



Working conditions in the retail sector

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This report examines trends in working conditions and employment status in the retail sector in the EU27 countries and Norway between 2001 and 2010. The considerable expansion of the sector over the past 20 years or so is associated with a transformation in its competitive structure, greater use of technology and changes in the regulatory framework. Large companies now dominate at the expense of the numerous small and micro businesses that once characterised the sector in most countries. One result is a significant decline in the number of self-employed workers and a substantial increase in the number of part-time jobs (many held by women) and non-permanent contracts. These changes have affected career patterns and introduced new risks to employees' health, especially psychosocial ones. Recent initiatives by the social partners have aimed above all to regulate flexibility and working time arrangements, promote training, reduce the risk of robbery and enhance employee well-being.

Introduction

The retail sector accounts for a considerable share of the EU economy. According to the European Commission's [Retail monitoring report: Towards more efficient and fairer retail services in the internal market for 2020 \(54Kb PDF\)](#) issued in July 2010, the sector accounts for about 4.2% of the EU's gross domestic product (GDP) and 20% of European small and medium enterprises (SMEs).

Over the past decade, employment in the sector increased from 17 million to over 19 million and, in 2010, represented about 9% of total employment in Europe (source: Eurostat, 2011). It is one of the main entry gates to the labour market for young people and a re-entry point for those who had left the labour market for personal reasons (for example, women giving up work to look after their children).

The sector consists of a variety of forms (shops, electronic commerce, open markets, and so on), shop size and formats (from small shops to hypermarkets), products (food, non-food, prescription and over-the-counter drugs, and so on), legal structures (independent stores, franchises, integrated groups, and so on) and locations (urban/rural, city centre/suburbs, and so on). It also has close links with a multitude of upstream and downstream markets. The effect of all this is that the sector's configuration affects both economic competitiveness (its efficiency affects price levels), and social and territorial cohesion.

There was a major change in the sector's structure over the past decade with a strong increase in the share taken by large retailers across all Member States, leaving numerous micro and small businesses at the margins. The driving forces for this change are described by:

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- EU–USA comparative studies such as the book, *Retailing in the 21st century* (Krafft and Mantrala, 2006), and the chapter on 'Retail jobs in comparative perspective' in *Low-wage work in the wealthy world* published by The Russell Sage Foundation (Carré et al, 2010);
- the [sector report for distribution and trade \(2.27Mb PDF\)](#) published in 2009 as part of the [New Skills for New Jobs](#) initiative;
- the 2008 [report on the evolution of the high-volume retail sector in Europe over the past five years \(381Kb MS Word\)](#) prepared on behalf of the [European Economic and Social Committee \(EESC\)](#).

These sources identify the following drivers.

- Changes in sectoral legal framework resulted in a liberalisation of licencing systems and opening hours which particularly favoured (especially the latter) medium and large premises with rotating shifts.
- Changes in urban planning regulations allowed the creation of shopping malls and large retail parks on the outskirts of almost all European cities.
- Retail outlets with a large surface area (especially grocery chains) display a higher productivity than small businesses. Introduction of information and communications technology (ICT) along the whole value chain such as refined programming and electronic traceability of goods (for example, radio frequency identification, RFID) amplifies the impact of economies of scale and the bargaining power over manufacturers in providing consumers with cheaper prices consumers. (See also the [distribution and trade sector report \(2.27Mb PDF\)](#)).
- Changes in consumers' tastes and attitudes resulted in an increased average bill for grocery shopping and favoured large retail outlets with easy access by car. These changes were partly related to higher employment rates, which provided higher incomes on the one hand but a worse [work-life balance](#) on the other.

The [Commission staff working document accompanying the retail market monitoring report \(678Kb PDF\)](#) highlights the fact that the continuing decline of small businesses due to competitive pressure from large retailers raises territorial and social cohesion as issues of concern. For example, local shops offering essential goods and services such as grocery, which are usually run as small businesses, are of growing importance for two groups with deteriorating accessibility. These groups are:

- increasing numbers of elderly and disabled people (17% and 15%, respectively, of the EU population; source: Eurostat, 2009);
- people who are socially isolated, that is, those who live in sparsely populated areas (22% of EU population) and those without a car (9% of EU citizens).

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The changes have had a considerable impact on both employment and quality of work in the sector.

- The number of self-employed workers has dropped significantly and there has been a considerable increase in their average age. Only ethnic shops run by retailers with a foreign background can call on ethnic and family resources.
- By combining ICT and 'lean management' techniques, large retailers optimise their workforce needs according to customer numbers by making widespread use of part-time shift work and increasing use of temporary work to meet seasonal needs.
- Implementation of ICT results in people with new, highly skilled professional profiles managing the whole spectrum of the supply chain. As outlined in the New Skills for New Jobs [distribution and trade sector report \(2.27Mb PDF\)](#), retailers face difficulties in filling these posts due to the lack of a suitably trained workforce and wages that are generally below average.
- Increasing liberalisation of the sector (especially in opening hours with extended days and Sunday opening) has a negative effect on employees' work-life balance by increasing working times in unsocial hours. It also increases competitive pressures on small businesses, which face higher costs through extending opening hours to defend their sales.

The main concerns among social partners and governments are:

- career paths, including job security and the greater use of both part-time workers and employees with non-permanent contracts;
- health and safety at work.

The decline in opportunities as self-employed workers deprives the sector of its traditional career path, while new professional paths need to be further developed and felt as real opportunities by a significant share of the current workforce.

Musculoskeletal disorders (MSDs) and psychosocial risk factors are both of increasing concern. The combined effect of technological advances and a competitive framework can limit employees' room to manoeuvre (producing MSDs), while unacceptable behaviour by customers such as verbal abuse, violence and theft can lead to psychosocial stress. In the latter case, the 2004 framework agreement on work-related stress and 2007 [framework agreement on harassment and violence at work \(4.79Mb PDF\)](#) provide a common platform. Currently, national initiatives in both areas may act as pathways for a new 'social compromise'.

Structure of this report

Following an overview of sectoral trends in employment and structure and regulatory changes, the report summarises the main changes in sectoral career perspectives and wages with a particular focus on transitions between labour pools and the role of training policies in securing upward movement, including several examples of good practice. It then maps physical and psychosocial risk factors and their impact on health problems as reported by retail workers. Finally it examines the main measures promoted by governments and social partners in order to cope with the increasing flexibility mix, training needs and health problems, with a specific focus on violence by third parties and the risk of robbery.

Changes in employment, sectoral structure and legal framework

Employment and structural changes

The retail sector generated over 2.5 million net jobs between 2001 and 2010. There was a 12% increase from almost 17 million employed in 2001 to over 19 million in 2010, with a peak of 19.5 million in 2008 (Table 1).

The sector's share of total employment in the EU27 increased from 8.3% in 2001 to 8.8% in 2010, peaking at 9% in 2004. The increase in employment appears to be concentrated in 2003–2005, when almost 1.4 million jobs were created and, to a minor extent, in 2007–2008 (Table 1), although a break in the Eurostat series in 2008 when the sectoral scope was redefined prevents us from validating this figure.

Table 1: Employment in the retail sector, EU27

	Men	Women	Total	% variation on previous year	% women
2001	6,780,100	10,224,700	17,004,800		60.1
2002	6,740,500	10,227,800	16,968,400	-0.2	60.3
2003	6,890,800	10,470,900	17,361,700	2.3	60.3
2004	7,186,700	11,384,100	18,570,800	7.0	61.3
2005	7,253,500	11,505,300	18,758,800	1.0	61.3
2006	7,238,400	11,633,200	18,871,500	0.6	61.6
2007	7,271,000	12,004,500	19,275,500	2.1	62.3

	Men	Women	Total	% variation on previous year	% women
2008	7,281,900	12,237,100	19,519,000	(b)	62.7
2009	7,155,200	12,010,500	19,165,700	-1.8	62.7
2010	7,155,400	11,912,100	19,067,500	-0.5	62.5

Notes: [NACE classification](#) G47 Retail trade, except of motor vehicles and motorcycles

(b) = break in series

Source: Eurostat, 2011

Table 2 highlights the considerable differences in employment levels in the retail sector between countries over the past decade. Most experienced an increase in overall employment between 2001 and 2010 but Austria, Belgium, Italy, Luxembourg, Portugal and the UK showed a decline – especially Luxembourg (-43%). Particularly large increases were seen in Cyprus (41.5%), Bulgaria (41.3%), Lithuania (30.7%), Poland (27.9%), Denmark (26.4%), Slovakia (24.4%), Spain (23.4%), Greece (24.2%) and Ireland (21.2%).

Table 2: Change in employment levels in the retail sector (%), 2001–2010

	Men	Women	Total
EU	12.1	5.5	16.5
Austria	-5.4	-2.5	-6.5
Belgium	-8.6	-10.1	-7.5
Bulgaria	24.0	0.4	41.3
Cyprus	36.1	29.6	41.5
Czech Republic	3.1	-1.4	5.2
Denmark	30.4	35.8	26.4
Estonia	3.2	-24.0	12.5
Finland	10.6	8.5	11.6
France	16.2	15.7	16.5
Germany	2.5	3.9	1.9

	Men	Women	Total
Greece	13.8	4.6	24.2
Hungary	-3.8	-15.7	3.4
Ireland	15.8	7.5	21.2
Italy	-12.0	-21.2	-1.6
Latvia	3.1	-30.7	16.0
Lithuania	7.0	-29.4	30.7
Luxembourg	-42.0	-41.1	-42.6
Malta	2.9	-3.5	11.5
Netherlands	4.7	0.2	7.7
Poland	20.3	5.1	27.9
Portugal	-3.9	-4.3	-3.6
Romania	5.4	-11.0	15.8
Slovakia	18.0	1.7	24.4
Slovenia	5.9	-10.0	17.4
Spain	14.7	2.6	23.4
Sweden	8.8	14.9	5.4
UK	-2.6	6.0	-8.0
Norway	15.9	15.1	16.3

Note: Break in series in 2008

Source: Eurostat, 2011

Age of workers

The overall economy experienced a significant ageing over the decade, with the share of those aged over 50 increasing from 22.5% in 2001 to 26.8% in 2010, especially for women whose share increased from 21.3% to 26.2% (Figure 1). The retail sector, however, displayed a much more moderate ageing profile, with the share of employed aged over 50 increasing from 19.3% in 2001 to 20.9% in 2010, especially among women (from 18.3% to 20.7%) (Figure 1).

The share of young male workers in the retail sector (that is, those aged 15–24 years) increased from 17.3% in 2001 to 17.6% in 2010, having reached 18.4% in 2008. This age group's share among women declined after 2005; the proportion of those aged over 50 increased from 18.3% in 2001 to 20.7 in 2010 (Figure 1).

Figure 1: Distribution of employment in retail sector by gender and age (%)

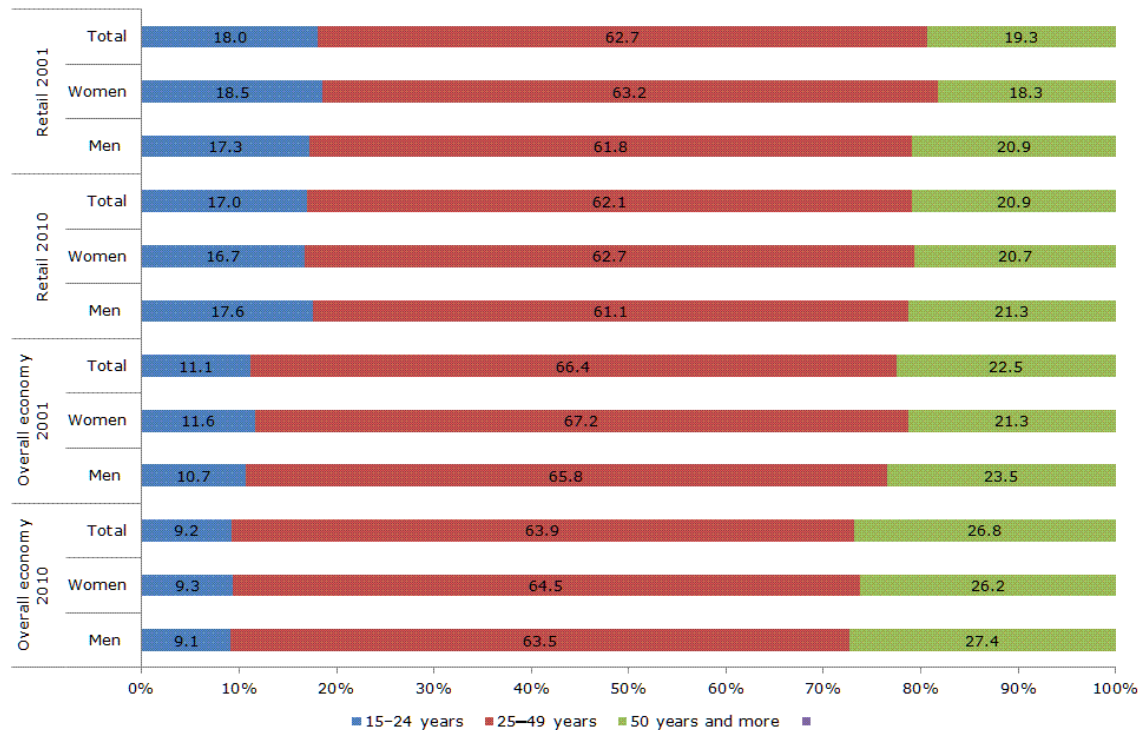


Figure 1: Distribution of employment in retail sector by gender and age (%)

Note: Break in series in 2008

Source: Eurostat, 2011

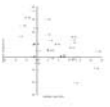
On disaggregating the data by country (Table 3), it can be seen that a number of countries had a high proportion of young workers during the period 2001 to 2010 (that is, those aged 15–24 years). This is the case of Ireland, Norway, Finland, the UK, Malta, Sweden and especially Denmark (41% in 2001 and 45.2% in 2010) and the Netherlands (41.3% in 2001, no data available in 2010).

Regulatory frameworks in some of these countries (such as Denmark, the Netherlands, Sweden and the UK) provide incentives to hire young workers and their share of total employment in the sector is on the increase with the noticeable exception of Ireland (-6.3% between 2001 and 2010; Table 3).

Most countries with low shares of young workers display a negative trend with the noticeable exception of Belgium (+3.5%), Germany (+1.4%), Slovenia (+0.7%) and Austria (+0.1%).

The overall decline in young employment is entirely due in lower female participation: Romania (-9.5%), Spain (-8.4%) and Slovakia (-7.5%) display the sharpest decline while Norway (+8.9%) and Denmark (+6.8%) report the strongest increase in the employment of young women in the retail sector between 2001 and 2010 (Table 3).

Table 3: Share of workers aged 15–24 years employed in the retail sector (%)

	2001			2010		
	Men	Women	Total	Men	Women	Total
EU	17.3	18.5	18.0	17.6	16.7	17.0
Austria	15.1	18.7	17.6	15.6	18.7	17.7
Belgium	9.2	10.9	10.2	12.6	14.5	13.7
Bulgaria	11.4	13.5	12.6	11.0	9.3	9.9
Cyprus	14.1	16.4	15.0	8.2	15.7	12.4
Czech Republic	14.1	17.2	16.2	9.4	9.6	9.5
Denmark	42.9	39.7	41.0	43.6	46.5	45.2
Estonia	–	–	–	–	–	–
Finland	23.0	26.9	25.7	22.0	28.6	26.6
France	1  3.8	17.8	16.2	15.5	16.1	15.9
Germany	13.5	13.3	13.3	15.7	14.2	14.7
Greece	10.8	15.1	12.8	7.0	8.2	7.6
Hungary	14.1	14.9	14.6	9.6	7.9	8.5
Ireland	29.9	30.5	30.3	23.0	24.7	24.0

Italy	7.8	12.8	10.1	7.1	10.4	8.8
Latvia	18.7	11.4	13.4	–	12.4	12.6
Lithuania	10.8	12.4	11.7	–	9.6	9.8
Luxembourg	10.7	12.9	12.1	–	–	–
Malta	–	40.4	24.1	–	34.5	24.1
Netherlands	40.4	41.9	41.3	–	–	–
Poland	–	–	–	13.8	14.1	14.0
Portugal	12.9	17.5	15.5	12.2	13.2	12.8
Romania	11.8	18.7	16.0	12.7	9.2	10.3
Slovakia	23.3	16.1	18.0	10.1	8.6	9.0
Slovenia	10.7	12.0	11.6	15.0	10.6	12.3
Spain	12.6	19.3	16.5	9.7	10.9	10.5
Sweden	27.1	24.3	25.3	25.2	29.1	27.6
UK	33.0	23.9	27.5	33.2	28.2	30.3
Norway	39.3	29.6	33.0	41.6	38.5	39.6

Note: Break in series in 2008

Source: Eurostat, 2011

Although 12.2% fewer young people were employed in the overall economy in 2010 than in 2001 while total employment increased during the same period by 5.9%, the employment of young people in the retail sector increased by 6% (Table 4).

In addition, there were with significant differences between the sexes (Table 4). The employment of young men in the retail sector increased by 7.7% between 2001 and 2010, well above their increase in the overall economy during this period. However, the employment of young women in the retail sector increased by just 4.9% in the retail sector between 2001 and 2010 compared with an increase of 10.3% in the overall economy in the same period. It would seem that the retail sector is gaining in attractiveness as an entry point to employment for young men but not for young women, although as stated previously, it offers more opportunities for women to re-enter the labour market.

Table 4: Change in employment share of young workers (%), 2001–2010

	Retail sector		Overall economy	
	15–24 years	Total	15–24 years	Total
Men	7.7	5.5	-13.0	2.5
Women	4.9	16.5	-11.2	10.3
Total	6.0	12.1	-12.2	5.9

Note: Break in series in 2008

Source: Eurostat, 2011

The share of workers aged over 50 years in the retail sector was above the EU27 average in the UK, Portugal, the Czech Republic, Luxembourg, Cyprus, Germany and especially Estonia (28.5%) in 2010, with Luxembourg (+12.1%), Slovakia (+8.8%) and the Czech Republic (+7.9%) displaying the biggest increase compared with 2001 (Table 5). Romania (12.9%) and Denmark (14.8%) had the lowest shares in the sector in 2010 while Sweden (-4.6%) and Denmark (-4.1%) displayed the biggest decline between 2001 and 2010 (Table 5).

