison with the total number of salaried workers in the sector (%)

If any, other elements allowing to appreciate the quantitative importance of the organisation (results of social elections, estimations, claims of the players)

***Recognition : Capacity to negotiate collective agreements or to take part in formal consultation :***

- Are there formal or reciprocal recognition systems on the part of the social partners ?
- Does the organisation sign or coordinate sector collective agreements ? Which one ?
- How many collective agreements have been signed by the organisation per sector or per company for the years 2002 and 2003?
- Participation in formal consultations at national, sector or company levels ?

***National, European and international affiliations***

- List of national organisations at a higher level to which the organisation is affiliated either directly or indirectly
- List of European organisations at a higher level to which the organisation is affiliated either directly or indirectly
- List of international organisations at a higher level to which the organisation is affiliated either directly or indirectly

# COUNTRY

## Contextual data in the sector

### *Companies*

Sub-sectors	Number of Companies	% companies without SW	% companies with < 10 SW	% Companies 10-100 SW	% companies with > 100 SW
Sub-sector 1					
Sub-sector 2					
Sub-sector 3					
Total of the sector					

SW: salaried workers

### *Workers*

Sub-sectors	Number of workers	Number of SW	Number of SW/number of SW in the country (%)	Number of SW in companies < 10 SW/number of SW in the sector (%)	Number of SW in companies 10-100 SW/number of SW in the sector (%)	Number of SW in companies >100 SW/number of SW in the sector (%)
Sub-sector 1						
Sub-sector 2						
Sub-sector 3						
Total of the sector						

SW: salaried workers

## COUNTRY

### Elements relating to the organisations

#### *Employers' organisations*

Organisation		Sub-sectors covered	Companies	SW	Density Companies	Density SW	CB	National affiliations		European affiliations		International affiliations	
<u>Original name</u>	<u>English name</u>		<u>number</u>	<u>number</u>	<u>%</u>	<u>%</u>	<u>yes/no</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>

SW: salaried workers

Density companies: number of companies affiliated / total number of companies in the sector

Density SW: number of salaried workers in the affiliated companies / total number of salaried workers in the sector

T: Does the organisation take part in a tripartite process?

CB: Does the organisation take part in collective bargaining?

#### *Trade Unions*

Organisation		Type of SW	Members	Members working in the sector	Density	CB	National affiliations		European affiliations		International affiliations	
<u>Original name</u>	<u>English name</u>	<u>Type</u>	<u>Number</u>	<u>Number</u>	<u>%</u>	<u>yes/no</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>	<u>Direct</u>	<u>Indirect</u>

SW: salaried workers

Density: number salaried workers affiliated to the organisation / number of salaried workers in the sector

T: Does the organisation take part in a tripartite process?

CB: Does the organisation take part in collective bargaining?

## ANNEX 2 : CONSULTATIONS

### AUSTRIA

In the framework of the compilation of the study about the **representativeness of trade unions and employers' organisations and the social dialogue in the Cleaning Sector**, the national expert of Austria consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
M. Haim	GHGPD	Staff
A. Korntheuer	GBH	Staff
A. Steffel	GPA	Staff
J. Wild	BIR	Staff
E. Czesany	BIC	Staff
G. Lintner	BIC	Staff

National expert had organised validation at SECTOR level of his/her report.

### BELGIUM

In the framework of the compilation of the study about the **representativeness of trade unions and employers' organisations and the social dialogue in the cleaning Sector**, the national expert of Belgium consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
	FGTB (centrales professionnelles)	Permanents syndicaux
	CSC (centrales professionnelles)	Secrétaires nationaux et service d'études
	UGBN	Secrétaire nationale
	SPF de l'emploi, du travail et de la concertation sociale	Fonctionnaires
	ONSS	Fonctionnaires

National expert had organised validation at SECTOR level of his/her report.

### DENMARK

In the framework of the compilation of the study about the **representativeness of trade unions and employers' organisations and the social dialogue in the cleaning Sector**, the national expert of Denmark consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
Jeanette Staffeld	Danish Trade Union of Public Employees (FOA)	Consultant
Morten Eriksen	Cleaners Union in the Danish Clerical Union (DFF; Sanitørernes Fagforening)	Consultant
Jacob Preisler	Danish Chamber of Commerce (HTS - SBA and VPA)	Consultant

National expert had organised a consultation at SECTOR level of his/her report.

