European Foundation for the Improvement of Living and Working Conditions

Representativeness of the European social partner organisations: Cleaning activities industry

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This study sets out to provide the necessary information for assisting the existing sectoral social dialogue in the cleaning activities sector. The report identifies the national organisations on both sides of the industry, and analyses the sector's relevant European organisations. Following a brief overview of the sector's economic background, the study describes the social partner organisations in all of the EU Member States, focusing on membership, their role in collective bargaining and public policy, and national and European affiliations. It then goes on to look at the relevant European organisations, focusing in particular on membership levels and capacity to negotiate. The impetus for these EIRO series of studies on representativeness arises from the European Commission's goal of recognising the representative social partner organisations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU). Hence, this study is designed to provide the basic information required to establish sectoral social dialogue.

Objectives of study

The aim of this **representativeness** study is to identify the relevant national and supranational associational actors – that is the **trade unions** and **employer organisations** – in the field of industrial relations in the cleaning activities sector, and show how these actors relate to the sector's European interest associations of labour and business. The impetus for this study, and for similar studies in other sectors, arises from the aim of the **European Commission** to identify the representative social partner associations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU) (1.41Mb PDF). Hence, this study seeks to provide basic information needed to set up sectoral **social dialogue**. The effectiveness of European social dialogue depends on whether its participants are sufficiently representative in terms of the sector's relevant national actors across the EU Member States. Hence, only European associations which meet this precondition will be admitted to the European social dialogue.

Against this background, the study will first identify the relevant national social partner organisations in the cleaning activities sector, subsequently analysing the structure of the sector's relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both the national and European level of interest representation. The study includes only organisations whose membership domain is 'sector-related' (Table 1).

Table 1: Determining the 'sector relatedness' of an organisation

Scope	Question in the standardised questionnaire to all correspondents	Possible answers	Notes and Explanations
	Does the union's/employer organisation's domain embrace potentially all employees in the cleaning sector?	Yes/No	This question has not been asked directly in the questionnaire, but is considered to be 'yes' if all of the five following sub-questions are 'yes'. It is considered to be 'no', if at least one of the following sub-questions is answered with 'no'.

Scope	Question in the standardised questionnaire to all correspondents	Possible answers	Notes and Explanations
Domain of the organisation within the sector	...cover ‘basically all’ groups of employees (min.: blue collar, white collar) in the cleaning sector?	Yes/No	This question refers to the organisation’s scope of the sector with regard to different types of employment contracts etc. As the contractual forms are rather heterogeneous, the minimum requirement to answer this question with ‘yes’ would be the fact that both blue-collar and white-collar workers are potentially covered by the organisation’s domain.
	...cover the ‘whole’ cleaning sector in terms of economic activities, (i.e. including all sub-activities	Yes/No	This question refers to the economic sub- activities of the NACE code chosen. In the spreadsheet part of the questionnaire, correspondents have been provided a detailed breakdown of sub-activities down to the four-digit level.
	… cover employees in all types of companies (all types of ownership: private, public) in the cleaning sector?	Yes/No	This question refers to ownership. Some organisations might limit for instance their domain to domestically owned, or to public sector companies/employees only.
	… cover employees in enterprises of all sizes in the cleaning sector?	Yes/No	Often, organisations limit their domain to enterprises by size class (for example, SMEs only).
	...cover all occupations in the cleaning sector?	Yes/No	Some organisations (notably trade unions) limit their domain to certain occupations only. This sub-question intends to identify these occupational organisations.
Domain of the organisation outside the sector	Does the union also represent members outside the cleaning sector?	Yes/No	This question is again being asked directly of the correspondents

Source: Standardised Excel-based questionnaire, sent to EIRO national correspondents

At both national and European levels, many associations are not considered as social partner organisations as they do not deal with industrial relations. Thus, there is a need for clear-cut criteria to differentiate the social partner organisations from other associations.

As for the national-level associations, classification as a sector-related social partner organisation in the context of this study implies fulfilling one of two criteria: the associations must either be:

- party to 'sector-related' **collective bargaining**;
- a member of a 'sector-related' European association of business or labour that is on the Commission's list of European social partner organisations consulted under Article 154 of the TFEU, and/or which participates in the sector-related European social dialogue.

The criterion that a national association can be a social partner if it is affiliated to a European social partner implies that such an association may not be involved at all in industrial relations in its own country. This criterion may seem odd, but a national association does become involved in industrial relations through its membership of such a European organisation.

Furthermore, it is important to assess whether the national affiliates to the European social partner organisations are engaged in industrial relations in their respective countries. Affiliation to a European social partner organisation and/or involvement in national collective bargaining are vital to the European social dialogue, since they are the two constituent mechanisms that can systematically connect the national and European levels.

In terms of the selection criteria for the European organisations, this report:

- includes those sector-related European social partner organisations that are on the Commission's list of consultation;
- considers any other European association with sector-related national social partner organisations – as defined above – under its umbrella.

Thus, the aim to identify the sector-related national and European social partner organisations applies both a 'top-down' and 'bottom-up' approach.

Definitions

For the purpose of this study, the cleaning activities sector is defined in terms of the Statistical Classification of Economic Activities in the European Community (NACE), to ensure the cross-national comparability of the findings. More specifically, the cleaning activities sector is defined as embracing NACE (Rev. 2) 81.2 (Table 2).

Table 2: NACE classification

NACE Rev. 2	Description
81.2	Cleaning activities
81.21	General cleaning of buildings
81.22	Other building and industrial cleaning activities
81.29	Other cleaning activities

The domains of the trade unions and employer organisations and scope of the relevant collective agreements are likely to vary from this precise NACE demarcation. The study therefore includes all trade unions, employer organisations and multi-employer collective agreements which are 'sector-related' in terms of any of the following four aspects or patterns:

- congruence – the domain of the organisation or scope of the collective agreement must be identical to the NACE demarcation, as specified above;
- sectionalism – the domain or scope covers only a certain part of the sector, as defined by the aforementioned NACE demarcation, while no group outside the sector is covered;
- overlap – the domain or scope covers the entire sector along with parts of one or more other sectors. However, it is important to note that the study does not include general associations which do not deal with sector-specific matters;

Figure 1: Sector-relatedness of social partner organisations: domain patterns

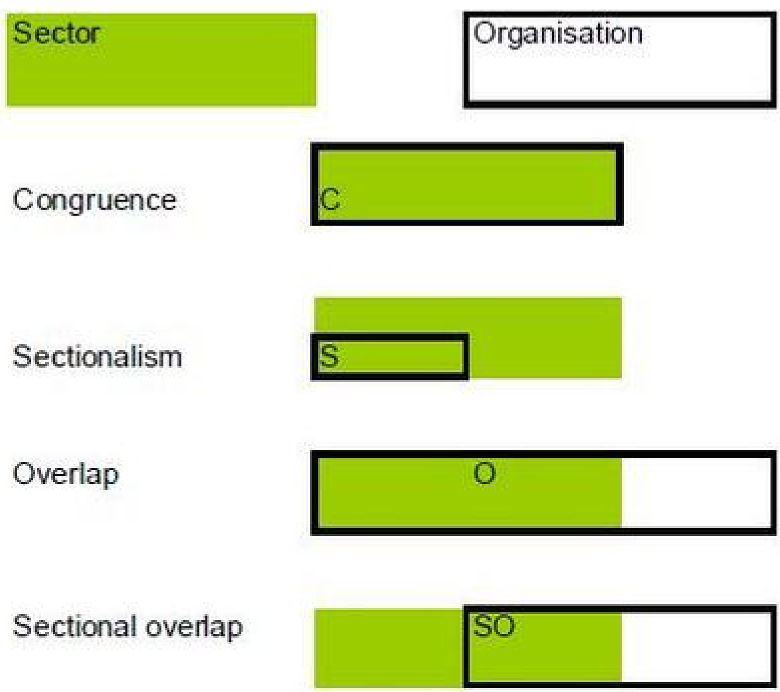


Table 3: Pattern and scope of the organisation's domain

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the union's/employer organisation's domain embrace potentially all employees in the cleaning activities sector?	**Does the union/employer organisation also represent members outside the cleaning activities sector?**
Congruence (C)	Yes	No
Sectionalism (S)	No	No
Overlap (O)	Yes	Yes
Sectional overlap (SO)	No	Yes

Note: The domain pattern results from the answers to the questions on the scope of the domain derived in Table 1

At European level, the European Commission established a Sectoral Social Dialogue Committee for the cleaning activities sector in 1999. The European Federation of Cleaning Industries (EFCI) on the employer side, as well as the Union Network International (UNI Europa) – Property Services Sector on the employee side, participate in the sector's European social dialogue. Therefore, affiliation to one of these European organisations is a sufficient criterion for classifying a national association as a social partner organisation for the purpose of this study. However, it should be noted that the constituent criterion is one of sector-related membership. This is important, in particular, in the case of UNI Europa due to its multi-sectoral domain. Thus, the study will include only those organisations affiliated to UNI Europa which are related to the cleaning activities sector, in terms of worker representation and collective bargaining, following the definition of 'sector-relatedness' illustrated above.

Collection of data

The collection of quantitative data, such as those on membership, is essential for investigating the representativeness of the social partner organisations. Unless cited otherwise, this study draws on the country studies provided by the EIRO national centres. The EIRO correspondents were provided with standardised questionnaires in both Word and Excel format by the European Foundation for the Improvement of Living and Working Conditions (Eurofound), which they completed through contacting the sector-related social partner organisations in their countries. The contact is generally made via telephone interviews, but might also – in certain cases – be established via email. In case of non-availability of any representative, the national correspondents are asked to fill out the relevant questionnaire based on secondary sources, such as information given on the social partner's website, or derived from previous research studies.

It is often difficult to find precise quantitative data. In such cases, the EIRO national centres are requested to provide rough estimates rather than leaving a question blank, given the practical and political relevance of this study. However, if there is any doubt over the reliability of an estimate, this will be noted.

In principle, quantitative data may stem from three sources, namely:

- official statistics and representative survey studies;

- administrative data, such as membership figures provided by the respective organisations, which are then used for calculating the density rate on the basis of available statistical figures on the potential membership of the organisation;
- personal estimates made by representatives of the respective organisations.

While the data sources of the economic figures cited in the report are generally official statistics (mainly from EUROSTAT or national statistical offices) the figures for the organisations are usually either administrative data or estimates. Furthermore, it should be noted that several country studies also present data on trade unions and business associations that do not meet the above definition of a sector-related social partner organisation, in order to give a complete picture of the sector's associational 'landscape'. For the above substantive reasons, as well as for methodological reasons of cross-national comparability, such trade unions and business associations will not be considered in this overview report. Yet, these organisations can still be found in the national contributions, which will be published together with the overview report.

Quality assurance

In order to assure the quality of the information gathered, several verification procedures have been put in place.

- Eurofound staff, together with the author of this report, checked the figures provided for consistency, and ensured the organisations listed met the criteria for the scope of this study (see above).
- Eurofound sent the national contributions to national members of the governing board, as well as to the European-level sector-related social partners' organisations. The peak-level organisations then asked their affiliates to verify the information. Feedback received from the sector-related organisations was then taken into account, if it was in line with the methodology of the study.
- The complete study was finally evaluated by the European-level sectoral social partners and Eurofound's Advisory Committee on Industrial Relations, which consists of representatives from both sides of industry, governments and the European Commission.

Structure of report

The study consists of three main parts, beginning with a brief summary of the sector's economic background. The report then analyses the relevant social partner organisations in all EU Member States. The study therefore covers all 27 European countries. The third part of the analysis considers the representative associations at European level.

Each section will contain a brief introduction explaining the concept of representativeness in greater detail, followed by the study findings. As representativeness is a complex issue, it requires separate consideration at national and European level for two reasons. Firstly, the method applied by national regulations and practices to capture **representativeness** has to be taken into account. Secondly, the national and European organisations differ in their tasks and scope of activities. The concept of representativeness must therefore be suited to this difference.

Finally, it is important to note the difference between the research and political aspects of this study. While providing data on the representativeness of the organisations under consideration, the report does not reach any definite conclusion on whether the representativeness of the European social partner organisations and their national affiliates is sufficient for admission to the European social dialogue. The reason for this is that defining criteria for adequate representativeness is a matter for political decision rather than an issue of research analysis.

Economic background

The cleaning industry covers services provided by specialised contractors, building maintenance and associated cleaning, cleaning of public transport vehicles, waste management services and disinfecting and extermination activities. The European cleaning sector employs, according to the European Commission, some three million people, who perform a broad range of cleaning activities from dusting and vacuuming to cleaning windows, factory roofs and industrial equipment. Contract cleaning has grown steadily over the past 20 years, mainly as a direct consequence of outsourcing of services by organisations and companies. At the same time, markets have developed towards a more global and integrated service delivery, with the provision of facilities management and support services rather than just simple cleaning services, especially among larger companies. Nevertheless, according to EFCI, although diversification of cleaning activities has significantly increased over the past one or two decades, simple 'office' cleaning activities still represents the bulk of the cleaning market in Europe. EFCI estimated, from figures given by their national members, that there were 3.75 million employees within the cleaning sector in 20 European countries in 2008. Eurostat provides employment figures solely for the whole NACE (Rev. 2) code 81 (including combined facilities support activities, cleaning activities and landscape service activities) but nevertheless counts less than 3.6 million people working in this more encompassing segment of the economy in 2009 (see Figure 2 below).

As in many other sectors, it appears that the financial crisis has had some repercussions on the sector's labour market at least in some of the Member States. According to the country reports, major negative employment effects have been observed, particularly in France, Greece, Italy and Spain. For the entire NACE (Rev. 2) class 81, according to Eurostat, overall employment of the EU 27 grew in the period 2008–2011 (see Figure 2 below; for the cleaning sector as demarcated for the purpose of this study no Eurostat employment figures are available.) However, even though it appears from both the country reports and Eurostat (see Figure 3 below) that in most countries the financial crisis did not affect, or only marginally affected, the sector in terms of employment, it may have worsened the business environment within the sector in several countries, in that the recent economic downturn has tightened competition, which has resulted in falling profit margins within the sector and increased pressure on costs. This, in turn, has resulted in reduced working hours and/or cuts in pay and premiums rather than direct job losses (for example in Bulgaria, Ireland, Luxembourg, the Netherlands and the UK). Moreover, the crisis may also have led to an increase in irregular and **undeclared work** in the cleaning industry (for example, Italy). Apart from that, according to several country reports, the crisis may have had negative effects on the public procurement policies of many administrations. Accordingly, against the background of increasingly restrictive austerity programmes imposed by national governments, the administrations have increasingly tended to award contractors offering the lowest price rather than the best value. As a consequence, the quality of work in the sector may have decreased in many instances.