Table 5: Share of workers aged over 50 years employed in the retail sector (%)

	2001			2010		
	Men	Women	Total	Men	Women	Total
EU27	20.9	18.3	19.3	21.3	20.7	20.9
Austria	20.3	12.8	15.1	23.5	19.2	20.5
Belgium	21.0	15.1	17.6	21.9	20.6	21.1
Bulgaria	19.4	16.3	17.6	20.2	19.8	19.9
Cyprus	29.6	18.7	23.6	29.3	22.3	25.4
Czech Republic	16.9	15.9	16.2	22.2	24.9	24.1
Denmark	17.7	19.7	18.9	14.6	15.0	14.8
Estonia	–	25.5	23.3	–	30.9	28.5
Finland	19.2	20.6	20.2	19.9	20.7	20.5
France	16.2	15.3	15.6	21.3	18.6	19.7

	2001			2010		
Germany	24.9	22.6	23.3	25.1	27.3	26.6
Greece	24.1	13.7	19.2	23.1	19.1	21.0
Hungary	18.4	16.1	16.9	17.5	21.6	20.2
Ireland	17.5	14.5	15.7	17.5	18.4	18.1
Italy	23.8	18.6	21.4	24.5	17.4	20.8
Latvia	–	17.7	15.9	–	22.0	21.8
Lithuania	–	13.8	10.4	15.6	17.1	16.7
Luxembourg	12.5	11.9	12.1	–	24.1	24.2
Malta	27.1	–	21.9	28.0	–	19.9
Netherlands	14.9	11.8	13.0	–	–	–
Poland	–	–	–	19.6	16.5	17.4
Portugal	30.6	22.3	25.9	25.3	21.4	23.0
Romania	12.3	7.7	9.5	13.6	12.5	12.9
Slovakia	12.4	9.1	10.0	14.7	20.1	18.8
Slovenia	14.4	8.6	11.0	20.6	16.8	18.2
Spain	22.9	15.6	18.7	22.1	17.6	19.2
Sweden	21.0	25.0	23.5	18.5	19.2	18.9
UK	19.8	22.5	21.4	18.9	24.4	22.1
Norway	15.2	23.2	20.3	13.1	18.1	16.4

Note: Break in series in 2008

Source: Eurostat, 2011

Combining the shares of young and older workers (that is, those aged 15–24 years and those aged over 50 years) provides a picture of the demographic balance of employment in the retail sector (Figure 2).

Taking the EU27 averages for these two age groups as the reference values, the retail sector in the Nordic countries (Denmark, Finland, Norway, Sweden), Ireland and Malta show a balance in favour of young workers (bottom right-hand quadrant of Figure 2). Here the retail sector is

considered a gateway into employment but with a poor career perspective. From the 2001 figures (not shown), the Netherlands should also be included in this group.

Retail employment in Portugal and the UK shows high shares of both young and older workers (top right-hand quadrant of Figure 2), according to a bi-directional transitional pattern although, as we described below, shares in self-employment in the sector differ widely in these two countries.

The share of young workers is below the EU27 average in Germany, Cyprus, the Czech Republic and Latvia while older workers are well above it (top left-hand quadrant of Figure 2).

Greece, Italy and Belgium have a share of older workers close to the EU27 average but less young workers, while Austria and France display a sectoral demographic composition very close to the EU27 average.

Finally, most NMSs and Spain display lower shares of both young and older workers (bottom left-hand quadrant of Figure 2).

Figure 2: Demographic balance of retail employment, 2010

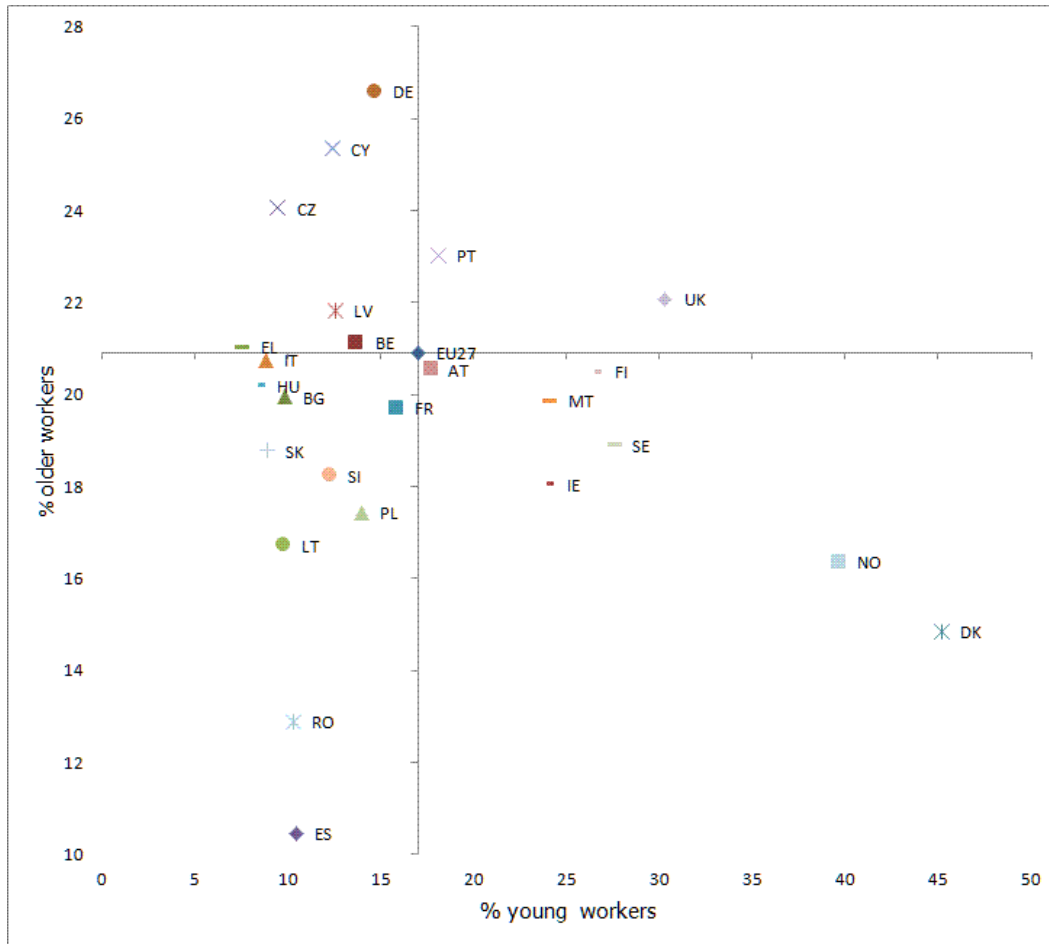


Figure 2: Demographic balance of retail employment, 2010

Source Eurostat, 2011

Employment trends: part-time and temporary workers

Part-time work

According to Eurostat figures (Table 6), which are available only at industry level, the share of part-time workers increased in the commerce sector from 20.2% in 2001 to 22.2% in 2010. This is a lower rate than in the overall economy, which increased from 16.2% in 2001 to 19.2% in 2010, especially in 2009–2010 (+0.5 and +1% respectively). The commerce sector is defined by [NACE](#) as category G ‘Wholesale and retail trade; repair of motor vehicles and motorcycles’. It has three main categories:

- G45 Wholesale and retail trade and repair of motor vehicles and motorcycles (NACE code 50 under rev. 1.1, code 45 under rev. 2);
- G46 Wholesale trade, except of motor vehicles and motorcycles (NACE code 51 under rev. 1.1, code 46 under rev. 2);
- G47 Retail trade, except of motor vehicles and motorcycles (NACE code 52 under rev. 1.1, code 47 under rev. 2).

The share of men working part-time in the commerce industry increased from 7.8% in 2001 to 10.1% in 2010, slightly more than in the overall economy (from 6.6% in 2001 to 8.7% in 2010). The reverse holds for women: the share of part-timers increases from 33.4% to 34.7%, after peaking at 35% in 2005–2006 and declining to 34.2% in 2009, while in the overall economy their share increased from 28.8% in 2001 to 31.9% in 2010.

Table 6: Share of part-time employment in the commerce sector and overall economy, EU27 (%)

	Men		Women		Total	
	Commerce	Overall economy	Commerce	Overall economy	Commerce	Overall economy
2000	7.4	6.5	32.8	28.5	19.6	16.1
2001	7.8	6.6	33.4	28.8	20.2	16.2
2002	7.8	6.6	33.2	28.5	20.1	16.1
2003	7.9	6.8	33.4	29.0	20.3	16.6
2004	8.5	7.1	34.7	30.0	21.2	17.2
2005	8.9	7.4	35.0	30.6	21.6	17.7
2006	9.3	7.7	35.0	31.1	21.8	18.1
2007	9.3	7.7	34.8	31.1	21.7	18.1
2008	9.4	7.8	34.3	31.1	21.7	18.2
2009	9.6	8.3	34.2	31.5	21.7	18.8
2010	10.1	8.7	34.7	31.9	22.2	19.2

Notes: NACE G

Break in series in 2008

Source: Eurostat, 2011

At EU level, **part-time work** was a major element of employment in the commerce sector in 2010 (Figure 3).

In some countries (Austria, Belgium, Denmark and Germany), the increase in part-time work in the commerce sector between 2001 and 2010 was higher than that for the overall employment in the commerce sector over this period, thus crowding out the latter. According to the German national contribution, the growth in employment in its commerce sector was entirely due to mini-jobs (that is, part-time employees working less than 15 hours per week and paying lower social security contributions), which accounted for over 30% of employees in the sector in 2010, while the number of employees 'liable to social security contributions' (most of them full-timers) in 2010 was less than in 2001. This was notwithstanding their increase after 2006 and company agreements favouring short-time arrangements in order to cope with the impact of the financial and economic crisis.

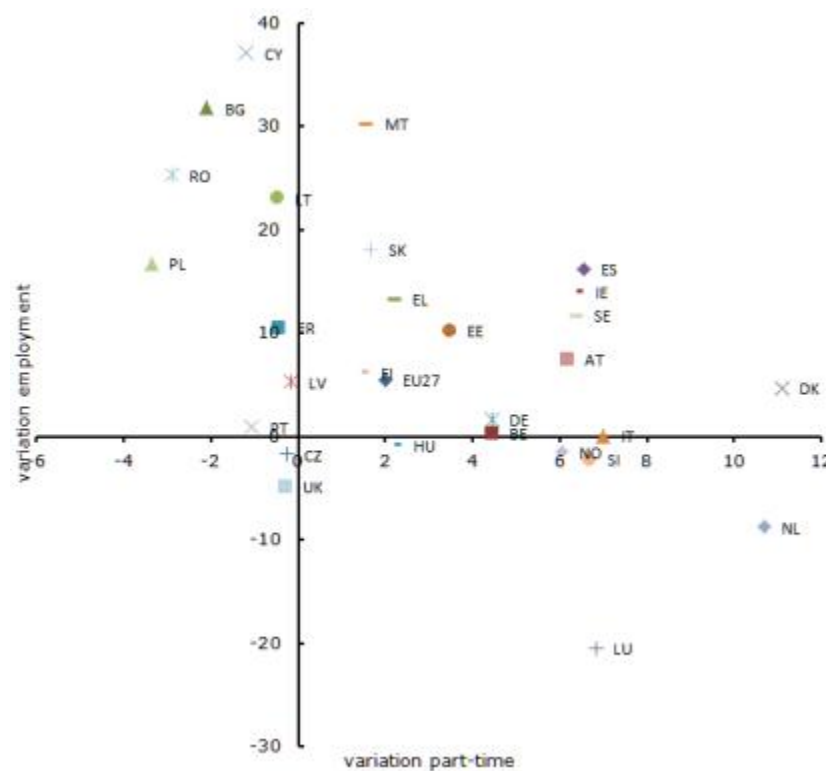
Part-time work crowding out full-time work is found more strongly in those countries reporting a reduction in employment levels but an increase in the share of part-time (Italy, Hungary, Norway, Slovenia, and, more vigorously, Luxembourg and the Netherlands), which tends to weaken the reduction in total employment.

Estonia, Finland, Greece, Ireland, Malta, Slovakia and Spain are a third group with a more 'balanced' increase where part-time works significantly matches the positive performance in the overall economy.

Finally, there is a group of countries where positive employment performance is combined with a decline in the share of part-timers (top left-hand quadrant of Figure 3). The pattern is particularly striking in several NMSs (Bulgaria, Cyprus, Latvia, Poland and Romania) where a shortage of skilled workers forces large retailers to reduce the share of part-time work. Such a pattern is shared to a minor extent by France, Portugal and Latvia; in France this is due to regulatory changes in favour of 'long' part-time work of at least 26 hours per week.

In the UK, the share of part-time employment in the commerce sector is almost the double that in the overall economy (50.4% compared with 27.5%) especially in the sale of clothing in specialised stores (62.3%) and from stalls and markets of textiles, clothing and footwear (78.3%).

Figure 3: Trends in part-time employment compared to trends in total employment in the commerce sector, 2001-2010



Source: Eurostat, 2011

Temporary work

Temporary work has a major impact on employment trends in the retail industry and is related to high turnover rates and business variation according to both anticipated and non-anticipated changes. Eurostat data, which are available only at industry level (Table 7), show a lower share of temporary work in the commerce sector (10.7%) than the overall economy (11.6%) in 2010 although this share has increased faster compared with that in 2001 (3.4% and 2.7% respectively). Such a convergence is the effect of a stronger increase among women (from 8.4% in 2001 to 12.4% in 2010 (slightly below women's share of temporary employment in the overall economy in the same year (12.7%)). Such an asymmetry between men and women could give rise to concern, especially among the trade unions.

Table 7: Share of temporary employment in the commerce sector and overall economy, EU27 (%)

	Men		Women		Total	
	Commerce	Overall economy	Commerce	Overall economy	Commerce	Overall economy
2001	6.3	8.1	8.4	10.0	7.3	8.9
2002	6.5	8.0	8.3	10.0	7.4	8.9
2003	6.1	7.9	8.1	10.0	7.1	8.8
2004	6.3	8.2	8.1	10.1	7.2	9.0
2005	8.9	10.6	11.7	12.4	10.3	11.4
2006	9.1	11.0	12.1	13.0	10.6	11.9
2007	9.2	11.1	12.6	13.3	10.8	12.1
2008	9.0	10.7	12.2	13.1	10.6	11.8
2009	8.7	10.2	11.8	12.7	10.2	11.3
2010	9.1	10.6	12.4	12.7	10.7	11.6

Notes: NACE G

Break in series in 2008

Source: Eurostat, 2011

Discussion

Thus, the commerce industry displays a relatively low share of temporary employment in favour of part-time work.

According to Carré et al (2010), part-time employment offers the following three key advantages for retailers.

- It allows businesses to match staffing to peak footfall days and hours, reducing 'excess' labour, especially in the context of new 'just-in-time' inventory management systems and to cover longer opening hours. Part-time workers thus act as both 'gap fillers' and 'time adjusters' (Jany-Catrice and Lehdorff, 2005; Cerruti, 2010).

- Part-time workers have a higher productivity than their full-time colleagues while performing repetitive tasks, as the required pace of work is unachievable on a full-time basis (Prunier-Poulmaire, 2000).
- In some regulatory frameworks, part-time employment opens up exit options that allows employers to evade normative, legal or collective bargaining standards for compensation, fringe benefits and social insurance.

This last argument seems to be limited to those countries offering some advantage in terms of pay rolls or lower pay in either a direct way (such as the German ‘mini-jobs’ or the French *contrat d’insertion professionnelle*) or an indirect way such as young students looking for a part-time job in order to pay their studies (Luxembourg, UK) or tax exemptions for low wages. In some countries, such as Austria, apprentices may be employed for similar purposes, while in Italy such opportunities are instead offered by recourse to ‘bogus’ self-employed positions, especially in franchises located in commercial centres with long opening hours.

As pointed out by Vielle and Walthery (2003), part-timers are often excluded or benefit less from certain pension and social protection entitlements, while according to a 2009 report commissioned by the Directorate General for Employment, Social Affairs & Inclusion ([DG EMPL](#)) under the [PROGRESS](#) programme (Alphametrics, 2009), only 77% of part-time employees have access to unemployment benefits and 80% to sickness benefits. Austria, Denmark, France, Germany, Ireland and the UK limit their access to both benefits while Belgium, Finland, the Netherlands, Portugal, Spain and Sweden have some limits of access to the former.

Cerruti (2010) points out that Italian large retailers prefer part-timers as being more reliable because of their confidence with assigned tasks and their higher propensity to work overtime and extra shifts (such as on Sundays) in order to increase their pay. These large retailers are also less keen on temporary workers because of their negative impact on the quality of customer service; they tend to limit their use to seasonal peaks and to allow permanent workers to take holiday, possibly hiring them each year on a recurring basis.

In Sweden, a 2006 report by the Swedish Federation of Trade Unions ([LO](#)) of a survey of its members stated that 50% of women were part-time and only 9% of men; furthermore, 66% of all part-time employees said they would like to work more hours if possible.

As outlined by the New Skills for New Jobs [distribution and trade sector report \(2.27Mb PDF\)](#), the search by retailers for more labour flexibility in order to increase competitiveness and labour productivity has:

the downside .. that this could lead to less motivated workers because of less attractive working conditions and as a result poor service quality and unsatisfied customers. This is an important weakness as one of the main

opportunities for the sector lies in competition based on services and customer relations.

Decline in self-employment in the retail sector

Running a small or micro businesses as a self-employed person was a distinctive feature of retail sector in most Member States , especially the ones in southern and eastern Europe where they were dominant not only in terms of employment but also in affecting retail national regulations.

Available figures from Eurostat are only at industry level (NACE G). Notwithstanding a considerable decline over the decade from 21.2% in 2001 to 18.1% to 2010, the share of self-employed in the commerce sector is still higher than that in the overall economy where it is stable at around 15% (Table 8). The decline in the share of self-employed in the commerce sector between 2001 and 2010 among men was almost twice than among women (3.8% compared with 2.2%).

Table 8: Share of self-employed in the commerce sector and overall economy, EU27 (%)

	Commerce			Overall economy		
	Men	Women	Total	Men	Women	Total
2001	27.6	14.3	21.2	19.1	10.2	15.2
2002	27.0	13.6	20.5	19.0	10.1	15.1
2003	26.7	13.1	20.1	19.2	9.9	15.1
2004	27.0	13.8	20.6	19.4	10.2	15.3
2005	25.7	13.3	19.7	19.2	10.2	15.2
2006	25.1	13.0	19.2	19.1	10.2	15.2
2007	24.8	12.8	18.9	19.0	10.1	15.1
2008	23.8	12.2	18.1	19.1	10.0	14.9
2009	23.7	12.1	18.0	19.0	10.1	15.0
2010	23.8	12.1	18.1	19.2	10.2	15.2

Notes: NACE G

Break in series in 2008

Source: Eurostat, 2011

There was a 10.5% decline in self-employed in the commerce industry from over 6.1 million in 2001 to almost 5.5 million in 2010 (Table 9). Employers showed the strongest decline (-19%), mainly in the youngest age group (15–24 years). Only self-employed without employees aged over 50 increased in number significantly, highlighting the fact that their overall decline was due to a lack of new entrants to the sector and especially younger members of the same family.

Table 9: Change in self-employed in the commerce sector by age and employment status (%), 2001–2010

	15–24 years	25–49 years	50+ years	Total
Employers	-41.4	-26.1	-4.4	-19.0
Self-employed without employees	-16.1	-8.9	6.8	-4.0
Self-employed	-22.7	-16.4	1.8	-10.5

Notes: NACE G

Break in series in 2008

Source: Eurostat, 2011

When considering the extent and changes in self-employment in individual countries between 2001 and 2010 (Figure 4), we can divide them into the following three groups based on the EU averages for the share of self-employed in the commerce sector (21.2% in 2001 and 18.1% in 2010).

