



Representativeness of the European social partner organisations: Personal services sector

Objectives of study

Economic background

National level of interest representation

European level of interest representation

Commentary

References

Annex: List of abbreviations

This report is available in electronic format only.

This report sets out to provide the necessary information for establishing sectoral social dialogue in the personal services sector. The report falls into three main parts: a brief summary of the sector's economic background; an analysis of the social partner organisations in all EU Member States, with the exception of Malta, with special emphasis on their membership, role in collective bargaining and public policy, and national and European affiliations; and, finally, an overview of the relevant European organisations, in particular membership composition and capacity to negotiate. The aim of the EIRO representativeness studies is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. The impetus of these studies arises from the European Commission objective to recognise the representative social partner associations to be consulted under the EC Treaty provisions. 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 personal services sector, which encompasses hairdressing and other beauty treatments, and to 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 EC Treaty. Hence, this study seeks to provide basic information needed to set up sectoral **social dialogue**. The effectiveness of the **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. Therefore, only European organisations 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 personal services 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' (see below). At both national and European levels, a multiplicity of associations exist which are not considered as social partner organisations as they do not essentially deal with industrial relations. Thus, there is a need for clear-cut criteria that will enable analysis to differentiate the social partner organisations from other associations.

As regards the national-level associations, classification as a sector-related social partner organisation implies fulfilling one of two criteria: the associations must either be a party to 'sector-related' **collective bargaining** or 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 138** of the EC Treaty, and/or which participates in the sector-related European social dialogue. Affiliation to a European social partner organisation and involvement in national collective bargaining are of utmost importance to the European social dialogue. Following the criteria for national organisations, this study includes those sector-related European organisations that are on the Commission's list of consultation. In addition, the report considers any other sector-related European association with sector-related national social partner organisations 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.

This report is available in electronic format only.

Definitions

To ensure the cross-national comparability of the research findings, the study defines the personal services sector in terms of the Statistical Classification of Economic Activities in the European Community (*Nomenclature statistique des activités économiques dans la Communauté européenne*, [NACE](#)), using the classification NACE 93.02: 'Hairdressing and other beauty treatment'. (This is equivalent to the new NACE code S96.0.2).

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;
- sectional overlap – the domain or scope covers part of the sector as well as parts of one or more other sectors.

At European level, the European Commission established a European Social Dialogue Committee for the personal services sector in 1999. Thus far, the dialogue has been restricted to the trade unions and employer organisations in the hairdressing sector, while the social partner representatives from the cosmetics industry still remain outside. The European Association of Employers' Organisations in Hairdressing ([Coiffure EU](#)), as well as the Hair and Beauty Section of [UNI-Europa](#) of the global [Union Network International \(UNI\)](#) on the employees' side, participate in the sector's European social dialogue. Thus, 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 the case of [UNI-Europa](#) due to its multi-sectoral domain. Thus, the study will include only the organisations affiliated to UNI-Europa whose domain relates to the personal services sector – that is, members of the Hair and Beauty section of UNI-Europa.

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](#). It is often difficult to find precise quantitative data. In such cases, rough estimates are provided 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 statistics, the figures in respect of 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 report.

Structure of report

The report 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, with the exception of Malta where the personal services sector is very small and could not be captured in quantitative terms. The study therefore covers 26 European countries in total. The third part of the analysis considers the representative associations at European level. Each section will give 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 personal services industry is a permanently growing business sector in Europe, covering nearly 1.5 million workers in the 27 Member States of the European Union (EU27), according to both figures provided by the European social partners and aggregate information drawn from the country reports. A major part of the sector's growth is attributable to the increasing incidence of self-employment as well as the various forms of **undeclared work**. The total number of hairdressing and beauty treatment companies in the EU27 amounts to about half a million such companies. This implies that the average company size in the sector does not exceed three workers. The nature of enterprises in the sector varies significantly from large (international) chains to micro-companies, often consisting of only one operator running its own salon.

Employment in the sector is still characterised by an increasing proportion of female workers, who make up more than 80% of all workers, as well as various forms of **atypical work**, such as part-time and temporary agency work (ECOTEC, 2000). In line with this, **working conditions** and **pay** have remained relatively poor. Moreover, national training standards and provisions differ considerably across the EU27, which translates into a broad variation in the quality of service provisions from one Member State to the other. In order to improve overall service standards in the sector, and to grant upward harmonisation of quality standards across the EU, the European social partners have launched several initiatives to introduce European standard training. The aim is to establish a uniform European hairdressing certificate, which proves that

hairdressers have completed the new European hairdressing ‘level B’ training; this would ensure equal quality standards throughout the EU (see relevant [social dialogue texts](#)).

In contrast to most other sectors of the economy, the personal services sector has not undergone any substantial innovative or technology-driven [restructuring](#) in recent years. Apart from the introduction and application of information technology (IT) in the sector, in particular in relation to marketing and administration, new developments in products and techniques largely revolve around the improved user-friendliness, quality and safety of mass-marketed products for home use, for example colouring products. An increasing trend towards ‘do-it-yourself’ (DIY) has prompted the personal services industry to mainly compete on quality and to diversify new niche markets, by expanding business activities into areas such as health and beauty treatments.

Pressure on the ‘professional’ personal services sector has emerged in relation with two distinct trends. The first trend concerns the growing number of franchise companies, which are often located in large shopping malls and which provide standard services at highly competitive rates. However, the ‘traditional’ industry frequently questions the quality provided by such franchise salons. Secondly, the high incidence of activities in the illegal economy has caused problems for the hairdressing and beauty treatment industry. Undeclared work is often performed by women who, after having children, do not return to regular employment. Due to low rates of pay and unattractive [working time](#) schedules in the ‘official’ labour market, these workers often prefer to supplement their household income by providing in-home hairdressing or other services in the illegal economy rather than resuming formal employment. In 2001, the sectoral social partners at European level signed a code of conduct – entitled [How to get along](#) – which includes guidelines for hairdressing salons to set up good working relations between the two sides of industry – based on criteria such as fair wages and working conditions, [lifelong learning](#), [equal treatment](#), [health and safety](#) and family life; nonetheless, the effectiveness of this code for actual working life has remained questionable.

Due to the nature of the sector – more specifically, the fact that virtually all people need basic personal services such as haircutting – all of the 27 Member States record sector-related business activities. Therefore, this study covers all Member States – with the noticeable exception of Malta, where a small personal services sector does exist, but no information on the sector structure is available. Thus, the study covers all of the Member States excluding Malta. Tables 1 and 2 below give an overview of the sector’s development from the mid 1990s to the mid 2000s, presenting a few indicators that are significant to industrial relations and social dialogue. In all of the Member States for which related data are available, excluding Italy, the number of companies has generally increased, reflecting the expansion of the sector. Part of the growth in the number of companies may be attributable to the growing number of [self-employed persons](#) without employees in the sector.

Similarly, available data on total employment and the number of employees show the same trend. All of the countries with available data record an increase in overall employment; with the exception of the Czech Republic, the countries also register a rise in the number of employees. Increases in employment within a decade are, in most cases, only gradual, although a relatively dramatic rise in employment is evident in Latvia and Slovakia. In several countries for which comparable data are available, such as Belgium, the Czech Republic, Finland, Italy, Poland, Slovakia and Sweden, the number of employees remains considerably below the total number in employment. This indicates that the sector is characterised by a high incidence of ‘non-standard’ employment in general and self-employment in particular.

Tables 1 and 2 also show that the sector is clearly dominated by female workers. In most of the countries for which data are available, the level of female employment clearly exceeds male employment levels. The tables also indicate that – despite the sector’s partially significant growth

over the last decade – it has remained relatively small. In most of the countries under consideration, the sector’s share of aggregate employment amounts to between 0.4% and 1%, while the number of employees is between 0.1% and 0.7% of all employees. Only Ireland and Poland, where the sector accounts for 1% or more of the country’s employees/employment, record outstandingly high rates. In contrast, in Slovakia, regular employment in the sector is almost non-existent. In general, it should be noted that the employment figures provided in Tables 1–2 do not, of course, reflect the widespread practice of undeclared work, which is supposed to account for approximately 30% of the sector’s total turnover in certain countries.

Table 1: Total employment in personal services sector, 1995 and 2006

	Number of companies		Total employment		Male employment		Female employment	
	1995	2006	1995	2006	1995	2006	1995	2006
AT	n.a.	8,151 ^{a,b}	n.a.	29,679 ^a	n.a.	n.a.	n.a.	n.a.
BE	5,800 ^c	>8,200 ^d	n.a.	35,433 ^d	n.a.	7,705 ^d	n.a.	27,728 ^d
BG	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CY	1,985 ^f	2,488 ^{f,g}	2,526	3,357 ^g	663	769 ^g	1,863	2,588 ^g
CZ	n.a.	n.a.	19,800	31,500 ^d	300	1,300 ^d	19,500	30,200 ^d
DE	n.a.	73,342 ^{g,h}	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DK	5,848 ⁱ	6,400	13,104	13,767	1,869	1,496	11,235	12,271
EE	n.a.	n.a.	n.a.	2,979 ^{e,t}	n.a.	40 ^{e,t}	n.a.	2,939 ^{e,t}
EL	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
FI	7,368	10,840	12,615	14,269	481	581	12,134	13,688
FR	54,871 ^{b,c}	65,990 ^{b,d}	145,000 ^c	162,000 ^d	23,300 ^c	22,700 ^d	121,800 ^c	139,300 ^d
HU	180 ^{k,l}	203 ^g	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
IE	n.a.	3,145 ^m	n.a.	21,000 ^d	n.a.	n.a.	n.a.	n.a.
IT	121,711 ⁿ	118,516 ^a	20,0256 ⁿ	202,142 ^a	59,909 ⁿ	60,473 ^a	140,347 ⁿ	141,669 ^a
LT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LU	466	564 ^d	1,615 ^o	2,123 ^{d,o}	n.a.	n.a.	n.a.	n.a.
LV	324 ^{j,p}	1,069 ^p	2,780 ^j	5,622	n.a.	n.a.	n.a.	n.a.
NL	13,990	21,965	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
PL	n.a.	35,000 ^s	n.a.	200,000 ^s	n.a.	n.a.	n.a.	n.a.
PT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
RO	2,433 ^q	3,392	16,007 ^q	18,971	n.a.	n.a.	n.a.	n.a.
SE	8,938	13,486	13,312	18,462	1,782	2,179	11,530	16,283