The cleaning sector's business structure is dominated by small and medium-sized companies (SMEs). Whereas Eurostat calculated that in 2009, there were about 189,000 companies in the cleaning sector in the EU27, according to EFCI, about 10% of the sector's companies have 50 or more employees. Apart from this, the cleaning industry is a highly labour-intensive sector with labour accounting for about three-quarters of the total employers' costs. For individual companies, pressure on labour costs thus constitutes the core element of improving competitiveness.

The national social partner organisations within the sector, where they exist, tend to record relatively low levels of organisation (see below), in particular on the employee side. This is because the sector's predominant employment structure (low-skilled, female, often migrant service workers) tends to be quite unfavourable to high unionisation rates.

Employment characteristics

As indicated in most country reports, employment in the cleaning industry is characterised by relatively high rates of illicit and non-standard forms of employment, in particular part-time work and (bogus) self-employment, and relatively low levels of qualification. Moreover, the high incidence of migrant workers, as well as their ease of replacement, makes them particularly vulnerable to exploitation – especially since trade union membership in the sector tends to be fairly low. According to EFCI, at European level about 75% of the sector's workforce are women and about 70% of cleaners work part time. Most country reports show that pay and working conditions tend to be fairly poor.

Long-term trends

As indicated earlier, at least over the past two decades, the EU cleaning industry has undergone a process of steady and sustainable growth, which has mainly been caused by an increasing market penetration due to the continuous outsourcing of cleaning services. Moreover, the continuing diversification of activities towards integrated services and facilities management has attracted a number of cleaning staff who are highly skilled, particularly in the field of industrial cleaning and specialised hygiene and cleaning services (such as hygiene maintenance in food chains, and cleaning of hospitals, façades and certain modes of public transport). However, fierce competition over low labour costs together with the trend of outsourcing are thought to have exacerbated the sector's incidence of precarious working conditions.

Tables 4 and 5 present an overview of figures on companies, employment and employees in the sector and in relation to the national economy, mainly stemming from national sources from around 2000–2010 (that is, the situation just after the peak of the Great Recession of the late 2000s). These figures have been collected through the EIRO national centres. In all 17 Member States but one (Denmark), for which related data are available, the number of companies more or less increased, generally reflecting an expansion of the sector in these countries. In a few countries, such as Latvia, Portugal, Slovakia and Slovenia, the number of companies at least doubled within the decade to 2010.

Table 4: Total employers and employment in cleaning, 2000 and 2010 (approximately)

	Year	No. of companies	Year	Total employment	Female employment	Male employment	Total sectoral employment as % of total employment in economy
AT	2000	1,541	2000	35,595	n.a.	n.a.	1.0
AT	2008	2,671	2008	55,430	n.a.	n.a.	1.4
BE	2002	1,183	n.a.	n.a.	n.a.	n.a.	n.a.
BE	2010	1,744	n.a.	n.a.	n.a.	n.a.	n.a.
BG	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
BG	2009	860	2010	32,170	18,253	13,917	n.a.
CY	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CY	2009	214	2009	1,403	n.a.	n.a.	0.4

CZ*	2000	2,837	2000	26,000	21,000	5,000	0.5
CZ*	2010	3,015	2010	78566	63,638	14,928	1.5
DE	n.a.	n.a.	2001	393,000	290,000	103,000	1.0
DE	2008	35,896**	2009	565,000***	397,000	168,000	1.5
DK	2000	5,819	2001	48,299	28,629	19,670	1.7
DK	2008	5,718	2009	52,430	28,877	23,553	1.9
EE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
EE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
EL	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
EL	2010	1,654	2010	23,275	15,858	7,417	0.5
ES	2001	14,825	2001	272,300	218,600	53,700	1.7
ES	2010	25,700	2010	431,600	338,400	93,000	2.3
FI	2000	2,609	2000	29,020	21,494	7,526	1.3
FI	2010	4,306	2010	36,851	26,313	10,538	1.6
FR	2000	12,780	n.a.	n.a.	n.a.	n.a.	n.a.
FR	2010	20,039	n.a.	n.a.	n.a.	n.a.	n.a.
HU	2000	5,323	2000	15,116	n.a.	n.a.	0.5
HU	2010	5,857	2010	38,355	n.a.	n.a.	1.5
IE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
IE	n.a.	n.a.	2010	25,000	n.a.	n.a.	1.3
IT	2001	24,311	2001	339,574	216,818	122,756	1.4
IT	2008	28,756	2008	435,083	277,800	157,283	1.7
LT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LU	2000	75	2000	3,891	3,222	669	1.5
LU	2010	123	2010	7,516	6,276	1,240	2.1
LV****	2000	96	2000	1,309	837	472	0.2
LV****	2010	260	2010	5,764	2,945	2,819	0.7
MT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
MT*****	n.a.	n.a.	2010	507	325	182	0.3
NL	2000	6,200	n.a.	n.a.	n.a.	n.a.	n.a.
NL	2010	7,195	n.a.	n.a.	n.a.	n.a.	n.a.
PL	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

PL	2010	23,875	n.a.	n.a.	n.a.	n.a.	n.a.
PT	1999	716	1999	40,261	35,349	4,912	1.6
PT	2009	1,559	2009	62,275	54,513	7,762	2.0
RO	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
RO	2008	2,679	2008	28,336	n.a.	n.a.	0.3
SE	2000	2,085****	n.a.	n.a.	n.a.	n.a.	n.a.
SE	2010	3,036****	n.a.	n.a.	n.a.	n.a.	n.a.
SI	2000	234	2000	6,133	4,647	1,486	0.8
SI	2010	1,243	2010	6,722	5,094	1,628	0.8
SK	2000	130	2000	600	500	100	0.0
SK	2010	849	2010	14,300	8,900	5,400	0.6
UK*	2000	7,790	2000	226,800	122,800	104,000	0.8
UK*	2010	14,075	2010	345,200	206,900	138,300	1.2

** = 2000 and 2010 figures are not strictly comparable.*

*** = 14,276 in 2008, 15,746 in 2009 and 17,194 in 2010 according to BIV. The difference obviously ensues from different methods of data collection applied by the Federal Statistical Office.*

**** 549,591 in 2008, 540,248 in 2009 and 532,144 in 2010 according to BIV. The difference obviously ensues from different methods of data collection applied by the Federal Statistical Office.*

***** = Without self-employed persons*

****** = Figures are likely to be underestimated*

Source: EIRO national centres, national statistics. For detailed description of sources please refer to the national reports

All of the 14 countries with available data record an often notable increase in overall employment in the same period. In terms of the number of sectoral employees, only the Netherlands records a slight decrease during the period, while in 16 countries this indicator increased, again remarkably in most of the countries (for 10 countries no comparable data are available). There are at least three Member States (the Czech Republic, Germany and the UK) where the number of employees clearly falls short of the total number of employment. One can infer from these findings that at least in these countries, the sector is characterised by a high incidence of non-standard employment. (For several other countries no comparable data are available. Furthermore, anecdotal evidence of several country reports implies that many cleaning workers, in particular those engaged in private households, are illicitly employed and thus do not show up in official statistics).

Table 5: Total employees in cleaning, 2000 and 2010 (approximately)

Country	Year	Total employees	Female employees	Male employees	Total sectoral employees as % of total employees in economy
AT	2000	34,469	n.a.	n.a.	1.1
AT	2008	53,006	n.a.	n.a.	1.6
BE	2002	38,978	25,350	13,628	n.a.
BE	2010	46,122	27,616	18,506	1.2
BG	n.a.	n.a.	n.a.	n.a.	n.a.
BG	2010	32,170	18,253	13,917	1.4
CY	n.a.	n.a.	n.a.	n.a.	n.a.
CY	n.a.	n.a.	n.a.	n.a.	n.a.
CZ*	2000	9,700	7,500	2,200	0.2
CZ*	2010	31,800	17,400	14,400	0.8
DE	2001	387,581	256,733	130,848	1.4
DE	2009	405,033	267,180	137,853	1.5
DK	2001	43,030	26,518	16,512	1.7
DK	2009	47,583	27,168	20,415	1.8
EE	n.a.	n.a.	n.a.	n.a.	n.a.
EE	n.a.	n.a.	n.a.	n.a.	n.a.
EL	n.a.	n.a.	n.a.	n.a.	n.a.
EL	2010	17,634	13,716	3,918	0.6
ES	2001	250,700	206,100	44,600	2.0
ES	2010	409,600	323,800	85,800	2.6
FI	2000	26,636	20,254	6,382	1.2
FI	2010	33,203	24,222	8,981	1.4
FR	2000	200,000	130,000	70,000	0.9
FR	2010	436,000	298,000	138,000	1.8
HU	2000	n.a.	n.a.	n.a.	n.a.
HU	2010	n.a.	n.a.	n.a.	n.a.
IE	n.a.	n.a.	n.a.	n.a.	n.a.
IE	2010	25,000	n.a.	n.a.	1.3

IT	2001	303,593	200,876	102,717	1.8
IT	2008	393,764	260,539	133,225	2.0
LT	n.a.	n.a.	n.a.	n.a.	n.a.
LT	n.a.	n.a.	n.a.	n.a.	n.a.
LU	2000	3,839	3,179	660	1.6
LU	2010	7,435	6,209	1,226	2.2
LV**	2000	1,309	837	472	0.2
LV**	2010	5,701	2,931	2,788	0.8
MT	n.a.	n.a.	n.a.	n.a.	n.a.
MT	n.a.	n.a.	n.a.	n.a.	n.a.
NL	2000	150,300	99,000	51,300	2.2
NL	2010	141,700	93,500	48,200	1.8
PL	n.a.	n.a.	n.a.	n.a.	n.a.
PL	n.a.	n.a.	n.a.	n.a.	n.a.
PT	1999	39,747	35,141	4,606	1.7
PT	2009	60,244	53,131	7,113	2.1
RO	n.a.	n.a.	n.a.	n.a.	n.a.
RO	2008	27,846	n.a.	n.a.	0.6
SE	2000	29,382	n.a.	n.a.	0.8
SE	2010	72,926	n.a.	n.a.	1.8
SI	2000	5,754	4,485	1,269	0.8
SI	2010	6,067	4,692	1,375	0.8
SK	2000	500	500	0	0.0
SK	2010	13,300	8,200	5,100	0.7
UK	2000	193,200	112,900	70,300	0.8
UK	2010	251,300	149,900	101,400	1.0

** 2000 and 2010 figures are not strictly comparable.*

*** Without self-employed persons*

Source: EIRO national centres, national statistics. For detailed description of sources please refer to the national reports

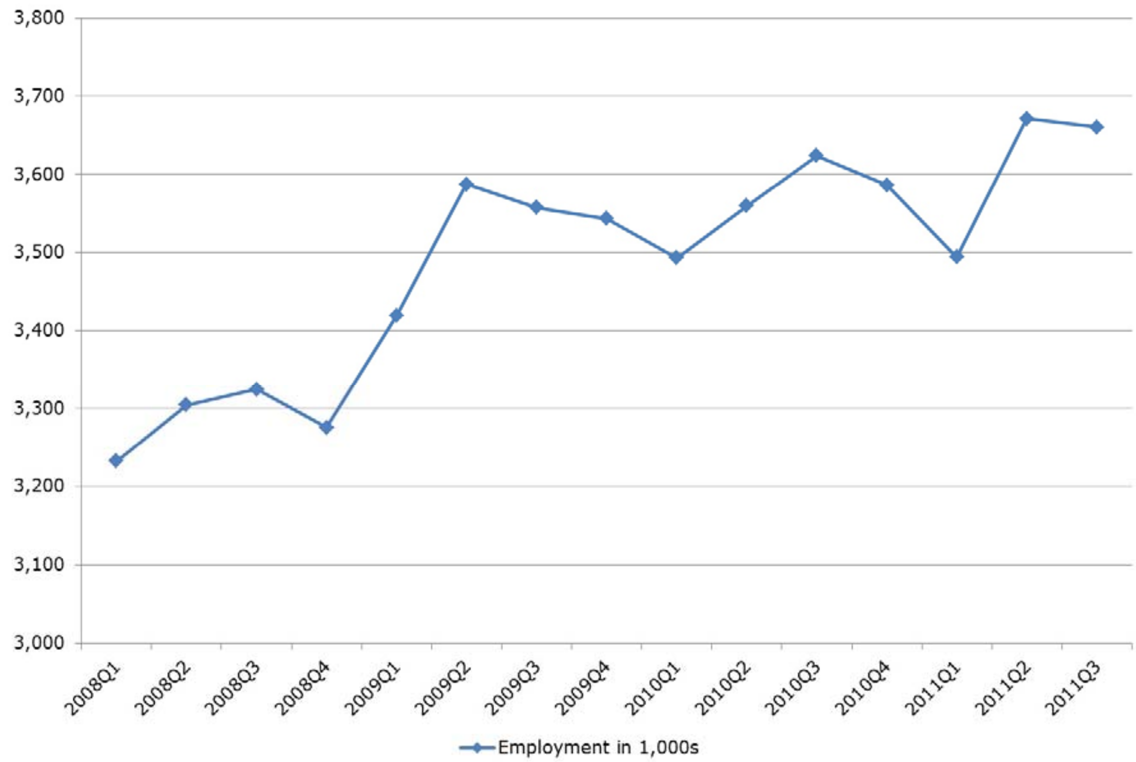
Tables 4 and 5 also show that women represent a clear majority of the workers in this sector in all countries with available data. In most countries, for which data are available, the numbers of female employees clearly exceed those of male employees and, in some countries, such as Finland, France, Greece, Luxembourg, Portugal, Slovenia and Spain, women employees within the workforce outnumber men by at least two to one. Relatively small gaps between the sexes in terms of the number of sectoral employees can be found only in Bulgaria, the Czech Republic, Denmark and Latvia, while in Austria, Cyprus, Estonia, Lithuania, Malta, Poland, Romania and Sweden, no comparable data are available. The tables also indicate that the sector is not very large but nevertheless quite significant in most of the Member States and – in terms of employment share – continued to grow in almost all countries with available data during the decade to 2010. Its share in aggregate employment is below 2% in all countries under examination with available data but Luxembourg, Portugal and Spain. In the latter, this share lies at between 2% and 2.3%. In terms of absolute numbers of sectoral workers, Germany holds an outstanding position, reporting that more than half a million people are in paid employment in the sector.

Recent developments

As indicated earlier in this report, the impact of the financial crisis on the cleaning sector varies from one country to the other. Overall, at least in terms of employment, the sector appears to have suffered less from the crisis compared with most other industries.