- Well above EU average: Greece, Italy, Malta, Portugal and Spain, and to a minor extent, the Czech Republic and Poland. Apart from Malta, these countries display a significant decline in the share of self-employed between 2001 and 2010 (from -9.6% in Portugal to -4.3% in the Czech Republic) and have a 'traditional' distributive structure centred on micro companies.
- Around EU average: Belgium, Bulgaria, Cyprus, Hungary and Slovakia. They all experienced a considerable decline in the share of self-employed between 2001 and 2010, especially Cyprus (-12.3%), with the exception of Slovakia where there was an increase of 1.6%.
- Well below EU average: all other Member States and Norway, ranging in 2010 from 5.1% in Norway to 14% in France. Most experienced a decline in self-employment between 2001 and 2010, especially Romania (-7.6%) and Lithuania (-12.8%), while Austria, France and the

Netherlands showed a moderate increase. These countries display a 'rationalised' distributive structure with a clear preponderance of large retailers.

Figure 4: Share of self-employed workers in the commerce sector (%)

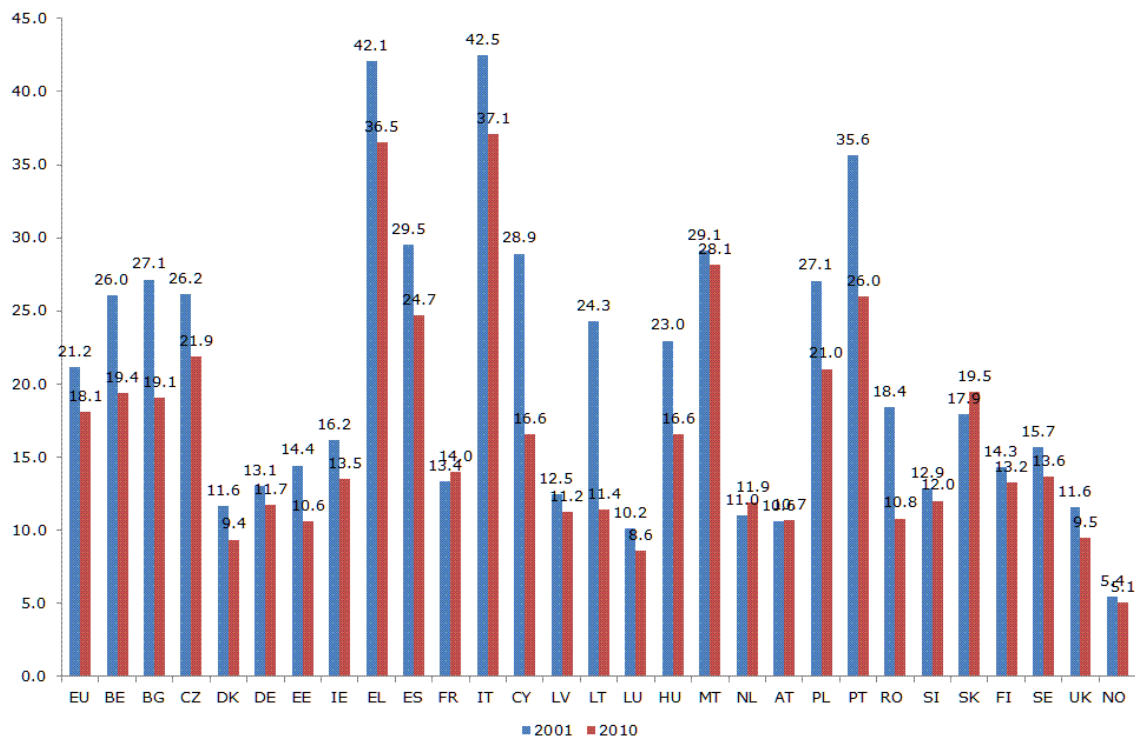


Figure 4: Share of self-employed workers in commerce (%)

Notes: NACE G

Break in series in 2008

Source: Eurostat, 2011

Few of Austria, France, Malta and Slovakia display a consistent performance between self-employed and employment levels (top right-hand quadrant of Figure 5). However, only Austria and France had sectoral regulation in the past decade aimed at preserving small businesses, although this resulted in a moderate increase in opening hours.

Most countries display a simultaneous increase in overall employment and decrease in self-employment rates (bottom right-hand quadrant of Figure 5), thus demonstrating a considerable restructuring process.

Only Luxembourg, the Netherlands, Portugal and Sweden display a decline in both overall employment and self-employment rates (bottom left-hand quadrant of Figure 5).

Finally Belgium, the Czech Republic, Germany, Hungary, Italy and Latvia display a modest variation in sectoral employment with a remarkable decline in self-employment. The Belgian case is quite surprising as the decline in self-employment between 2001 and 2010 is greater than the EU average notwithstanding strict regulation of shop opening hours and a moderate increase in opening on Sundays. Thus, there is no apparent association between liberalisation and both employment and self-employed performance.

Figure 5: Trends in employment and self-employment in the commerce sector (%), 2001–2010

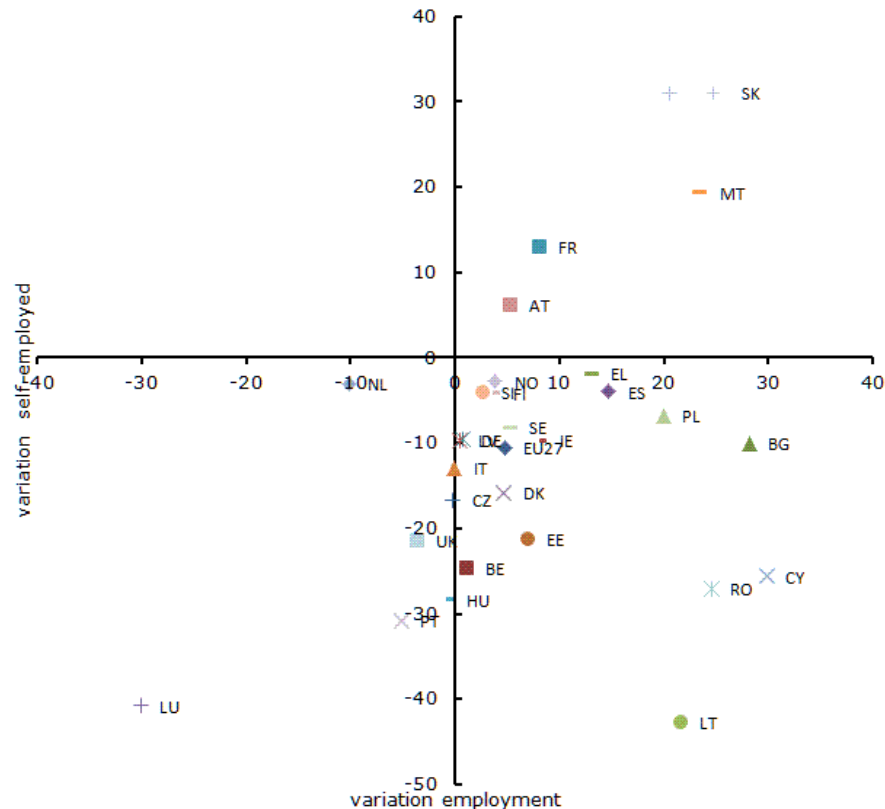


Figure 5: Trends in employment and self-employment in the commerce sector (%), 2001–2010

Note: NACE G

Break in series in 2008

Source: Eurostat, 2011

Age

The share of self-employed aged over 50 years in the commerce sector increased from 33.1% in 2001 to 37.6% in 2010 (Table 10), especially among women (from 32.2% to 38.5%); this is well above the 20.9% share in 2010 with a 1.6% increase among employees in the sector.

This is a general trend among Member States, with the noticeable exception of Denmark where the share of self-employed aged over 50 years declined by 7.7% from 48.9% (the highest among Member States in 2001) to 41.1% (-4.1% among the overall sector), notwithstanding a 9.4% decline both in numbers and in their share (Table 10).

Some NMSs (Bulgaria, Romania, Lithuania and Slovakia) reported a share of self-employed aged over 50 years below 30% in 2010 while Portugal (50.1%), the UK (46.8%) and Cyprus (46.7%) were the highest. Only Austria, Romania and Slovenia display a higher proportion of older workers in the sectoral workforce, while in Italy and Portugal the share of older workers declined among the employed and increased among the self-employed.

The decline of the self-employed and their ageing highlight a low replacement rate in traditional small businesses as there are generally not attractive, while new businesses (such as e-commerce or specialised trade services) display higher barriers to entry in terms of both skills and investment. Older self-employed people tend to accept declining returns as they have already paid off (or close to do so) their loans and do not perceive there to be sustainable alternatives independent of occupational status.

Slovakia displays an increase in the share of self-employed and a share above the EU average in the overall employment as an effect more of good macroeconomic performance than new regulatory framework. Belgium, the Czech Republic, Greece, Italy, Poland, Portugal and Spain display a convergence towards the EU average, although none of them experienced a strong regulatory change in the liberal sense between 2001 and 2010 (rather in the 1990s). Among countries with a share of self-employed below the EU average, only in Austria and France is their share clearly on the increase.

Table 10: Share of self-employed and employed aged over 50 years in the commerce sector (%)

	Self-employed			Employees		
	2001	2010	Change	2001	2010	Change
EU27	33.1	37.6	4.6	19.3	20.9	1.6
AT	36.0	40.3	4.3	15.1	20.5	5.4

	Self-employed			Employees		
BE	30.4	37.7	7.3	17.6	21.1	3.5
BG	22.3	28.5	6.1	17.6	19.9	2.4
CY	35.4	46.7	11.4	23.6	25.4	1.7
CZ	21.1	30.7	9.6	16.2	24.1	7.8
DE	40.4	43.5	3.1	23.3	26.6	3.3
DK	48.9	41.1	-7.7	18.9	14.8	-4.1
EE				23.3	28.5	5.2
EL	31.4	35.1	3.8	19.2	21.0	1.9
ES	36.6	37.8	1.1	18.7	19.2	0.6
FI	39.3	44.8	5.5	20.2	20.5	0.3
FR	35.9	37.4	1.5	15.6	19.7	4.1
HU	25.9	35.5	9.6	16.9	20.2	3.2
IE	37.9	45.6	7.7	15.7	18.1	2.4
IT	32.0	35.5	3.5	21.4	20.8	-0.6
LT	12.0	27.3	15.4	10.4	16.7	6.3
LU	37.0			12.1	24.2	12.1
LV		34.5		15.9	21.8	5.9
MT	37.1	36.5	-0.6	21.9	19.9	-2.0
NL	36.6	41.5	4.8	13.0	16.0	3.0
PL	19.8	32.7	12.9	...-	17.4	...-
PT	44.0	50.1	6.1	25.9	23.0	-2.8
RO	15.9	18.9	3.0	9.5	12.9	3.3
SE	43.2	45.0	1.8	23.5	18.9	-4.6
SI	26.7	30.0	3.3	11.0	18.2	7.2
SK	10.5	24.7	14.1	10.0	18.8	8.8

	Self-employed			Employees		
UK	42.4	46.8	4.4	21.4	22.1	0.7
NO	41.4	45.5	4.4	20.3	16.4	-4.0

Notes: NACE G

No data available for Estonia

Source: Eurostat, 2011

Finally, we expect a negative association between self-employment and part-time work (Figure 6) as large retailers, which gained considerable ground in most countries during the decade under study, rely strongly on part-time jobs (see above). This holds in most Member States with the following exceptions:

- NMSs that display both a significant increase and skills' shortage, and stable or declining part-time work such as Poland and Romania (both with a roughly stable share of self-employment), and Bulgaria, Latvia and Lithuania;
- countries with sectoral stagnation (the Czech Republic, Portugal, Sweden and the UK), where both decline, while the French adjustment is mainly due to regulatory changes in the labour market;
- the remaining countries which display declining self-employment and a moderate increase in part-time work of which in Belgium, Estonia, Hungary, Luxembourg and Slovakia the increase in part-time jobs does not compensate for the decline in self-employment.

Figure 6: Trends in part-time and self-employment in the commerce sector, 2001–2010

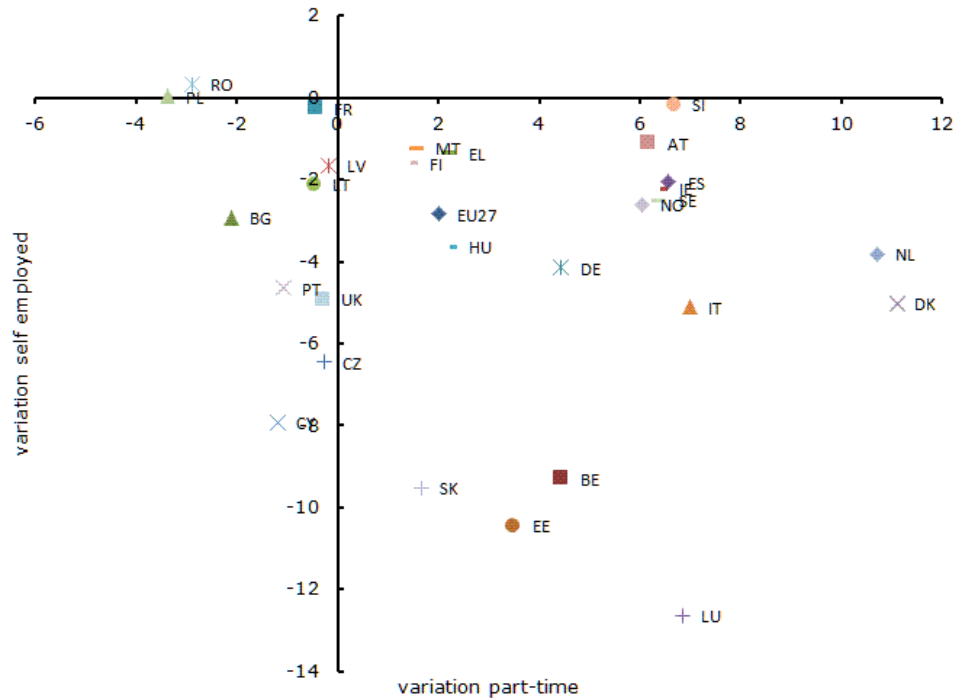


Figure 6: Trends in part-time and self-employment in the commerce sector, 2001–2010

Note: NACE G

Source: Eurostat, 2011

Migrant and foreign background workers

Eurostat statistics do not provide sectoral disaggregation for migrant workers. According to 2006 data from the Organisation for Economic Co-operation and Development ([OECD](#)), the share of migrants (that is, of people who migrate from one country to another for any reason and work as employees or self-employed people in the country of destination) and foreign background workers in the retail sector varied from 11.2% in Greece to 18.2% in the Czech Republic, displaying an intermediate density. The share in Austria (14%) was below the average for the country's overall economy (16.8%) and in Belgium it was just above the average (6.3% in 2009). See also the Eurofound report, [Employment and working conditions of migrant workers](#), published in 2007.

There is considerable variation between those countries reporting considerable migratory inflows over the past decade. Shares in the retail sector varied significantly from 3% in Portugal (from 1.4% in 2001) to 40% in the UK.

Among those countries reporting figures for total employment, Cyprus's considerable growth in retail employment relied strongly on inflows of EU workers, especially women from Bulgaria and Romania following to enlargement of the EU in 2004. Their share in the sector was boosted from 5.2% in 2005 to 15.6% in 2010, while the share of non-EU workers increased more moderately (from 2.2% to 3.6%). Denmark reported an increase in the sector in both immigrants (from 4% to 5.4%) and nationals with a foreign background (from less than 1% to over 1.6%) between 2001 and 2008.

Statistics Norway points out that nearly 30% of businesses in the grocery trade have more than 10% non-western immigrants among their employees but only 6.5% have offered them tuition. More than half of all businesses had not hired a jobseeker with a non-western background over the previous two years because they had the wrong skills for the job, namely lack of education, experience and knowledge of the Norwegian language. (Source: Structural statistics, wholesale and retail trade, Statistics Norway, 1998-2008).

Self-employment is considered an important opportunity for immigrants as, in contrast to large retailers, they are able to manage on informal support from their family and ethnic group in order to provide long opening hours and retail outlets in urban areas otherwise devoid of shops after closing hours. According to the 2010 OECD report, [Open for business: migrant entrepreneurship in OECD countries](#), native and immigrant self-employed people display a quite similar diversification among sectors: the wholesale and retail sector accounts for a slightly lower share among non-natives than natives (19% and 21% respectively).

Diversities are reported at national level. A 2004 [report \(254Kb PDF\)](#) from the Institute for the Study of Labour (IZA) in Bonn highlights far higher shares of self-employed in the retail sector in Denmark and Sweden among immigrants than natives (34% and 20.2% in Denmark and 27.2% and 14.9% in Germany respectively), regardless of the national background of the latter. However, they have lower incomes (especially non-western ones) and the differences are bigger the shorter the time they have been living in the new country. According to the Swedish national contribution, several trade union reports confirm that part-time employment is a common contractual arrangement for immigrants, especially for those newly arrived.

In the Netherlands, those employed in the retail sector with a non-national background increased from 14.6% in 2005 to 17.9% in 2007 before their share decline to 16.7% in 2010. (Source: National Working Conditions Surveys from 2005 to 2010).

1. In Italy, while there was a considerable increase in the share of immigrant self-employed in the sector by 36.6% between the first half of 2006 and the first half of 2011, Italian entrepreneurs declined by 6.6%. The retail sector in Italy accounts for 36% of total migrants entrepreneurs. Source: [Fondazione Moressa report](#) on migrant entrepreneurs).

In Slovakia, migrants (especially those from China and Vietnam) are most often found at markets where they provide stalls selling goods.

Distribution by company size

The retail sector experienced substantial restructuring over the first decade of the 21st century, with a considerable increase in the number of large companies (especially grocery chains).

Eurostat statistics by company size are available at the industry level (NACE G) only on a country basis, as they are lacking for some Member States.

Companies with more than 250 employees account for over two out of three employed in the UK in 2009, and almost one out of two in Austria, Finland and Slovenia. Bulgaria (17.8%), Italy (24.2%) and Cyprus (27.9%) had the lowest concentrations in companies with more than 50 employees (Table 11). Small businesses with fewer than 10 employees accounted for over 50% of total employment in the commerce sector in these three countries in 2009; Italy had the highest share (63.6%) followed by Poland (56.1%), Spain (55%), Portugal (54.3%) and Romania (50.5%).