	Number of companies		Total employment		Male employment		Female employment	
	1995	2006	1995	2006	1995	2006	1995	2006
SI	38	138 ^r	4,123	4,923	251	451	3,872	4,472
SK	43	148	3,331	8,409	n.a.	n.a.	n.a.	n.a.
UK	n.a.	38,000	n.a.	23,2675	n.a.	30,305	n.a.	202,370

Notes: ^a = 2001; ^b = figure refers to establishments rather than employers; ^c = 1996; ^d = 2007; ^e = 2000; ^f = figure refers to companies rather than employers; ^g = 2005; ^h = figure refers to both companies and establishments; ⁱ = 1999; ^j = 1997; ^k = 2003; ^l = only employers with at least five employees; ^m = 2002; ⁿ = 1991; ^o = hairdressing subsector according to NACE 93.02-01 only; ^p = figure refers to companies, without self-employed persons; ^q = 2004; ^r = figure excludes 2,000–3,000 self-employed persons in sector; ^s = 2008; ^t = approximate value

n.a. = not available

Source: EIRO national centres, 2008

Table 2: Total employees in personal services sector, 1995 and 2006

	Total employees		Male employees		Female employees		Total sectoral employment as % of total employment in economy		Total sectoral employees as % of total employees in economy	
	1995	2006	1995	2006	1995	2006	1995	2006	1995	2006
AT	n.a.	22,535 ^a	n.a.	n.a.	n.a.	n.a.	n.a.	0.87 ^a	n.a.	0.72 ^a
BE	6,276 ^b	15,233 ^c	n.a.	n.a.	n.a.	n.a.	n.a.	0.80 ^c	n.a.	0.40 ^c
BG	1,413 ^d	3,234	222 ^d	362	1,191 ^d	2,872	n.a.	n.a.	0.07 ^d	0.14
CY	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.88	0.96 ^e	n.a.	n.a.
CZ	9,000	6,800 ^c	300	400 ^c	8,700	6,400 ^c	0.40	0.64 ^c	0.21	0.16 ^c
DE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DK	6,185	7,182	489	458	5,696	6,724	0.50	0.50	0.30	0.30
EE	n.a.	n.a.	n.a.	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.	n.a.	n.a.	n.a.
ES	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
FI	2,077	2,688	97	142	1,980	2,546	0.70	0.60	0.1	0.1
FR	99,393 ^f	118,552 ^c	13,900 ^f	14,200 ^c	85,500 ^f	104,300 ^c	0.65	0.64	0.50	0.52
HU	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
IE	n.a.	21,000 ^c	n.a.	n.a.	n.a.	n.a.	n.a.	1.00	n.a.	1.21

	Total employees		Male employees		Female employees		Total sectoral employment as % of total employment in economy		Total sectoral employees as % of total employees in economy	
	1995	2006	1995	2006	1995	2006	1995	2006	1995	2006
IT	56,441 ^g	62,224 ^a	6,152 ^g	6,782 ^a	50,289 ^g	55,442 ^a	0.86 ^g	0.86 ^g	0.34 ^g	0.36 ^a
LT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LU	1,227	1,956 ^c	132	223 ^c	1,095	1,733 ^c	n.a.	n.a.	0.55	0.55 ^c
LV	2,648 ^f	5,567	n.a.	n.a.	n.a.	n.a.	0.36 ^f	0.58	0.35 ^f	0.58
NL	24,700	33,400	4,300	4,600	20,400	28,800	n.a.	n.a.	0.41	0.48
PL	n.a.	20,000 ⁱ	n.a.	n.a.	n.a.	n.a.	n.a.	1.2 ⁱ	n.a.	0.13 ⁱ
PT	7,478 ^d	10,724 ^e	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.24 ^d	0.28 ^e
RO	15,701 ^h	18,542	n.a.	n.a.	n.a.	n.a.	0.19 ^h	0.22	0.35 ^h	0.40
SE	5,307	5,524	588	560	4,719	4,964	0.35	0.43	0.15	0.14
SI	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.55	0.61	n.a.	n.a.
SK	87	93	9	52	78	41	0.16	0.38	0.004	0.005
UK	n.a.	138,631	n.a.	11,974	n.a.	126,657	n.a.	0.8	n.a.	0.5

Notes: ^a = 2001; ^b = 1996; ^c = 2007; ^d = 2000; ^e = 2005; ^f = 1997; ^g = 1991; ^h = 2004; ⁱ = 2008

n.a. = not available

Source: EIRO national centres, 2008

National level of interest representation

In many of the 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; and participation in public policy and tripartite bodies of social dialogue. Under these circumstances, representativeness is normally measured by the membership strength of the organisations. For instance, statutory extension provisions usually allow for the **extension of collective agreements** to unaffiliated employers only when the signatory trade union and employer organisation 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 policymaking 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 (see 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 governments to persistently 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 membership domain and strength of the social partner organisations; their role in collective bargaining; and 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 that the organisation does not claim to represent. As already explained, this study considers only organisations whose domain relates to the personal services 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. Regarding membership strength, a differentiation exists 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 persons. 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. However, measuring the membership strength of employer organisations is more complex since they organise collective entities, namely companies that employ 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 of an employer organisation.

For a sector study such as this, measures of membership strength of both the trade unions and employer organisations also have 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 – that is, 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.

Trade unions

Table 3 presents the trade union data on their domains and membership strength. The table lists all of the trade unions that meet at least one of the two criteria for classification as a sector-related social partner organisation, as defined earlier. Of the 26 countries under consideration, eight do

not record any sector-related trade union – namely, Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Poland, Romania and Slovakia. In the remaining 18 countries, 38 sector-related trade unions could be identified – for one of these, the membership domain could not be clarified. Only four out of the remaining 37 unions (10.8%) have demarcated their domain in a way that is congruent with the sector definition. This underlines the fact that statistical definitions of business activities, in particular in smaller branches of the economy, differ somewhat from the lines along which employees identify common interests and band together in trade unions.

Table 3: Interest representation of trade unions in personal services sector, 2006–2007

Country	Type of membership ^a	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations ^c
			Members	Members in sector	Female membership (% of total membership) ^b	Domain	Sector			
AT										
GPA-DJP	Vol.	SO*	249,500	n.a.	43.2%	20%	<10%	Yes	n.a.	ÖGB, UNI Europa, Eurocadres, EFFAT, EMCEF, EPSU
vida	Vol.	SO*	155,712	2,200	33%	n.a.	n.a.	Yes	Yes	ÖGB, ETF, EFFAT, UNI-Europa (Hair & Beauty Section)
BE										
ACV/CSC Energie-chimie	Vol.	SO*	55,000	n.a.	n.a.	n.a.	n.a.	Yes	No	ACV/CSC, UNI-Europa (Hair & Beauty Section)
ABVV/FGTB Centrale générale	Vol.	SO*	300,000	3,000	n.a.	n.a.	20% (n.a.)	Yes	No	ABVV/FGTB, UNI-Europa (Hair & Beauty Section)
SETCa-BBTK	Vol.	SO*	356,912	n.a.	n.a.	n.a.	n.a.	Yes	No	ABVV/FGTB,

Country	Type of membership ^a	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations ^c
			Members	Members in sector	Female membership (% of total membership) ^b	Domain	Sector			
										UNI-Europa
ACLVB/CGSLB)	Vol.	O*	265,000	680	51%	6%	4.5%	Yes	No	UNI-Europa (Hair & Beauty Section)
BG										
ITUFECCTCS	Vol.	O	5,341	58	85%	n.a.	1.8%	No	n.a.	<i>CITUB</i> , UNI-Europa (Hair & Beauty Section)
CY	–	–	–	–	–	–	–	–	–	–
CZ	–	–	–	–	–	–	–	–	–	–
DE										
verdi	Vol.	O	2,205,145	n.a.	49.8%	n.a.	n.a.	Yes	Yes	<i>DGB</i> , UNI-Europa (Hair & Beauty Section)
DK										
DFKF	Vol.	C*	4,906	4,906	95.9%	85%	85%	Yes	No	<i>LO</i> , NHU UNI-Europa (Hair & Beauty Section)
KF	Vol.	O*	92,802	500–1,000	53.8%	5%	About 9%	Yes	No	<i>Krifaf</i> , Eurofedop
EE	–	–	–	–	–	–	–	–	–	–
EL										
ACCE-OIYE	Vol.	S	400	400	99%	n.a.	n.a.	Yes	Yes	<i>GSEE</i> , UNI-Europa (Hair & Beauty)