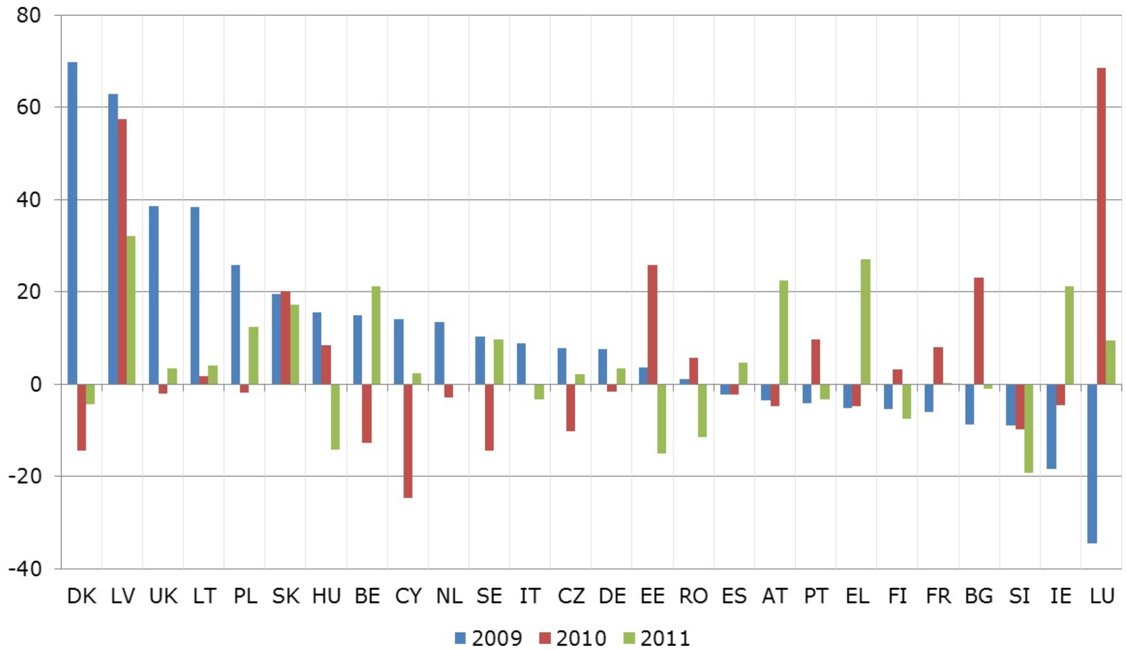
Figure 2 shows that, overall in the European Union, the entire services to buildings and landscape activities sector was – in terms of employment – hardly hit by the crisis, in that employment continued to grow during 2008–2011. While total employment (for the age group 15–64) stood at slightly more than 3.2 million in the first quarter of 2008, it peaked at almost 3.7 million in the second quarter of 2011. Figure 2 shows a cyclical development of employment each year, indicating a seasonal fluctuation of employment, rather than an effective impact of the global economic downturn. However, it is important to note that Figure 2 refers to the entire services to buildings and landscape activities sector according to NACE (Rev.2) code 81 rather than to the cleaning activities sector only, as defined for the purpose of this study, since Eurostat does not provide distinct employment data for NACE code 81.2.

Figure 2: Overall development of employment (workforce aged 15–64) during and after the Great Recession in the EU27 services to buildings and landscape activities sector (including the cleaning industry), total numbers



Source: Eurostat, Labour Force Survey

Figure 3: Member States' development of employment (workforce aged 15–64) during and after the Great Recession in the services to buildings and landscape activities sector (including the cleaning industry), percentage change to quarter two of the previous year



Source: Eurostat, Labour Force Survey, and own calculations. No data available for MT. For a few countries, in particular EE, LT, LU and SI, the data may be unreliable

Compared with Figure 2, Figure 3 provides a far more differentiated picture of sectoral employment, in that the annual percentage changes of sectoral employment to the second quarter of the previous year for the period 2008–2011 are indicated for each individual Member State. Figure 3 shows that – while in some countries, such as Latvia, Lithuania and Slovakia, the entire NACE class 81 has been relatively unshaken by the Great Recession (in that employment within the sector increased in 2009, 2010 and 2011) – in most EU Member States the sector declined to some extent in terms of employment in at least one of the years 2009, 2010 and 2011. In part of this group of countries, in particular in Austria, Bulgaria, Finland, France, Greece, Ireland, Luxembourg, Portugal and Spain, there was a decline in sectoral employment in 2009, with an upward trend in employment for at least one of the years 2010 and 2011. Nonetheless, the crisis appears to have had a delayed effect on the sector's labour market in countries such as Belgium, Cyprus, the Czech Republic, Denmark, Estonia, Germany, Hungary, Italy, the Netherlands, Poland, Romania, Sweden and the United Kingdom. In these countries, significant redundancies were not experienced until 2010 at the earliest. Slovenia is the only country that records job losses for each of the three consecutive years 2009–2011. However, the data for Slovenia are assessed by Eurofound to be unreliable, as is also the case for figures given for Estonia, Lithuania and Luxembourg. Apart from that, increases in sectoral employment of more than 60% within one year only, as is the case, for instance, in Denmark and Latvia, appear to be doubtful and thus in need of explanation. Moreover, it is not possible to trace back job losses to a single cause, such as the financial crisis. Rather, it seems to be likely that outsourcing practices and other restructuring measures affecting employment in the sector are caused by several factors and would have been likely to occur in a more positive global economic context, even though perhaps on a smaller scale.

National level of interest representation

In many Member States, statutory regulations explicitly refer to the concept of representativeness when assigning certain rights of interest representation and public governance to trade unions and/ or employer organisations. The most important rights addressed by such regulations include:

- formal recognition as a party to collective bargaining;
- extension of the scope of a multi-employer collective agreement to employers not affiliated to the signatory employer organisation;
- participation in public policy and tripartite bodies of social dialogue.

Under these circumstances, representativeness is normally measured by the strength of the organisations' membership. For instance, statutory extension provisions usually allow for extension of collective agreements to unaffiliated employers only when the signatory trade union and employer association represent 50% or more of the employees within the agreement's domain.

As outlined, the representativeness of the national social partner organisations is of interest to this study in terms of the capacity of their European umbrella organisations for participation in European social dialogue. Hence, the role of the national actors in collective bargaining and public policy-making constitutes another important component of representativeness. The effectiveness of European social dialogue tends to increase with the growing ability of the national affiliates of the European organisations to regulate the employment terms and influence national public policies affecting the sector.

A cross-national comparative analysis shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy (Traxler, 2004). Social partner organisations that are engaged in multi-employer bargaining are incorporated in state policies to a significantly greater extent than their counterparts in countries where multi-employer bargaining is lacking. This can be attributed to the fact that only multi-employer agreements matter in macroeconomic terms, setting an incentive for the governments to seek the cooperation of the social partner organisations. If single-employer bargaining prevails in a country, none of the collective agreements will have a noticeable effect on the economy due to their limited scope. As a result, the basis for generalised tripartite policy concertation will be absent.

In summary, representativeness is a multi-dimensional concept that embraces three basic elements:

- the social partners' membership domain and their strength;
- their recognised role in collective bargaining;
- their role in public policymaking.

Membership domains and strength

The membership domain of an organisation, as formally established by its constitution or name, distinguishes its potential members from other groups which the organisation does not claim to represent. As already explained, this study considers only organisations whose domain relates to the cleaning activities sector. However, there is insufficient room in this report to delineate the domain demarcations of all the organisations. Instead, the report notes how they relate to the sector by classifying them according to the four patterns of 'sector-relatedness', as specified earlier. A more detailed description of how an organisation may relate to the sector can be found in Figure 1 and in Table 1.

Regarding membership strength, there is a difference between strength in terms of the absolute number of members and strength in relative terms. Research usually refers to relative membership strength as the density – in other words, the ratio of actual to potential members.

Furthermore, a difference also arises between trade unions and employer organisations in relation to measuring membership strength. Trade union membership simply means the number of unionised people. However, in this context, a clarification of the concept of 'member' should be made. Whereas in most countries recorded membership includes both employees and members who are not in active employment (such as unemployed people and retired workers) some countries provide information on employed membership only. Hence, two measures of trade union density have to be defined: gross union density (including inactive members) and net union density (employed union members only). In addition to taking the total membership of a trade union as an indicator of its strength, it is also reasonable to break down this membership total according to gender.

Measuring the membership strength of employer organisations is more complex since they organise collective entities, namely companies with employees. In this case, therefore, two possible measures of membership strength may be used – one referring to the companies themselves, and the other to the employees working in the member companies.

For a sector study such as this, measures of membership strength of both the trade unions and employer organisations have also to consider how the membership domains relate to the sector. If a domain is not congruent with the sector demarcation, the organisation's total density – that is, the density referring to its overall domain – may differ from sector-specific density, or the organisation's density referring to the sector. This report will first present the data on the domains and membership strength of the trade unions and will then consider those of the employer organisations.

To summarise, this report basically distinguishes between three types of organisational densities, as defined in Table 6, which are – depending on data availability – also broken down into net and gross rates.

Table 6: Definition of organisational density figures

Type of density	Definition	Breakdown
Domain density	Total number of employees (companies) organised by the organisation divided by potential number of employees (companies) as demarcated by the organisation's domain	Number of employees (companies) organised by the organisation net and gross; employees (for trade unions); companies and employees (for employer organisations)
Sectoral density	Number of employees (companies) organised by the organisation in the cleaning sector divided by total number of employees (companies) in the sector.	Net and gross; employees (for trade unions); companies and employees (for employer organisations)
Sectoral domain density	Number of employees (companies) organised by the organisation in the cleaning sector divided by potential number of employees (companies) in the cleaning sector as demarcated by the organisation's domain	Net and gross; employees (for trade unions); companies and employees (for employer organisations)

Trade unions

Tables 7 and 8 present the trade union data on their domains and membership strength. The tables list all trade unions which meet at least one of the two criteria for classification as a sector-related social partner organisation, as defined earlier. All of the 27 countries under consideration but six (the Czech Republic, Estonia, Latvia, Lithuania, Romania and Slovakia) record at least one sector-related trade union. In total, 64 sector-related trade unions were identified. Of these 64 unions, none has demarcated its domain in a way that is congruent with the sector definition. This does not come as a surprise, given that artificially defined demarcations of business activities for statistical purposes differ from the lines along which employees identify common interests and gather in associations. Domain demarcations resulting in overlap in relation to the sector are common in the sector and occur in exactly 40.6% of cases. Overlap mostly arises from two different modes of demarcation. The first one refers to general (cross-sectoral) domains (for example, ACLVB/CGSLB of Belgium, SEVETTYK-PEO of Cyprus, UNSA of France and GWU of Malta). The second mode relates to domains covering part of a broader or the entire services sector (such as OIYK-SEK of Cyprus, Serviceforbundet of Denmark, CFDT-Services and CFTC-CSFV of France, FILCAMS and FISASCAT of Italy, STAD and SITESE of Portugal, and Services Area-USO of Spain).

Table 7: Domain coverage and membership of trade unions in cleaning, 2009/2010/2011

Country	Trade Union	Type of membership	Domain coverage[a]	Membership				
				Members	Members active	Members sector	Members sector active	Female membership (%) of total membership
AT	Vida	voluntary	SO	n.a.	155,000	n.a.	13,000	33
AT	GPA-djp	voluntary	SO	n.a.	180,000	n.a.	n.a.	44
AT	GBH	voluntary	SO	n.a.	180,000	n.a.	n.a.	n.a.
AT	GdG-KMSfB	voluntary	SO	n.a.	119,000	n.a.	n.a.	49
BE	AC-CG*	voluntary	SO	370,000	n.a.	n.a.	15,000	n.a.
BE	CCVD-CCAS*	voluntary	SO	n.a.	165,000	n.a.	15,000	n.a.
BE	ACLVB-CGSLB*	voluntary	O	260,000	n.a.	n.a.	n.a.	n.a.
BG	FITUSGO*	voluntary	SO	n.a.	n.a.	167	n.a.	57
BG	ITUFECCTCS*	voluntary	SO	n.a.	n.a.	345	n.a.	58
BG	PSU*	voluntary	SO	n.a.	n.a.	120	n.a.	56
CY	OIYK-SEK*	voluntary	O	n.a.	7,568	n.a.	58	n.a.
CY	SEVETTYK-PEO*	voluntary	O	n.a.	13,885	n.a.	45	n.a.
CZ	no							
DE	IG BAU*	voluntary	SO	314,568	n.a.	58,691	53,765	21
DE	Ver.di*	voluntary	SO	2,094,455	n.a.	n.a.	1,4123	51
DE	ZDS	voluntary	S	5,071	n.a.	5,071	n.a.	n.a.
DK	3F*	voluntary	O	n.a.	30,1172	n.a.	n.a.	35
DK	Serviceforbundet*	voluntary	O	n.a.	17,500	n.a.	3,000	n.a.
EE	no							
EL	OIYE*	voluntary	SO	44,800	44,800	5,200	5,200	n.a.
EL	POE OTA*	voluntary	SO	70,000	70,000	5,000	5,000	n.a.
ES	FES-UGT*	voluntary	SO	136,000	n.a.	30,000	n.a.	n.a.
ES	FSP-UGT*	voluntary	SO	n.a.	n.a.	n.a.	n.a.	n.a.
ES	AADD-CCOO*	voluntary	O	87,636	n.a.	33,682	n.a.	54
ES	Services Area-USO*	voluntary	O	n.a.	n.a.	n.a.	n.a.	n.a.