Table 11: Employment distribution in commerce by company size in 2009 and change between 2002 and 2009 (%)

	0–1		2–9		10–19		20–49		50–249		250+	
	%	change	%	change	%	change	%	change	%	change	%	change
AT	3.9	-19.2	24.9	-12.8	10.5	-4.8	7.6	0.8	7.4	-4.8	45.8	13.4
BE	15.2		29.2		8.6		8.4		6.4		32.3	
BG	16.6	-29.2	44.8	-17.0	10.6	30.3	10.1	37.8	9.7	95.3	8.1	300.7
CY	16.3	-28.0	38.3	-9.9	8.1	0.0	9.3	18.8	12.7	12.1	15.2	103.1
CZ	19.7	-11.3	24.0	-34.2	9.3	9.7	6.6	2.0	7.9	32.7	32.5	58.7
DE	1.9	-5.0	24.9	-6.4	11.9	5.8	10.4	24.6	11.0	32.4	39.8	-8.3
EE	4.2	3.0	18.3	-40.0	8.5	-43.7	10.0	-23.5	19.6	..	39.5	–
ES	14.9	-18.7	40.1	-4.8	6.3	-2.9	4.7	-19.4	4.2	-0.6	29.8	29.5
FI	5.4	-42.2	19.2	4.9	9.8	-2.9	10.7	6.4	7.9	-16.6	47.1	9.9
HU	15.4	-32.3	34.5	-7.6	9.3	9.3	6.1	2.0	8.6	-9.4	26.1	63.8
IE	1.5	-37.6	23.3	-25.6	13.4	42.6	13.7	30.1	14.9	15.6	33.1	-0.8
IT	18.7	-27.3	44.9	-1.8	7.2	17.8	5.0	14.2	5.6	21.6	18.6	38.6
LT	12.1	252.3	21.7	-40.2	9.7	-31.3	9.8	-24.6	14.1	-17.5	32.4	104.4
LU	4.9		23.0		13.0		13.1		–		–	
LV	5.4	–	26.4	-24.5	11.8	-37.2	10.2	-23.7	18.4	9.0	27.9	–
NL	7.1	166.7	20.1	-20.6	7.8	19.7	8.1	-15.4	13.7	-0.6	43.2	2.4
PL	16.4	-34.6	39.7	-18.7	4.1	36.3	6.6	42.5	10.2	32.3	23.0	115.0
PT	24.9	-13.2	29.4	-20.8	7.8	2.6	6.7	8.3	7.6	38.2	23.7	57.7
RO	12.5	-31.3	38.0	0.1	12.6	-22.7	9.9	-18.8	9.3	-16.9	17.7	331.2
SE	9.1	-40.8	21.8	-3.6	9.4	-2.1	8.8	-7.4	11.9	28.3	39.0	15.9
SI	6.2	-21.1	17.7	-50.3	5.8	-58.5	6.4	-56.7	14.4	-6.8	49.3	309.2
SK	2.9	-42.8	21.9	58.6	15.5	2.4	4.1	-21.5	11.1	-9.5	44.5	-8.2
UK	1.2	-39.1	15.6	-9.5	5.8	-23.3	4.8	15.5	5.3	30.7	67.2	3.5

Notes: NACE G

Data for EU, Denmark, France and Malta not available

Source: Eurostat, sps

The NMSs reported the biggest increase in the share of large retailers between 2002 and 2009 (Table 11); large multinationals from the EU15 in particular expanded massively after 2004-2006. As outlined in the national contributions, the proportion of large retailers increased more than four-fold in Bulgaria, Romania and Slovenia. However, employment in both individual and large companies reduced in Slovakia. Individual and micro companies with fewer than 10 employees declined across all Member States, except for individual companies in Lithuania and the Netherlands, where they increased, and Estonia. In general, NMSs are the target areas in the 2000s for large retailers expanding their businesses as part of internationalisation efforts.

In Germany, Ireland and the UK, where the large traders' share achieved a 'maturity', SMEs displayed the best performance, illustrating the development of specialised trade business.

According to the 2010 European Commission [staff working document on retail services in the internal market \(678Kb PDF\)](#), the eight biggest companies accounted for 50–80% of the national grocery retail market in 2007 in most of the mature EU15 retail markets. According to the national contributions, some countries displayed sectoral concentration of grocery chains in a few large groups. In Finland, the two largest retailers accounted for 76% of grocery stores. In Lithuania, Norway and Slovenia employment in companies with more than 250 employees was concentrated in four large retailers which clearly controlled the sector. This was a further increase with respect to the OECD findings in 1998, where the three largest distributors in Finland, Norway and Sweden accounted for at least 60% of the retail food trade. At the other extreme, the 10 largest retail distributors in the Czech Republic, Italy and Poland represented less than 20% of the sector.

Changes in the legal framework

Working conditions in the retail sector are significantly affected not only by national labour market and employment regulations but also by sectoral regulation in terms of opening hours and authorisation regimes. Sectoral regulations cover topics such as:

- urban issues;
- need for minimum standards in terms of service availability and competences in offering special services such as pharmacies;
- public security regulations.

These regulations, which are administered by both national and local governments, can also include requirements lobbied for by employers' associations in the sector. These aspects

strongly affect the degree and the form of competition, with sectoral distribution by company size considered a signalling indicator.

Liberalisation processes in both the retail sector and labour markets in general have had a major impact on the share of self-employment, as the higher productivity of large retailers (due primarily to their increasing use of ICT) allows them to supply goods to customers at lower prices. The ageing of self-employed workers illustrates not only the lack of turnover among them but also a dramatic change in the career ladder of retail employees.

Sector liberalisation

Traditionally, the structure of the retail sector has been strongly affected by a number of regulations at both national and local level. The 2000 OECD report, [Regulatory reform in road freight and retail distribution \(937Kb PDF\)](#), groups these regulations into three broad categories.

The first category is those that set barriers to entry (mainly opening regulations), which include commercial registers, licences or permits to engage in commercial activity, and specific regulations for large outlets. Such regulations mainly affect competitiveness.

The second is operation restrictions such as protection for existing companies, including limits on sales promotions and opening hours. The aim of the latter is to increase the shift in opening hours away from 'standard' working time schedules in order to offer more favourable times for shopping to consumers but which in turn increase the probability of retail employees being required to work unsocial hours (evenings and weekends).

The third category is price regulation.

Both the design and changes imposed by regulations affect different types of businesses in different ways. They also have a considerable impact on:

- the competitive configuration of businesses;
- the social life of both employees in the retail sector, and consumers and society as a whole.

By monitoring changes over the past decade detailed in the national contributions, we can explore some links with changes in sectoral employment structure and working conditions – in particular on career opportunities in the sector.

Sectoral regulation

When describing restrictions to the opening and establishing of new businesses, the 2000 OECD report includes 'being a fit and proper person' (required in Austria, the Czech Republic, France, Hungary, Italy and the Netherlands). A 2001 [OECD report](#) mentions specific training and diplomas (required in Belgium, France and Hungary).

Most EU countries set some restrictions on large outlets ranging in floor area from 800 m² (Belgium) to 5,000 m² (Poland). More stringent requirements apply to certain types of shops or businesses (for instance those involving health or safety hazards), or with specific limitations (sale of pharmaceuticals, alcohol and tobacco). These types are not taken into account here.

A number of patterns in changes in sectoral regulation during the decade can be identified.

- **Changes in restrictive sense:** In the early 2000s, both Belgium and France widened the scope of authorisation of local governments by reducing the surface area threshold to 400 and 300 m² respectively. In Belgium, there is a differentiation according to shop size; decisions made by the municipality are integrated by the National Economic and Social Committee for Retail, which includes all sectoral stakeholders, for shops above 1000 m² while the neighbouring municipalities have to be consulted in cases of shops with a surface area greater than 2,000 m². In France, the authorisation threshold was increased to 1,000 m² in 2008 in order to stimulate employment opportunities.
- **Specific measures in favour of small businesses in specific contexts,** especially in historical centres and villages, have been taken in France and Spain, in this latter case in order to enforce 'national identity', while in Italy the lower chamber approved in 2011 some support for shops in historical villages which conflicted with the liberalisation of opening hours in 2012. The rationale behind such measures was concerns about social cohesion, especially for older and disabled people, caused by the closure of neighbourhood shops and the need to support the local economy in small historical centres.
- Spain and Portugal **reduced administrative burdens**, with an apparently neutral impact across company size.
- Denmark (among others) achieved an extensive, although gradual, liberalisation of the sector by **lifting restrictions on large retailers opening in small cities**.

The boosting of large retailers in NMSs raised serious concerns for the traditional small business retail model. In Poland, legislation that imposed more restrictions on the opening of large retail stores was rejected by a [Constitutional Tribunal decision \(in Polish, 25Kb PDF\)](#) in 2008 because it contravened the freedom of enterprises. In Lithuania the issue is under discussion.

The picture given above only partly supports the view expressed in the 2000 OECD report that the EU trend was towards stricter regulation in countries that had traditionally been more liberal; this pattern is seen only in few countries (Belgium, France and Spain). Rather, the persistent recession since 2008 seems to have provided further arguments in favour of liberal regulations while the social cohesion stance appeared to be more supported by targeted measures such as incentives and reductions in administrative burdens.

Changes in opening hours

According to the 2000 OECD report, only EU few countries (the Czech Republic, Hungary, Ireland, Poland and Sweden) did not regulate opening hours and the main restrictions related to Sunday opening. The national contributions highlight a trend towards longer opening hours over the past decade, both on a weekly basis and/or by allowing more Sunday opening, with a significant acceleration after 2008 in order to tackle unemployment.

Strategies differed widely between countries:

- **National level restriction in opening hours:** this was the case in Spain where opening was limited to 72 hours a week, and in the Netherlands where all Sunday openings permitted for reasons of tourism (as established by the 1996 legislation on opening hours) were restricted to cases where tourism plays a 'substantial' role in local economies.
- **Longer opening hours** were established in Austria in two steps. The first was an increase from 66 to 72 hours and the second a widening of permitted opening periods. The latter was achieved in exchange for an increase in overtime pay negotiated with the trade unions.
- **Greater opening on Sundays** was introduced in Belgium (from three to nine months of the year), Germany (from three to ten months of the year) and Finland (from four to six months of the year plus a further five Sundays for large retailers, while small shops are left free to do what they want). In France, large cities and tourist areas were allowed in 2009 to derogate from the requirement for Sunday rest days.
- **Liberalisation** in opening hours has been introduced in Denmark (to be achieved in 2012), in Germany (except in the case of Sunday openings), Italy and Portugal (with an allowed opening period from 6 am to 12 midnight). This occurred in the last three countries in 2011
- **No substantive revision** in regulations in the other countries: this means that very liberal regulations persisted or there were no regulations on opening hours (especially in the NMSs).

Several examples fall within this latter group. In Poland and Slovenia, the past decade saw controversy about opening on Sundays. In Poland, limits were introduced in the labour code in 2010; in Slovenia, a referendum banned them in 2003 before agreement was reached introducing a 100% supplement and Sunday openings were re-liberalised (see [SI0803049Q](#)). The Lithuanian labour code bans work on public holidays except on technical grounds. Large retailer claim to fall within this category, but as the 'grounds' are not specified, the issue is unsettled – notwithstanding protests by the trade unions and small businesses.

Regional regulation can introduce some variations in opening hours. In Italy municipalities were left free to increase from 12 to 20 Sunday openings per year before the liberalisation in 2011 (leading to a race by large retailers to open on Sundays), while in Belgium municipalities can

impose a limit of six and in Portugal they can set different allowed opening periods. Spanish regional implementation tends to be more restrictive while, in Germany, four regions out of 16 set some limitations following the 2006 reform delegating the regulation of opening hours to them.

Such overviews suggest that the regulation of opening hours has had a significant impact on sectoral liberalisation. Both labour law and collective bargaining on one hand and local level regulation on the other may considerably affect the final outcome – in this last case by increasing differentiation.

In most countries, liberalisation of the sector has been indirect through action on opening hours (Table 12). This has given a clear advantage to large retailers as they can accommodate a move to longer hours more easily; such an advantage is apparently mitigated in Finland by setting restrictions on large retailers.

Table 12: Trends in regulation of opening hours in the retail sector, 1990s

	Regulated	Moderately regulated	Liberal
Less barrier to licencing		ES, DK, PT	
Increase in opening Sundays/weekends	AT, BE, FR	DK, ES, FI, IT, MT, PT	DE
Regulated increase in opening hours	AT, LU		
No changes in opening hours	EL	UK	BG, CZ, HU, IE, LT, LV, SI, SE, NO
Restriction on opening hours			NL
Restrictions via labour laws	PL		

Note: No information available for Estonia and Romania from national contributions

Source: [OECD \(2000\)](#) and national contributions

As a reaction to the extensive regulation of working times, especially on Sundays, there have been strong calls in several countries to limit such trends. These pleas for partial reversal of the liberalisation trend can be grouped into the following arguments:

- social cohesion and urbanistic reasons: the expansion of large retailers occupies land and leads to fewer shops in the centre of towns and cities (France and Italy appear to be working

towards achieving specific niche areas for shops, although legislation on this in Italy is still in the pipeline);

- limiting of freedoms on opening hours in order to grant workers a better work–life balance (such as the Polish campaign ‘Don’t shop on Christmas Eve’ and the [campaign for a work-free Sunday in Europe](#)) and to reduce competition between large and micro retailers in terms of competition on opening hours;
- sectoral concentration: this is the case in Lithuania where four large retailers control 50% of the market;
- maintaining the identity of national retailers (such as in Spain).

The most widespread coalitions are between trade unions with the explicit or indirect support of churches or other religious organisation (such as in Austria, Italy and Poland). In some countries (such as Greece, Hungary, Italy and Spain), opponents to deregulated Sunday opening also include employers’ associations representing small retailers. The role of churches is also relevant in explaining differences in Sunday opening and holidays between regions in Germany; such regulations are most restrictive in Bavaria which is predominantly Catholic. In Lithuania, however, the association representing large retailers favours longer opening hours and opposes their restriction. In several eastern countries, the [Karat Coalition](#), a women rights’ coalition that also fights against discrimination, is a further actor intervening in the political arena where it has a relatively influential role.

In several countries, especially eastern ones, trade union opposition is related to the lack, or poor level, of extra pay for accommodating longer opening hours (such as in Slovenia). Recent liberalisation in Italy is opposed by trade unions because of the lack of affordable childcare and the worsening of employees’ work–life balance as work on Sundays means it is no longer a day rest. The unions are therefore calling on regional governments to limit such changes using their implementing prerogatives.

Labour market liberalisation

Two clusters of labour market reforms in the past decade can be identified.

A first cluster in the early 2000s implemented the European Framework Agreements on part-time (Council Directive 97/81/EC) and fixed-term (Council Directive 1999/70/EC) work. This was followed by the implementation in NMSs of the Community [acquis communautaire](#), which in general entailed a re-regulation process from previous quite liberal frameworks.

While defending any discrimination on the basis of working time and less than proportional treatment than an equivalent full-time worker (pro rata time principle), these reforms considered part-time as a means of promoting working time flexibility, and as something to be encouraged on a voluntary basis and not to bar workers from any career opportunities. They

also established that fixed-term contracts should be based on objective reasons, have limited reiteration over time, be established by national regulations, and favour transition to permanent positions by means of training and employers' information on available positions.

Overviews of the implementation of this first wave of reforms in the EU15 noted that most national legislative frameworks guaranteed the pro rata time principle in the case of part-time work, while pay and overtime were the main discriminatory factors (Freyssinet, 2001; Clauwert, 2002). The most relevant exception is the German mini-jobs; these are 'marginal' jobs (that is, less than 15 hours per week) often paid at below the collectively bargained pay scale. There was wide variation in the implementation of the fixed-term directive between countries ([TN020101S](#)).

The second cluster served as a liberalisation process, which in the EU15 was mainly a liberalisation at the margin according to the two-tier approach widely apparent in the previous decade (Esping-Andersen and Regini, 2000) with a significant intensification after the 2008 crisis in some eastern countries. Carré et al (2010) point out the role of labour market liberalisation in companies' hiring strategies favouring the least expensive labour contracts as part of their cost-cutting strategies.

From the national contributions, it is possible to group the measures taken as follows.

- Employment protection was reduced by extending the probationary period (in Hungary from three to six months, in Greece from two to 12 months) or by increasing the flexibility for employers to lay off workers (as in Estonia in 2009).
- Lower wages (although progressively increasing) were paid for non-permanent contracts as in the case of Italian 'bogus' self-employed where the gap with employees' pay fell gradually from 23% in 1999 to 6% in 2011, the German 'mini jobs' boosted after the 2003 laws on 'modern services on the labour market' tightened the eligibility criteria and duration for unemployment benefits, or target groups such as young workers in Denmark, the Netherlands and the UK, the French professional contract introduced in 2005, and tax exemptions for low-paid workers (as in the case of Belgium).
- There was liberalisation at the margin by introducing new non-permanent contracts as [temporary agency work](#) in Norway (2000), staff leasing and on-call jobs in Italy (2003), reducing restrictions on hiring workers on a non-permanent basis (Italy, 2001; Greece, 2011), and the use of temporary employees for longer periods from 18 to 36 months (Greece, 2011). However, the 2006 Spanish agreement went in the opposite direction by converting temporary contracts to permanent contracts for those who had worked for at least 36 months for the same employer.
- Changes in working time flexibility were achieved by allowing employers greater variation in the weekly working time (Belgium, Finland, Latvia, Lithuania, Poland, Portugal and Romania) and/or by reducing the wage premium for overtime (Greece); these measures were mostly

introduced after 2009. In Cyprus and Finland, there was an increase in such premiums for Sunday work by adapting to an extension in opening hours; in the latter, collective bargaining managed the adaptation.

- Changes in access to workers' representativeness (Romania) were introduced with a company threshold and a restrictive closed shop clause.

Most of these measures are concentrated in two waves. In the first half of the decade, the prevalent pattern is liberalisation at the margins while, after the 2008 recession, legal changes affected the whole labour market by increasing both their external and internal flexibility. In addition, NMSs introduced further specific reforms in order to comply with the EU directives.

In Romania, under the Social Dialogue Act 62/2011 which took effect in May 2012, it takes 15 employees working in the same company to set up a trade union compared with the previous condition that the 15 people had to all be from the same industry or profession, and not necessarily working for the same employer. The new rules governing trade unions therefore preclude workers at a small company from forming a union.

In Bulgaria and Lithuania, increased working time flexibility is not compensated by a pay supplement. In Romania, changes in 2010 increased the time off as compensation from 30 to 60 days, and introduced the opportunity to reduce the number of working days from five to four per week, and pay accordingly.

This latter advantage is available to large retailers only in those countries where the labour market legislation allows for lower payroll and/or lower wages for part-time positions (as in the case of the German mini-jobs, made easier by the Hartz reforms) or young workers (as in the case of the UK's young apprenticeships, Denmark, the Netherlands and Sweden in 2007 and 2009), or overtime and/or unsocial hours premiums are not paid (Slovenia).

Career perspectives and employment security

Career perspectives changed dramatically during the decade. The decline in self-employment due to competition from large retailers and online shopping made the sector less attractive as a career option (with the exception of opportunities for migrants). The massive introduction of ICT-driven innovation by large retailers created new positions requiring medium and high skill levels, which provided opportunities for an increasing share by part-time and temporary employees. However, such a career pattern is not straightforward due to the skills mismatch, and work-life balance and career expectations. The search by employers for increasing flexibility in the workforce is a final factor hampering the emergence of a new career pattern. The intervention of social partners both at national and local level could produce suitable patterns, as shown by national regulations (as in Finland and France) and companies' good practice.

Working time arrangements

Number of hours worked per week

Analysis of data from the European Working Conditions Surveys ([EWCS](#)) on working times revealed that marginal part-time work (that is, 20 hours or less per week) is increasingly concentrated among women (from 20% in 2005 to 23.2% in 2010), in the youngest age group (15–24 years old) (from 26.3% in 2005 and 42.2% in 2010), for non-permanent workers (from 18.2% in 2005 to 31.1% in 2010) and for low-skilled manual workers (from 23.4% in 2005 to 27.3% in 2010) (Table 13).