Country	Type of membership ^a	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations ^c
			Members	Members in sector	Female membership (% of total membership) ^b	Domain	Sector			
										Section)
ES										
FES-UGT	Vol.	O*	120,000	4,000	40%	4%	2%	Yes	No	UGT, UNI-Europa (Hair & Beauty Section)
AADD-CCOO	Vol.	O*	73,700	4,000	35%	4%	2%	Yes	No	UNI-Europa (Hair & Beauty Section)
ELA-Zerbitzuak	Vol.	SO*	22,000	200	n.a.	n.a.	n.a.	Yes	No	UNI-Europa (Hair & Beauty Section)
FI										
PAM	Vol.	O	211,305	2,400	80%	67%	89.3%	Yes	Yes	UNI-Europa (Hair & Beauty Section), EFFAT
FR										
FdS-CFDT	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	CFDT, UNI-Europa (Hair & Beauty Section)
FNECS-CFE-CGC	Vol.	SO*	2,700	n.a.	40%	n.a.	n.a.	Yes	No	CFE-CGC
FCSF-CFTC	Vol.	O*	25,000	n.a.	35%	n.a.	n.a.	Yes	No	CFTC
FC-CGT	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	CGT, UNI-Europa (Hair & Beauty)

Country	Type of membership ^a	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations ^c
			Members	Members in sector	Female membership (% of total membership) ^b	Domain	Sector			
										Section) ^d
SGC-FGTA-CGT-FO	Vol.	S*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	CGT-FO, UNI-Europa (Hair & Beauty Section) ^d
HU	–	–	–	–	–	–	–	–	–	–
IE										
Unite	Vol.	O*	50,000	90	n.a.	n.a.	0.43%	Yes	Yes	ICTU, UNI-Europa
SIPTU	Vol.	O*	225,000	40	n.a.	n.a.	0.19%	Yes	Yes	ICTU, UNI-Europa
IWU	Vol.	O*	1,500	10	n.a.	n.a.	0.04%	Yes	No	–
IT										
FILCAMS	Vol.	O*	350,000	1,200	62%	21%	1.9%	Yes	Yes	CGIL, UNI-Europa (Hair & Beauty Section), EFFAT, ETLIC
FISASCAT	Vol.	O*	200,000	6,220	n.a.	12%	10%	Yes	Yes	CISL, UNI-Europa (Hair & Beauty Section), EFFAT
UILTuCS	Vol.	O*	100,141	n.a.	n.a.	6%	n.a.	Yes	Yes	UIL, UNI-Europa (Hair & Beauty Section), EFFAT
LT										

Country	Type of membership ^a	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations ^c
			Members	Members in sector	Female membership (% of total membership) ^b	Domain	Sector			
LKKPS-LKKDPS	Vol.	C	100	100	100%	n.a.	n.a.	No	n.a.	<i>LPSK, UNI-Europa (Hair & Beauty Section)</i>
LU										
OGB-L	Vol.	O	61,000	500	33%	19.5%	25.8%	No	n.a.	<i>CGT-L, UNI-Europa (Hair & Beauty Section)</i>
LV	–	–	–	–	–	–	–	–	–	–
NL										
FNV Mooi	Vol.	C*	11,550	11,550	n.a.	34.6%	34.6%	Yes	No	<i>FNV, UNI-Europa (Hair & Beauty Section)</i>
CNV Bedrijvenbond – Hairdressing Section	Vol.	S*	4,950	4,950	n.a.	n.a.	14.8%	Yes	No	<i>CNV</i>
VPP	Vol.	n.a.*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	–
PL	–	–	–	–	–	–	–	–	–	–
PT										
SINDPAB	Vol.	C*	1,000	1,000	>80%	10%	10%	Yes	No	–
CESP	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	<i>CGTP-IN</i>
SITese	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	No	No	<i>FETese, UGT, UNI-Europa (Hair & Beauty Section)</i>

Country	Type of membership ^a	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations ^c
			Members	Members in sector	Female membership (% of total membership) ^b	Domain	Sector			
RO	–	–	–	–	–	–	–	–	–	–
SE										
HF	Vol.	O	150,343	2,000	68%	75%–80%	36%	Yes	Yes	<i>LO</i> , UNI-Europa (Hair & Beauty Section)
SI										
SODS	Vol.	O	15,000	n.a.	50%	12%	n.a.	Yes	No	ZSSS, UNI-Europa ^d
SK	–	–	–	–	–	–	–	–	–	–
UK										
GMB	Vol.	O*	575,892	<1,000	43%	n.a.	<1%	No	Yes	<i>TUC</i> , UNI-Europa (Hair & Beauty Section)
USDAW	Vol.	O*	368,258	<2,000	58%	n.a.	About 1%	No	Yes	<i>TUC</i> , UNI-Europa (Hair & Beauty Section)

Notes: See Annex for list of abbreviations and full names of organisations.

^a Vol. = voluntary

^b As a percentage of total union membership

^c National affiliations appear in italics; for the national level, only cross-sectoral (i.e. peak-level) associations are listed; for the European level, only sectoral associations are listed

^d Affiliation via higher-order unit

* Domain overlap

O = Overlap, SO = Sectional overlap, S = Sectionalism, C = Congruence

n.a. = not available

Source: EIRO national centres, 2008

Domain demarcations resulting in overlap in relation to the sector prevail in the sector, accounting for 62.2% of cases. Overlap largely arises from two different modes of demarcation. The first mode relates to general or cross-sectoral domains – as seen in the cases of the Luxembourg Confederation of Independent Trade Unions ([Onafhängege Gewerkschaftsbond Lëtzebuerg](#), [OGB-L](#)), [Unite](#) in Ireland and the [GMB](#) general trade union in the United Kingdom (UK). The second and more frequent demarcation mode in the sector relates to various forms of multi-sector domains, covering contiguous sectors, mostly in the broader services segment of the economy – as observed, for example, in the cases of the Independent Trade Union Federation of Employees in Commerce, Cooperatives, Tourism, Credit and Social Services ([ITUFECCTCS](#)) in Bulgaria, the United Services Union ([Vereinte Dienstleistungsgewerkschaft](#), [ver.di](#)) in Germany, the National Service Federation of the General Workers' Confederation ([Federación Estatal de Servicios de la Unión General de Trabajadores](#), [FES-UGT](#)) in Spain, the Service Union United ([Palvelualojen ammattiliitto](#), [PAM](#)) in Finland, and the French trade unions the [Services Federation](#) (FdS-CFDT) of the French Democratic Confederation of Labour ([Confédération française démocratique du travail](#), [CFDT](#)), the [Commerce, Services, Sales Staff Federation](#) (FCSF-CFTC) of the French Christian Workers' Confederation ([Confédération française des travailleurs chrétiens](#), [CFTC](#)) and the [Commerce Federation](#) (FC-CGT) of the General Confederation of Labour ([Confédération générale du travail](#), [CGT](#)).

Sectional overlap can be found in 18.9% of the cases and is thus the second most frequent domain demarcation in relation to the sector. This mode usually emanates from domain demarcations that focus on certain categories of employees which are then organised across several or all sectors. Employee categories are specified by various parameters, such as: distinct occupations, for example managers as is the case of France's National Federation of Commerce and Services Executives (FNECS) affiliated to the French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff ([Confédération française de l'encadrement – Confédération générale des cadres](#), [CFE-CGC](#)); employment status, such as blue-collar workers, as observed in the case of [vida](#) in Austria, along with Belgium's General Christian Trade Union ([Algemeen Christelijk Vakverbond/Confédération des syndicats chrétiens](#), [ACV/CSC](#)) and the Belgian General Confederation of Labour ([Algemeen Belgisch Vakverbond/Fédération Générale du Travail de Belgique](#), [ABVV/FGTB](#)), or white-collar employees, as is the case regarding the Union of Salaried Employees, Graphical Workers and Journalists ([Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier](#), [GPA-DJP](#)) in Austria; and geographic region, as seen for instance in the case of the employees, technicians, shops and food sector within the Basque Workers' Solidarity ([ELA-Zerbitzuak](#)), which is only active in Basque region of Spain.

Finally, sectionalism represented only three or 8.1% of the cases. This mode ensues from the existence of sector-specific trade unions, which represent and organise only certain categories of employees in the sector, while they do not organise employees outside the personal services sector. In this sector, such employee categories are specified by distinct occupations, such as hairdressers in the case of France's [General Hairdressing Union \(SGC-FGTA\)](#) affiliated to the General Federation of Agricultural, Food, Tobacco and Allied Services Workers ([Fédération Générale des Travailleurs de l'Agriculture, de l'Alimentation, des Tabacs et des Services, FGTA](#)), and the hairdressing section of the Christian Industrial Union ([CNV Bedrijvenbond](#)) in the Netherlands, or beauty treatment workers in the case of the [Association of Cosmetic Company Employees \(ACCE-OIYE\)](#) affiliated to the [Federation of Private Employees in Greece \(OIYE\)](#).

As the domains of the trade unions often overlap with the demarcation of the sector, so too do their domains with one another in the case of the countries with a pluralist trade union landscape in the sector. Table 3 also gives an insight into these inter-union domain overlaps, which appear to be endemic. In all countries with more than one sector-related trade union, the domain of any of them overlaps with the domain of all or most of the others. Depending on the scale of mutual overlap, this results in competition for members. Noticeable inter-union competition is, for instance, recorded in Denmark, Ireland and, to a lesser extent, the Netherlands.

Looking at the trade union membership data, it becomes apparent that female employees comprise the majority group in most of the unions for which membership figures by gender are available. Nevertheless, in some trade unions, the proportion of male members is close to or even above 50%. At first glance, this finding is quite remarkable, since the sector's employment is clearly dominated by female employees. However, closer consideration shows that the domain of all trade unions recording a majority of male members overlaps or sectionally overlaps in relation to the sector. Hence, the predominance of male members in these unions is likely to originate in areas of their domains other than the personal services sector. The fact that women clearly prevail in European personal services (see Table 1) is, as far as related data are available, mirrored by female membership rates of above 80% – or in most cases above 95% – in those trade unions whose domain is congruent or sectional in relation to the sector.