### FINLAND

In the framework of the compilation of the study about the **representativeness of trade unions and employers' organisations and the social dialogue in the Industrial Cleaning Sector**, the national expert of Finland consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
Mr Paavo Härö	Property Maintenance Association	Managing director
Ms Arja Pohjola	Service Union United	Senior Contract secretary
Mr Juhani Rantioja	Union of Salaried Employees	Manager
Ms Pirkko Hirvelä	Finnish National Union of State Employees and Special Services	Contract secretary (Cleaning Sector)

National expert had organised a consultation at SECTOR level of his report.

## FRANCE

In the framework of the compiling of the study about **the representativeness of trade unions and employers' organisations and the social dialogue in the CLEANING SECTOR**, the national experts of France consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
Mrs Lefebvre et Dupont	CGT, Fédération des ports et docks	Secrétaire général, secrétaire général adjoint
Mr Montant	Fédération des entreprises de propreté	Responsable du service juridique
M. Bonte	CFDT, Fédération des services	Secrétaire fédéral
M.Hédou	CGT-F, Fédération de l'Equipeement, de l'Environnement, des Transports et des Services	Secrétaire général
M. Samora	CFTC, Fédération commerce, services et force de vente	
Mme Perrin	Chambre 3D	Secrétaire générale
Mr Joucla	SAMERA	Président
Mr Fathi	Sud nettoyage	Secrétaire

National experts had organised validation at SECTOR level of their report.

## GERMANY

In the framework of the compiling of the study about **the representativeness of trade unions and employers' organisations and the social dialogue in the CLEANING SECTOR**, the national experts of Germany consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
Andreas Wittig	IG Bauen-Agrar-Umwelt	Branchensekretär (industry specialist) Facility Management
Johannes Bungart	Bundesinnungsverband des Gebäudereiniger-Handwerks	Geschäftsführer (director)

National experts had organised validation at SECTOR level of their report.

Note: Andreas Wittig responded to our first request and provided comments on our first draft. Johannes Bungart was contacted three times but did not respond to our validation request.

## GREECE

In the framework of the compiling of the study about **the representativeness of trade unions and employers' organisations and the social dialogue in the CLEANING SECTOR**, the national expert of Greece consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
Thanos VASSILOPOULOS	OIYE (Greek Federation of Private Sector Employees)	secretary general
KATSIGIANNIS	PASEP (Panhellenic Association of Cleaning Firms)	President

National experts had organised validation at SECTOR level of their report.

## IRELAND

The national expert of Ireland has consulted the following people for validation of the study about the representativeness of trade unions and employers' organisations and the social dialogue in the cleaning sector:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation	
Name of the person consulted	Name of the organisation consulted	Function of the person in the organisation	Validation received

Ms Sonya Higgins	The Irish Contract Cleaning Association	Secretary	Yes
Mr Jimmy Sommers	Services Industrial Professional and Technical Union	Branch Secretary	Yes
Mr Aidan Grogan	Irish Business and Employers Confederation	IR/HR Executive	No reply

## ITALY

In the framework of the compiling of the study about the **representativeness of trade unions and employers' organisations and the social dialogue in the CLEANING SECTOR**, the national experts of ITALY consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
Filippo Turi	AGCI Produzione e Servizi Lavoro	Industrial Relations Responsible
Gianfranco Piseri	ANCST (Legacoop)	President
Francesco Tiriolo	ANIP-FISE (Confindustria)	Director
Arcangelo Roncacci	ANISP (Confartigianato)	Confartigianato Alimentazione's Secretary
Maurizio Troiani	Assopulizie (CNA)	National Secretary
Giacomo Basso	CASA	President
(1)	CLAAI	General Secretariat
Orazio Di Renzo	CNAI	President
Marco Mingrone	Federlavoro e Servizi (Confcooperative)	Formal Representative
Adriano Cosimati	FENASALC-CISAL	General Secretary
Carmelo Romeo	FILCAMS (CGIL)	National Secretary
Giovanni Pirulli	FISASCAT (CISL)	National Secretary
Aldo Greco	FNIP (Confcommercio)	President
Giancarlo Favocchia	UGL Igiene Ambientale	National Secretary
Ubaldo Conti	UIL Trasporti	National Secretary
Paolo Ravagli	Unionservizi (Confapi)	Secretary

(1) The expert did not succeed in reaching someone to interview

National experts had organised a consultation at SECTOR level of their report.