In contrast, the share of those working more than 48 hours per week declined from 24.7% in 2005 to 17.7% in 2010 and from 8.6% to 7.7% for those working 41–47 hours per week. There was a slightly smaller decrease in self-employed working more than 48 hours per week (from 55.6% in 2005 to 49.6% in 2010). There was a significant change in the mix of high-skilled clerical from self-employed to managers, professionals and technicians working as employees, with a considerable decrease in the share of those working long hours from 46.9% in 2005 to 30.9% in 2010 (Table 13).

Both part-time and full-time workers in the retail sector in the Czech Republic, Lithuania, Portugal and Romania worked longer hours than in the overall economy. The working time of part-timers declined considerably (by 7.5 hours per week on average) as in the overall economy, while full-timers' hours worked remained stable.

Table 13: Number of hours worked per week by sociodemographic characteristics, EU27 (%)

	2005					2010				
	≤20	21–34	35–40	41–47	≥48	≤20	21–34	35–40	41–47	≥48
Gender										
Male	10.3	6.3	37.9	10.9	34.6	10.3	6.9	51.5	8.4	22.9
Female	20.0	15.9	37.3	7.4	19.4	23.2	16.5	38.8	7.1	14.3
Age (years)										
≤24	26.3	12.4	38.9	5.7	16.6	42.2	11.5	33.9	7.3	5.1
25–39	11.9	13.8	39.9	7.5	26.8	11.1	13.2	49.6	8.1	18.0
40–54	14.3	11.5	36.2	10.5	27.5	13.7	13.0	42.2	8.7	22.4

	2005					2010				
	≤20	21–34	35–40	41–47	≥48	≤20	21–34	35–40	41–47	≥48
≥55	23.0	11.6	31.5	10.8	23.0	19.8	11.9	43.1	4.3	20.9
Type of employment										
Self-employed	6.8	5.6	16.6	15.4	55.6	6.6	6.4	27.2	10.2	49.6
Permanent employee	17.7	12.4	48.0	7.4	14.5	16.2	14.6	52.2	7.5	9.5
Non-permanent employee	18.2	24.2	35.5	6.0	16.1	31.1	10.7	40.7	6.3	11.3
Other	29.9	19.0	33.3	3.5	14.3	32.3	17.3	38.2	5.9	6.4
Type of occupation										
High-skilled clerical	7.1	5.2	32.1	8.6	46.9	4.0	7.9	48.8	8.4	30.9
Low-skilled clerical	19.5	17.6	37.1	9.7	16.2	19.7	14.0	41.5	8.0	16.8
High-skilled manual	4.4	3.0	67.4	7.4	17.8	11.8	10.0	53.7	7.4	17.0
Low-skilled manual	23.4	10.8	38.8	6.1	20.9	27.3	10.7	49.1	3.4	9.5
Total	16.6	12.5	37.5	8.6	24.7	18.1	12.7	43.8	7.7	17.7

Source: EWCS

Overtime

Overtime is reported as being more extensively used in the retail sector rather than in the overall economy in Bulgaria (reported by 43.4% of employees, 17.8% of which as a permanent phenomenon), Czech Republic (especially medium enterprises, reported by 62.4% of men and 49.6% of women), Lithuania, Poland and Portugal. Italian large retailers make widespread use of overtime for part-timers because of increased unpredictability of customer inflows and in order to fill Sunday shifts.

According to a [2009 paper \(in Hungarian, 77Kb Ms Word\)](#) from the Centre for Social Dialogue (TPK) which investigated time usage by workers in the commerce sector in Hungary, workers

faced a working time frame from one to four months, and daily working and commuting times totalling nearly 10 hours of which 49 minutes were spent travelling and 27 minutes taken up resting at work; they thus worked 14.7% more than the legal working time. Although the legal daily maximum working time is 12 hours, 5% of workers in the sample had to work more hours than this once or twice in the one month period.

Unpaid overtime is a recurrent issue reported by the [Bulgarian Work Climate Index](#) for 2010 and Lithuanian surveys, while the Polish National Labour Inspectorate ([PIP](#)) report that the most frequent breach of employee rights among large retailers is extending their working time and irregularities in their payment.

Shift work

Shift work increased from 18.7% in 2005 to 20.6% in 2010 (Table 14). It was most widespread among younger workers (27.8% of those aged 15–24 years and 23.8% of those aged 25–39 years in 2010 – an increase since 2005), non-permanent workers (from 23.4% in 2005 to 34.5% in 2010 compared with 24.4% among permanent ones, whose share was stable over the period) and low-skilled clerical (22.4% in 2010) and low-skilled manual (25.7% in 2010). The latter reported a significant increase (9.9%) with respect to 2005. Finally overtime was more frequent among women (22.7% in 2010) than men (17.4%), although men reported a considerable increase (4.6%) with respect to five years earlier (Table 14).

Table 14: Shift work by sociodemographic characteristics, EU27 (%)

	2005	2010
Gender		
Male	12.8	17.4
Female	21.9	22.7
Age (years)		
≤24	21.9	27.8
25–39	21.0	23.8
40–54	17.3	15.2
≥55	12.1	15.5
Type of employment		
Self-employed	8.6	4.2

	2005	2010
Permanent employee	24.1	24.4
Non-permanent employee	23.4	34.5
Other	11.7	14.9
Type of occupation		
High-skilled clerical	11.5	11.4
Low-skilled clerical	23.8	22.4
High-skilled manual	12.6	10.5
Low-skilled manual	15.8	25.7
Total	18.7	20.6

Source: EWCS

Unsocial working

Work on Sundays was reported by 29.4% of the EWCS sample in 2010 (up 1.4% from 2005) and especially among the self-employed (though this declined from 39.7% in 2005 to 34.1% in 2010) and young workers (from 31.6% in 2005 to 44.8% in 2010) (Table 15). These figures highlight the substitution effect of young employees for older self-employed, working more frequently part-time and on a non-permanent basis by covering shift work and unsocial hours.

Table 15: Number of Sundays worked per month by sociodemographic characteristics (%)

	2005				2010			
	Never	1	2	3 or more	Never	1	2	3 or more
Gender								
Male	68.6	9.7	5.2	14.2	70.2	8.1	9.8	11.9
Female	71.0	7.4	8.6	11.4	70.8	7.6	10.7	10.9
Age (years)								
≤24	66.7	6.3	10.1	15.2	55.2	11.8	13.9	19.1

	2005				2010			
25–39	67.9	9.3	9.9	10.8	73.3	7.7	10.8	8.2
40–54	72.5	8.9	5.4	11.6	74.7	7.2	9.3	8.8
≥55	75.2	6.3	2.6	15.1	71.7	4.50	7.10	16.7
Type of employment								
Self-employed	58.1	8.1	7.7	23.9	63.9	13.9	6.1	14.1
Permanent employee	75.9	9.2	6.3	7.2	70.9	6	8.7	12.4
Non-permanent employee	75.5	5.4	8.7	10.5	72.4	7.5	6.7	12.7
Other	65.5	9.2	10.5	10.5	77.2	7.4	5.7	8.6
Type of occupation								
High-skilled clerical	63.9	13.9	6.1	14.1	67.8	10.1	10.6	11.5
Low-skilled clerical	70.9	6.0	8.7	12.4	70.9	8.4	10.2	10.5
High-skilled manual	72.4	7.5	6.7	12.7	70.7	5.4	11.7	12.1
Low-skilled manual	77.2	7.4	5.7	8.6	70.8	1.8	10.0	17.3
Total	70.2	8.2	7.4	12.4	70.6	7.8	10.3	11.3

Source: EWCS

Increase in shift work and de-standardisation of working times is discussed by several national contributions.

In Portugal, almost a third of retail workers (30.2%) were working in shifts in 2010 as against 23.3% in 2005; in 2010, 65.8% of retail workers were had unsocial work patterns or worked at unsocial hours, though this was a slight decline from 2005 (68.8%). While evening work was reported on the increase (from 32.3% in 2005 to 35.6% in 2010), working Saturdays and Sundays displayed a slight decrease (from 65.6% in 2005 to 61.9% in 2010 and from 33.9% in 2005 to 34.1% in 2010 respectively).

A similar picture was reported in the Netherlands where shift work is on the increase among those employed in the retail sector (from 10.9% in 2005 to 18% in 2010), more than in the general employed population (from 14.9% to 15.7%). Evening or night work was stable at about 60% while working at the weekends had decreased slightly but was still more than 80%. However, the ‘regularity’ of all unsocial hours was on the increase though partly compensated

by the decrease in working overtime (both in the percentage of workers working overtime and the number of hours).

The TPK study found that Hungarian workers in the commerce sector worked three weekend days per month: 13% of respondents worked on both days of at least one weekend (despite this being forbidden by law), while only 57% had 10 rest days, and 12% had seven or fewer rest days.

Cerruti (2010) pointed out that increased competition among supermarkets (such as promotional campaigns) increased unsocial hours as did unpredictable variations in customer flows. In addition, the length of warning of changes in work schedules and overtime requests are often not respected, thus worsening work–life balance.

Unsocial working hours are reported to be on the increase In Bulgaria, this is allegedly mainly due to full liberalisation of the sector and the refusal to regulate opening and closing times in the retail sector. Only 21.3% of employees in the sector had never worked on a Saturday while 28.9% worked ‘nearly always’ or ‘very often’ on a Saturday and about half worked on Sunday and during holidays (source: Bulgarian national contribution).

The impact of unsocial working times is different across countries.

Although highlighted as a one of the main drawbacks of working in the retail sector, a [2009 study \(in Danish\)](#) by [HK Danmark](#) found that unusual working hours in Denmark in terms of night and weekend work do not score it as one of the top sectors when it comes to work–family conflict and high workloads. In addition, as reported in a [paper](#) presented at the 60th Annual Meeting of the US-based Labor and Employment Relations Association ([LERA](#)) in 2008, issues such irregular working hours and lower skill discretion do not necessarily pose a problem in the retail sector as a whole.

The 2010 [Survey on quality of life at the workplace](#) carried out by the [Ministry of Labour and Immigration](#) found that Spanish employees in the commerce sector are less satisfied than the average Spaniard in terms of working time arrangements (especially those concerning holidays and leave).

In France, 29% of people working in the retail sector have working time schedules that vary from week to week against 22% in all other sectors. Irregular schedules are more common in food supermarkets and for those employed as cashiers (who are generally women). Overtime and Sunday work display some countertendency; according to a [report \(in French\)](#) by [Dares](#), overtime performed by full-time workers in the commerce sector (NACE G) increased by 8.1% from the second quarter in 2009 to the same period in 2010, while those ‘usually’ working on Sundays slightly decreased. The report also found that those working ‘regularly’ declined from 10.2% in 2008 to 9.7% in 2009, and those working on Sundays ‘occasionally’ from 26.3% in 2008 to 26% in 2009). Almost nine out of 10 employed people in this sector (88%) usually or occasionally worked on a Saturday or Sunday, and nearly eight out of 10 usually worked on a Saturday compared with less than a third in other sectors. Night work in France is undertaken

mainly by men, with women accounting for fewer night-time workers, although no figure is reported in the national contribution.

Transitions between different employment status

The issue of transition between different employment status was explored by the question 'Immediately before this job, in your main activity were you?' included for the first time in the fifth EWCS.

In the retail sector, 34.2% of self-employed had previously worked as a permanent employee, 26.8% had been self-employed and 13.2% had been unemployed, while 53.1% of permanent employees had previously worked with a permanent contract, 14.8% had been in training and education, and 15.3% had been non-permanent employees; 41.3% of non-permanent employees had worked on a non-permanent basis, 22.1% had been in training and education, and 14.6% had been unemployed. Finally, 30.3% of those working with 'no or other contract' had been in education and training, 22% had worked with a permanent contract and 19.3% had worked with 'no or other contract' (Table 16).

According to the EWCS data, permanent employment was the main access to self-employment in the retail sector, while employees show a significant persistency in their labour pool and working with no contract or a non-permanent contract was the access point for over 53% of those in education.

Although no information is available from EWCS about the sector of their previous employment, the sectoral decline of self-employment appears to have had a significantly impact of the sample's perception of career opportunities. This suggests that the 'old' small retail centred pattern offered some career opportunities to employees as self-employed, though this hypothesis requires more refined information to be validated. Strict regulation of both opening hours and licencing, combined with good macroeconomic performance, enabled this previous pattern, which is now under pressure through technological change and increasing competition in the sector.

Table 16: Transitions in the retail sector in the EU27 in 2010 (%)

Current situation	Previous type of contract/type of employment						
	Permanent employee	Employed fixed-term contract	Temporary agency worker	Self-employed	Unemployed	In education or training	Other
Self-employed	34.2	8.4	1.0	26.8	13.2	8.5	7.8
Employee: permanent	53.1	13.1	2.2	2.0	10.0	14.8	4.7

Current situation	Previous type of contract/type of employment						
	Permanent employee	Employed fixed-term contract	Temporary agency worker	Self-employed	Unemployed	In education or training	Other
contract							
Non-permanent employee	16.7	37.1	4.3	.9	14.6	22.1	4.3
Employee: no or other contract	22.0	9.6	.9	4.1	13.8	30.3	19.3
Total	42.3	15.0	2.1	7.4	11.6	15.4	6.2

Source: EWCS

In most EU countries, research and debate among social partners concentrate on career opportunities for part-time and non-permanent workers in terms of their transition to full-time and permanent positions respectively – known as the ‘stepping stones’ versus ‘dead end’ debate.

According to the [Austrian Work Climate Index](#), part-time workers (40% of them working in large retailers) have shorter job tenure than employees with full-time contracts (49% compared to 40% with a job tenure of less than three years) and they take more frequently career breaks (89% compared to 61% of full-time workers) with an overall longer duration (62 months compared to 37 months among full-time workers), well above the national average. Further, they also face a higher risk of unemployment (6% unemployed in the past year) than full-time workers (4%). Employees’ satisfaction with career opportunities (50%) is slightly below average (54%). Things change when disaggregating between full-time (58% satisfied) and part-time employees (39% satisfied); this is reflected in the gender gap as men (54%) are more satisfied with their career opportunities than women (47%).

Similarly, according to the Bulgarian Work Climate Index for 2010, the retail sector ranks last for professional development and with the highest propensity to change jobs: this is due to low wages, attracting nonqualified workforce or students considering working in the sector as a temporary experience, while those qualified look at those sector paying better wages.

According to Italian social security files, part-time work is much more widespread among non-permanent workers (57.1% in 2009) than among permanent ones (36.8%), although they display a lower increase with respect to 2005 (3.9% and 5.9% respectively).

In several countries, collective bargaining can establish that employers filling vacant full-time posts should give preference to part-time workers wanting full-time employment. This is the case in Germany and some company-level collective agreements in Italy. Vice-versa, because of

legal differences in regulating part-time and full-time, under a 2007 law, full-time workers in Germany have the right to part-time work, yet part-timers have no right to opt for full-time. In order to prevent transitions from standard part-time to marginal part-time, the sectoral agreement regulates that part-timers are subject to working-time reductions by the employer, but that working time cannot be cut below the threshold of the unemployment insurance contribution.

Notwithstanding such agreements, involuntary part-time work is widespread, especially among the lowest skilled and in those countries characterised by the dominance of a Tayloristic functional model, such as France and Italy (Carré et al, 2010).

Factors affecting the transition to full-time or permanent employment

A number of factors are reported in the national contributions to play a key role in favouring or hampering transitions from part-time to full-time and from temporary to permanent employment. We can group these in three categories of issues:

- qualification and skills development at work;
- work–life balance;
- skills shortage.

The Nordic countries provide some evidence of the first issue. The Swedish employers' association for service companies, [Almega](#), supports the 'stepping stones' claim for temporary employment as a springboard to permanent employment, especially for immigrants. According to a 2004 working paper by the Institute for Evaluation of Labour Market and Education Policy ([IFAU](#)), such claims hold only for highly qualified employees and men in general, and is not the case for women and seasonal employees. In Denmark, part-time workers to a large extent have the same working conditions in terms of career progression and employment security as those typical for full-time workers. A study carried out by Danish trade unions found a difference in career opportunities between part-time and full-time workers, especially in those retailers characterised by special products, special knowledge and customer experience. Furthermore, temporary workers are in a worse position when it comes to career progression and job security, although [national collective agreement for retailers \(in Swedish, 969Kb PDF\)](#) foresees that companies should inform temporary employees about options for permanent employment and training.

The second issue is exemplified by an Italian hypermarket where the low turnover among permanent workers limits the chance of transition from non-permanent to permanent positions, while the transition to full-time from part-time faces a further organisational constraint. Full-time positions imply a somewhat supervisory role and thus unconstrained working time and the share of those performing supervisory tasks on the shop floor on a part-time basis is increasing

(Cerruti, 2010). Furthermore, career opportunities for women working part-time are no more than local supervisory positions as managers, medium and highly qualified technical position (planning, logistics, contractors and providers) are filled through new recruitment. Although women do seek full-time positions, high-skilled clerical jobs require the capacity to accommodate boundless working times in order to face unforeseen occurrences, to meet tight deadlines and to participate in the group's meetings. This discourages most women, who tend to have domestic duties and have achieved a satisfactory work-life balance, although the latter is continuously challenged by increasing unpredictability in working times. In that sense, 'involuntary' part-time gives way to 'discouraged' part-time.

Finally, Poland provides an interesting case for the third issue where qualitative research at two large retailers outlines the following career pattern. Employees hired on a non-permanent basis undergo extensive training and enjoy a range of opportunities on being hired on a permanent basis after one year. However, further opportunities in terms of training and promotion are very limited and, to a large extent, depend on the nature of the employee's relations with managerial staff – sharing with the Italian case a clear advantage for those displaying higher fidelity. Alongside this, it is worth remembering that the Polish national contribution reports declining shares of part-time workers over the past decade due to a considerable skills shortage.

Skills and training

Skills, qualifications and occupations

According to Eurostat figures, which are available only for 2008–2010, the share of senior managers is higher in the retail sector than the overall economy due to the higher share of self-employed with employees, while the share of technicians and professionals (especially the latter) is far lower in the retail sector than in the overall economy (Table 17). This finding is consistent with the claim by Jany-Catrice and Lehndorff (2005) that qualification levels in the retail sector are considerably lower than in the overall economy at EU level. There are no figures available by gender or by working time.

Table 17: Workforce distribution by professional status, EU27

	Commerce sector		Overall economy	
	2008	2010	2008	2010
Senior managers	16.6	16.5	9.2	9.2
Professionals	3.6	3.8	15.2	16.0
Technicians and associate professionals	14.8	15.0	17.9	18.1
Clerks	13.4	13.1	11.8	11.6
Service workers/ shop and market sales workers	33.3	33.6	15.0	15.5
Skilled agricultural and fishery workers	0.5	0.4	4.7	4.7
Craft and related trades workers	10.1	10.1	15.4	14.2
Plant and machine operators and assemblers	4.2	4.0	9.4	8.8
Elementary occupations	7.7	7.5	10.8	10.6

Note: NACE G

Source: Eurostat

EWCS data show that the share of part-time workers in the retail sector increased from 27.7% in 2005 to 30.5% in 2010 with a considerable increase in all professional categories apart from low-skilled clerical, which fell from 36.4% in 2005 to 33.4% in 2010. The 'manual' category showed the greatest increase in the share of part-time workers, from 6.8% in 2005 to 20.6% in 2010 for high-skilled and from 31.5% to 37.9% for low-skilled (Table 18).