ES	ELA-ZERBITZUAK*	voluntary	SO	n.a.	n.a.	n.a.	n.a.	n.a.
ES	ESK*	voluntary	SO	n.a.	n.a.	n.a.	n.a.	n.a.
ES	LAB*	voluntary	SO	n.a.	n.a.	n.a.	n.a.	n.a.
FI	PAM*	voluntary	SO	221,000	154,000	19,000	17,000	80
FI	Trade Union Pro*	voluntary	SO	130,000	110,000	850	800	55
FR	CGT Ports et Docks*	voluntary	SO	n.a.	n.a.	10,000	10,000	n.a.
FR	FO-FEETS*	voluntary	O	n.a.	n.a.	n.a.	n.a.	n.a.
FR	CFDT Services*	voluntary	O	70,000	70,000	5,000	n.a.	n.a.
FR	CSFV-CFTC*	voluntary	O	23,000	23,000	n.a.	n.a.	n.a.
FR	FNECS*	voluntary	SO	3,000	3,000	n.a.	n.a.	n.a.
FR	UNSA*	voluntary	O	n.a.	n.a.	n.a.	n.a.	n.a.
HU	HVDSZ 2000	voluntary	SO	10,000	10,000	n.a.	n.a.	n.a.
IE	SIPTU	voluntary	SO	217,000	n.a.	5,500	n.a.	37
IT	FILCAMS*	voluntary	O	372,268	372,268	85,000	85,000	58
IT	FISASCAT*	voluntary	O	233,887	233,887	n.a.	n.a.	60
IT	UIL Trasporti*	voluntary	O	107,846	107,846	n.a.	n.a.	20
IT	UGL Igiene Ambientale*	voluntary	O	n.a.	n.a.	n.a.	n.a.	n.a.
IT	FESICA*	voluntary	O	375,000	375,000	9,765	9,765	40
IT	FISALS*	voluntary	SO	7,500	6,500	n.a.	n.a.	55
IT	USAE*	voluntary	O	n.a.	n.a.	n.a.	n.a.	n.a.
IT	USSPI*	voluntary	O	n.a.	n.a.	n.a.	n.a.	n.a.
IT	CEL*	voluntary	O	n.a.	n.a.	n.a.	n.a.	n.a.
LT	no							
LU	LCBG-Commerce*	voluntary	SO	n.a.	n.a.	935	935	n.a.
LU	OGBL-SSPN*	voluntary	S	n.a.	n.a.	4,000	4,000	n.a.
LV	no							
MT	GWU	voluntary	O	41,575	34,543	100	100	18
NL	FNV Bondgenoten*	voluntary	O	460,000	460,000	15,000	15,000	80
NL	CNV Vakmensen*	voluntary	O	140,000	140,000	2,437	2,437	70

PL	MOZ Solidarność POCS*	voluntary	O	n.a.	5,000	800	800	30
PT	STAD*	voluntary	O	7,900	7,900	5,300	4,800	75
PT	SITESE*	voluntary	O	10,000	8,000	100	80	68
RO	no							
SE	Kommunal*	voluntary	SO	500,000	465,000	20,000	20,000	81
SE	Fastighets*	voluntary	SO	33,500	30,500	12,000	10,800	50
SE	SEKO*	voluntary	SO	130,000	130,000	250	250	30
SE	Unionen*	voluntary	SO	500,000	465,000	1,500	1,500	65
SE	Ledarna*	voluntary	SO	84,800	83,600	1,200	1,200	24
SI	SODS	voluntary	O	8,000	8,000	300	300	30
SK	no							
UK	GMB*	voluntary	SO	602,212	n.a.	n.a.	n.a.	48
UK	Unison*	voluntary	SO	1,374,500	n.a.	n.a.	n.a.	69
UK	Unite*	voluntary	SO	1,474,564	n.a.	n.a.	11,000	24
UK	PCS*	voluntary	SO	292,091	n.a.	n.a.	n.a.	60
UK	RMT*	voluntary	SO	79,499	n.a.	n.a.	n.a.	11

** = Domain overlap with other sector-related trade unions.*

a = domain coverage: C = Congruence; O = Overlap; SO = Sectional Overlap; S = Sectionalism

n.a. = not available

Table 8: Density, collective bargaining, consultation and affiliations of trade unions in cleaning, 2009/10/11

Country	**Trade union**	**Union densities (%)**						**Collective bargaining**	**Consult-ation**	***Nati* a Euro affilia**
		Domain total	**Domain active**	**Sector**	**Sector active**	**Sectoral domain**	**Sectoral domain active**			
AT	Vida	n.a.	44	n.a.	25	n.a.	37	yes	yes	*ÖGB*; Europ EFFA ETF,
AT	GPA-djp	n.a.	16	n.a.	n.a.	n.a.	n.a.	yes	yes	*ÖGB*; Europ EFFA EMC EPSU
AT	GBH	n.a.	16	n.a.	n.a.	n.a.	n.a.	yes	yes	*ÖGB*; EFBW

AT	GdG-KMSfB	n.a.	68	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*ÖGB*; Europ EFJ, E Eurofe EPSU
BE	AC-CG*	n.a.	51–75	n.a.	30–40	n.a.	35-45	yes	yes	*ABVV* *FGTB* Europ
BE	CCVD-CCAS*	n.a.	51–75	n.a.	30–40	n.a.	35-45	yes	yes	*ACV-* UNI E
BE	ACLVB-CGSLB*	n.a.	9–11	n.a.	0–9	n.a.	0-9	no	yes	UNI E
BG	FITUSGO*	n.a.	n.a.	n.a.	1	n.a.	0-9	yes	no	*CITU* EPSU
BG	ITUFECCTCS*	n.a.	n.a.	1	n.a.	n.a.	n.a.	yes	no	*CITU* UNI E
BG	PSU*	n.a.	n.a.	0	n.a.	n.a.	n.a.	yes	no	*CL* *Podkr* EPSU
CY	OIYK-SEK*	n.a.	n.a.	n.a.	4	n.a.	4	yes	no	*SEK*; Europ
CY	SEVETTYK-PEO*	n.a.	n.a.	n.a.	3	n.a.	3	yes	no	*PEO*
CZ	none									
DE	IG BAU*	n.a.	n.a.	14	13	n.a.	n.a.	yes	yes	*DGB*; Europ
DE	Ver.di*	n.a.	n.a.	n.a.	3	25	n.a.	yes	yes	*DGB*; Europ EPSU
DE	ZDS	n.a.	n.a.	1	n.a.	n.a.	n.a.	yes	yes	
DK	3F*	n.a.	75	n.a.	26–50	n.a.	26–50	yes	yes	*LO*; U Europ EFFA EMCE
DK	Serviceforbundet*	n.a.	n.a.	n.a.	0–9	n.a.	0–9	yes	yes	*LO*; U Europ
EE	none									
ES	FES-UGT*	n.a.	n.a.	7	n.a.	n.a.	n.a.	yes	yes	*UGT*; Europ
ES	FSP-UGT*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	*UGT*;
ES	AADD-CCOO*	n.a.	n.a.	8	n.a.	n.a.	n.a.	yes	yes	*CCOO*

										UNI Europ EPSU
ES	Services Area-USO*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	no	*USO*
ES	ELA-ZERBITZUAK*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	no	*ELA*
ES	ESK*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	no	
ES	LAB*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	no	
FI	PAM*	n.a.	n.a.	57	51	n.a.	n.a.	yes	yes	*SAK*; Europ
FI	Trade Union Pro*	n.a.	n.a.	3	2	n.a.	n.a.	yes	yes	*STTK* Europ EFFA EMF, EFBW
FR	CGT Ports et Docks*	n.a.	n.a.	2	2	n.a.	n.a.	yes	no	*CGT*
FR	FO-FEETS*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*FO*; U Europ ETF,
FR	CFDT Services*	n.a.	n.a.	1	n.a.	n.a.	n.a.	yes	n.a.	*CFDT*
FR	CSFV-CFTC*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*CFTC*
FR	FNECS*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*CFE-*
FR	UNSA*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	
GR	OIYE*	n.a.	n.a.	29	29	n.a.	n.a.	yes	yes	*GSEE* Europ
GR	POE OTA*	n.a.	n.a.	28	28	n.a.	n.a.	yes	no	*ADED*
HU	HVDSZ 2000	43	43	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*MSZO* EPSU
IE	SIPTU	n.a.	n.a.	22	n.a.	n.a.	n.a.	yes	yes	*ICTU* Europ
IT	FILCAMS*	23	23	22	22	22	22	yes	yes	*CGIL*, Europ EFFA ETLC
IT	FISASCAT*	14	14	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*CISL*; Europ EFFA
IT	UIL Trasporti*	9	9	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*UIL*; I

IT	UGL Igiene Ambientale*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*UGL*
IT	FESICA*	n.a.	n.a.	2	2	n.a.	n.a.	yes	yes	*CONF* CESI
IT	FISALS*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*CONF* CESI
IT	USAE*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	
IT	USSPI*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	
IT	CEL*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	
LT	none									
LU	LCBG-Commerce*	11	11	13	13	n.a.	n.a.	yes	yes	*LCGE* EFFA
LU	OGBL-SSPN*	n.a.	26–50	54	54	n.a.	n.a.	yes	yes	*OGBL* Europ
LV	none									
MT	GWU	25	21	20	20	20	20	no	no	UNI Europ EFFA EFBW EMF, EPSU EURO WEA, Euroc
NL	FNV Bondgenoten*	n.a.	n.a.	11	11	11	11	yes	yes	*FNV*; Europ
NL	CNV Vakmensen*	n.a.	n.a.	2	2	2	2	yes	yes	*CNV*; Europ
PL	MOZ Solidarność POCS*	n.a.	0–9	n.a.	0–9	n.a.	0–9	yes	yes	*NSZZ* *Solida* UNI E
PT	STAD*	7	7	9	8	9	8	yes	no	*CGTP* Europ
PT	SITESE*	1–4	1–3	0	0	0	0	yes	n.a.	*UGT*; Europ
RO	none									
SE	Kommunal*	71	51–75	26–50	26–50	86	76–90	yes	yes	*LO*; E ETF, EFFA
SE	Fastighets*	71	26–50	10–25	10–25	36	26–50	yes	yes	*LO*; U Europ

SE	SEKO*	76	76–90	0	0	91–100	91–100	yes	no	*LO*; U Europ EPSU EFBW
SE	Unionen*	80–83	51–75	2	2	51–75	51–75	yes	yes	*TCO*; EFBW ETF
SE	Ledarna*	17	10–25	2	2	10–25	10–25	yes	yes	CEC
SI	SODS	3	3	5	5	5	5	yes	no	*ZSSS*
SK	none									
UK	GMB*	n.a.	n.a.	n.a.	0–9	n.a.	n.a.	yes	n.a.	*TUC*; Europ EFBW EFFA EPSU EMF, EMCI ETF
UK	Unison*	n.a.	n.a.	n.a.	0–9	n.a.	n.a.	yes	n.a.	*TUC*; Europ EPSU
UK	Unite*	n.a.	n.a.	n.a.	0–9	n.a.	0–9	yes	no	*TUC*; Europ EFBW EFFA EPSU EMF, EMCI ETF
UK	PCS*	n.a.	n.a.	n.a.	0–9	n.a.	n.a.	yes	n.a.	*TUC*; Europ EPSU Euroc
UK	RMT*	n.a.	n.a.	n.a.	0–9	n.a.	n.a.	yes	n.a.	*TUC*;

** = Domain overlap with other sector-related trade unions*

*** = National affiliations put in italics; for the national level, only cross-sectoral (i.e. peak-level) associations are listed; for the European level sectoral associations only; affiliation put in parenthesis means indirect affiliation via higher-order unit.*

n.a. = not available

Note: The figures have been rounded in all cases. Densities reported as 0% hence refer to a figure lower than 0.5%.

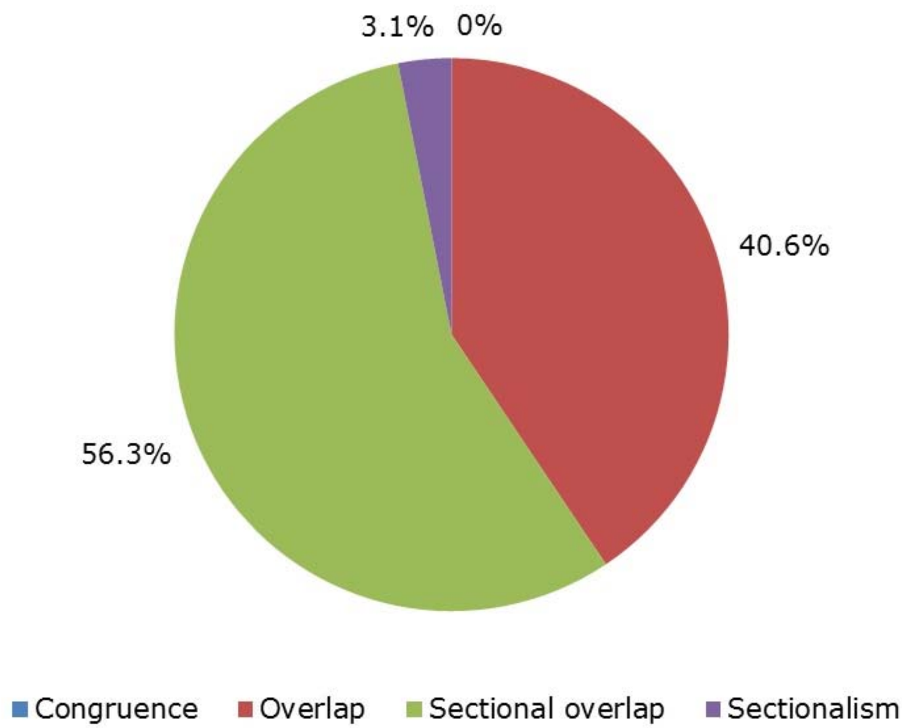
Sectional overlaps prevail in the sector and occur in exactly 56.3% of cases. This mode usually arises from domain demarcations that focus on certain categories of employees which are then organised across several or all sectors. Moreover, this mode can be found with trade unions representing employees in segments of the economy across the cleaning sector. Employee categories are specified by various parameters. These can be distinct occupations, such as:

- managers and professionals (FNECS of France and Ledarna of Sweden);
- public service staff and municipal employees (GdG-KMSfB of Austria, ADEDY of Greece, HVDSZ 2000 of Hungary, FSP-UGT of Spain and Kommunal of Sweden);
- transport services workers, (vida of Austria, CGT-Ports et Docks of France, UIL Trasporti of Italy and RMT of the UK).
- They can also be employment status:
- white-collar workers (GPA-djp of Austria, Finland's STTK and Sweden's Unionen);
- blue-collar workers (AC-CG of Belgium).

They can also be defined by geographic region, for example ELA-ZERBITZUAK of Spain). Other trade unions' domains cover part of the cleaning sector in terms of business activities (rather than in terms of employee categories) in addition to parts of at least one other sector. Such domains may, for instance, cover local governments, public utilities and specific parts of the broad private and/or public service sector (also including part of the cleaning sector).

Finally, sectionalism is virtually non-existent within the sector, with only two trade unions (3.1%) recording this mode of domain demarcation. Sectionalism ensues from the existence of sector-specific trade unions whose domain is – in terms of business activities – confined to one specific segment within the sector, such as chimney sweeping in the case of Germany's ZDS and private cleaning services in the case of Luxembourg's OGBL-SSPN. An explanation for the very low incidence of sector-related trade unions with a membership domain focussing specifically either on the cleaning sector or just on a segment of it may be found in the fact that cleaning workers have proved too weak to gather in small, highly specialised organisations that would be able to represent their particular interest. Rather, more general trade unions representing service employees usually tend to include cleaning workers within their domain, often without paying specific attention to this weak and vulnerable group of employees.