Membership of the sector-related trade unions is voluntary in all cases in the 26 Member States under consideration. The absolute numbers of trade union members differ widely, ranging from more than 2.2 million to about 100 members. 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 which is more appropriate to a comparative analysis. Domain density is over 50% in the case of only 20% of the trade unions that document figures on density. Only 13.3% of the unions gather 70% or more of the employees covered by their domain. More than half of the trade unions (53.3%) for which data are available organise fewer than 15% of the employees within their domain. The remaining trade unions (26.7%) record a density of between 15% and 50% of their potential members. These results indicate that overall domain density of the sector-related unions is rather low. However, it should also be noted that for only 15 out of the 38 sector-related trade unions, domain density data are recorded.

These findings largely correspond to the trade unions' density in the personal services sector, although sector density tends to be even lower than domain density. When looking at sector density, 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. 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 sectionally overlapping in relation to the sector. Even when taking the trade unions’ sectoral domain density into account – which tends to be higher than their sectoral density for the reasons outlined above – the trade unions’ density in the personal services sector falls short of the already low density ratio referring to their domain on aggregate. Sectoral domain density is over 50% in the case of only 10.5% of the trade unions for which data are available. Some 73.7% of the trade unions record a sectoral domain density lower than 15%, while 15.8% of them record a sectoral domain density of between 15% and 50%. Again, it should be noted that for about half of the sector-related trade unions, no data on sectoral (domain) density are available. Regarding those trade unions for which figures on both measures are recorded – that is, for sectoral domain density and domain density on aggregate – sectoral (domain) density tends to be lower compared with aggregate density, although a few trade unions also show the reverse relationship between the two densities.

Low unionisation rates in the personal services sector may be attributed to a variety of reasons. First, the sector has a high and still increasing proportion of self-employed persons – or ‘one-person companies’ – who are usually not inclined to join a trade union. The second reason is related to the predominance of female employees in the sector, who are in most countries, except for the Nordic countries, traditionally harder to organise compared with men ([TN0103201U](#)). Third, the small size of most establishments – which consequently often do not meet the criteria for setting up workplace representation – as well as the high staff turnover and exit rates constitute significant obstacles for establishing stable ties with trade unions. Lastly, it is possible that most trade unions in the sector may not be strong enough to effectively promote substantial employee interests, in particular in terms of pay and working conditions, in comparison with the employers, such that a core incentive for unionisation may be lacking.

Employer organisations

Table 4 presents the membership data for employer organisations in the personal services sector. For 18 out of the 26 countries under consideration, sector-related employer organisations are documented. In at least one of these countries, a proportion of the listed employer organisations are not a party to collective bargaining. They are classified here as social partner organisations only due to their European-level affiliation to [Coiffure EU](#). At least 14 of the 18 countries have employer organisations engaged in collective bargaining, although more definite figures cannot be provided since no related data are available for some of the organisations. In a number of the countries – namely, Bulgaria, the Czech Republic, Estonia, Lithuania, Latvia, Luxembourg, Romania and Slovakia – there is no employer association that meets the definition of a social partner organisation, as outlined earlier. However, this does not mean that business has remained unorganised. 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’ (see [TN0311101S](#)). Such sector-related trade associations also exist in the personal services sector.

In terms of their national scope of activities, all of the organisations that are not involved in collective bargaining according to Table 4 either primarily or exclusively act as trade associations in their country. It is only the conceptual decision to include all associational affiliates of [Coiffure EU](#), regardless of whether they have a role in national bargaining, that gives them the status of a social partner organisation within the framework of this study. Of the 40 employer organisations listed in Table 4, at least one organisation belongs to this group. In seven of the 18 countries where employer organisations exist, only one single employer organisation – in the meaning of a

social partner organisation as previously defined – has been established. Pluralist associational systems on the employer side are thus – like on the trade union side – prevailing in the sector. Regardless of this, the employer organisations’ domains tend to be narrower than those of the trade unions. Some 21.1% and 13.2% of these organisations rest on overlapping and sectionally overlapping domains, respectively. The individual domains of the [Christian Employers’ Association \(KA\)](#) in Denmark, the [Irish Business and Employers’ Confederation \(IBEC\)](#) in Ireland and the Chamber of Commerce and Industry of Slovenia ([Gospodarska zbornica Slovenije, GZS](#)) are cross-sectoral. Otherwise, most of the domain overlaps ensue from coverage of the broader beauty/wellness sector, often including some kind of basic medical treatment, part of the cosmetics/wigs production industry – as seen in the case of the [Federal Association of Hairdressers \(BIF\)](#) in Austria and the [Hellenic Cosmetic, Toiletry and Perfumery Association \(PSVAK\)](#) in Greece – or the broader artisan sector. Overlaps of the latter kind can especially be found in Italy. Sectionalism or sectional overlaps in cases of broader domain demarcation in terms of the sector are mainly caused by domain demarcations that focus on either hairdressing activities or beauty treatment services only. Sectionalism resulting from such specialisation is most common in the personal services sector. Aside from this, sectionalism also arises due to domain demarcations that focus on small and medium-sized enterprises (SMEs), as is the case regarding the IBEC-affiliated [Small Firms Association \(SFA\)](#) in Ireland, and particular geographic regions, as seen in relation to the [Association of Barbershops and Hairdressers in the District of Braga \(ABCDB\)](#) in Portugal. A relative majority (47.4%) of the associations are sectional with regard to their domain. Some 18.4% of the cases have a domain congruent with the sector definition. The two existing sector-related employer organisations of Austria – namely, BIF and the [Federal Association of Beauty Treatment Companies \(BIFKM\)](#) – along with the Chamber of Craft and Small Businesses of Slovenia ([Obrtno-podjetniška zbornica Slovenije, OZS](#)) can rely on obligatory membership. In the case of all three of these organisations, this is due to their public-law status as chambers. Nevertheless, with regard to Slovenia’s OZS, 2006 legislation on chambers of commerce and industry will cease its capacity to conclude collective agreements by May 2009 ([SI0809039I](#)).

In those countries with a pluralist structure in relation to employer organisations, these associations have usually managed to achieve non-competing relationships. Their activities complement each other as a result of inter-associational differentiation by either membership demarcation or functions and tasks. However, a few cases of inter-associational rivalry are recorded in Ireland, the Netherlands and Slovenia.

As the figures on density show (Table 4), membership strength in terms of companies varies widely with regard to both the membership domain in general and the sector-related densities. The same holds true for the densities in terms of employees. Companies’ densities tend to be equal to or, where they differ, lower than employee densities. This indicates a higher propensity of the larger companies to associate, compared with their smaller counterparts. However, overall densities in the sector are rather low. Irrespective of the kind of density referred to, apart from the employer organisations with mandatory membership, only a few associations register a density higher than 50% of the employees – namely, the [Hairdressers’ Association \(Suomen Hiusyrittäjät\)](#) in Finland and the [Royal General Dutch Hairdressers’ Organisation \(ANKO\)](#) in the Netherlands. Most of the voluntary employer organisations record employee densities lower than 30%. This is due to the sector’s company structure, which is characterised by a high proportion of small and micro-enterprises. Traditionally, small companies appear to be less willing to gather in associations. Another negative influence on membership strength and density rates may be found in the high degree of fragmentation of the associational systems in a few countries, such as Belgium, Italy and Spain – particularly regarding the representation of small companies. Overall, little difference emerges between the density of domains and the sector-related densities, and in most cases they tend to be equally low. One can infer from these findings that employers are

poorly organised in the personal services sector – particularly very small companies and self-employed persons.

Table 4: Domain coverage, membership and density of employer organisations in personal services sector, 2006–2007

Country	Domain coverage	Membership					Density			
		Type ^a	Companies	Companies in sector	Employees	Employees in sector	Companies		Employees	
							Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
AT										
BIF	SO	oblig.	6,500	6,000	18,997	16,000	100%	75% (100%)	100%	70% (100%)
BIFKM	SO	oblig.	9,058	6,000	24,000	7,000	100%	25% (100%)	100%	30% (100%)
BE										
RCBH	S*	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
NVHB	S*	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
NCBH	S*	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
UNEB	S	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
PABC	S	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
BG	–	–	–	–	–	–	–	–	–	–
CY										
CHF	S	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CZ	–	–	–	–	–	–	–	–	–	–
DE										
ZV	C	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DK										
DF	C*	vol.	3,500	3,500	5,317	5,317	58%	58% (58%)	n.a.	n.a.
KA	O*	vol.	1,000	20	100,000	200	10%	<1% (<1%)	n.a.	n.a.
EE	–	–	–	–	–	–	–	–	–	–
ELL	O	vol.	15	11	6,000–7,000	~4,000	15.8%	55%	48%	60%–70%
EL										
PSVAK	SO	vol.	66	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
GFH	S	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES										