Table 18: Employment by working time and professional group, EU27 (%)

	2005		2010	
	Part-time	Full-time	Part-time	Full-time
High-skilled clerical	10.7	89.3	11.4	88.6
Low-skilled clerical	36.4	63.6	33.4	66.6
High-skilled manual	6.8	93.2	20.6	79.4
Low-skilled manual	31.5	68.5	37.9	62.1
Total	27.7	72.3	30.5	69.5

Source: EWCS

All national contributions reporting figures on skills distribution by working time arrangements confirm this pattern.

In Belgium, the share of low-skilled workers in the retail sector (30%) in 2009 was higher than in the overall economy (25%), while the share of high-skilled workers (19%) was almost the half that in the overall economy (36%), notwithstanding the trend towards higher qualifications, especially as a result of the introduction of ICT. Italian figures from social security files show an increase in the share of blue-collar workers (by 21.1%) and supervisors and managers (by 23.7%) between 2005 and 2009. This was greater than the sectoral growth (+16.2%), highlighting increasing segmentation, the increase in supervisory positions in large retailers and the demand for highly qualified technical skills. In Portugal, however, the trend was in the opposite direction, with a strong decline in senior staff and managers from 20.9% in 2000 to 14% in 2010.

Most part-timers are women with men benefitting from a higher professional status. The national contributions provide information about distribution by skills and working times.

In France, part-time work increased particularly among the lowest skilled; cashiers and sales people are largely women (85% and 76% respectively), and they account for the majority of part-time workers in the retail sector. The claim by 36% that they want to work more hours, suggests that a third of the overall retail workforce are involuntary part-timers. These people are concentrated among large retailers (44% of involuntary part-time) and cashiers and employees in self-service outlets (41%). The phenomenon is more pronounced among the young, with almost half of young part-time employees in the retail trade and craft business stating they would like to work more hours.

According to Italian social security files, there was a 16.2% increase in the number of employees in the retail sector between 2005 and 2009. Clerks accounted for about 53% of the workforce, with a slight decline over time. The share of blue-collar workers (+23.7%) and supervisors and

managers (+21.1%) increased more than the average for the sector, apparently in parallel with their increasing role in multi-site companies (mainly retail chains), while the decline in apprentices (most of them blue-collar workers) was due to the impact of the 2009 recession. Clerical jobs were dominated by women (over 68%). Blue-collar jobs had an almost even distribution between men and women, with a noticeable increase in the share of women from 49.6% in 2005 to 52.9% in 2009. Supervisory and managerial jobs were dominated by men, although the share of women had increased from 31.6% in 2005 to 35.6% in 2009. Part-time work was an almost exclusive female feature among supervisors and managers (30.6% compared with 1.8% among men). By comparing the workforce structure in a supermarket, Cerruti (2010) identified a noticeable shift in full-timers from semi-skilled jobs (47.1% in 1991 to 31.2% in 2008) to skilled sales operators and low-level supervisors (24.1% in 1991 to 41.6% in 2008). However, part-timers were concentrated (over 98%) in the ranks of semi-skilled occupations (cashiers, basic sales operators).

However, Portuguese figures report an increase in service workers and shop and market sales from 42% in 2000 to 50.4% in 2010, while the share of senior staff and managers decreased from 20.9% in 2000 to 14% in 2010.

According to Voss-Dahm (2009) who investigated figures on earnings by gender and professional status in Germany, 57.7% of men and 40% of women who work part-time were unskilled or low-skilled while their share declined to 22.6% and 27.4% respectively among full timers. However, just 5.3% of men and 6.6% of women who worked part-time were high-skilled; this group accounted for 19.6% of men and 15.7% of women who worked full-time. Managers accounted for about 2% among part-timers, with little difference between the sexes, while they accounted for 10.4% of men and 5.3% of women among full-timers. These figures indicate that women who work part-time display higher skills than men who work part-time. However, managerial positions displayed a double advantage for men (glass ceiling effect) and full-timers.

According to Italian social security figures, which do not actually fit with professional status, over 30% of women qualified as supervisors or managers (over 35% of personnel with such a status) work part-time while this is the case for just 1.8% of men.

Training opportunities

Training opportunities is an important issue in favouring both transitions from non-standard to standard employment contracts and in filling companies' skills needs by offering career opportunities to employees. According to Eurostat continuing vocational training surveys (CVTS), carried out in 1999 (CVTS2 in EU25) and in 2005 (CVTS3 in EU27), the share of companies in the commerce sector performing continuous vocation training (CVT) declined from 64% in 1999 to 62% in 2005 (EU25), though this was still slightly above the EU average for the overall economy where such share was stable at 61% (Table 19). Both formal training off the job and

other forms (mostly on the job) in the retail sector were in line with the EU27 average in 2005; they were more widespread in 1999.

Table 19: Enterprises performing CVT by type of training (%)

	Commerce sector				Overall economy			
	1999		2005		1999		2005	
	EU27	EU25	EU27	EU25	EU27	EU25	EU27	EU25
Any training		64	60	62		61	60	61
CVT courses		55	48	50		53	49	50
Other forms		53	48	49		52	48	49

Note: NACE G

Source: Eurostat CVTS2 and CVTS3

Similarly, the 1999 share of participants in CVT (Table 20) in the commerce sector (41%) was higher than in the overall economy (39%) mainly due to higher participation of men (48% and 40% respectively) while women's participation was lower (34% and 36% respectively). In 2005 participation rates in the commerce sector displayed a stronger decline than in the overall economy, with lower share (26% and 34% respectively) and an almost similar gender gap, still in favour of men.

By combining Tables 19 and 20, it can be seen that enterprises tend to concentrate training activities on key professional profiles, thus increasing the polarisation between high-skilled and low skilled workers well above pattern in the overall economy and producing a competence divide.

Table 20: Participants in CVT by gender (%)

	Commerce sector				Overall economy			
	1999		2005		1999		2005	
	EU27	EU25	EU27	EU25	EU27	EU25	EU27	EU25
Men		48	27	28		40	34	34
Women		34	25	25		36	31	32
Total		41	26	26		39	33	34

Note: NACE G

Source: Eurostat CVTS2 and CVTS3

There is wide diversity among countries both in the share of enterprises in the commerce sector carrying out CVT (Table 21) and in employees' participation (Table 22).

Looking at the first issue, we can group countries according to the following four profiles (Table 21).

- Share of enterprises above both the EU average for the commerce sector and the national average for the overall economy: this is the case of Belgium, where it declined between 1999 and 2005 while in Austria, Denmark and Slovenia it increased. In France there was no difference from the national average.
- Share of enterprises above the EU average for the commerce sector and below the national average for the overall economy: while their share declined between 1999 and 2005 in the Czech Republic, Estonia, Finland Ireland, Luxembourg, the Netherlands and Sweden, it displayed some increase in Germany, the UK and Norway.
- Share of enterprises below the EU average for the commerce sector and above the national average for the overall economy: seen mostly in southern countries and NMSs. While such a share was on the increase in Greece, Italy, Lithuania, Portugal, Romania and Spain, it declined in Latvia. Figures for Cyprus, Malta and Slovakia and Cyprus are only available for 2005.
- Share of enterprises below both the EU average for the commerce sector and the national average for the overall economy: their share was stable in Bulgaria but declined in Poland.

Table 21: Enterprises performing CVT by country (%)

	Commerce sector		Overall economy	
	1999	2005	1999	2005
EU27		60		60
EU25	64	62	61	61
Austria	74	85	72	81
Belgium	72	64	70	63
Bulgaria	25	24	28	29
Cyprus		45		51

	Commerce sector		Overall economy	
	1999	2005	1999	2005
Czech Republic	63	69	69	72
Denmark	100	93	96	85
Estonia	85	77	63	67
Finland	76	74	82	77
France	18	25	76	74
Germany	39	50	75	69
Greece	77	62	18	21
Hungary	39	44	37	49
Ireland	75	71	79	67
Italy		42	24	32
Latvia	33	32	53	36
Lithuania	24	49	43	46
Luxembourg	9	40	71	72
Malta	30	75		46
Netherlands	41	52	88	75
Poland	83	87	39	35
Portugal	87	91	22	44
Romania			11	40
Slovakia				60
Slovenia			48	73
Spain			36	47
Sweden			91	78
UK			87	90
Norway			86	86

Note: NACE G

Source: Eurostat CVTS2 and CVTS3

A similar set of profiles can be obtained for employees' participation in CVT in the commerce sector between 1999 and 2005 (Table 22).

- Share of participants both above the EU average in the commerce sector and above the national average for the overall economy: the Czech Republic, Estonia, Ireland, Luxembourg, Portugal and Slovenia displayed an increase at sectoral level between 1999 and 2005, while Italy and Spain experienced a mild decline. Slovakia participated only in the 2005 wave of CVTS and had a sector share in line with the national average for the overall economy.
- Share of participants above the EU average in the commerce sector and below the national average for the overall economy: their share declined in Austria, Belgium, Finland and France. Figures are only available for Cyprus for 2005.
- Share of participants below the EU average in the commerce sector and above national average for the overall economy: mostly southern and NMSs. Their share increased in Greece, Latvia, Lithuania, Poland and Romania and declined in Hungary.
- Share of participants below both the EU average in the commerce sector and the national average for the overall economy: their share increased in Bulgaria and Norway and decreased in Denmark, Germany, the Netherlands and the UK. Figures are only available for Malta for 2005.

A comparison of these two sets of profiles suggests that the latter better reflect changes in the commerce sector. Countries in the first and the third groups of this set were clearly in the modernisation phase of the industry structure, though at a different extent as outlined by the differences in the workforce share, which appears to fit a new organisational pattern with the noticeable exception of Luxembourg. While countries in the second group displayed a relative stability both in their regulatory pattern and sectoral structure, most countries included in the fourth group display high shares of companies providing training for a relatively low share of employees, thus concentrating training on those most affected by technological change while the organisational pattern, centred on large retailers, is well consolidated.

Table 22: Participants in CVT by country (%)

	Commerce sector		Overall economy	
	1999	2005	1999	2005
Austria	35	31	31	33

	Commerce sector		Overall economy	
Belgium	33	34	41	40
Bulgaria	7	11	13	15
Cyprus		25		30
Czech Republic	26	47	42	59
Denmark	56	24	53	35
Estonia	48	35	19	24
Finland	27	23	50	39
France	11	18	46	46
Germany	8	13	32	30
Greece	30	50	15	14
Hungary	5	11	12	16
Ireland	38	41	41	49
Italy		13	26	29
Latvia	11	16	12	15
Lithuania	23	34	10	15
Luxembourg	2	14	36	49
Malta	22	50		32
Netherlands	27	31	41	34
Poland	60	20	16	21
Portugal	43	30	17	28
Romania			8	17
Slovakia				38
Slovenia			32	50
Spain			25	33
Sweden			61	46

	Commerce sector		Overall economy	
UK			49	33
Norway			48	29

Note: NACE G

Source: Eurostat CVTS2 and CVTS3

According to EWCS data, those employed in the retail sector consider their skills fit with their current duties better than in the overall economy (Tables 23 and 24), with an increasing match from 2005 (54% with respect to 52.3% in the overall economy) to 2010 (57.5% with respect to 54%). This is due to clerical workers receiving far more training than their colleagues in the other sectors and because transferable skills such as communication, ICT and foreign languages can be seen as somewhat 'specialist' in the retail sector. This point is exemplified by the Irish case, where 39.7% of employees in the retail sector stated they had participated in training sponsored by their employer in the past two years, with 75% receiving general training.

Permanent employees in the retail sector had the best fit with their duties in 2010 (59.9% with respect to 56.4% in the overall economy) while self-employed display a considerable decline in matching (from 56.9% in 2005 to 52.3% in 2010). This was stronger, and therefore structural rather than conjectural, than that observed in the overall economy (-0.3%), reflecting a feeling of inadequacy in coping the crisis. Although the skill matching declined in the overall economy as professional status increased, the same cannot be said for the retail sector from 2005 to 2010.

Table 23: Skills fitting task requirements by occupational status (%)

	Retail sector		Overall economy	
	2005	2010	2005	2010
Self-employed	56.9	52.3	52.4	52.1
Permanent employee	55.8	59.9	52.9	56.4
Non-permanent employee	41.0	57.0	50.0	53.4

Note: NACE G47

Source: EWCS

Table 24: Skills fitting task requirements by professional status (%)

	Retail sector		Overall economy	
	2005	2010	2005	2010
High-skilled clerical	44.4	57.3	47.5	50.4
Low-skilled clerical	57.8	58.4	52.1	54.8
High-skilled manual	53.8	53.1	54.5	57.5
Low-skilled manual	54.7	55.5	55.8	61.0

Note: NACE G47

Source: EWCS

Training paid by the employer increased in the overall economy between 2005 and 2010, especially for the self-employed and permanent employees (Tables 25 and 26). Participation in training was much lower in the retail sector than the average for the overall economy primarily due to low participation in micro companies which account for a larger share of the retail sector than in the overall economy. However, the increase in total participation in training activities in the retail sector between 2005 and 2010 is lower (3.2%) than in the overall economy (7.6%), especially among the self-employed (1.7% compared with 9.9% in the overall economy) due to the effect of the higher share of older self-employed – thus confirming their ‘sunk cost’ strategy before retiring (Table 25).

Table 25: Training paid by the employer by occupational status (%)

	Retail sector		Overall economy	
	2005	2010	2005	2010
Self-employed	7.8	9.5	12.2	22.1
Employee: permanent contract	21.7	25.5	30.8	39.4
Employee: other arrangement	18.6	23	23.4	26.0
Total	17.6	20.8	26.1	33.7

Note: NACE G47

Source: EWCS

Table 26: Training paid by the employer by professional status (%)

	Retail sector		Overall economy	
	2005	2010	2005	2010
High-skilled clerical	23.9	23.6	37.4	47.0
Low-skilled clerical	17.4	20.6	29.8	36.4
High-skilled manual	8.9	15.2	14.4	21.6
Low-skilled manual	11.8	24.0	16.5	21.7
Total	17.7	20.9	26.1	33.7

Note: NACE G47

Source: EWCS

These findings are confirmed by many of the national correspondents. The 2010 Spanish [survey on quality of life at the workplace \(in Spanish\)](#) notes that, while employees in the commerce sector receive less training than in the overall economy (39.8% versus 50.3%), they consider it 'very useful' more than in the overall economy (45.2% compared with the average of 36.1% for all Spanish salaried workers), thus demonstrating a considerable mismatch which has a negative impact on employees' satisfaction and feelings of security. Italian surveys of companies have produced similar findings.

In the Czech Republic, the retail sector displayed below average opportunities for advanced vocational education, especially in small companies with fewer than 50 employees. The survey

[ISSP 2005](#) implies that shop assistants and cashiers, more often than other workers, do not believe that their job allows their skills to be improved; 90% of shop assistants stated that they did not attend any educational activity the most recent year and a mere 8% underwent some training, whereas vocational education in the entire sample and in the same period of time was experienced by about one third of respondents. Furthermore, in several countries such as Greece and Latvia, practical skills and previous employment were evaluated higher than education, especially in small enterprises where employers tended to hire people without initial skills. In Estonia, disparities in job profiles between retailers and training institutions appeared to jeopardise skills' matching.

Career progression

There are some examples of companies in the national reports establishing a clear link between a training programme and career progression. This is the case of the Slovakian branch of [Tesco](#), a major UK retailer, which launched a plan offering each employee the possibility to develop their own potential and knowledge through training and development programmes.

Large retailers in Belgium generally offer good possibilities for the career promotion of low-skilled employees by devising internal recruitment policies and promotion opportunities: the case of [Colruyt](#) is particularly appreciated. This approach is favoured for overcoming skills shortages for ICT technicians and traditional tasks like butchers. However, no specific information is given as to whether such opportunities are also offered to part-time and non-permanent employees.

Other actions aim to increase transparency among labour pools, thus reducing segmentation, although not explicitly supported by training. The seminal practice was set by the 2005 Finnish collective agreement requiring the employer to provide information on vacancies in accordance with practice generally adopted in the enterprise or at the workplace in order to ensure that part-time and fixed-term employees had the same opportunity to apply for full-time and/or permanent positions, with priority given to those with suitable skills. Unfortunately, there is no evidence about its impact. Such an approach seems to be shared by the 10-point action plan presented in 2011 by the Norwegian government to social partners aimed at reducing involuntary part-time. This plan includes measures such as new legislation, strengthening of the individual's right to full-time work and grant schemes.

The [2009 intersectoral agreement \(in French\)](#) signed by French social partners and implemented by the retail food industry establishes a joint fund for the purposes of promoting career security, funded by a share of 5–13% of the compulsory contribution for training (1.5% of the wages bill) paid by companies with at least 10 employees. This fund finances leave for individual training and training plans. This agreement complements the [Carrefour](#) initiative negotiated with trade unions in 2008 in its French units, which introduced a web-based toolkit that allow its employees to search all current vacancies and which displays the skills profile of each vacancy.

This allows training to be effective in promoting career development, thus matching company skills needs with a reliable workforce.

Wages

As outlined in an EESC [opinion \(105Kb MS Word\)](#) issued in December 2008, working times and their organisation is a key element of the changes in the retail sector, reflecting the increasing price competition which is transferred as pressure on both wages and working times.

According to the Eurostat Structure of Earnings Survey ([SES](#)), hourly earnings at European level (EU25) in the retail sector in 2002 were 86.2% (85.2% in the case of women) of those in the overall economy (excluding agriculture, fishery and domestic services) (Table 27). The hourly wages of non-permanent employees were even lower at 78.3%, especially for women (83.5%). Earnings on a monthly basis were 88.1% of the average (88.2% in the case of women): this apparently conflicts with the higher share of part-time workers in the retail sector (especially women), although it may reflect longer working times.

Table 27: Wages in the retail sector by gender, EU25, 2002

	Men		Women		Total	
	Hourly	Monthly	Hourly	Monthly	Hourly	Monthly
Permanent	88.6	89.8	83.5	86.4	85.1	86.8
Non-permanent	82.1	83.0	75.4	78.2	78.3	80.0
Other	78.2	78.7	87.4	91.3	81.2	82.9
Unknown	104.5	106.1	109.8	117.8	105.6	109.5
Total	89.4	90.6	85.2	88.2	86.2	88.1

Note: Overall economy = 100

Source: SES 2002

Data from the 2006 wave of SES are not available at EU level, and so we can only look at trends in the retail sector for nine countries out of the 27 (Table 28). All countries in 2002 apart from Slovakia had monthly earnings below the national average, ranging in 2002 from 70.2 in Bulgaria to 125.7 in Slovakia; in 2006 the range decreased from 79 in the UK to 100.4 in the Czech Republic. Employees in the retail sector displayed a relative improvement between 2002 and 2006 with the exception of Poland and Slovakia, and to a minor extent, the UK.