Figure 4: Distribution of membership domain patterns of sector-related trade unions with regard to the cleaning sector (N=64)



Source: EIRO country reports

As the domains of the trade unions often overlap with the demarcation of the sector, so do their sectoral domains with one another in the case of those countries with a pluralist trade union 'landscape' in the cleaning sector. Tables 7 and 8 also show these inter-union sectoral domain overlaps. Inter-union overlaps of domains are endemic. In all countries but one (Austria) with more than one sector-related trade union, the sectoral domain of any of them overlaps with the sectoral domain of at least another one. Depending on the scale of mutual overlap, this results in competition for members. Noticeable inter-union competition within the sector is recorded in six countries, namely Belgium, France, Italy, Luxembourg, Poland and Portugal.

Looking at the trade union membership data, it becomes apparent that female employees comprise the majority group in only about half of the unions for which membership figures by gender are available. This finding starkly contrasts with the fact that the sector's employment is clearly dominated by female employees (see Tables 4 and 5). In those sector-related trade unions, where male membership prevails, this predominance – due to the fact that the domain of all these unions (sectionalistically) overlaps with regard to the sector – is likely to originate in areas of their domains other than the cleaning activity sector.

Membership of the sector-related trade unions is voluntary in all 21 Member States that record at least one sector-related trade union. The absolute numbers of trade union members differ widely, ranging from about 2.1 million (in the case of Germany's ver.di) to around 3,000 (in the case of France's FNECS). This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the ability to attract members. Therefore, density is the measure of membership strength that is more appropriate for a comparative analysis. In this context, it should be noted that density figures in this section refer to net ratios, which means that they are calculated on the basis of active employees rather than including union members who are not in work. This is mainly because net union densities are more informative than gross densities, since they better reflect unionisation trends among the active workforce (only the active workforce is capable of taking industrial action) than the latter.

However, there are some methodological factors to be aware of when calculating and comparing associational densities. Social partner organisations frequently tend to be hesitant in providing these density figures as they reveal an interest organisation's relative strength to its counterpart on the employer/employee side or the state. Therefore, the density data set for this study is far from complete and has to be treated with cautious. Moreover, one cannot rule out the possibility that a trade union or employer organisation might give inflated figures in order to exaggerate their organisational strength.

Domain density is over 50% in the case of around 29% of the trade unions which document figures on density. For some unions, densities cannot be indicated by discrete figures but have to be estimated by a range (where the density is estimated to lie between a value 'x' and a value 'y'). If this range overlaps with two or more intervals used for describing the distribution of trade union densities, the lowest value of this range (for example, 'x' rather than 'y') is used, in order to clearly assign this estimate to one of the intervals. This method applies to the entire section examining union densities, and also to the corresponding section dealing with employer organisations (see below).

Only about 8% of the unions gather 70% or more of the active employees covered by their domain. About 38% of the trade unions for which data are available organise fewer than 15% of the active employees within their domain; and one-third of the trade unions record a density of 15%–50% of their potential active members. These results indicate that overall domain density of the sector-related trade unions tends to be rather low. However, it should also be noted that for clearly less than 40% of the 64 sector-related trade unions domain density data are recorded. Therefore these figures should be treated very cautiously, as indicated earlier.

Comparing the trade unions' overall domain densities with their sector density figures, provides an indication of whether the cleaning sector tends to be a stronghold of those sector-related trade unions which also organise employees in sectors other than the cleaning industry. When looking at sector density (again referring only to active members), it is important to differentiate between the trade unions' *sectoral* density on the one hand and their *sectoral domain* density on the other. Whereas the former measures the ratio of the total number of members of a trade union in the sector to the number of employees in the sector (as demarcated by the NACE classification), the latter indicates the total number of members of a trade union in the sector in relation to the number of employees who work in that part of the sector as covered by the union domain (see Tables 3 and 4). This means that the *sectoral domain* density must be higher than the *sectoral* density if a trade union organises only a particular part of the sector – that is where the trade union's membership domain is either sectionalist or sectionalistically overlapping relative to the sector.

When taking the trade unions' *sectoral domain* density into account, the trade unions' density in the cleaning sector tends to be lower compared with the density ratio referring to their domain on aggregate. Sectoral domain density is over 50% in the case of about 13% of the trade unions for which data are available. About 9% of the unions attract 70% or more of the active employees covered by their sectoral domain. More than half of the trade unions (around 57%) record a sectoral domain density lower than 15%, and about 30% record a sectoral domain density of in between 15% and 50%.

In this context it should be noted that a more appropriate measure of the relationship between the trade unions' overall domain density and their sectoral domain density would also relate to the union membership domain patterns (see Figure 4). For unions with a membership domain congruent or sectionalist with regard to the sector, domain density and sectoral domain density must be equal. This means that only for unions with a domain which overlaps or sectionalistically overlaps with regard to the cleaning sector it is reasonable to compare domain density and sectoral domain density when assessing whether the sector under examination is a stronghold of the relevant unions or not. Such a measure adjusted for domain patterns corroborates and accentuates the above finding, according to which the trade unions' density in the cleaning sector tends to be lower compared with their overall domain density. Taking another very tentative measure –the median – into account reveals the same result. The median of the trade unions' overall domain densities (22%) clearly exceeds that of their sectoral domain densities (10%), when taking all trade unions with available data into account irrespective of their membership domain patterns relative to the sector.

As for those few trade unions for which figures for both sectoral domain density and domain density on aggregate are recorded, the same tendency can be revealed. There are more trade unions with an aggregate density higher compared with sectoral domain density as unions showing the reverse relationship between the two densities. This result confirms the above finding according to which the trade unions' sectoral densities tend to fall short of their low overall domain densities. However, again, it is important to note that for most trade unions no density data are available, and there are only very few unions for which data on both densities are recorded.

Despite these shortcomings in relation to the data set, one can nevertheless infer from the figures that density rates in the sector tend to be rather low. This is tentatively indicated by a median of the trade unions' sectoral domain densities that no more than 10%. Although it is reasonable to assume that this measure may be biased (for most countries trade union density figures are almost completely lacking), the finding of low overall density rates of the sector-related trade unions is supported by anecdotal evidence provided by several country reports. Low densities within the sector are unsurprising, given the:

- frequently dispersed nature of employment;
- low average skill levels;
- low pay;
- large numbers of non-standard, part-time, female and migrant workers;
- high labour turnover.

All these factors – at least in the context of most European countries – tend to make union membership less likely.

Employer organisations

Tables 9 and 10 present the membership data for the employer organisations in the cleaning sector. As in the trade union side, not all sector-related employer organisations are documented in the 27 countries under consideration. In Bulgaria, Cyprus, Estonia, Latvia, Lithuania, Malta and Romania, no sector-related employer organisation matching at least one of the two criteria for inclusion (see above) has been identified, while in the remaining 20 Member States at least one sector-related employer organisation could be found. In six of the latter group of countries, there is at least one employer/ business organisation which is not a party to collective bargaining (see Table 10). These associations are classified as social partner organisations in this report only due to their affiliation to the sector-related European-level employer organisation participating in the European sectoral social dialogue (EFCI). In 14 of the 20 countries which record one or more sector-related employer/ business organisations at least one of them is engaged in sector-related collective bargaining. Generally, business interest organisations may also deal with interests other than those related to industrial relations. Organisations specialised in matters other than industrial relations are commonly defined as 'trade associations' (**TN0311101S**). Such sector-related trade associations also exist in the cleaning sector. In terms of their *national* scope of activities, all the associations which are not involved in collective bargaining according to Table 9 either primarily or exclusively act as trade associations in their country. Put very simply, trade associations' main reference is the 'product' market (where business has interests in relation to customers and suppliers) rather than the labour market. It is only the conceptual decision to include all associational affiliates to EFCI, regardless of whether they have a role in national bargaining, which gives them the status of a social partner organisation within the framework of this study.

Table 9: Domain coverage and membership of employer/business organisations in cleaning, 2009/2010/2011

Country	Employer Organisation	Domain coverage**	Membership				
			Type	Companies	Companies in sector	Employees	Employees in sector
AT	BIRB	SO	compulsory	1,192	665	4,086	2,825
AT	FVAA	SO	compulsory	3,317[a]	1,289[a]	33,000[a]	5,400[a]
AT	BICGDFG	SO	compulsory	8,250	1250	40,000	33,000
BE	ABSU-UGBN	C	voluntary	185	185	34,875	34,875
BG	none						
CY	none						
CZ	CAC	O	voluntary	63	n.a.	70,000	n.a.
DE	BIV	S	voluntary	2,540	2,540	777,556	n.a.
DE	VKA	SO	voluntary	n.a.	n.a.	~2,000,000	n.a.
DE	ZIV	S	voluntary	7,630	7,630	n.a.	n.a.
DK	SBA*	SO	voluntary	170	n.a.	n.a.	n.a.
DK	RSBA*	S	voluntary	n.a.	n.a.	n.a.	n.a.
EE	none						
EL	PEOK	S	voluntary	2,500[b]	2,500[b]	45,000[b]	45,000[b]
ES	AFELIN*	S	voluntary	1,000	1,000	100,000	100,000
ES	ASPEL*	S	voluntary	16	16	130,803	130,803
ES	ASELIP	SO	voluntary	36	36	110,000	n.a.
FI	Kiinteistöpalvelut ry	SO	voluntary	400	300	40,000	25,000
FR	FEP	S	voluntary	2,000	2,000	261,600	261,600
HU	MATISZ	S	voluntary	62	62	50,000	n.a.
IE	ICCA*	S	voluntary	30	30	18,000	18,000

IE	IBEC*	O	voluntary	n.a.	n.a.	n.a.	n.a.
IT	FISE*	O	voluntary	821	250	95,434	90,000
IT	ANCST-Legacoop*	SO	voluntary	2,177	338	185,015	68,626
IT	FNIP*	C	voluntary	1,500	1,500	95,000	95,000
IT	FeS*	SO	voluntary	5,083[c]	n.a.	183,962[c]	n.a.
IT	Unionservizi*	SO	voluntary	n.a.	n.a.	n.a.	n.a.
IT	PSL-AGCI*	SO	voluntary	2,567[d]	n.a.	8,981[d]	n.a.
IT	UNCI*	SO	voluntary	7,825[e]	n.a.	129,301[e]	n.a.
IT	ANIP*	S	voluntary	n.a.	n.a.	n.a.	n.a.
IT	USC*	SO	voluntary	3,936	2,360	11,700	7,000
IT	Casartigiani*	SO	voluntary	84,663[c]	n.a.	35,587[c]	n.a.
IT	CLAAI*	SO	voluntary	115,976	n.a.	266,744	n.a.
IT	FENAPI*	SO	voluntary	n.a.	n.a.	n.a.	n.a.
IT	CAPIMED*	SO	voluntary	58,000	1,200	220,000	40,000
LT	none						
LU	FLEN	S	voluntary	49	49	6,501	6,501
LV	none						
MT	none						
NL	OSB	C	voluntary	750	750	110,000	110,000
PL	PIGC	SO	voluntary	100	80	80,000	n.a.
PT	APFS	O	voluntary	50	n.a.	n.a.	n.a.
RO	none						
SE	Almega SA*	SO	voluntary	10,000	786	500,000	32,696
SE	KFO*	SO	voluntary	3,643	15	87,264	2,000
SE	SALAR	SO	voluntary	320	320	920,000	12,385
SE	Fastigo*	SO	voluntary	2,000	125	20,000	1,100
SI	OZS - Section Building Cleaners*	C	compulsory	1,120	1,120	7,217	7,217
SI	ZDOPS*	O	voluntary	2,700	n.a.	22,000	n.a.
SI	PTZ*	O	voluntary	3,389	36	n.a.	n.a.
SK	SAC	O	voluntary	38	30	6,000	5,500
UK	CSSA	SO	voluntary	100	90	300,000	275,000[b]

** = Domain overlap with other sector-related employer/ business organisations*

*** = domain coverage: C = Congruence; O = Overlap; SO = Sectional Overlap; S = Sectionalism*

[a] = figure refers to 2006

[b] = figure appears to be inflated

[c] = figure refers to 2007

[d] = figure refers to 2008

[e] = figure refers to 2004

n.a. = not available

Table 10: Density, collective bargaining, consultation and affiliations of employer/ business organisations in cleaning, 2009/2010/2011

Country	Employer organisation	Density (%)						Collective bargaining	Consultation	*National* and European affiliations**
		Companies			Employees					
		Domain	Sector	Sectoral domain	Domain	Sector	Sectoral domain			
AT	BIRB	100	25	100	100	5	100	yes	yes	*WKO*; ESCHFOE
AT	FVAA	100	48[a]	100	100	10[a]	100	yes	yes	*WKO*
AT	BICGDFG	100	47	100	100	62	100	yes	yes	*WKO*; EFCI, CEPA
BE	ABSU-UGBN	10	10	10	76	76	76	yes	yes	*VBO-FEB*; EFCI
BG	none									
CY	none									
CZ	CAC	0–9	0–9	0–9	n.a.	n.a.	n.a.	no	yes	*HK CR*; EFCI
DE	BIV	n.a.	7	n.a.	87	n.a.	87	yes	yes	*BDA, ZDH, UDH*; EFCI
DE	VKA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	CEEP
DE	ZIV	n.a.	21	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*ZDH, UDH*; ESCHFOE

DK	SBA*	50	n.a.	n.a.	75	n.a.	n.a.	yes	yes	*DI*; EFCI
DK	RSBA*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	*Dansk Erhverv*
EE	no									
EL	PEOK	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	no	
ES	AFELIN*	n.a.	4	n.a.	n.a.	24	n.a.	yes	yes	
ES	ASPEL*	n.a.	0	n.a.	n.a.	32	n.a.	yes	yes	*CEOE*; EFCI
ES	ASELIP	n.a.	0	n.a.	n.a.	n.a.	n.a.	yes	no	*CEOE*
FI	Kiinteistöpalvelut ry	n.a.	7	n.a.	n.a.	~75	n.a.	yes	yes	*EK*; EFCI
FR	FEP	11	10	n.a.	n.a.	60	n.a.	yes	yes	*MEDEF, CGPME*; EFCI
HU	MATISZ	1–2	1	1	50–100	50–71	50–71	no	yes	*VOSZ*; EFCI
IE	ICCA*	n.a.	n.a.	n.a.	75	72	75	yes	yes	*IBEC*
IE	IBEC*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	Eurocommerce
IT	FISE*	n.a.	1	1	n.a.	23	23	yes	yes	*Confindustria*; EFCI
IT	ANCST - Legacoop*	9	1	n.a.	17	17	n.a.	yes	yes	*Legacoop*; EFCI, CECOP
IT	FNIP*	5	5	5	24	24	24	yes	n.a.	*Confcommercio*
IT	FeS*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*Confcooperative*; CECOP
IT	Unionservizi*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*CONFAPI*
IT	PSL-AGCI*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*AGCI*
IT	UNCI*	9	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	
IT	ANIP*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	*Confartigianato*
IT	USC*	18	8	12	18	2	12	yes	yes	*CNA*