Country	Domain coverage	Membership					Density			
		Type ^a	Companies	Companies in sector	Employees	Employees in sector	Companies		Employees	
							Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
FEIPPSB	C*	vol.	7,733	7,733	15,446	15,446	9%	9% (9%)	9%	9% (9%)
ANEPECS	C*	vol.	27,556	27,556	55,000	55,000	30%	30% (30%)	30%	30% (30%)
FANAE	S*	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CEPE	C*	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
FI										
SH	S	vol.	1,400	1,400	2,300	2,300	15%	13% (15%)	>90%	85.6% (>90%)
FR										
FNC	S*	vol.	7,595	7,595	n.a.	n.a.	n.a.	12% (n.a.)	n.a.	n.a.
CNEC	S*	vol.	3,752	3,752	25,000	25,000	n.a.	n.a.	n.a.	21% (n.a.)
HU										
MOSZI	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
IE										
IBEC	O*	vol.	7,500	7	n.a.	n.a.	n.a.	0.22% (0.22%)	n.a.	n.a.
SFA-IBEC	SO*	vol.	8,000	5	n.a.	n.a.	n.a.	0.16% (0.16%)	n.a.	n.a.
IT										
Confartigianato Estetica	SO*	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Confartigianato Acconciatori	S*	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Can Benessere e Sanita	O*	vol.	28,000	n.a.	12,233	n.a.	19.3%	19.6% (19.6%)	19.3%	19.6% (19.6%)
CLAAI	O*	vol.	115,976	n.a.	48,749	n.a.	8%	5.7% (5.7%)	8%	5.7% (5.7%)
Casartigiani	O*	vol.	84,663	n.a.	35,587	n.a.	n.a.	3% (3%)	n.a.	3.8% (3.8%)
CIA	S*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LT	–	–	–	–	–	–	–	–	–	–
LU	–	–	–	–	–	–	–	–	–	–

Country	Domain coverage	Membership					Density			
		Type ^a	Companies	Companies in sector	Employees	Employees in sector	Companies		Employees	
							Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
LV	–	–	–	–	–	–	–	–	–	–
NL										
ANKO	S*	vol.	6,300	6,300	18,000	18,000	37%	28.7% (37%)	66%	53.9% (66%)
FUSION	S*	vol.	180	180	n.a.	n.a.	1.1%	0.8% (1.1%)	5%	4.5% (n.a.)
PL										
SFKWP-POLFRYZ	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
PT										
APBCIB	C*	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ACP	S*	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ABCDB	S*	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
RO	–	–	–	–	–	–	–	–	–	–
SE										
Frisörföretagarna	S	vol.	4,500	4,500	2,700	2,700	About 30%	About 30% (30%)	49%	49% (49%)
SI										
OZS	O*	oblig.	50,000	3,270	140,000	n.a.	100%	100% (100%)	100%	100% (100%)
ZDOPS	O*	vol.	2,700	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
GZS	O*	vol.	18,600	30	n.a.	200	16.7%	1% (1%)	40%	n.a.
SK	–	–	–	–	–	–	–	–	–	–
UK										
NHF	C	vol.	7,000	7,000	116,000	116,000	50%	50% (50%)	50%	50% (50%)

Notes: See Annex for full list of abbreviations and full names of organisations.

^a vol. = voluntary, oblig. = obligatory

* Domain overlap

O = Overlap, SO = Sectional overlap, S = Sectionalism, C = Congruence

n.a. = not available

Source: EIRO national centres, 2008

Table 5: Collective bargaining, consultation and national/European affiliations of employer organisations in personal services sector, 2006–2007

Country	Collective bargaining	Consultation	National and European affiliations ^a
AT			
BIF	yes	yes	WKÖ, Coiffure EU
BIFKM	yes	yes	WKÖ
BE			
RCBH	yes	no	UBK/UCB, UNIZO, UCM, Coiffure EU ^b
NVHB	yes	no	UBK/UCB, UNIZO, UCM, Coiffure EU ^b
NCBH	yes	no	UBK/UCB, UNIZO, UCM, Coiffure EU ^b
UNEB	yes	no	–
PABC	yes	no	–
BG	–	–	–
CY			
CHF	n.a.	n.a.	Coiffure EU
CZ	–	–	–
DE			
ZV	yes ^c	n.a.	Coiffure EU
DK			
DF	yes	no	SAMA, DA ^b , HVR, Coiffure EU
KA	yes	no	HVR
EE	–	–	–
EL			

Country	Collective bargaining	Consultation	National and European affiliations ^a
PSVAK	yes	yes	SEV, COLIPA
GFH	n.a.	n.a.	Coiffure EU
ES			
FEIPPSB	yes	no	CEOE
ANEPECS	yes	no	CEPYME
FANAE	yes	no	CEPEC
CEPE	yes	no	–
FI			
SH	yes	yes	SY, Coiffure EU
FR			
FNC	yes	yes	CNAMS, Coiffure EU
CNEC	yes	yes	CGPME
HU			
MOSZI	n.a.	n.a.	Coiffure EU
IE			
IBEC	yes	yes	–
SFA-IBEC	yes	yes	IBEC
IT			
Confartigianato Estetica	yes	yes	Confarti-Gianato
Confartigianato Acconciatori	yes	yes	Confarti-Gianato
Can Benessere e Sanita	yes	yes	CAN, CEPEC
CLAAI	yes	yes	–
Casartigiani	yes	yes	–
CIA	n.a.	n.a.	Coiffure EU
LT	–	–	–
LU	–	–	–
LV	–	–	–
NL			
ANKO	yes ^d	no	MKB-NL, Coiffure

Country	Collective bargaining	Consultation	<i>National and European affiliations^a</i>
			EU
FUSION	yes	no	–
PL			
SFKWP-POLFRYZ	n.a.	n.a.	Coiffure EU
PT			
APBCIB	yes	no	<i>CCP</i>
ACP	yes	no	–
ABCDB	yes	no	–
RO	–	–	–
SE			
Frisörföretagarna	yes	yes	Coiffure EU
SI			
OZS	yes	no	Coiffure EU
ZDOPS	yes	no	–
GZS	yes	no	–
SK	–	–	–
UK			
NHF	no	yes	Coiffure EU

Notes: See Annex for full list of abbreviations and full names of organisations.

^a *National affiliations appear in italics; only affiliations to sectoral European associations are listed*

^b *Affiliation via higher-order unit*

^c *Collective bargaining involvement via lower-order units at regional level*

^d *Collective bargaining involvement via higher-order unit (i.e. MKB-NL)*

Source: EIRO national centres, 2008

Collective bargaining and its actors

Table 3 lists all of the trade unions engaged in sector-related collective bargaining. Despite numerous cases of inter-union domain overlap and of unclear domain demarcation, only a few cases of inter-union rivalry and competition for bargaining rights have been identified (see above). Such competition for members and/or bargaining rights is reported in Denmark – more specifically, in the case of the Danish Hairdressing and Cosmetics Union ([Dansk Frisør og Kosmetiker Forbund, DFKF](#)) and the Christian Trade Union ([Kristelig Fagforening, KF](#)), both of which claim to organise employees in the personal services sector. In Ireland, inter-union rivalries occur in particular between trade unions affiliated to the [Irish Congress of Trade Unions \(ICTU\)](#) and the non-affiliated [Independent Workers' Union \(IWU\)](#).

With regard to the sector-related employer organisations, apart from a few cases of inter-associational rivalry for members and consultation rights in Ireland, the Netherlands and Slovenia (see above), only one case of competition over collective bargaining rights is documented in Ireland. In this case, the [Irish Small and Medium Enterprises Association \(ISME\)](#), which split off from the SFA affiliated to the IBEC umbrella association, claims to have a more prominent role in the national bargaining process.

The data presented in Table 6 provide an overview of the system of sector-related collective bargaining in the 26 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 (see Traxler, Blaschke and Kittel, 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.

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 party to the agreement. This includes 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 that 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. On the one hand, extending a collective agreement to the employees who are not unionised in the company covered by the collective agreement is a standard of the [International Labour Organization \(ILO\)](#), 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 collective agreement in question will bind them in any case (see Traxler, Blaschke and Kittel, 2001).

Table 6: System of sectoral collective bargaining in personal services sector, 2006–2007

Country	Collective bargaining coverage (CBC)	Proportion of multi-employer bargaining (MEB) as % of total CBC	Extension practices*
AT	70%	100%	(Limited/exceptional)
BE	100%	MEB prevailing	2
BG	0%	n/a	n/a
CY	0%	n/a	n/a
CZ	0%	n/a	n/a
DE	n.a.	MEB prevailing	Pervasive
DK	85%	MEB prevailing	No practice
EE	0%	n/a	n/a
EL	n.a.	100%	No practice
ES	100%	100%	Pervasive
FI	100%	100%	Pervasive
FR	100%	100%	No practice
HU	0%	n/a	n/a
IE	n.a.	MEB prevailing	No practice
IT	100%	100%	(Pervasive)
LT	0%	n/a	n/a
LU	0%	n/a	n/a
LV	0%	n/a	n/a
NL	>80%	MEB prevailing	Pervasive
PL	0%	n/a	n/a
PT	Almost 100%	100%	Pervasive
RO	0%	n.a.	n.a.
SE	60%	80%	Limited/exceptional
SI	100%	>95%	(Pervasive)
SK	0%	n/a	n/a

Country	Collective bargaining coverage (CBC)	Proportion of multi-employer bargaining (MEB) as % of total CBC	Extension practices*
UK	0%	n/a	n/a

Notes: 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 include functional equivalents to extension provisions, i.e. obligatory membership and labour court rulings; cases of functional equivalents appear in parentheses.*

n.a. = not available

n/a = not applicable

Source: EIRO national centres, 2008

Collective bargaining coverage

In terms of the sector's collective bargaining coverage, nine of the 23 countries for which related data are available record a very high coverage rate of 80% or more. Conversely, there are as many as 12 countries – in other words, almost half of all countries with available data – where collective bargaining is completely absent. Overall, Table 6 provides for a rather polarised picture in this respect. In those countries where sector-related collective bargaining takes place, bargaining coverage tends to be very high, with rates all exceeding 60% and often coming close to 100%. On the other hand, as already stated, collective bargaining is completely absent in about half of the countries. One can infer from these findings that in about half of the EU Member States, the personal services sector's industrial relations structures are well-established, while they appear to be underdeveloped in the remaining half.