In Bulgaria, the Czech Republic, Ireland and Slovenia and, to a minor extent the Netherlands, employees displayed a relative improvement in their relative earnings between 2002 and 2006,

whereas in Lithuania, Poland, Slovakia and the UK they declined (Table 28). Only in the Czech Republic did earnings achieve the national average, while earnings in Slovakia were considerably above average in 2002. Non-permanent workers suffered worse relative earnings in all nine countries apart from Bulgaria, Slovenia and, to a minor extent, the Czech Republic, in both waves and in Ireland in 2006. Their relative earnings improved in most countries apart from Slovakia and Lithuania.

Table 28: Monthly relative wages in the retail sector by occupational status

	2002			2006		
	Permanent	Non-permanent	Total	Permanent	Non-permanent	Total
BG	68.4	84.2	70.2	77.3	91.1	79.4
CZ	88.2	90.4	87.6	99.1	102.2	100.4
IE	71.3	68.7	72.1	82.3	86.5	82.4
LT	92.9	81.4	91.7	89.3	69.4	88.5
NL	85.0	75.1	81.5	85.8	79.8	84.6
PL				89.9	85.8	83.6
SI	84.3	93.1	85.8	89.8	93.5	90.2
SK	130.8	96.9	125.7	99.1	89.6	98.5
UK	79.8	71.7	79.9	78.7	71.8	79.0

Note: Overall economy = 1000

Source: SES 2002 and SES 2006

Figures by industry and occupation are available only from SES 2006, although not at EU level (Table 29). While senior managers are above national average only in Bulgaria, we can group countries by those occupation having earnings above the national average or around it.

- Bulgaria, Hungary, the Netherlands and Poland show relatively better pay for professionals and technicians and worse pay for clerical and semi-skilled workers, while the reverse can be observed in Ireland and Latvia.
- The Czech Republic, Estonia, Romania and Slovenia display earnings above the national average for both highly qualified clerical positions and low qualified manual ones due to the labour shortages because of strong sectoral growth and migration.
- In Cyprus and Slovakia, all professional groups are below the national average.

Table 29: Monthly relative earnings by profession and country, 2006

	Senior managers	Professionals	Technicians	Clerks	Service sales workers	Craft workers	Semi-skilled workers	Elementary occupations	Total
BG	104.3	114.4	103.4	94.5	97.4	–	78.0	86.0	79.4
CY	93.6	90.3	81.3	80.1	-	83.3	80.0	89.0	74.6
CZ	90.3	121.8	101.9	97.6	95.7	104.9	97.8	115.7	100.4
EE	99.5	117.5	115.4	98.8	96.5	–	109.3	129.1	94.6
HU	78.8	151.4	98.5	90.8	87.6	84.9	78.3	95.1	85.0
IE	87.0	97.2	80.0	90.3	88.9	75.5	90.0	107.8	82.4
LT	87.8	89.1	96.9	97.9	96.9	81.1	–	101.1	88.5
LV	74.2	84.8	98.8	102.6	101.1	93.5	93.2	117.2	85.8
NL	85.5	112.9	103.7	92.2	97.5	91.3	85.3	94.7	84.6.
PL	79.8	111.0	94.1	79.7	98.9	–	81.2	94.9	83.6
RO	90.2	112.8	97.3	86.8	98.3	–	106.4	101.3	90.2
SI	92.6	131.6	110.6	92.9	100.3	–	92.3	110.4	98.5
SK	80.1	98.4	91.9	90.9	–	–	84.9	97.2	79.0

Note: Overall economy = 100

Source: SES 2006

While the distribution of earnings by occupational status in 2005 was strongly polarised to the extreme deciles in the case of the self-employed and to lower deciles for employees (Table 30), we can observe a shift in 2010 towards the central deciles for the former to medium ones for permanent employees (Table 31). This reflects the impact of competitive pressure and the economic downturn on the self-employed, thus reducing earning in the upper side, while employees appear to be segmented between permanent and other non-permanent contractual arrangements.

Table 30: Earning distribution by decile and employment status, 2005 (%)

Decile	Self-employed	Permanent employees	Non-permanent employees	Other	Total
1	11.6	25.3	38.7	61.3	27.1
2	7.0	11.9	14.4	6.3	10.8
3	4.2	10.4	10.9	3.8	8.7
4	6.3	8.5	13.0	10.6	8.8
5	7.9	9.2	10.6	5.0	8.8
6	5.6	9.1	1.4	3.1	6.9
7	9.5	8.2	2.5	1.3	7.2
8	13.7	6.6	2.1	1.3	7.0
9	13.0	5.7	2.8	5.6	6.8
10	21.3	5.1	3.5	1.9	8.0

*Source: EWCS***Table 31: Earning distribution by decile and employment status, 2010 (%)**

Decile	Self-employed	Permanent employees	Non-permanent employees	Other	Total
1	9.9	7.8	15.3	22.1	10.2
2	7.3	12.4	25.9	17.1	13.8
3	7.1	10.1	14.0	20.4	10.9
4	9.1	11.8	14.3	18.8	12.1
5	14.4	15.3	9.9	7.2	13.9
6	10.3	17.2	9.6	8.3	14.4
7	12.1	9.7	7.9	2.2	9.3
8	9.5	6.1	2.0	0.6	5.7

Decile	Self-employed	Permanent employees	Non-permanent employees	Other	Total
9	8.8	6.4	1.2	0.6	5.7
10	11.4	3.1	0	2.8	4.0

Source: EWCS

Looking at the distribution of earnings by professions, high-skilled clerical workers show a certain polarisation as self-employed in 2005 but significantly concentrated in the upper quintile (33.8%) (Table 32) and experience a slight decline in 2010 to 31.5% (Table 33). High-skilled manual workers increase their concentration in the central deciles but with a shift toward the lowest, which increased from 3.5% in 2005 to 7.3% in 2010. Finally, both clerical and manual low-skilled were strongly concentrated in the lowest quintile in 2005 (49.6% and 41.6% respectively), but show a different distribution in 2010; the former experienced a shift towards the medium-low one, while the latter at 38.7% was still concentrated in the lowest quintile (Tables 32 and 33).

Table 32: Earning distribution by decile and occupation, 2005 (%)

Decile	High-skilled clerical	Low-skilled clerical	High-skilled manual	Low-skilled manual	Total
1	12.2	35.7	3.5	30.8	27.7
2	3.7	13.9	10.4	10.8	10.8
3	3.7	11.2	14.8	7.2	9.0
4	8.4	8.1	8.7	10.5	8.6
5	4.3	9.6	10.4	10.3	8.5
6	8.1	4.1	15.7	9.5	6.6
7	14.7	4.3	4.3	6.9	7.1
8	11.2	4.6	11.3	7.9	7.1
9	16.7	2.9	12.2	3.6	6.7
10	17.1	5.6	8.7	2.6	7.8

Source: EWCS

Table 33: Earning distribution by decile and occupation, 2010 (%)

Decile	High-skilled clerical	Low-skilled clerical	High-skilled manual	Low-skilled manual	Total
1	4.8	10.5	7.3	21.4	10.8
2	4.8	15.4	5.8	17.3	13.9
3	5.6	12.3	11.5	5.5	11.0
4	9.3	12.5	14.1	8.1	11.9
5	14.1	14.2	9.9	11.1	13.6
6	8.9	13.9	19.4	19.2	14.3
7	12.2	9.0	8.9	8.1	9.2
8	8.9	5.0	7.9	5.9	5.7
9	15.2	4.1	12.6	3.0	5.6
10	16.3	3.1	2.6	0.4	4.0

Source: EWCS

National contributions converge in showing lower than average earning for retail workers compared with the overall economy, especially in terms of higher shares of low wages.

The distribution of earning according to percentiles from the EWCS displays considerable variation between 2005 and 2010, probably due to the high rates of non-responses.

The retail sector displayed a significant concentration among those with a low income: 38.5% of respondents were concentrated in the lower quintile and 14.4% in the upper quintile in 2005. From the 2010 wave, we can observe a shift towards the median deciles, as both extreme quintiles display a significant decline (24.6% in the lower and 9.7% in the upper). Thus, the relative position of the retail sector in terms of low wages improved to some extent between 2005 and 2010 relative to the overall economy, although there were still only a few attractive positions among qualified jobs.

Several countries reported earnings in 2010 only. From the Spanish 2010 [survey on quality of life at the workplace \(in Spanish\)](#), 40.6% of those employed in the commerce sector earned less than €1,000 per month (net income) compared with 31.2% working in the overall economy in this situation; only 4.8% in the commerce sector earned more than €2,100 per month (10.1% on average in the overall economy). In France, both average and median earnings were 40% lower

in the commerce sector than in the overall economy and the distance between quartiles higher; in Poland it was one third lower (2009 data).

This is validated by the reduction of the relative gap in several countries. For instance, in Bulgaria average earnings in the retail sector increased from 52% in 2001 to 67% in 2010 of the average earning in the overall economy, while in Romania the average sectoral wage was 71% of the average national wage in 2000 and 88% in April 2011. However, relative pay declined in the retail sector in the Czech Republic from 95% in 2002 to 92% in 2010 mostly due to the increase in part-time workers. A similar trend was seen in Estonia and Lithuania (from 90.1% in 2007 to 86.6% in 2010).

According to a [2007 survey \(in German, 88.5Kb PDF\)](#) based on Socio-Economic Panel data, a share of about 28% of all retail employees in Germany (including mini-jobbers) received a low wage income of less than €7.50 per hour.

In Spain, data from the [survey on quality of life at the workplace \(in Spanish\)](#) allow us to conclude that on average salaries are lower for the commerce sector than for the Spanish economy as a whole. Thus, 40.6% of those working in the commerce sector earned less than €1,000 per month (net income) in 2010 compared with 31.2% in the overall economy in this situation, whereas only 4.8% earned more than €2,100 per month (10.1% on average in Spain). Moreover, variable remuneration is more common in the commerce sector than in the overall economy in general. Thus, 33.6% of those working in the commerce sector received a variable salary in 2010, whereas the average for those receiving variable remuneration in the overall economy was 26.8%. A variable salary in the commerce sector in Spain was more frequently related to the production and sales volume rather than to working hours.

In general, the retail sector offers some of the lowest pay levels at national level. For example, Polish cashiers and shop assistants had the lowest paid jobs in 2010. Basic pay in the sector in Slovenia in 2011, which was established by national labour contracts (NLCs), ranged from €442.30 per month for elementary occupations to €901.34 per month for 'highly demanding' positions while the national average was around €1,500 per month in 2010.

For instance, workers in France received the fourth lowest mean wages and the lowest median wages. But according to [data \(in French, 32Kb MS Excel\)](#) from National Institute of Statistics and Economic Studies ([INSEE](#)), retail wages increased by 32.3% between 1998 and 2007, more than the overall economy (increase of 24.9%). Similarly, in Greece employees' actual annual earnings increased by 31.8% more than with the average annual inflation in the same period.

In Italy, while contractual wages in the retail sector increased between 2005 and 2009 by 9.3% (+8.6% for blue-collar workers and + 9.6% for clerks), non-permanent workers reported lower annual wages because of their shorter working periods, with a 4% increase when working full-time and around 6% when working part-time. However, permanent workers showed a stronger increase in their wages, especially women working full-time (+16%).

In Lithuania, there is a strong concentration among low earnings. In 2009 the monthly wage was €410, which was 84% of the average national net wage; 30.4% of those employed in the entire trade sector were in wage group €142–285 per month, 20.3% in the wage group €285–426, and only 4.4% in the wage group earning more than €1,423 per month. In 2010, the monthly wage had declined to €377 and the allocation had shifted towards the lower levels.

In Norway, wages increased in the retail sector by 5.5% between 2009 and 2010 with some differences among occupational groups. Office and customer service occupations reported a 3% increase in their earnings and a monthly salary of NOK 30,600 (€4,050 as of 2 July 2012), an increase of NOK 900 or 3.0% from 2009. Sales employees reported an increase of 4.1%, foremen a 5.6% increase and managers a 7.6% increase.

Gender pay gap

The gender pay gap is a key issue in the retail sector. According to the Eurostat indicator, all countries apart from Hungary have a gender pay gap in the wholesale and trade industry which is much higher than in the overall private sector economy, especially in Malta, Poland and Slovenia (Table 34). National contributions allow us to fill in several gaps. In Austria the gender pay gap is around 32%, while according Italian social security data, women earn about 20% less than men when working full-time and 11% more when working part-time.

According to the [Austrian Work Climate Index](#) (aggregated data 2005–2008), an average monthly net income of €980 marks out retail as a low-wage sector, with a 32% gender pay gap (men: €1,330 per month; women: €890 per month). This is mainly due to the high share of part-time contracts among female workers in the sector, concentrated in large retailers. In large companies of 500+ employees, the average monthly wage was €900, in SMEs (20–499 employees) it was €1,120 and in small companies with less than 20 employees it was €480. Subjective satisfaction with wage levels in the retail sector is below average (51% with respect to 64%), especially among part-time employees (45%).

In Italy, women earn less than men when working full-time and more when working part-time, largely due to the number of weeks worked by non-permanent workers; the same relationship does not hold for those working on a permanent basis. The most likely explanation for such a divergent trend is that women working part-time tend to be more senior and that such a gap is increasing as the women consider part-time to be a stable working arrangement of their choice, while men consider it as a temporary status and are more successful in achieving a full-time position, independently of the current employer. Among large Italian retailers, the gender gap is due to the combined effect of the higher share of women employed on a part-time basis and the fact that highly qualified jobs are offered only on a full-time basis although the underlying working times are unpredictable (Cerruti, 2010).

Table 34: Unadjusted gender pay gap (%)

	Wholesale and retail industry			Overall economy		
	2008	2009	2010	2008	2009	2010
EU27	–	–	–	17.5(p)	17.1(p)	–
AT	–	–	–	25.5	25.4	25.5(p)
BE	17.3	17.3	–	9.0	8.8	–
BG	17.7	19.4	18.3	13.6	15.3	15.7
CY	33.7	33.3	33.3(p)	21.6	21.0	21(p)
CZ	34.9	34.1	33.4	26.2	25.9	25.5
DE	25.1	24.8	24.7	23.2	23.2	23.1
DK	22.2	21.0	–	17.1	16.8	–
EL	25.1	25.7	25.7(p)	22(i)	–	–
ES	16.3	17.5	15.8	16.1	16.7	16.7(p)
FI	22.0	18.8	–	20.0	20.1	19.4
FR	–	–	–	17.9	16(p)	–
HU	26.1	26.9	24.6	17.5	17.1	17.6
IE	24.9	25.6	25.0	12.6	12.6	–
IT	–	–	–	4.9	5.5	–
LT	26.9	26.9	–(c)	21.6	15.3	14.6
LU	24.4	22.0	22.2	12.4	12.5	12.0
LV	15.6	12.5	19.8	13.4	14.9	17.6
MT	24.9	23.5	21.7	8.6	6.9	6.1
NL	24.2	28.5	29.5	19.6	19.2	18.5
PL	21.2	20.2	18.9	9.8	9.8	–(c)
PT				9.2	10.0	12.8
RO				9.0	8.1	12.5

	Wholesale and retail industry			Overall economy		
	2008	2009	2010	2008	2009	2010
SE				17.1	16.0	15.8
SI				8.5	3.2	4.4
SK				20.9	21.9	20.7
UK				21.4	20.6	19.5
NO				17.2	16.7	16.1

Note: (c) = confidential; (i) = see Eurostat metadata; (p) = provisional;

Source: Eurostat

In 2005, women were strongly concentrated in the lowest deciles (46.6%, more than twice that for men) and one man in four reported earnings in the upper quintile (one in 11 among women). In 2010, the inequality between the sexes was less striking but still clear: 28.4% of women and 18.4% of men were in the lowest decile while 17.3% of men and just 5.1% of women were in the upper decile (Table 35).

In Austria, women earned a third less than men because of their concentration in part-time jobs requiring lower qualifications. In Bulgaria, where the share of part-time jobs is very low, the gender gap was about 20% throughout the past decade. In Germany, the gender pay gap was 23%. In Italy, women working full-time earned around 21% less than men, but when working part-time, their earnings were higher than those of men.

Table 35: Earning distribution by decile (%)

Decile	2005			2010		
	Men	Women	Total	Men	Women	Total
1	15.5	33.9	27.8	10.1	11.2	10.8
2	6.9	12.7	10.7	8.3	17.2	13.9
3	6.9	9.9	8.9	8.4	12.4	10.9
4	7.5	9.1	8.7	9.0	13.8	12.0
5	8.0	8.7	8.5	12.8	14.2	13.6
6	7.8	6.3	6.8	13.8	14.5	14.2

7	12.1	4.7	7.1	12.4	7.4	9.2
8	9.9	5.7	7.1	8.0	4.2	5.6
9	11.0	4.4	6.6	9.5	3.3	5.6
10	14.0	4.7	7.8	7.8	1.8	4.1

Source: 4th and 5th EWCS

Health, safety and well-being at work

Massive ICT-driven rationalisation and increased flexibility both in working times and employment contracts not only affect the career patterns in the retail sector, but also raise new risk factors, of both a physical and a psychosocial nature (especially the latter).

A high pace of work, repetitiveness and exposure to customers' misbehaviour (such as verbal abuse, violence and theft), often combined with career uncertainties, unpredictable working times and poor support from colleagues, are the driving changes raising concerns among social partners because of their impact on workers' health.

[PRIMA-EF: Guidance on the European Framework for Psychosocial Risk Management](#) is one of many studies highlighting a number of factors increasingly widespread in the retail sector affecting physical and psychosocial health. These factors include:

- the relationship between job demands and worker's influence over their work (Karasek, 1979);
- the balance between the effort expended on the job and the rewards received (Siegrist, 1996);
- the relationship between the job demands and job resources (Bakker and Demerouti, 2007).

Exposure to physical risk factors

According to the 5th EWCS, 83.1% of workers in the retail sector at EU level reported they were well-informed about their risks at work and 86.1% considered their health and safety was not at risk because their work. Both these figures are below the EU average, thus raising doubts about the extent of underreporting due to poor awareness.

However, the findings on exposure to risk factors present a slightly different picture (Figure 7). Ergonomic risk factors are by far the most reported:

- over 70% of respondents reported standing or walking while working 'at least half of the time';

- about 50% of respondents reported repetitive hand/arm movements (well above the EU average);
- about 25% of respondents reported risks implying physical effort such as a tiring or painful position while working and carrying or moving heavy loads for 'at least half of their working time'.

All the ergonomic risk factors are on the increase, reflecting the shift towards an increasingly 'rationalised' work pattern. Non-permanent workers are the most exposed to this kind of risk.

These figures are in general slightly below the EU average, except for standing or walking which is well above the EU average and lifting or moving people, which is well below the EU average.