IT	Casartigiani*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	
IT	CLAAI*	8	n.a.	n.a.	8	n.a.	n.a.	yes	n.a.	
IT	FENAPI*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	
IT	CAPIMED*	12	4	n.a.	22	10	n.a.	yes	yes	
LT	no									
LU	FLEN	n.a.	40	n.a.	n.a.	87	n.a.	yes	yes	*FDA*; EFCI
LV	none									
MT	none									
NL	OSB	10	10	10	78	78	78	yes	yes	*VNO-NCW*; EFCI
PL	PIGC	0–9	0–9	0–9	10–25	10–25	10–25	no	yes	*(PKPP Lewiatan)*; EFCI
PT	APFS	3	3	3	10–25	10–25	10–25	yes	no	*CCP*; EFCI
RO	none									
SE	Almega SA*	n.a.	10–25	26–50	n.a.	26–50	76–90	yes	yes	*Svenskt Näringsliv*; EFCI
SE	KFO*	n.a.	0	0–9	n.a.	0–9	26–50	yes	no	European Cooperatives
SE	SALAR	91–100	10–25	91–100	91–100	10–25	91–100	yes	yes	CEEP, CEMR, CLRAE, UCLG
SE	Fastigo*	26–50	0–9	n.a.	26–50	0–9	n.a.	yes	yes	CEEP
SI	OZS - Section Building Cleaners*	90	90	90	99	99	99	no	no	*OZS*; EFCI
SI	ZDOPS	2	n.a.	n.a.	8	n.a.	n.a.	yes	no	

	*									
SI	PTZ*	2	3	3	n.a.	n.a.	n.a.	yes	no	*GZS*
SK	SAC	0–9	4	4	n.a.	41	41	no	no	*RUZ SR*; EFCI[b]
UK	CSSA	n.a.	1	1	n.a.	60	60	no	yes	*BCC, Asset Skills*; EFCI

** = Domain overlap with other sector-related employer/ business organisations*

*** = National affiliations put in italics; for the national level, only cross-sectoral (i.e. peak-level) associations are listed; for the European level sectoral associations only; affiliation put in parenthesis means indirect affiliation via higher-order unit.*

[a] = figure refers to 2006

[b] = EFCI membership until the end of 2010

n.a. = not available

Note: The figures have been rounded in all cases. Densities reported as 0% hence refer to a figure lower than 0.5%.

Of the 45 employer/business organisations listed in Tables 9 and 10, six organisations belong to this group. In 12 of the 20 countries where sector-related employer/ business organisations exist, only one single organisation (in the meaning of a social partner organisation as defined before) has been established. Thus, unlike the situation on the trade union side, where pluralist associational systems clearly prevail, the employer side is dominated by monopolistic associational systems. This is in line with the fact that the number of sector-related employer/business organisations across the Member States somewhat falls short of the number of sector-related trade unions.

The employer/business organisations' membership domains tend to be significantly narrower than those of the trade unions, although, as is the case of the trade unions, membership domains sectionalistically overlapping the sector also prevail among the employer organisations. Exactly 15.6% and 51.1%, respectively, of the associations for which related information is available, rest on overlapping and sectionalistically overlapping domains relative to the sector. Only one of these organisations, namely Ireland's IBEC, has a domain which is cross-sectoral. Alternatively, most cases of domain overlaps (in the case of organisations with domains either overlapping or sectionalistically overlapping relative to the sector) are caused by:

- coverage of (part of) the broader services sector (as is the case of SBA of Denmark, FISE, FeS and Unionservizi of Italy, and Almega of Sweden);
- coverage of (part of) the broader cleaning and facilities/property management sector, as is the case of CAC of the Czech Republic, Kiinteistöpalvelut ry of Finland, PIGC of Poland, APFS of Portugal and Fastigo of Sweden.

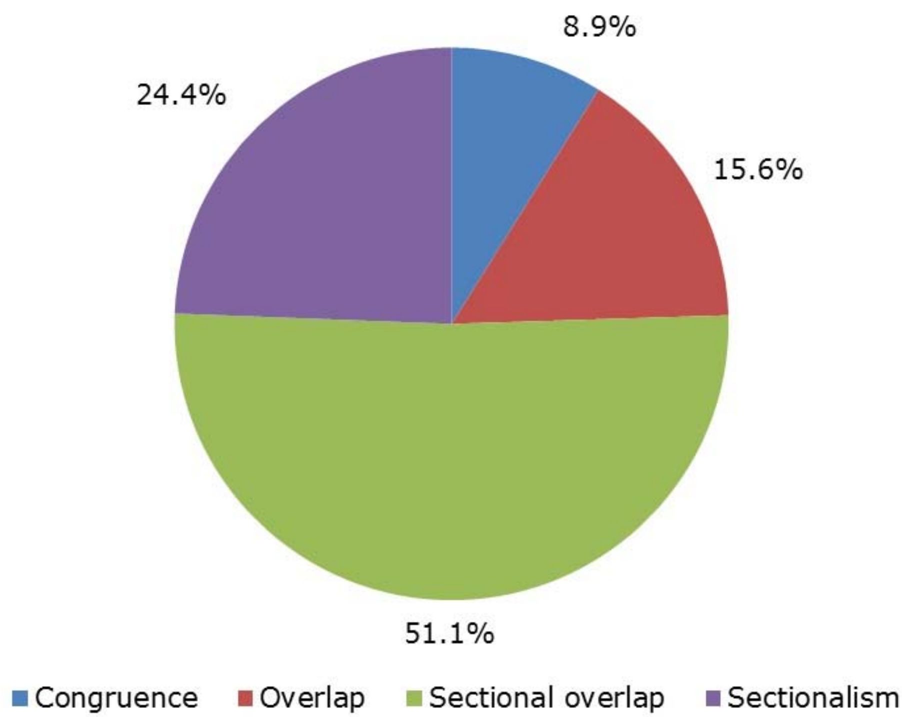
There are also several employer/business organisations whose domain is focused on a very particular segment of the economy transversally crossing the cleaning sector. Such organisations with a domain sectionalistically overlapping with regard to the sector may cover the cooperative sector (such as ANCST-Legacoop, PSL-AGCI and UNCI of Italy and KFO of Sweden), the local/regional authorities (such as Germany's VKA, Italy's USC, Spain's ASELIP and Sweden's SALAR) and the SMEs and a craft segment of the economy (as is the case of Italy's CLAAI, FENAPI and CAPIMED and Slovenia's PTZ and ZDOPS).

Sectionalism is caused by domain demarcations that focus on a particular subsegment of the cleaning sector, such as building cleaning or chimney sweeping. Overall, 24.4% of the associations have a membership domain that is sectionalist relative to the cleaning sector.

Finally, 8.9% of the associations show a membership domain that is more or less congruent with the sector definition. This means that the domain of these organisations largely focuses on the cleaning activities sector as defined for the purpose of this study.

In several countries, the sectoral employers have managed to establish specific employer organisations as a particular voice of the cleaning sector's companies, distinct from other service businesses. This enables these associations to perform a focused interest representation on behalf of their members, even though their membership strength may widely vary from one organisation to the other. This finding contrasts with the sector's associational 'landscape' on the trade union side, where associational representation of labour interests tends to be more dispersed and less focused. Such an associational configuration tends to favour the (bargaining) power of organised business and to weaken the labour side.

Figure 5: Distribution of membership domain patterns of sector-related employer organisations with regard to the cleaning sector (N=45)



Source: EIRO country reports

All of the three existing sector-related employer organisations of Austria (BIRB, FVAA and BICGDFG) as well as one of Slovenia (OZS – Section Building Cleaners) can rely on obligatory membership. This is due to their public-law status as chamber units.

In those countries with a pluralist structure in relation to employer organisations, these associations have usually – with the exception of Slovenia's OZS-Section of Building Cleaners, PTZ and ZDOPS – managed to arrive at non-competing relationships. Their activities are complementary to each other as a result of inter-associational differentiation by either membership demarcation (as is the case of Austria and partially Italy) or functions and tasks (as is the case of Ireland, partially Italy, Slovenia, Spain and Sweden).

As the figures on membership totals (Table 9) and density (Table 10) indicate, membership strength in terms of both companies and employees widely varies with regard to both the membership domain in general and the sector. Again, as outlined earlier in the context of the trade unions, density figures are more informative in terms of membership strength than absolute membership numbers. Generally, both the domain and the sectoral domain densities of companies tend to be lower than the corresponding densities in terms of employees. This indicates a higher propensity of the larger companies to associate, as compared to their smaller counterparts. In general, overall densities of the employer/ business organisations in the sector tend to be higher compared to trade union densities (see above) although they are not particularly high. Of the associations for which relevant data are available, 26.3% and 63.2%, respectively, register a sectoral domain density higher than 50% in terms of companies and employees. These findings suggest that the employers in the cleaning industry do not tend to be better organised than their counterparts in most other services sectors, at least in terms of companies. This is despite the fact that a number of employer organisations have tailored their membership domain to the cleaning sector or part of it, in order to align their policy of interest representation with the specific requirements of their members. Even when looking solely at those employer organisations with a membership domain congruent or sectionalist with regard to the sector, (sectoral) domain densities, in particular in terms of companies, in several instances remain relatively low. It must be stressed again, however, that since the data set in relation to the sector-related employer/business organisations is far from being complete, it should be treated cautiously.

Collective bargaining and its actors

Table 8 lists all the trade unions engaged in sector-related collective bargaining. Despite numerous cases of inter-union domain overlap and of unclear domain demarcation, in only a few countries (Belgium, France, Italy and Portugal) inter-union rivalry and competition for bargaining capacities have been identified. In the case of the sector-related employer organisations, competition over collective bargaining capacities has been reported only from Slovenia.

The data presented in Table 11 provide an overview of the system of sector-related collective bargaining in the 27 countries under consideration. The importance of collective bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (Traxler et al, 2001) Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

Table 11: System of sectoral collective bargaining (2010/2011)

Country	CBC (%) (estimates)	Share of MEB in total CBC (%) (estimates)	Extension practices[a]
AT	95	99	(2)
BE	100	100	2
BG	n.a.	0	0
CY	n.a.	0	0

CZ	0.25	0	0
DE	100	almost 100	2
DK	75	MEB prevailing	0
EE	~0	0	0
EL	100	100	2
ES	n.a.	MEB prevailing	2
FI	almost 90	100	2
FR	100	100[b]	2
HU	3.5	0	0
IE	almost 100[c]	almost 100[b,c]	2[c]
IT	100	100[b]	(2)
LT	~14	0	0
LU	94.5	100	2
LV	n.a.	0	0
MT	~0	0	0
NL	100	100	2
PL	n.a.	0	0
PT	~100	90–100	2
RO	~50[d]	0[d]	0
SE	70–75	~99	1
SI	almost 100	100	0
SK	0	0	0
UK	~10	SEB prevailing	0

CBC = collective bargaining coverage: employees covered as a percentage of the total number of employees in the sector

MEB = multi-employer bargaining relative to single-employer bargaining

Extension practices (including functional equivalents to extension provisions, i.e. obligatory membership and labour court rulings):

[a] *= 0 = no practice, 1 = limited/exceptional, 2 = pervasive. Cases of functional equivalents are put in parentheses.*

[b] *= complemented by single-employer bargaining*

[c] *= considering also forms of de facto bargaining conducted by the sectoral Joint Labour Committee*

[d] *= since January 2011, when the unique cross-sectoral national collective agreement expire*d

n.a. = not available

To delineate the bargaining system, two further indicators are used. The first indicator refers to the relevance of multi-employer bargaining, compared with single-employer bargaining. Multi-employer bargaining is defined as being conducted by an employer organisation on behalf of the employer side. In the case of single-employer bargaining, the company, or its divisions, is the party to the agreement. This includes the cases where two or more companies jointly negotiate an agreement. The relative importance of multi-employer bargaining, measured as a percentage of the total number of employees covered by a collective agreement, therefore provides an indication of the impact of the employer organisations on the overall collective bargaining process.

The second indicator considers whether statutory extension schemes have been applied to the sector. For reasons of brevity, this analysis is confined to extension schemes which widen the scope of a collective agreement to employers not affiliated to the signatory employer organisation; extension regulations targeting the employees are therefore not included in the research. Regulations concerning the employees are not significant to this analysis for two reasons. First, extending a collective agreement to the employees who are not unionised in the company covered by the collective agreement is a standard practice of the ILO, aside from any national legislation. Secondly, employers have good reason to extend a collective agreement concluded by them, even when they are not formally obliged to do so; otherwise, they would set an incentive for their workforce to unionise.

In comparison with employee-related extension procedures, schemes that target the employers are far more significant for the strength of collective bargaining in general and multi-employer bargaining in particular. This is because the employers are capable of refraining from both joining an employer organisation and entering single-employer bargaining in the context of a purely voluntaristic system. Therefore, employer-related extension practices increase the coverage of multi-employer bargaining. Moreover, when it is pervasive, an extension agreement may encourage more employers to join the controlling employer organisation; such a move then enables them to participate in the bargaining process and to benefit from the organisation’s related services in a situation where the respective collective agreement will bind them in any case (Traxler et al, 2001).

Collective bargaining coverage

Due to the lack of strong, well established social partners within the sector in several countries, sectoral industrial relations tend to be relatively poorly developed in these countries. Where they have been established in these countries, they frequently cover only particular niches of the sector. Where they have not, collective bargaining activities within the sector are either almost non-existent or take place at single-company level only. For that reason, for some countries it has proved difficult or impossible even to roughly estimate the collective bargaining coverage rate of the entire cleaning industry. Accordingly, for five countries (Bulgaria, Cyprus, Latvia, Poland and Spain) the sector's collective bargaining coverage remains unknown, as none of the social partners contacted could provide an estimate for the entire cleaning sector. Countries lacking functioning social partner structures within the sector typically do have not only low, or no, collective bargaining coverage rates within the sector, but often also a lack of multi-employer bargaining. The 11 Member States with no sector-related multi-employer bargaining are Bulgaria, Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania and Slovakia. In all but Romania, the collective bargaining coverage rate is either very low or zero or no related information is available. It is clear from this list, that only the 2004/2007 accession countries are involved.

