

UNIVERSITE CATHOLIQUE DE LOUVAIN

Institut des Sciences du Travail



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

SUMMARY

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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 1st 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 1993¹, 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 document², 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 1998³, 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*⁴. In the respect of the three criteria set up by the Commission, as had been observed in previous studies⁵, *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*

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

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

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

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

⁵ 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 level⁶. 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 1st 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*⁷. 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.

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

⁷ *Reply to Call for Tenders VT/2002/83. Studies on the representativeness of the social partners at sectoral 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 industry⁸.

Besides this general delimitation, it is worth noting that the sector is delimited in 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

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

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
Austria	The sector is divided into three sub-sectors, reflecting three distinct vocations: Cleaning; chimney cleaning; and disinfection and exterminating activities.
Belgium	<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.
Denmark	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.
Finland	The industrial cleaning sector in Finland corresponds to the NACE classification: NACE 74.7.
France	<u>The Code 74.7 in the French Nomenclature of Activities</u> : basic cleaning in premises of all kinds, cleaning collectively used facilities, cleaning public transport vehicles and window cleaning; specialist cleaning; sweeping chimneys, rat extermination, pest control, and disinfection. <u>In terms of collective bargaining</u> : the "cleaning activity" (Code 74.7 Z) the "laundering 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.
Germany	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.
Greece	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.
Ireland	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
Italy	<u>Article 1st of Law No. 82 of 25 December 1994</u> : cleaning, disinfecting, exterminating, and sanitation provided by cleaning companies. <u>The last 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.
Luxembourg	<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. 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.
Netherlands	<u>Dutch classification system (Standaard Bedrijfsindeling, SBI)</u> : SBI 7470.1: Cleaning of buildings: the cleaning of Building interiors, window cleaning, chimney sweeping, the cleaning of house fronts, and cleaning after fires 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.
Portugal	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.
Spain	<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
Sweden	The industrial cleaning includes: 74.701: Cleaning companies; 74.702: Disinfection companies; 74.703: Chimney sweeps.
United Kingdom	The industrial cleaning industry includes the group of employees employed by specialised firms and corresponds to the NACE code 74.7.

Source: national reports

Characteristics of the industrial cleaning sector

Market developments

According to an EFCI survey⁹, 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%¹⁰ 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. The dynamism of the Swedish market was quite spectacular during the year 2002. Four countries (Luxembourg, Finland, Belgium and the UK) registered an increase above the EU average, while the growth in France and Portugal was relatively weak.

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 over recent years has been 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%

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

¹⁰ Hungary and Slovakia have been excluded from this calculation since no figures were available in 2001.

Related services (waste collecting, catering, etc.)	5.60%	3.5%
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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.

However, the cleaning industry is highly competitive and the main competitive strategies of companies are based on prices and 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).

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 adding to the intense and unfair competition that is the current characteristic of the sector.

Companies

Number of companies

According to the EFCI survey¹¹, 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 year¹². 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 some are 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 groups¹³.

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	
	EFCI Survey ¹⁴ – 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)

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

¹² Hungary and Slovakia have been excluded from this calculation since no figures were available in 2001.

¹³ *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.

¹⁴ *ibidem*, p. 9.

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)
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 Italy¹⁵.

Employment in the industrial cleaning by country

Country	Number of employed people	
Source	EFCI Survey – data 2002 ¹⁶	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

¹⁵ *Ibidem*, pp. 11-14.

¹⁶ *Ibidem*, p. 12.

workforce, in 2002, were blue-collar workers¹⁷. Traditionally, women constitute the majority of the workforce since they accounted for about 76% of the workforce in the European Union in 2002¹⁸. 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 account the following countries: Austria, Belgium, France, Ireland, Luxembourg, the Netherlands and Portugal, immigrant employees are estimated to be 32%¹⁹. 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)²⁰. 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.

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

Austria	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).
Belgium	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.
Denmark	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

¹⁷ *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.

¹⁸ *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.

¹⁹ *Ibidem*, p. 17.

²⁰ *Ibidem*, p.16 and *the cleaning industry in Europe. An EFCI survey*, EFCI, July 2003, p.22-23.

	agreement that is covered by sector collective agreements.
Finland	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.
France	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.
Germany	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.
Greece	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.
Ireland	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).
Italy	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.
Luxembourg	One collective agreement covers blue-collar workers in the cleaning sector.
Netherlands	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).
Portugal	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.
Spain	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.
Sweden	In Sweden, there is one collective agreement for cleaning and sanitation companies and another for chimney sweeping companies.
United Kingdom	As is the norm in the United Kingdom, when pay bargaining takes place, it does so at the level of the individual employer.

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 level²¹

- Recommendation by EFCI and Euro-FIET on the application of certain provisions of the Directive on the organisation of working time, 17 December 1993.
- Guidelines on vocational training adopted by EFCI and Euro-FIET, 9 February 1995
- Joint Memorandum by EFCI and Euro-FIET on new sources of employment, 21 October 1996
- 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
- Agreement between EFCI and Euro-FIET on establishing a committee for social dialogue in the cleaning sector, 18 December 1998
- 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
- Report on the study into key issues of the industrial cleaning sector in Europe. EFCI and UNI-Europa joint conclusions, 31 January 2001
- Joint contribution on employment, 20 February 2001
- Common recommendations of the European social partners for the cleaning industry, 1 March 2004
- The framework programme of the social dialogue committee in the cleaning industry, 1 March 2004

²¹ *Cleaning industry. European social dialogue*, EFCI, UNI-Europa, 2001.

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

Joint projects²²

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
- 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

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. EFCI has members in 13 of the 15 countries taken into account in this study. EFCI has no affiliated member in Ireland and in Greece²³. 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.

²² See *cleaning industry. European social dialogue*, EFCI, UNI-Europa, 2001 ; consultation of EFCI, October-November 2004.

²³ 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.

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).

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 organisation²⁴. 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 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).

²⁴ *Cleaning industry. European social dialogue*, EFCI, UNI-Europa, 2001.