Closer consideration regarding the different countries reveals that collective bargaining coverage rates tend to be high in the 'older' 15 EU Member States (EU15), with the notable exceptions of Luxembourg and the UK. In contrast, sectoral bargaining is lacking in all of the newer Member States that joined the EU in 2004 and 2007, with the exception of Slovenia. This is because most of the central and east European countries had no well-performing industrial relations structures in place in the sector, which is clearly manifested in the lack of sector-related representative social partner organisations in these countries (see Tables 2 and 3). Organising members is equally difficult for both trade unions and employer organisations, due to the small size of most enterprises and the high incidence of, often illegally operating, self-employed persons instead of regular employees.

In the EU15, excluding Luxembourg and the UK, several factors which sometimes interact with each other account for the high coverage rates – at least in those countries for which related data are available. Such factors include the following: the predominance of multi-employer bargaining; the partially high density rates of the trade unions and/or employer organisations, as seen for example in Denmark, Finland, the Netherlands and Sweden; the existence of pervasive extension practices, as observed in countries such as in Belgium, Finland, the Netherlands, Portugal, Spain and Sweden. In the case of Austria (as well as Slovenia), obligatory membership in the employer organisations works as a functional equivalent to pervasive extension. Nevertheless, in Austria, the entire beauty treatment industry is not covered by any collective agreement, since the former, regionally differentiated agreements applying to this subsector were

ceased a few years ago. While coverage in countries with prevalent multi-employer bargaining is generally high, single-employer bargaining arrangements are rare in the sector. Strikingly, it was not possible to identify one single country with prevalent single-employer bargaining. Instead, countries without working multi-employer arrangements generally do not have any bargaining structures at all.

The fact that multi-employer bargaining is the dominant – if not exclusive – form of bargaining in all countries where sector-related collective agreements are concluded does not imply sector-level bargaining in all these cases. In Ireland, for instance, national-level multi-employer wage agreements cover the whole unionised sector in the country, including unionised employees in the hairdressing and beauty industry. This primary level of central cross-sectoral multi-employer bargaining in Ireland may be supplemented by company bargaining, which takes place quite rarely in the personal services sector, while sector-level bargaining does not exist. Likewise, sectoral-level bargaining is absent in Slovenia. Instead, all of the sector's employees are covered by collective agreements concluded by OZS, with obligatory membership for all companies and self-employed persons operating in the crafts industry. In addition, one company agreement has been signed by a medium-sized hairdressing company in Slovenia's capital city of Ljubljana.

Due to the clear prevalence of multi-employer settlements in the sector, the use of extension practices is significant. Pervasive extension practices in the personal services sector are reported for Belgium, Finland, Germany, the Netherlands, Portugal and Spain. In Sweden, extension practices are limited to the hairdressing industry. Referring to the aim of extension provisions – that is, making multi-employer agreements generally binding – the provisions for obligatory membership in the chamber systems of Austria and Slovenia should also be noted. Obligatory membership creates an extension effect, since the Austrian Federal Economic Chamber ([Wirtschaftskammer Österreich, WKÖ](#)) as well as Slovenia's OZS, and their respective subunits, are parties to multi-employer bargaining. However, since no collective agreement is currently in force in Austria's beauty treatment industry, there is no extension practice in effect with regard to this subsector either. Another functional equivalent to statutory extension schemes can be found in Italy. Under 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 can partake in public policy in two basic ways. Firstly, they may be consulted by the authorities on matters affecting their members; or secondly, they may be represented on 'corporatist', in other words tripartite, committees and boards of policy concertation. This study only considers cases of consultation and corporatist participation that 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 an occasional rather than a regular basis. Given this variability, Tables 3 and 4 only feature those sector-related trade unions and employer organisations that are usually consulted.

Trade unions

The trade unions are regularly consulted by the authorities only in eight of the 18 countries where sector-related trade unions are recorded. About half of the countries cite a lack of regular consultation, whereas no information on consultation practices is available for the trade unions of Bulgaria, Lithuania and Luxembourg. Since a multi-union system has been established in 10 of

the 18 countries with sector-related trade unions, one cannot rule out the possibility that the authorities favour certain trade unions over others or that the unions compete for participation rights. However, in the majority of countries where a noticeable practice of consultation is observed, any of the existing trade unions may take part in the consultation process. Ireland appears to be the only exception in this respect. As a result, inter-union conflicts over participation in public policy matters do not figure prominently.

Employer organisations

Similarly, about half of the sector-related employer organisations in those countries where they exist are involved in consultation procedures. In countries with multi-organisation systems, conflicts over participation rights of employer organisations are only rarely reported. In the multi-organisation system of Austria, France and Ireland, where related data for all employer organisations are available, all of the sector's organisations are consulted. Conversely, in the pluralist systems of six countries – namely, Belgium, Denmark, the Netherlands, Portugal, Slovenia and Spain – none of the various employer organisations are regularly consulted. None of the countries records the co-existence of organisations that are consulted and those that are not. In all of the countries where employer organisations co-exist with trade unions, excluding France, consultation rights are symmetrically attributed to the two sides of industry, in that at least one organisation on each side is consulted. This means that in all but one of the 14 countries, for which information on consultation is reported for organised business and labour, representatives of both sides are consulted. In those countries where an employer association in the context of the aforementioned definition of a social partner organisation does not exist – namely, Bulgaria, the Czech Republic, Estonia, Latvia, Lithuania, Luxembourg, Romania and Slovakia – business is not necessarily excluded from consultation procedures. Under these circumstances, sectoral trade associations may be consulted.

Tripartite participation

Turning from consultation to tripartite participation, the findings reveal that genuinely sector-specific tripartite bodies have been established in only four of the 26 countries under consideration. This is mainly due to the relatively small size of the personal services sector and its relative underdevelopment in terms of labour market regulation. Table 7 lists a total of four bodies of this kind. One of them is based on a bipartite agreement of the social partners, while three are based on statutes. Two of them primarily deal with education and training issues, while one each focuses on pay and working conditions, on the one hand, and tackling illicit work and tax fraud in the sector, on the other hand. This reflects the need in virtually all countries to regulate and improve the sector's employment conditions as well as its **vocational training** standards, since in both respects the situation across the EU is characterised by a lack of quality, at least in some of the countries, as well as coherence.

Table 7: Tripartite sector-specific boards of public policy in personal services sector, 2006–2007

Country	Name of body and scope of activity	Origin	Participants	
			Trade unions	Business associations
FI	Sectoral Subunit of Finnish National Board of Education	Agreement	PAM	SH, SY

Country	Name of body and scope of activity	Origin	Participants	
			Trade unions	Business associations
	(Opetushallitus , OPH)			
IE	Joint Labour Committee regulating minimum pay and conditions for hairdressers and beauticians	Statutory	Unite, SIPTU	IBEC/SFA, IHF, ISME
PT	Special Technical Committee for occupational training	Statutory	CESP, SINDPAB	CCP, CIP
SE	Taxation Fraud Committee – aimed at tackling illicit work and tax fraud	Statutory	HF	Frisörföretagarna

Notes: See Annex for list of abbreviations and full names of organisations.

Source: EIRO national centres, 2008

European level of interest representation

At 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 that are themselves an integral and recognised part of Member States' social partner structures and that 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. Against this background, this section on European associations of the personal services 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, the Hair and Beauty Section of UNI-Europa – and one on the employer side – namely, Coiffure EU – are particularly significant in the personal services sector: both of them are listed by the European Commission as a social partner organisation consulted under Article 138 of the EC Treaty. Hence, the following analysis will concentrate on these two organisations, while providing supplementary information on other associations that are linked to the sector's national industrial relations actors.

Membership domain

Since the Hair and Beauty Section of UNI-Europa, which is affiliated to the [European Trade Union Confederation \(ETUC\)](#), organises both the hairdressing and the beauty treatment segment of the economy, its membership domain largely coincides with the personal services sector. By contrast, Coiffure EU only represents the hairdressing industry. Hence, Coiffure EU's domain is sectional in relation to the sector under consideration; the organisation only organises business/employer organisations rather than individual companies.

Membership composition

In terms of membership composition, it should be noted that the countries covered by the Hair and Beauty Section of UNI-Europa and Coiffure EU extend beyond the 26 countries examined in this study. However, the report will only consider the members of these 26 countries. Table 8 documents the membership list of the Hair and Beauty Section of UNI-Europa, as provided by a UNI-Europa representative. Accordingly, at least one affiliation in each country under consideration is recorded – except for Cyprus, the Czech Republic, Estonia, Hungary, Ireland, Latvia, Poland, Romania, Slovakia and Slovenia. In some countries – such as Belgium, France, Italy, Spain and the UK – multiple memberships occur. Overall, the Hair and Beauty Section of UNI-Europa counts 25 direct affiliations from the countries under examination. Almost two thirds (66%) of the trade unions listed in Table 3 are directly or indirectly (via higher-order units) affiliated to the Hair and Beauty Section of UNI-Europa. A number of other trade unions are also affiliated to UNI-Europa, albeit to a section other than Hair and Beauty.