Nevertheless, there is a group of countries recording high or even full collective bargaining coverage rates in the sector. This group of countries comprises almost exclusively 'old' Member States, namely Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, the Netherlands, Portugal and Sweden, with Slovenia as the only 'new' Member State. The UK records a mixture of both single- and multi-employer bargaining, although the former is prevalent, and it shows a very low bargaining coverage rate of about 10%. Taking the collective bargaining coverage rate and the share of multi-employer bargaining as indicators for the effectiveness and strength of sectoral industrial relations structures, one can infer from these findings that, in slightly more than half of the 27 Member States, the sector's industrial relations structures are quite well-established, while they appear to be underdeveloped (and in some cases even non-existent) in all the other countries. To summarise, in terms of sectoral collective bargaining systems, the sector is characterised by a high polarisation of countries. Interestingly, this polarisation largely follows the demarcation line which divides the 'old' and the 'new' Member States, with the exception of Slovenia and the UK.

In most of the countries with available information, several factors that sometimes interact with each other account for the (relatively) high coverage rates:

- the predominance of multi-employer bargaining (Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, the Netherlands, Portugal, Slovenia and Sweden);
- high density rates of the trade unions and/or employer organisations (Austria, Belgium and Sweden);
- the existence of pervasive extension practices (Belgium, Finland, France, Germany, Greece, Ireland, Luxembourg, the Netherlands and Portugal).

Single-employer bargaining arrangements in the sector are the exclusive type of sector-related bargaining in Bulgaria, Cyprus, the Czech Republic, Hungary, Latvia, Lithuania, Poland and Romania. As far as related information is available, in these countries collective bargaining coverage tends to be very low.

In those countries with prevalent multi-employer settlements in the sector, the use of extension practices is often significant. Pervasive extension practices in the cleaning sector are reported for several countries (see Table 11). As the aim of extension provisions is to make multi-employer agreements generally binding, the provisions for obligatory membership in the chamber system of Austria should also be noted. Obligatory membership creates an extension effect, since the Austrian Federal Economic Chamber (WKO) and its subunits are parties to multi-employer bargaining. Another functional equivalent to statutory extension schemes can be found in Italy. According to the country's constitution, minimum conditions of employment must apply to all employees. The country's labour court rulings relate this principle to the multi-employer agreements, to the extent that they are regarded as generally binding.

Participation in public policymaking

Interest associations may partake in public policy in two basic ways:

- they may be consulted by the authorities on matters affecting their members;
- they may be represented in tripartite committees and boards of policy concertation.

This study considers only cases of consultation and participation which explicitly relate to sector-specific matters. Consultation processes are not necessarily institutionalised and, therefore, the organisations consulted by the authorities may vary according to the issues to be addressed and also over time, depending on changes in government. Moreover, the authorities may initiate a consultation process on occasional rather than a regular basis. Given this variability, in Tables 8 and 10 only those sector-related trade unions and employer organisations are flagged that are *usually* consulted.

Trade unions

Trade unions are regularly consulted by the authorities in at least 13 of the 21 countries where sector-related trade unions are recorded. Four countries cite a lack of regular consultation of any of the trade unions (Bulgaria, Cyprus, Malta and Slovenia). Since a multi-union system has been established in 16 out of the 21 countries with sector-related trade unions, one cannot rule out the possibility that the authorities may favour certain trade unions over others or that the unions compete for participation rights. In six (Belgium, Denmark, Finland, Germany, Luxembourg and the Netherlands) of the 11 countries with a multi-union system where there is a noticeable practice of consultation, any of the existing trade unions may take part in it. By contrast, in France, Greece, Spain and Sweden, only some of the sector-related trade unions are usually consulted. In several countries, (Austria, France, Hungary, Italy, Portugal and the UK) no information on consultation practices is available for at least one trade union. Nevertheless, evidence of major inter-union conflicts over participation in public policy matters in the cleaning sector cannot be found in any of the countries under consideration.

Employer organisations

Most sector-related employer/business organisations for which related data are available are involved in consultation procedures. There are no cases of conflict reported over participation rights of employer organisations in any of the eight countries with multi-organisation systems. In the multi-organisation systems of Austria, Denmark and Ireland, where related data of all employer organisations are available, all of the sector's organisations are consulted. Conversely, in the pluralist systems of Spain and Sweden, at least one of the employer organisations is regularly consulted, while at least one other is not. In Slovenia, none of the three sector-related employer organisations is consulted. However, for Germany and Italy, which have a pluralist system of employer representation, no information about consultation practices is available for some of the organisations. Therefore, it remains unclear here whether consultation rights are being attributed to the national organisations in a selective manner or not.

In at least 12 of the 18 countries with relevant sector-related social partner organisations on both sides of industry, consultation rights are symmetrically attributed to the two sides of industry, in that at least one organisation on each side is consulted. However, there are at least four countries (France, Greece, Hungary and the UK) where representatives of only one side are consulted. A more precise and further quantitative analysis of consultation procedures is difficult due to the incomplete data set.

Tripartite participation

Turning from consultation to tripartite participation, the findings reveal that genuinely sector-specific tripartite bodies have been established in only Germany and the UK. Table 12 lists one in Germany and two in the UK. In Germany, the organisation is an alliance against all forms of illegal employment in building cleaning. In the UK, Asset Skills is the statutory tripartite Sector Skills Council (SSC) dealing with skills improvement initiatives targeting the cleaning sector, while the Health and Safety Executive (HSE) has a specific advisory liaison forum for the cleaning sector. Other bodies listed in some country reports are not taken into account in this study, since they are either bipartite or do not specifically target the sector under consideration.

Table 12: Tripartite sector-specific boards of public policy (2009/2010)

	Name of the body and scope of activity	Origin	Trade unions participating	Business associations participating
DE	Alliance against illegal employment in building cleaning	Agreement	IG BAU	BIV
UK	Asset Skills (sectoral skills and training council)	Statutory	Unison (in the past, position currently ‘pending’)	CSSA
UK	Health and Safety Executive – Cleaning Industry Liaison Forum	Statutory	Unison, Unite	CSSA

European level of interest representation

At a European level, eligibility for consultation and participation in the social dialogue is linked to three criteria, as defined by the European Commission. Accordingly, a social partner organisation must have the following attributes:

- be cross-industry or relate to specific sectors or categories, and be organised at European level;
- consist of organisations which are themselves an integral and recognised part of Member States’ social partner structures and which have the capacity to negotiate agreements, as well as being representative of all Member States, as far as possible;
- have adequate structures to ensure their effective participation in the consultation process.

Regarding social dialogue, the constituent feature is the ability of such organisations to negotiate on behalf of their members and to conclude binding agreements. Accordingly, this section on European associations of the cleaning activities sector will analyse these organisations’ membership domain, the composition of their membership and their ability to negotiate.

As outlined in greater detail below, one sector-related European association on the employee side – namely, UNI Europa – Property Services Sector – and one on the employer side – namely, EFCI – are particularly significant in the cleaning sector. Both UNI Europa and EFCI are listed by the European Commission as a social partner organisation consulted under Article 154 of the TFEU. Hence, the following analysis will concentrate on these two organisations, while providing supplementary information on others which are linked to the sector's national industrial relations actors.

Membership domain

The membership domain of UNI Europa – Property Services, as a division of the comprehensive skills and services trade union organisation UNI Europa, covers the cleaning sector as defined for the purpose of this study plus the security sector and therefore overlaps the sector under consideration. On the employer side, according to its web page, the membership domain of EFCI is largely congruent with the cleaning sector. It organises only employer organisations rather than individual companies.

Membership composition

In terms of membership composition, it should be noted that the countries covered by UNI Europa – Property Services and EFCI extend beyond the 27 countries examined in this study. However, the report will only consider the members of these 27 countries.

For UNI Europa – Property Services Table 13 documents a list of membership of sector-related trade unions drawn from the country reports. Accordingly, at least one affiliation in each country (except the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Romania, Slovakia and Slovenia) is recorded. In some countries (Austria, Belgium, Denmark, Finland, Germany, Italy, the Netherlands, Portugal, Spain, Sweden and the UK) multiple memberships occur, so that in some cases it remains unclear whether the affiliation refers to the cleaning and security division or any other division of UNI Europa. On aggregate, UNI Europa – Property Services counts 35 direct and indirect sector-related affiliations from the countries under examination. More than half of the trade unions listed in Tables 7 and 8 are directly or indirectly affiliated to UNI Europa – Property Services. As far as available data on sectoral membership of the national trade unions provide sufficient information on their relative strength, one can conclude that UNI Europa – Property Services covers the sector's most important labour representatives in most countries. An exception to this is Kommunal of Sweden. Some 33 of the 35 direct and indirect members of UNI Europa – Property Services are directly involved in collective bargaining related to the cleaning sector. Only two affiliates from countries such as Belgium and Malta are not.

Table 13: UNI Europa – Property Services Membership (2010/2011)[+]

Country	Members
AT	GPA-djp*, Vida*, GBH*, GdG-KMSfB*
BE	AC/CG*, CCVD-CCAS*, ACLVB/CGSLB
BG	ITUFECCTCS*
CY	OIYK-SEK*
CZ	n.a.
DE	IG BAU*, Ver.di*

DK	3F*, Serviceforbundet*
EE	n.a.
EL	OIYE*
ES	FES-UGT*, AADD-CCOO*
FI	PAM*, Trade Union Pro*
FR	FO-FEETS*
HU	n.a.
IE	SIPTU*
IT	FILCAMS*, FISASCAT*
LT	n.a.
LU	OGBL-SSPN*
LV	n.a.
MT	GWU
NL	FNV Bondgenoten*, (CNV Vakmensen*)
PL	MOZ 'Solidarność' POCS*
PT	SITESE*, STAD*
RO	n.a.
SE	Fastighets*, SEKO*
SI	n.a.
SK	n.a.
UK	GMB*, Unison*, Unite*, PCS*

+ = Membership list confined to the sector-related associations of the countries under consideration; organisation put in brackets means indirect affiliation via higher-order unit.

** = Involved in sector-related collective bargaining*

Table 14 lists the members of EFCI. Of the 27 countries under consideration, EFCI has 17 under its umbrella through direct associational members from these countries. Multiple memberships occur only in Italy, where two affiliates co-exist. On aggregate, EFCI counts 18 direct associational members from the EU 27 (SAC of Slovakia ceased its membership in 2010 and is not considered here).

Table 14: EFCI Membership (2010/2011)+

Country	Members
AT	BICGDFG*
BE	ABSU-UGBN*
BG	n.a.

CY	n.a.
CZ	CAC
DE	BIV*
DK	SBA*
EE	n.a.
ES	ASPEL*
FI	Kiinteistöpalvelut ry*
FR	FEP*
GR	n.a.
HU	MATISZ
IE	n.a.
IT	FISE*, ANCST-Legacoop*
LT	n.a.
LU	FLEN*
LV	n.a.
MT	n.a.
NL	OSB*
PL	PIGC
PT	APFS*
RO	n.a.
SE	Almega SA*
SI	OZS – Section Building Cleaners
SK	SAC[a]
UK	CSSA

+ = Membership list confined to the sector-related associations of the countries under consideration.

[a] = Membership until the end of 2010

** = Involved in sector-related collective bargaining*

Table 10 indicates that affiliated and unaffiliated associations coexist in Austria, Denmark, Germany, Italy, Slovenia, Spain and Sweden. Data on sectoral membership of the respective organisations of these countries do not show clearly whether the most important associations are affiliated. In Austria, Denmark, Germany, Greece, Ireland, Italy, Slovenia, Spain and Sweden, some important or even all-employer organisations that conduct bargaining are not affiliated to EFCI. There are also several countries (the Czech Republic, Hungary, Poland, Slovenia and the UK) where the affiliate of EFCI is not engaged in bargaining. Employer/ business organisations which are not involved in collective bargaining may regard themselves as trade associations rather than as industrial relations actors. Of the 18 direct affiliates of EFCI, 13 are involved in sector-related collective bargaining. Thus, compared with its counterpart on the labour side, namely UNI Europa – Property Services, EFCI's proportion of member organisations which are involved in sector-related collective bargaining is slightly lower. EFCI members cover collective bargaining in 13 of the 17 countries which record affiliations to this European-level employer organisation, which accounts for slightly less compared to the 17 countries where sector-related collective bargaining is conducted by affiliates of UNI Europa – Property Services. As can be seen from Table 10, many sector-related employer organisations across the EU not affiliated to EFCI are involved in sector-related collective bargaining and thus have to be regarded as relevant actors within the sector.

Capacity to negotiate

The third criterion of representativeness at the European level refers to the organisations' capacity to negotiate on behalf of their own members. On the employee side, UNI Europa – Property Services is equipped with a permanent mandate to negotiate on behalf of its members in matters of European social dialogue through a general mandate laid down in the statutes of UNI Europa.

On the employer side, according to the Director General of EFCI, no provisions on a general negotiating mandate have been laid down in the EFCI statutes. However, an ad-hoc mandate to negotiate on behalf of its members can be assigned on a case-by-case basis. Thus, both of the sector-related European-level interest organisations on the two sides of industry are, at the time being, capable of negotiating and acting on behalf of their members with regard to the European social dialogue.

As a final proof of the weight of both UNI Europa – Property Services and EFCI, it is useful to look at other European organisations which may be important representatives of the sector. This can be done by reviewing the other European organisations to which the sector-related trade unions and employer associations are affiliated.

For the trade unions, these affiliations are listed in Table 7. Accordingly, European organisations other than UNI Europa (Property Services Sector) represent a relatively large proportion of both sector-related trade unions and countries. For reasons of brevity, only those European organisations are mentioned here which cover at least three countries. This involves:

- the European Federation of Public Service Unions (EPSU), with 17 affiliations covering 9 countries;
- the European Transport Workers' Federation (ETF), with 12 affiliations and 6 countries;
- the European Federation of Trade Unions in the Food, Agriculture and Tourism Sectors and Allied Branches (EFFAT), with 11 affiliations and 8 countries;
- the European Federation of Building and Woodworkers (EFBWW), with 7 affiliations and 5 countries;
- the European Mine, Chemical and Energy Workers' Federation (EMCEF) with 4 affiliations and 3 countries;
- the European Metalworkers' Federation (EMF), with 4 affiliations and 3 countries.

Moreover, it should be noted that the affiliations listed in Table 8 are probably not exhaustive. Nevertheless, and despite the relatively large number of affiliations to European organisations other than UNI Europa – Property Services, this overview underlines the principal status of the latter association as the sector's labour representative. This is mainly because many of the aforementioned affiliations to other European organisations reflect the overlapping domains of the affiliates (see Table 7) rather than a real reference of the affiliations as such to the cleaning sector.

An analogous review of the membership of the national employer/business associations can be derived from Table 10. Most of them have few affiliations to European associations other than EFCI. Correspondingly, there is no other European association which covers three countries.

In conclusion, UNI Europa – Property Services on the employee side and EFCI on the employer side, appear to be by far the most important sector-related European organisations.