## LUXEMBOURG

In the framework of the compiling of the study about the **representativeness of trade unions and employers' organisations and the social dialogue in the cleaning Sector**, the national expert of Luxembourg consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
OGB-L	M. Léon JENAL, secrétaire central.	26 février 2004
LCGB	M. Paul de ARAUJO, secrétaire syndical.	1 <sup>er</sup> avril 2004
Fédération luxembourgeoise des entreprises de nettoyage de bâtiments	M. François ENGELS, secrétaire.	6 avril 2004

## THE NETHERLANDS

In the framework of the compiling of the study about the **representativeness of trade unions and employers' organisations and the social dialogue in the cleaning Sector**, the national expert of the Netherlands consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
Jan Kampherbeek	CNV BedrijvenBond	Trade union official, negotiates collective agreement for the cleaning sector
Eddy Stam	FNV Bondgenoten	Trade union official, negotiates collective agreement for the cleaning sector
M.F.R.J. (Mehdi) Du Puy	Ondernemersorganisatie Schoonmaak- en Bedrijfsdiensten	Management secretary of economics, services, and



	(OSB)	international affairs
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National expert had organised validation at SECTOR level of his/her report.

## PORTUGAL

In the framework of the compiling of the study about the **representativeness of trade unions and employers' organisations and the social dialogue in the Industrial Cleaning Sector**, the national expert of Portugal consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
Sra. Helena Pereira	AEPSLAS	Secretary
Sra. Maria Amélia Lourenço	SLEDA	Director
Sr. Victor Hugo Sequeira	SITese	President
Sr. Henrique Castro	SITESC	Director
Direction	STAD	
Sr. José Júlio Peixinho	ANEL	

National expert had organised validation at SECTOR level of his/her report.

## SPAIN

In the framework of the compiling of the study about the **representativeness of trade unions and employers' organisations and the social dialogue in the Cleaning Sector**, the national expert of Spain consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
Santiago González	USO	Área de Servicios de USO
José Luis Segura Ramal	UGT-Federación de servicios	Sector Estatal de Limpieza y Servicios a la Sociedad
Pascual Sánchez	CCOO-CONC	Resp. Sectorial y Salud Laboral de la Fed. de AA.DD. de CC.OO. de Catalunya
Maria Teresa Ñaya	CIG	
Noemi Etxebarria	ELA	
Javier Blanco	ASPEL (Asociación Profesional de Empresas de Limpieza)	Secretario general
Horacio Labat	ASPEL (Asociación Profesional de Empresas de Limpieza)	Gerente
Jesús Martín López	AELMA (Asociación de Empresarios de Limpieza de Madrid)	Presidente
Joan Carles Sánchez Vecina	ASCEN (Asociació Catalana d'Empreses de Neteja)	Presidente
Gerardo Martínez	FEL (Federación Española de Limpiezas)	Presidente

National expert had organised validation at SECTOR level of his/her report.

## SWEDEN

In the framework of the compiling of the study on **representativeness of organisations in the Industrial cleaning sector**, the national expert of Sweden consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
Lars Friberg Lars.friberg@almeqa.se	ALMEGA the Confederation of Swedish Enterprise	Responsable de branche.
Jan Hult jan@skorstensfejare.se	Sveriges Skorstensfejaremästares Riksförbund (SSR)	Responsable de branche
Anders Eriksson Anders.Eriksson.fk@fastighets.se	Fastighetanställdasförbund,F	Ombudsman
Per Holmström Per.Holmstrom@kommunal.se	Kommunalarebatreförbundet, Kommunal	Ombudsman Cleaning Industry
Peter Hammarin Peter.Hammarin@kommunal.se	Kommunalarebatreförbundet, Kommunal	Ombudsman Chimney Sweepers
Gabriela Lavetia	Facket för Service och Kommunikation, SEKO	Ombudsman

Eva Claeson ecl@htf.se	Tjänstemannaförbundet HTF: The salaried Employees' Union	Ombudsman
Börje Hammarström Borje.Hammarstrom@ledarna.se	LEDARNA: the Swedish association for managerial and professional staff	Ombudsman

National expert had organised validation at national level of his/her report.

#### UNITED KINGDOM

In the framework of the compiling of the study about **the representativeness of organisations in the Industrial Cleaning Sector**, the national experts of Country consulted these people:

Name of the person consulted	Name of the organisation consulted	Function of this person in this organisation
Mr. Martyn Vesey	Cleaning and Support Services Association - CSSA	Director
Helga Pile	GMB	Research & Policy officer
Chris Haswell	PCS	Research Officer
Ms. Julia Long	TGWU	National Secretary, General Workers' Section
Dave Prentis	Unison	General Secretary
Mr. John Hannett,	Usdaw	General Secretary

National expert had organised validation at national level of his/her report.