Table 8: Members of Hair and Beauty Section of UNI-Europa, 2008

Country	Members
AT	vida*
BE	ACV/CSC energie-chimie*, ABVV/FGTB centrale générale*, ACLVB/CGSLB*
BG	ITUFECCTCS
CY	–
CZ	–
DE	verdi*
DK	DFKF*
EE	–
EL	ACCE-OIYE*
ES	FES-UGT*, AADD-CCOO*, ELA-Zerbitzuak*
FI	PAM*
FR	FdS-CFDT*, FC-CGT*, SGC-FGTA-CGT-FO*
HU	–
IE	–

Country	Members
IT	FILCAMS*, FISASCAT*, UILTuCS*
LT	LKKPS-LKKDPS
LU	OGB-L
LV	–
NL	FNV Mooi*
PL	–
PT	SITESE
RO	–
SE	HF*
SI	–
SK	–
UK	GMB, USDAW

Notes: Membership list is confined to the sector-related associations of the countries under consideration.

* Involved in collective bargaining

Source: EIRO national centres, 2008

As far as available data on sectoral membership of the national trade unions provide sufficient information on their relative strength, one can conclude that the Hair and Beauty Section of UNI-Europa covers the sector's most important labour representatives – with the exception of Austria's Union of Salaried Employees, Graphical Workers and Journalists ([Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier, GPA-DJP](#)) and Portugal's [Union of Professionals in Hairdressing and Beauty Services](#) (SINDPAB), which are considered as major social partner organisations in the sector. Apart from this, exceptional cases of major trade unions that are not covered do not occur. Altogether, 19 of the direct and indirect members of the Hair and Beauty Section of UNI-Europa, for which relevant information is available, are involved in collective bargaining in personal services; on the other hand, six affiliates from countries such as Bulgaria, Lithuania, Luxembourg, Portugal and the UK are not involved in such bargaining.

Table 9 lists the members of Coiffure EU. Of the 26 countries under consideration, Coiffure EU has 15 members under its umbrella through associational members from these countries. Multiple memberships only exist in Belgium – more specifically, through affiliation to one and the same higher-order unit, namely the Union of Belgian Hairdressers ([Unie van de Belgische Kappers/Union des Coiffeurs Belges, UBK/UCB](#)). Table 3 indicates that affiliated and unaffiliated associations co-exist in Austria, Belgium, Denmark, France, Greece, Italy, the Netherlands and Slovenia. This co-existence partially ensues from the fact that Coiffure EU's membership domain embraces only hairdressing activities, such that this association does not represent national business organisations whose membership domain is confined to companies performing beauty treatment activities only. Lack of comparable membership data makes it difficult to reveal the relative importance of affiliated and unaffiliated associations in these countries. Taking into account also the role in collective bargaining as an indicator of an association's significance does not show a clear trend in this respect either. In several countries, some important or even all employer organisations that conduct bargaining remain outside this

process. Moreover, in at least one country, namely the UK, the affiliates of Coiffure EU are not engaged in bargaining. In all countries where sectoral multi-employer bargaining is absent, except for Cyprus, Poland and the UK, employer organisations do not exist at all. In all of the countries where sectoral multi-employer bargaining is not prevalent, collective agreements tend to be completely absent, which means that there is no company-level bargaining either. Employer organisations that are not involved in collective bargaining may regard themselves as trade associations rather than industrial relations actors. Of the 17 direct and indirect affiliates of Coiffure EU, 11 are involved in sector-related collective bargaining. This means that, in comparison with the Hair and Beauty Section of UNI-Europa, no significant difference in terms of Coiffure EU's proportion of member organisations that are involved in bargaining can be found. Coiffure EU members cover collective bargaining in at least nine of the 26 countries under consideration, which is only slightly below the number of countries (11) where sector-related collective bargaining is conducted by its European-level counterpart – that is, the Hair and Beauty Section of UNI-Europa.

Table 9: Members of Coiffure EU, 2008

Country	Members
AT	BIF*
BE	RCBH**, NFHB**, NCBH**
BG	–
CY	CHF***
CZ	–
DE	ZV****
DK	DF*
EE	–
EL	GFH***
ES	–
FI	SH*
FR	FNC*
HU	MOSZI***
IE	–
IT	CIA***
LT	–
LU	–
LV	–
NL	ANKO*****
PL	SFKWP-POLFRYZ***
PT	–

Country	Members
RO	–
SE	Frisörföretagarna*
SI	OZS*
SK	–
UK	NHF

Notes: Membership list is confined to the sector-related associations of the countries under consideration.

** Involved in collective bargaining*

*** Involved in collective bargaining; affiliation via higher-order unit*

**** No information available on collective bargaining involvement*

***** Collective bargaining involvement via lower-order units at regional level*

****** Collective bargaining involvement via higher-order unit*

Source: EIRO national centres, 2008

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. Both the Hair and Beauty Section of UNI-Europa and Coiffure EU have indicated obtaining from their members a permanent mandate to negotiate in matters of the European social dialogue.

As proof of the weight of both these organisations, it is useful to look at other European organisations that 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 3. Accordingly, European organisations other than the Hair and Beauty Section of UNI-Europa represent only a relatively small proportion of both sector-related trade unions and countries. Among the organisations listed are the following: the [European Federation of Food, Agriculture and Tourism Trade Unions \(EFFAT\)](#), with six affiliations covering three countries; UNI-Europa sections other than Hair and Beauty, with five affiliations covering four countries; and the [European Federation of Public Service Unions \(EPSU\)](#), the [European Mine, Chemical and Energy Workers' Federation \(EMCEF\)](#), the [Council of European Professional and Managerial Staff \(Eurocadres\)](#), the [European Federation of Public Service Employees \(Eurofedop\)](#), the [European Trade Union Liaison Committee on Tourism \(ETLC\)](#) and the [Nordic Hairdressers' Union \(NHU\)](#), with one affiliation each. While the affiliations listed in Table 3 may not necessarily be exhaustive, this overview underlines the principal status of the Hair and Beauty Section of UNI-Europa as the sector's labour representative, in particular since many of the aforementioned affiliations to other European organisations reflect the overlapping domains of the affiliates rather than a real reference of the affiliations as such to the personal services sector.

Table 4 provides a similar overview of European organisations to which employer organisations are affiliated. The results indicate that organisational links of the sector-related employer organisations with European federations other than Coiffure EU exist in only a few countries, as follows: the [European Confederation of Beauticians and Cosmeticians \(CEPEC\)](#), with two

affiliations covering two countries; and the [European Cosmetics Association \(Colipa\)](#), organising the cosmetics and personal care industry, with one affiliation only. The [Organisation Mondiale Coiffure \(OMC\)](#) – which is an international rather than a European organisation, specialising in the technical aspects of hairdressing rather than core business issues – is not taken into account in this study, despite several affiliations. The low incidence of affiliations to European organisations other than Coiffure EU highlights the relevance of the latter as the unmatched European voice of business in the sector, even though this association only has a proportion of the EU Member States under its umbrella through affiliations from these countries.

Commentary

Compared with most other sectors, industrial relations tend to be poorly organised in the personal services industry. This reality is reflected in the relatively low unionisation rates, the low densities in terms of employer representation and the high polarisation with regard to collective bargaining coverage. More precisely, this means that in about half of the countries for which relevant data are available, collective bargaining is completely absent. Conversely, in those countries where sector-related collective bargaining is recorded, bargaining coverage tends to be very high, with rates frequently coming close to 100%. In this respect, the following pattern can be revealed. In the ‘older’ EU15 countries, the sector’s industrial relations structures are generally well-established, with evidence of prevalent multi-employer bargaining settlements and very high collective bargaining coverage rates. The only exceptions in this group of countries are Luxembourg and the UK, where bargaining is absent. By contrast, in all of the new Member States that joined the EU in 2004 and 2007, with the noticeable exception of Slovenia, collective bargaining is completely lacking. This is because no industrial relations structures in the sector have been established in this group of countries, which is clearly manifested in the lack of sector-related, representative social partner organisations on the two sides of industry in almost all of these countries. Strikingly, not even single-employer bargaining arrangements have been set up in this group of countries, such that the collective bargaining coverage is zero in all of these Member States.

However, despite high collective bargaining coverage rates in most of the EU15 countries, both unionisation rates and overall densities of the employer organisations in the personal services sector also tend to be low in these countries. The difficulties faced by the trade unions in recruiting workers in the sector may result from different factors – such as the high incidence of non-standard work and female employment, the small size of most establishments, the high staff turnover and the limited capacity of the trade unions involved to set incentives for potential members. This relative weakness of organised labour in the sector translates into generally poor pay and problematic overall working conditions, particularly in terms of working time, training, [work-life balance](#) and occupational advancement.

In order to tackle at least some of these problems – in particular regarding training standards and health and safety – the sector’s social partners at European level, that is Coiffure EU on the employers’ side and the Hair and Beauty Section of UNI-Europa on the employees’ side, have launched some joint initiatives in the framework of social dialogue. In this context, a series of joint declarations and guidelines have been drawn up and delivered since 2000. However, despite these efforts, no substantial results have been achieved thus far – neither with regard to the envisaged harmonisation of training standards in hairdressing nor in relation to improvements in overall working relations. Nevertheless, Coiffure EU and UNI-Europa’s Hair and Beauty Section have to be regarded as, by far, the most important, if not the only EU-wide representatives of the personal services sector’s employers and employees.

References

ECOTEC Research and Consulting Ltd, *New trends and developments in the European hairdressing sector*, A final report for CIC-Europe and UNI-Europa, Birmingham, 2000, available online at:

<http://www.uniglobalunion.org/unihairbeauty.nsf/9548462b9349db27c125681100260673/abc5785b616a0fc0c1256b5d004d3907?OpenDocument>.

Traxler, F., 'The metamorphoses of corporatism', in *European Journal of Political Research*, Vol. 43, No. 4, 2004, pp. 571–598.

Traxler, F., Blaschke, S. and Kittel, B., *National labour relations in internationalised markets*, Oxford University Press, 2001.