Commentary

The cleaning industry has been a dynamic and fast-growing industry for many years. This trend is caused by several factors, including a diversification of cleaning activities as well as the continuing outsourcing of cleaning and hygiene services in administrations and companies. These developments have stimulated the emergence of new markets in the field of more global and integrated service delivery, providing highly qualified and encompassing facilities management and support services rather than simple cleaning. However, fierce competition over labour costs within the sector, as well as outsourcing, has frequently increased the number of temporary and vulnerable workers, often without legal contracts of employment.

Depending on the strength of the national social partner organisations within the sector, industrial relations standards widely vary from one country to the other. On the employee side, union density rates tend to be rather low across virtually all Member States. This may be explained by:

- the often dispersed nature of employment;
- low skill levels;
- low pay;
- the prevalence of female and part-time workers;
- the presence of large numbers of migrant workers;
- high labour turnover.

Sectoral employer organisations generally appear to be more prevalent in the sector than trade unions. This is partly because many have a membership domain that is relatively well tailored to the cleaning sector or part of it. This enables them to focus more on representing their members' interests than more general associations, which promote high rates of member recruitment. However, there are also many employer/business organisations recording low density rates, particularly in terms of companies.

Overall, compared to most other sectors, industrial relations tend to be slightly less developed within the sector in most Member States. Examining the figures on cross-sectoral collective bargaining coverage in the EU27, as presented in the EIRO industrial relations profiles for each Member State, it can be clearly seen that the cleaning industry's bargaining coverage is lower than the national overall collective bargaining coverage rates in 10 out of 21 countries for which comparable data are available. In turn, nine of these countries register higher sectoral than overall rates, while for two countries the two rates are largely equal. Closer consideration shows that the collective bargaining coverage within the cleaning sector tends to be high in the 'old' EU15 (with the exception of the UK) while it tends to be low among the 2004/2007 accession countries (with the exception of Romania and, in particular, Slovenia). Generally, high collective bargaining coverage rates in the sector are strengthened by the predominance of multi-employer arrangements and a significant use of extension practices.

Although the recession has to some extent affected the cleaning sector, shown by tightened procurement policies and increasing pressure on the labour market, no major effects on the national industrial relations systems within the sector have been observed. At European level, in order to cope with the challenges for the sector, the sector's social partners – UNI Europa – Property Services on the employees' side and EFCI on the employers' side – formally set up a joint sectoral social dialogue committee in 1998 (active since 1999). Since then, the committee usually meets three to four times a year. The recent outcomes of the committee work of these two European associations include joint declarations, manuals and recommendations on issues such as awarding practices involving cleaning contracts, ergonomics in cleaning operations and procurement practices. Compared with all other European social partner organisations, according to the study findings, both UNI Europa – Property Services and EFCI remain unchallenged in their position as EU-wide representatives of the sector's employees and employers.

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List of abbreviations

Country	Abbreviation	Full Name
AT	BICGDFG	Federal Association of Chemical Trade and Building Cleaners
	BIRB	Federal Association of Chimney Sweeps and Undertakers
	FVAA	Association of Waste and Sewage Management
	GBH	Trade Union of Construction and Wood Workers
	GdG-KMSfB	Union for Municipal Employees and the small Arts, Media, Sports and Liberal Professions
	GPA-djp	Union of Salaried Employees, Graphical Workers and Journalists
	ÖGB	Austrian Trade Union Federation
	vida	vida Trade Union
	WKO	Austrian Federal Economic Chamber
BE	ABSU-UGBN	General Belgian Cleaning Association
	ABVV/FGTB	Belgian General Federation of Labour
	ACLVB/CGSLB	Federation of Liberal Trade Unions of Belgium
	ACV/CSC	Confederation of Christian Trade Unions
	CCVD-CCAS	ACV Food and Services Trade Union
	CG/AC	General Federation
	VBO-FEB	Belgian Federation of Employers
BG	CITUB	Confederation of Independent Trade Unions of Bulgaria
	CL Podkrepa	Confederation of Labour ‘Podkrepa’
	FITUSGO	Federation of Independent Trade Unions of State Government and Organisations
	ITUFECCTCS	Independent Trade Union Federation of Employees in Commerce, Cooperatives, Tourism, Credit and Social Serviecs
	PSU	Podkrepa Services Union
CY	OIYK-SEK	Cyprus Federation of Private Employees
	PEO	Pancyprian Federation of Labour
	SEK	Cyprus Workers’ Federation
	SEVETTYK-PEO	Cyprus Union of Workers in Industry, Trade, Press and Printing and General Services

CZ	CAC	Czech Association of Cleaning
	HK CR	Czech Chamber of Commerce
DE	BDA	German Confederation of Employers' Associations
	BIV	Bundesinnungsverband des Gebäudereiniger-Handwerks
	DGB	German Trade Union Federation
	IG Bau	Industriegewerkschaft Bauen-Agrar-Umwelt
	ver.di	Vereinte Dienstleistungsgewerkschaft
	VKA	Vereinigung der Kommunalen Arbeitgeberverbände
	UDH	German Association of Skilled Crafts Confederations
	ZDH	German Confederation of Skilled Crafts
	ZDS	Zentralverband Deutscher Schornsteinfeger
	ZIV	Bundesinnungsverband des Schornsteinfegerhandwerks – Zentralinnungsverband
DK	3F	United Federation of Danish Workers
	DI	Confederation of Danish Industry
	Dansk Erhverv	Danish Chamber of Commerce
	LO	Danish Confederation of Trade Unions
	RSBA	RenRengøringsselskabernes Branche- og Arbejdsgiverforening
	SBA	Employers' Association in the Service Sector within DI
	Serviceforbundet	Danish Clerical Union
EE	---	
EL	ADEDY	Confederation of Public Servants
	GSEE	Greek General Confederation of Labour
	OYIE	Hellenic Federation of Private Sector Employees
	PEOK	Pan-Hellenic Federation of Cleaning Enterprises
	POE OTA	Pan-Hellenic Federation of Local Government Organisations Employees
ES	AADD	Federation of Diverse Activities of the CCOO
	AFELIN	Federation of Associations of Cleaning Employers
	ASELIP	Association of Enterprises of Public Cleaning
	ASPEL	Professional Association of Cleaning Enterprises
	CCOO	Trade Union Confederation of Workers' Commissions
	CEOE	Spanish Confederation of Employers' Organisations

	FeS-UGT	Federation of Services of the General Workers' Confederation
	FSP-UGT	Public Services Federation of the General Workers' Confederation
	ELA	Basque Workers' Solidarity
	ELA-ZERBITZUAK	Basque Workers' Solidarity ZERBITZUAK
	ESK	Federation of Leftist Unions
	LAB	Patriotic Workers' Commission
	Services Area – USO	Services Area of the USO
	UGT	General Workers' Confederation
	USO	Workers' Trade Unionist Confederation
FI	Ammattiliitto Pro	Trade Union Pro
	EK	Confederation of Finnish Industries
	Kiinteistöpalvelut ry	Property Management Association
	PAM	Service Union United
	SAK	Confederation of Finnish Trade Unions
	STTK	Finnish Confederation of Salaried Employees
FR	CFDT	French Democratic Confederation of Labour
	CFDT Services	French Democratic Confederation of Labour - Services
	CFE-CGC	Confédération Francaise de l'Encadrement – Confédération Générale des Cadres
	CFTC	French Christian Workers' Confederation
	CGPME	Employer Association of the French SMEs
	CGT	General Confederation of Labour
	CGT-Ports et Docks	General Confederation of Labour – Fédération Nationale des Ports et Docks
	CSFV-CFTC	Fédération Commerces, Services et Force de vente - CFTC
	FEP	Fédération des Entreprises de Propreté
	FNECS	Fédération Nationale de l'Encadrement, des Commerces et des Services – CFE-CGC
	FO	Force Ouvrière
	FO-FEETS	Fédération de l'Équipement, de l'Environnement, des Transports et des Services – Force Ouvrière
	MEDEF	Movement of French Enterprises
	UNSA	Union Nationale des Syndicats Autonomes

HU	HVDSZ 2000	Trade Union of Municipal and Urban Economy Workers
	MATISZ	Association of Hungarian Cleaning Technology
	MSZOSZ	Confederation of Hungarian Trade Unions
	VOSZ	National Association of Entrepreneurs and Employers
IE	IBEC	Irish Business and Employers Confederation
	ICCA	Irish Contract Cleaners Association
	ICTU	Irish Congress of Trade Unions
	SIPTU	Services, Industrial, Professional and Technical Union
IT	AGCI	General Association of Italian Cooperatives
	ANCST-Legacoop	National League of Cooperatives – Services and Tourism
	ANIP	Associazione Nazionale Imprese di Pulizia e Servizi Integrati
	CAPIMED	National Autonomous Federation of Small Artisans and Medium-Sized Enterprises
	Casartigiani	Casartigiani
	CEL	European Confederation of Workers
	CGIL	General Confederation of Italian Workers
	CISL	Italian Confederation of Workers' Unions
	CLAAI	Confederation of Liberal Associations of Italian Artisans
	CNA	National Confederation of Artisans and of SMEs
	CONFAPI	Confederazione Italiana della Piccole e Media Industria Privata
	Confartigianato	Confartigianato
	Confcommercio	Confcommercio
	Confcooperative	Confederation of Italian Cooperatives
	Confindustria	General Confederation of Italian Industry
	CONFSAL	General Trade Union Confederation of Autonomous Workers
	FENAPI	National Autonomous Federation of Small Entrepreneurs
	FeS	Federlavoro e Servizi
	FESICA	Federation of Industrial, Commercial and Artisan Trade Unions
	FILCAMS	Italian Federation of Workers in the Commerce, Tourism and Service Sector
	FISE	Federazione Imprese di Servizi

	FISALS	Italian Federation of Autonomous Trade Unions for Foreign Workers
	FISASCAT	Italian Federation of Commercial Services and Tourism
	FNIP	National Federation of Cleaning, Disinfection, Service and Multiservice Enterprises
	Legacoop	National League of Cooperatives
	PSL-AGCI	Produzione Servizi di Lavoro
	UGL	General Union of Workers
	UGL Igiene Ambientale	UGL – Environmental Hygiene
	UIL	Italian Union of Worker
	UIL Trasporti	Italien Union of Transport Workers
	Unionservizi	Unionservizi
	UNCI	National Union of Italian Cooperatives
	USAE	Unions of Autonomous European Trade Unions
	USC	Unione Servizi alla Comunità
	USSPI	Union of Professions and Intellectual Professionality
LT	---	
LU	FDA	Federation of Craftsmen
	FLEN	Luxembourg Federation of Cleaning Enterprises
	LCBG	Luxembourg Christian Union Federation
	LCBG-Commerce	Luxembourg Christian Union Federation – Commerce
	OGBL	Independent Luxembourg Union Federation
	OGBL-SSPN	Independent Luxembourg Union Federation – Syndicat Services Privés de Nettoyage
LV	---	
MT	GWU	General Workers' Union
NL	CNV	Christian Trade Union Federation
	CNV Vakmensen	Christian Trade Union Federation – Vakmensen
	FNV	Federation of Dutch Trade Unions
	FNV Bondgenoten	Federation of Dutch Trade Unions – Bondgenoten
	OSB	Association of Cleaning Companies
	VNO-NCW	Confederation of Netherlands Industry and Employers
PL	MOZ Solidarność POCS	Intercompany Union Organisation of Independent Self-Governing Trade Union Solidarność of Security, Catering and Cleaning Workers

	NSZZ Solidarność	Independent and Self-Governing Trade Union Solidarność
	PIGC	Polish Cleaning Chamber of Commerce
	PKPP Lewiatan	Polish Confederation of Private Employers 'Lewiatan'
PT	APFS	Portuguese Association of Facility Services
	CCP	Confederation of Commerce and Services of Portugal
	CGTP	General Portuguese Workers' Confederation
	STAD	Union of Janitors, Security Staff, Cleaning Personnel, Domestic Workers and Other Activities
	SITESE	Union of Workers in Administration, Commerce, Hotels and Services
	UGT	General Workers' Confederation
RO	---	
SE	Almega SA	Almega Employer Organisation – Service Associations
	Fastighets	Swedish Building Maintenance Workers' Union
	Fastigo	Employer Association of the Property Sector in Sweden
	KFO	Cooperative Movement Bargaining Organisation
	Kommunal	Municipal Workers' Union
	Ledarna	Confederation of Executives and Managerial Staff
	LO	Swedish Trade Union Confederation
	SALAR	Swedish Association of Local Authorities and Regions
	SEKO	Union of Service and Communication
	Svenskt Näringsliv	Confederation of Swedish Enterprises
	TCO	Swedish Confederation of Professional Employees
	Unionen	Trade Union for Professionals in the Private Sector
SI	GZS	Chamber of Commerce and Industry of Slovenia
	OZS	Chamber of Craft and Small Business of Slovenia
	PTZ	Chamber of Small Business and Trade
	SODS	Trade Union of Crafts Workers of Slovenia
	ZDOPS	Employer Association of Craft and Entrepreneurs of Slovenia
	ZSSS	Association of Free Trade Unions of Slovenia
SK	RUZ SR	National Union of Employers
	SAC	Slovakia Cleaning Association
UK	BCC	British Cleaning Council

	CSSA	Cleaning and Support Services Association
	GMB	General, Municipal, Boilermakers and Allied Trade Union
	PCS	Public and Commercial Services Union
	RMT	National Union of Rail, Maritime and Transport Workers
	TUC	Trades Union Congress
	Unison	Unison
	UNITE	Unite the Union
EUROPE		
	CEC	CEC European Managers
	CECOP	European Confederation of Cooperatives
	CEEP	European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest
	CEMR	Council of European Municipalities and Regions
	CEPA	Confederation of European Pest Management Associations
	CESI	European Confederation of Independent Trade Unions
	CLRAE	Congress of Local and Regional Authorities
	EFBWW	European Federation of Building and Woodworkers
	EFCI	European Federation of Cleaning Industries
	EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions
	EFJ	European Federation of Journalists
	EMCEF	European Mine, Chemical and Energy Workers' Federation
	EMF	European Metalworkers' Federation
	EPSU	European Federation of Public Service Unions
	ESCHFOE	European Federation of Chimney-Sweeps
	ETF	European Transport Workers' Federation
	ETLC	European Trade Union Liaison Committee on Tourism
	Eurocadres	Council of European Professional and Managerial Staff
	EuroCommerce	EuroComerce - The Retail, Wholesale and International Trade Representation to the EU
	Eurofedop	European Federation of Employees in the Public Service
	European Cooperatives	Cooperatives Europe

	EURO WEA	European Workers' Education Association
	UCLG	United Cities and Local Governments
	UNI Europa	Union Network International – Europe

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