Annex: List of abbreviations

Country	Abbreviation	Full name of organisation
Austria (AT)	BIF	Federal Association of Hairdressers
	BIFKM	Federal Association of Beauty Treatment Companies
	GPA-DJP	Union of Salaried Employees, Graphical Workers and Journalists
	ÖGB	Austrian Trade Union Federation
	vida	Vida Trade Union
	WKÖ	Austrian Federal Economic Chamber
Belgium (BE)	ABVV/FGTB	Belgian General Federation of Labour
	ACV/CSC	Confederation of Christian Trade Unions
	ACLVB/CGSLB	Federation of Liberal Trade Unions of Belgium
	NCBH	National Chamber of Belgian Hairdressers
	NVHB	National Federation for Hairdressers in Belgium
	PABC	Professional Association for Bio-Esthetics and Cosmetology
	RCBH	Royal Circle for Belgian Hairdressers
	SETCa/BBTK	Belgian Union of White-collar, Technical and Executive Employees
	UBK/UCB	Union of Belgian Hairdressers
	UCM	Union of Small Firms and Traders
	UNEB	National Union of Beauticians in Belgium
	UNIZO	Organisation of the Self-Employed
	Bulgaria (BG)	CITUB
ITUFECCTCS		Independent Trade Union Federation of Employees in Commerce, Cooperatives, Tourism, Credit and Social Services
Cyprus (CY)	CHF	Cyprus Hairdressing Federation
Czech Republic (CZ)	–	–
Denmark (DK)	DA	Confederation of Danish Employers
	DF	Danish Hairdressing Federation
	DFKF	Danish Hairdressing and Cosmetics Union
	DKF	Danish Christian Trade Union

Country	Abbreviation	Full name of organisation
	HVR	Federation of Small and Medium-sized Enterprises
	KA	Christian Employers' Association
	KF	Christian Trade Union
	Krifa	Christian Trade Union Movement
	LO	Danish Confederation of Trade Unions
	SAMA	Danish Federation of Small Employers' Associations
Estonia (EE)	ELL	Association of Estonian Cities
Finland (FI)	PAM	Services Trade Union
	SH	Finnish Hairdressers' Association
	SY	Federation of Finnish Enterprises
France (FR)	CFDT	French Democratic Confederation of Labour
	CFE-CGC	French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	CFTC	French Christian Workers' Confederation
	CGPME	General Confederation of Small and Medium-sized Enterprises
	CGT	General Confederation of Labour
	CGT-FO	General Confederation of Labour – <i>Force ouvrière</i>
	CNAMS	National Confederation of Craft Industry, Trades and Services
	CNEC	National Council of Hairdressing Companies
	FC-CGT	Commerce Federation – General Confederation of Labour
	FCSF-CFTC	Commerce, Services and Sales Staff Federation – French Christian Workers' Confederation
	FdS-CFDT	Services Federation of the French Democratic Confederation of Labour
	FNECS	National Federation of Commerce and Services Executives
	FNC	National Federation of Hairdressing
	MEDEF	Movement of French Enterprises
	SGC-FGTA	General Hairdressing Union – General Federation of Agricultural, Food, Tobacco and Allied Services Workers

Country	Abbreviation	Full name of organisation
Germany (DE)	DGB	Confederation of German Trade Unions
	verdi	United Services Union
	ZV	Employer Association for the German Hairdressing Sector
Greece (EL)	ACCE-OIYE	Association of Cosmetic Company Employees – Federation of Private Employees in Greece
	GFH	Greek Federation of Hairdressers
	GSEE	Greek General Confederation of Labour
	PSVAK	Pan-Hellenic Association of Industrialists and Representatives of Cosmetics and Perfumes
	SEV	Hellenic Federation of Enterprises
	Hungary (HU)	MOSZI
Ireland (IE)	IBEC	Irish Business and Employers' Confederation
	ICTU	Irish Congress of Trade Unions
	IHF	Irish Hotels' Federation
	ISME	Irish Small and Medium Enterprises Association
	IWU	Independent Workers' Union
	SFA-IBEC	Small Firms Association – Irish Business and Employers' Confederation
	SIPTU	Services, Industrial, Professional and Technical Union
	Unite	General Union Unite
Italy (IT)	Casartigiani	Autonomous Confederation of Artisan Unions
	CGIL	General Confederation of Italian Workers
	CIA	Italian Chamber of Hairdressers
	CISL	Italian Confederation of Workers' Unions
	CLAAI	Confederation of Free Italian Artisan Associations
	CNA	National Confederation of Artisans and of Small and Medium-sized Enterprises
	CNA Benessere e Sanita	National Confederation of Artisans and of Small and Medium-sized Enterprises – Health and Wellness
	Confartigianato	General Italian Federation of Artisans
	Confartigianato Acconciatori	General Italian Federation of Artisans – Hairdressers
	Confartigianato Estetica	General Italian Federation of Artisans – Beauty Care

Country	Abbreviation	Full name of organisation
	Federmanager	National Federation of Industrial Company Managers
	FILCAMS	Italian Federation of Workers in the Commerce, Tourism and Services Sector
	FISASCAT	Italian Federation of Commercial Services and Tourism
	UIL	Union of Italian Workers
	UILTuCS	Italian Union of Workers in the Commerce, Tourism and Services Sector
Latvia (LV)	–	–
Lithuania (LT)	LKKPS-LKKDPS	Trade Union of Lithuanian Hairdressers and Cosmetologists – Lithuanian Trade Union of Commercial and Cooperative Employees
	LPSK	Lithuanian Trade Union Confederation
Luxembourg (LU)	CGT-L	General Confederation of Labour in Luxembourg
	OGB-L	Luxembourg Confederation of Independent Trade Unions
Netherlands (NL)	ANKO	Royal General Dutch Hairdressers' Organisation
	CNV	Christian Trade Union Federation
	CNV Bedrijvenbond	Industry, Food and Transport Workers' Union
	FNV	Federation of Dutch Trade Unions
	FNV Mooi	Federation of Dutch Trade Unions – Beauty
	FUSION	Federation of Dutch Employers in Hairdressing
	MKB-NL	Dutch Federation of Small and Medium-sized Enterprises
	VPP	Association of Professionals for Professionals
Poland (PL)	SFKWP-POLFRYZ	Stowarzyszenie Fryzjerów, Kosmetyczek i Wizazystów Polskich - POLFRYZ Polish Association of Hairdressers, Barbers and Beauticians
Portugal (PT)	ABCDB	Association of Barbershops and Hairdressers in the District of Braga
	ACP	Association of Hairdressers of Portugal
	APBCIB	Portuguese Association of Barbershops, Hairdressers and Beauty Institutes
	CCP	Confederation of Commerce and Services of Portugal
	CESP	Union of Commerce, Office and Service Workers of

Country	Abbreviation	Full name of organisation
		Portugal
	CGTP-IN	General Confederation of Portuguese Workers
	CIP	Confederation of Portuguese Industry
	FETESE	Trade Union Federation of Workers and Technicians in Services
	SINDPAB	Union of Professionals in Hairdressing and Beauty Services
	SITESE	Union of Administrative, Commerce, Hotel and Services Workers
	UGT	General Workers' Confederation
Romania (RO)	–	–
Slovakia (SK)	–	–
Slovenia (SI)	GZS	Chamber of Commerce and Industry of Slovenia
	OZS	Slovenian Chamber of Craft and Small Businesses
	SODS	Trade Union of Craft Companies
	ZDOPS	Association of Employers in Craft and Small Businesses of Slovenia
	ZSSS	Association of Free Trade Unions of Slovenia
Spain (ES)	AADD-CCOO	Federation of Diverse Activities of the Trade Union Confederation of Workers' Commissions
	ANEPECS	National Association of General Hairdressing and Beauty Treatment Companies
	CEOE	Spanish Federation of Employer Organisations
	CEPE	Spanish Confederation of Hairdressers and Estheticians
	CEPYME	Spanish Confederation of Small and Medium-sized Enterprises
	ELA-Zerbitzuak	Federation of Solidarity Services of Basque Workers
	FANAE	National Federation of Estheticians
	FEIPPSB	Spanish Federation of Personal Image, Hairdressers and Beauty Salons
	FES-UGT	Service Federation of the General Workers' Confederation
	UGT	General Workers' Confederation
Sweden (SE)	Frisörföretagarna	Association of Employers in Hairdressing

Country	Abbreviation	Full name of organisation
	HF	Commercial Employees' Union
	LO	Swedish Trade Union Confederation
United Kingdom (UK)	GMB	Britain's General Union
	NHF	National Hairdressers' Federation
	TUC	Trades Union Congress
	USDAW	Union of Shop, Distributive and Allied Workers
Europe	CEPEC	European Confederation of Beauticians and Cosmeticians)
	Coiffure EU	European Association of Employers' Organisations in Hairdressing
	COLIPA	European Cosmetics Association
	EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions
	EMCEF	European Mine, Chemical and Energy Workers' Federation
	EMF	European Metalworkers' Federation
	EPSU	European Federation of Public Service Unions
	ETF	European Transport Workers' Federation
	ETLC	European Trade Union Liaison Committee on Tourism
	ETUC	European Trade Union Confederation
	Eurocadres	Council of European Professional and Managerial Staff
	Eurofedop	European Federation of Public Service Employees
	FEANI	European Federation of National Engineering Associations
	NHU	Nordic Hairdressers' Union
	OMC	Organisation Mondiale de la Coiffure
	UNI-Europa	Union Network International – Europe
	UNI-Europa – Hair and Beauty Section	Union Network International – Europe – Hair and Beauty Section

Georg Adam, Department of Industrial Sociology, University of Vienna
EF/09/32/EN