Figure 7: Exposure to ergonomic risk factors for 'half time or more' (%)

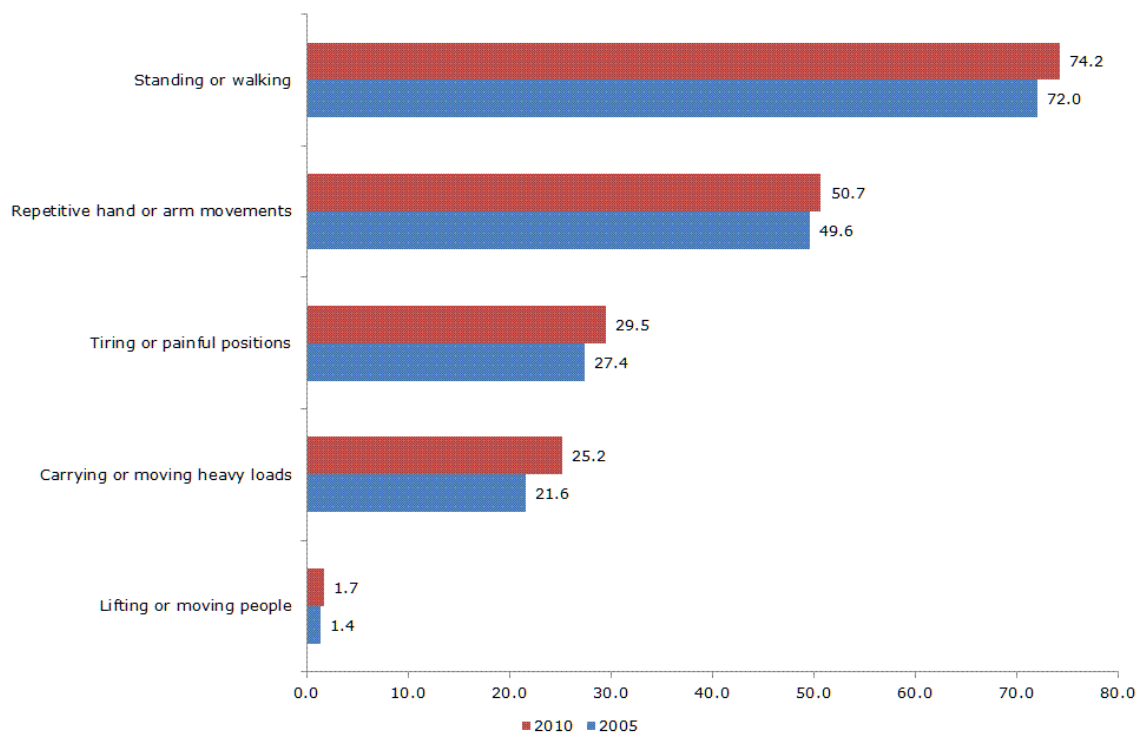


Figure 7: Exposure to ergonomic risk factors for 'half time or more' (%)

Source: EWCS, 2010

Physical risk factors related to the work environment, such as high and low temperatures and noise, and especially chemical and biological substances and powder or dust are reported far less often (Table 36). Among both these groups of risk factors, exposures were stable or on the increase between 2005 and 2010 (especially low temperatures) apart from chemical products and tobacco smoke, where exposure declined probably as a consequence of new general

European regulations banning smoking at work. In general, exposure to both groups of risk factors in the retail sector is below the EU average.

Table 36: Exposure to physical risk factors in the retail sector, EU27 (%)

Type of risk	2005		2010	
	Half of time or more	Around quarter of time	Half of time or more	Around quarter of time
Low temperatures	9.0	6.8	12.6	8.2
Tobacco smoke	7.1	7.3	4.4	3.0
High temperatures	7.0	6.8	7.0	5.8
Loud noise	6.8	6.0	7.0	5.9
Vibrations	4.8	2.6	5.9	3.0
Contact with chemicals	4.4	2.2	3.6	3.0
Smoke, fumes, powder or dust	2.9	2.4	2.8	2.1
Infectious materials	2.0	1.1	2.1	1.1
Breathing solvents and thinners	1.9	1.1	1.9	0.8
Radiation	0.5	0.8	n.d.	n.d.

Note: n.d. = not determined

Source: EWCS, 2010

According to the 'ad hoc module' of the EU Labour Force Survey ([LFS](#)) of 2007, 36% of workers in the commerce sector reported exposure to factors that can adversely affect physical well-being; male workers reported higher exposure (Table 37). However, these figures are below those for the overall economy at EU level, except for France, Malta and the Netherlands (Table 37).

Table 37: Exposure to factors adversely affecting physical health, 2007 (%)

	Overall economy			Commerce sector		
	Men	Women	Total	Men	Women	Total
EU27	46.6	31.4	39.8	43.6	28.1	36.0
AT	48.9	35.4	42.8	44.6	29.0	36.5
BE	23.5	14.2	19.4	19.4	11.8	15.9
BG	55.3	32.8	44.5	42.5	21.7	31.5
CY	59.1	34.1	47.8	55.2	31.7	44.9
CZ	39.6	19.3	30.8	30.6	18.5	24.2
DE	16.7	10.9	14.0	13.9	8.2	10.9
DK	26.0	28.3	27.1	22.1	20.7	21.5
EE	53.7	32.7	43.3	41.3	27.3	33.1
EL	50.7	26.9	41.4	43.1	22.5	34.4
ES	56.7	35.2	47.8	51.3	33.2	42.4
FI	54.6	46.7	50.8	47.7	43.0	45.3
FR	76.7	62.3	70.0	79.8	68.6	74.9
IE	30.4	13.7	23.1	24.1	8.6	16.4
IT	45.6	27.3	38.3	40.2	20.5	32.1
HU	36.7	18.2	28.3	25.7	16.7	20.9
LT	38.9	18.9	29.0	27.3	13.3	19.7
LU	9.1	5.1	7.3	8.6	5.5	7.1
LV	29.0	10.5	19.8	21.2	7.4	12.8
MT	48.9	27.8	42.1	54.6	24.2	44.7
NL	43.9	32.8	38.9	47.5	32.5	40.4
PL	56.6	33.7	46.3	47.6	31.4	39.0
PT	50.2	33.5	40.9	43.0	24.2	33.2

	Overall economy			Commerce sector		
	Men	Women	Total	Men	Women	Total
RO	47.5	34.5	41.6	36.8	28.4	32.2
SE	50.4	45.0	47.8	46.1	41.9	44.3
SI	59.8	42.1	51.8	47.8	30.3	38.8
SK	35.8	13.8	26.1	17.0	6.6	11.1
UK	50.9	32.3	42.2	51.5	30.5	41.2
NO	18.1	19.1	18.6	15.8	14.9	15.3

Notes: NACE G

Main factors are difficult work postures, work movements or handling of heavy loads; risk of accidents; noise; vibrations; chemicals, dusts, fumes, smoke or gases.

Source: Eurostat, LFS, 2007

The national contributions stress the relevance of ergonomic factors for health and well-being. German [research](#) for the German Social Accident Insurance ([DGUV](#)) highlights physical strain at checkouts, where work is increasingly limited to the continuous repeated scanning of purchases followed by acceptance of payments.

The Danish Work Environment Cohort Study 2010 ([DWECS 2010 \(in Danish\)](#)) carried out by the National Research Centre for the Working Environment ([NFA](#)) found that clerks reported being more exposed to ergonomic factors such as:

- tiredness in the body after work, especially legs and/or arms;
- standing and/or walking work which involves physically exhausting tasks such as lifting, carrying, heavy and/or fast work;
- push and pull movements;
- repeated movements, particularly finger and arm movements as well as job tasks repeated many times per hour;
- squatting and/or standing in the same spot.

However, they reported below average exposure to noise, chemicals and sedentary work and neither high workloads or high work pace.

According to the Netherlands national surveys on working conditions (NEA), the retail sector performs worse on the traditional ergonomic risk factors than other sectors; in particular the

use of force, uncomfortable working postures and repetitive movements occur more often, while visual display unit (VDU) work and working with chemical substances is less common.

According to the Lithuanian Labour Inspectorate ([VDI](#)), the most frequent violations of occupational health and safety legislation involve a lack of protection for workers against harmful factors in the work environment (36% of total violations) and basic requirements such as training, conditions of work equipment and risk assessment.

The Polish Labour Inspectorate records that the most frequent irregularities in large retailers are associated with negligence in the storage of goods, lack of appropriate transportation equipment (for example, electric trolleys) and lack of protective clothing. Despite this, smaller retail outlets display lower observance of health and safety at work regulations.

Low hygiene factors are also noted in a study of a commercial centre in the south of France, including the lack of natural light causing eyestrain, headaches, loss of reference with the outside world and a general feeling of depression.

According to the 2007 ad-hoc module in Romania:

- 69.6% of respondents reported ergonomic factors such as difficult work postures, moving and handling of heavy loads;
- 38.7% of respondents reported exposure to at least one risk factor that may affect their mental or physical health at work;
- 18.3% of respondents pointed to the risk of accidents; 6.8% of them pointed to physical risks from chemicals, dusts, smoke, steam, gas;
- 5.3% of respondents considered noise or vibrations to be the main risk factor.

Exposure to psychosocial risk factors

Psychosocial risk factors play a crucial role in the retail sector when assessing quality of work and health outcomes because of the key part played by the relationship established with third parties (mainly customers).

According to the ad hoc module of LFS 2007, 20.8% of the workers in the commerce sector reported being exposed to factors that can adversely affect mental well-being, with a similar percentage among men and women (Table 38). In general, workers in the commerce sector reported lower figures than in the overall economy with the exception of the Czech Republic, Cyprus, Latvia, Lithuania and Slovenia, though in general with small gaps. There was a large variation between countries. In Cyprus and France,—almost 50% of workers reported being exposed to these factors, while in Latvia, Luxembourg and Norway it was less than 5% (Table 38).

**Table 38: Exposure to factors adversely affecting mental well-being, 2007
(%)**

	Overall economy			Commerce sector		
	Men	Women	Total	Men	Women	Total
EU27	26.5	26.7	26.2	23.2	25.5	20.8
AT	32.5	36.4	27.8	28.9	33.3	24.8
BE	14.6	14.7	14.4	11.3	11.4	11.2
BG	12.8	13.3	12.1	10.4	11.6	9.3
CY	43.1	45.1	40.8	45.6	48.7	41.6
CZ	14.5	15.8	12.9	15.7	18.2	13.5
DE	15.8	17.1	14.2	12.8	15.5	10.4
DK	21.3	19.1	23.9	14.1	16.2	11.4
EE	17.4	16.0	18.8	14.5	10.7	17.2
EL	14.9	15.7	13.7	13.9	14.5	13.0
ES	25.6	26.7	24.0	23.8	27.0	20.6
FI	40.3	34.1	46.8	34.8	31.8	37.7
FR	49.0	48.5	49.7	49.5	50.2	48.7
HU	14.3	13.9	14.6	11.8	11.8	11.9
IE	13.3	13.2	13.3	8.5	10.7	6.1
IT	17.7	18.2	17.1	15.2	16.8	13.0
LT	19.2	18.3	20.0	20.3	16.1	23.8
LU	6.0	6.0	6.0	5.6	6.5	4.6
LV	0.9	0.9	0.9	1.3	n.a.	2.1
MT	27.8	28.2	26.9	22.3	25.9	15.0
NL	36.7	38.4	34.7	30.1	35.5	24.2
PL	25.0	26.3	23.3	24.6	26.4	23.1
PT	18.9	20.7	17.4	16.9	19.4	14.6

	Overall economy			Commerce sector		
	Men	Women	Total	Men	Women	Total
RO	18.3	18.2	18.4	18.6	19.1	18.2
SE	40.2	37.9	42.7	34.6	36.7	31.9
SI	40.2	39.8	40.7	38.3	34.0	42.2
SK	13.7	15.7	11.3	10.1	11.0	9.4
UK	38.0	37.6	38.5	27.3	30.1	24.3
NO	10.1	8.9	11.4	5.6	6.6	4.5

Notes: NACE G

Factors: time pressure; overload of work; harassment or bullying; violence or threat of violence.

n.a. = data not available

Source: Eurostat, LFS, 2007

According to the data from the 5th EWCS, 11.2% of workers in the retail sector reported they had been subjected to verbal abuse, 4.4% to threats and humiliating behaviour, and 3.9% to bullying or harassment (Table 39). Men reported higher figures than women except in the case of discrimination based on sex. Compared with the overall economy, verbal abuse, unwanted sexual attention and discrimination based on sex were reported more while the other misbehaviours displayed slightly lower figures. It is not possible to make an extensive comparison with previous waves of the EWCS due to differences in the way the occurrence of most items were investigated.

Table 39: Psychosocial risk factors at work, EU27, 2010 (%)

	Retail sector			Overall economy		
	Men	Women	Total	Men	Women	Total
Verbal abuse	12.0	10.7	11.2	10.8	10.6	10.7
Threats and humiliating behaviour	5.1	4.0	4.4	4.9	5.1	5.0
Physical violence	2.5	.6	1.3	2.0	1.7	1.9
Bullying/harassment	4.3	3.7	3.9	3.9	4.4	4.1

	Retail sector			Overall economy		
	Men	Women	Total	Men	Women	Total
Discrimination based on sex	1.6	1.9	1.8	0.7	2.9	1.7
Unwanted sexual attention	2.7	2.4	2.5	1.1	2.6	1.7
Discrimination linked race, ethnic background or colour	2.3	1.1	1.6	1.7	1	1.4

Source: EWCS, 2010

Dealing working with third parties such as customers, clients and patients is a dominant feature in the retail sector, occupying at least half their working time for over 80% of workers – well above the figure of 56.7% for the overall economy (Table 40). This implies that workers in the retail sector are expected to display emotions or use feelings or alternatively hide or manage them in order to accomplish tasks. In that sense tasks are emotionally demanding and are more often assigned to women than to men.

Table 40: Dealing at work with third parties, EU27, 2010 (%)

	Retail sector		Overall economy	
	Half of the time or more	Around quarter of the time	Half of the time or more	Around quarter of the time
Men	76.6	5.6	50.5	12.0
Women	85	4.1	64,0	8.4
Total	81.9	4.7	56.7	10.3

Source: EWCS, 2010

Consistent with their higher exposure to people, retail workers have to deal with angry people more often than in the overall economy (22.7% and 15.6% respectively for at least half of their working time and 20.1% and 14% respectively for around a quarter of their time) (Table 41), thus affecting their mental health.

Table 41: Dealing with angry third parties, EU27, 2010 (%)

	Retail sector		Overall economy	
	Half of the time or more	Around quarter of the time	Half of the time or more	Around quarter of the time
Men	20.7	19.3	14.5	12.9
Women	24.1	20.7	16,9	15.2
Total	22.7	20.1	15,6	14.0

Source: EWCS, 2010

According to the national contributions, in Finland and Ireland such aggressive behaviour displays similar patterns, although the figures are higher as the span of time considered is longer (one year) than in the EWCS.

In Finland, customer violence has increased over the past decade. While almost 33% of employees in the retail sector had faced a customer threat in 1998, the share increased to 63% in 2008 (16% in the previous month), to 39% in case of verbal threat (6% in the previous month) and to 5% in case of threat of physical violence). Violence was focused more often on men than on women and more on younger employees, especially on those working alone. It correlated significantly with lower physical and psychiatric well-being, especially in cases with no training and follow-up treatment. The effectiveness of training in how to deal with violent customers was considered sufficient by just 14% of employees in 1998; this share had increased to 48% in 2008.

According to [literature produced during a 'Respect Retail Workers' campaign](#) carried out in 2011 by [Mandate](#), the largest Irish trade union in the retail sector, a recent survey by the union had found that:

- 74% of shopworkers reported verbal abuse from a customer in the past year (10% every day and 30% every week);
- 30% had received threats from a customer in the past year;
- almost 10% reported having been assaulted by a customer during the course of their employment.

According to the 2007 Flemish Workability monitor, however, retail employees reported having been less subject to violence, harassment and [mobbing](#) at work than in the overall economy. Similar figures are given by a [study on bullying and violence in Italian society \(in Italian, 160Kb PDF\)](#) carried out in 2010 by the National Institute of Statistics ([Istat](#)), although a second Istat

[study on sexual harassment \(in Italian, 152Kb PDF\)](#) shows that this is over-reported in the commerce industry.

According to the Netherlands' NEA surveys, employees in the retail sector more frequently report aggressive behaviour (intimidation, bullying and physical violence) from third parties while experiences of misbehaviour from colleagues are less frequent apart from instances of age discrimination; there is little difference between workers of different background, different levels of educational attainment and company size. Men appear to be exposed to bullying and physical violence more, while women are more often exposed to sexual harassment. Workers of non-western origin more often reported being exposed to all types of discrimination.

According to a Swedish Work Environment Agency survey in 2009, 10% of all employees in the retail sector have experienced violence or threats.

According to a [study \(in Swedish\)](#) carried out in 2008 by the Centre for Corporate Performance at Aarhus University, checkout operators and sales assistants in Danish food retailing consider their job both physically and emotionally demanding in terms of fast working pace and harassment from customers. However, as reported in a [paper](#) presented at the 60th Annual Meeting of the Labor and Employment Relations Association (LERA) in 2008, overall job satisfaction is high because of the different ambitions and expectations on working hours and career perspectives among the different job profiles. Similarly, according to the [DWECS 2010 study \(in Danish\)](#) in the retail sector, health and well-being vary significantly among different sub groups; specialist shop workers display a higher level of health and well-being than those working in supermarkets.

According to the Spanish [Sixth national survey on working conditions \(in Spanish, 1.55Mb PDF\)](#) carried out in 2007, 66.7% of workers in the 'commerce and hotel industry' 'always' or 'frequently' have to deal with customers. This is also the sector displaying the highest share (26.1%) of those reporting having to work very fast and the highest levels of stress (32.6% compared to the Spanish average of 27.9%).

Investigations of emotional demands in France, Germany and the Netherlands found higher rates than in the overall economy. In France, 85.6% of employees reported being in direct contact with the public (69.9% for all sectors); among them, 89.1% referred to face-to-face contact and oral communication (85.5% in all sectors) and 49% said they had to suppress their emotions or pretend to be in a good mood (42.2% for all employees). A report presented at the 2009 meeting of the French Advisory Council on working conditions highlights the fact that emotional demands, especially in conjunction with the artificiality of emotions at work (such as anger repression), have a positive impact on musculoskeletal disorders and high blood pressure.

A report on two Polish supermarkets carried out on the behalf of the [KARAT Coalition](#) states that employees in the retail sector (especially women) are exposed to a number of factors that negatively impact their psychiatric health. Relations between low-qualified and medium and senior level employees tend to be rather tense, with poor direct relations with superiors

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including lack of kindness towards employees, disregarding employee needs, ridiculing, insulting, humiliation and intimidation, and 'malicious setting of shift work rotation'.

According to [reports \(in Portuguese\)](#) from the Portuguese Office of Strategy and Planning ([GEP](#)), physical and biological risk factors fell considerably between 2007 and 2009, but ergonomic chemical, and psychosocial and organisational risk factors displayed a considerable increase, especially ergonomic ones which were by far the most reported.

When further aspects relevant to the impact on psychosocial health were considered in the 5th EWCS, wage and career were the most diffused negative factor (Figure 8):

- 33.6% of the respondents said that they were not well paid for their work;
- 49.4% that their work did not offer good prospects for career advancement;
- 15.7% said they could lost their job in the next six months
- 43.7% said it could be very hard to find a job with a similar salary if they lost their job;
- 68.4% felt at home in their workplace;
- 72.4% considered they had good friends at work;

For the most part (60.4%), the respondents felt the organisation motivated them to give their best performance.

Figure 8: Job aspects with an impact on health, EU27, 2010 (%)

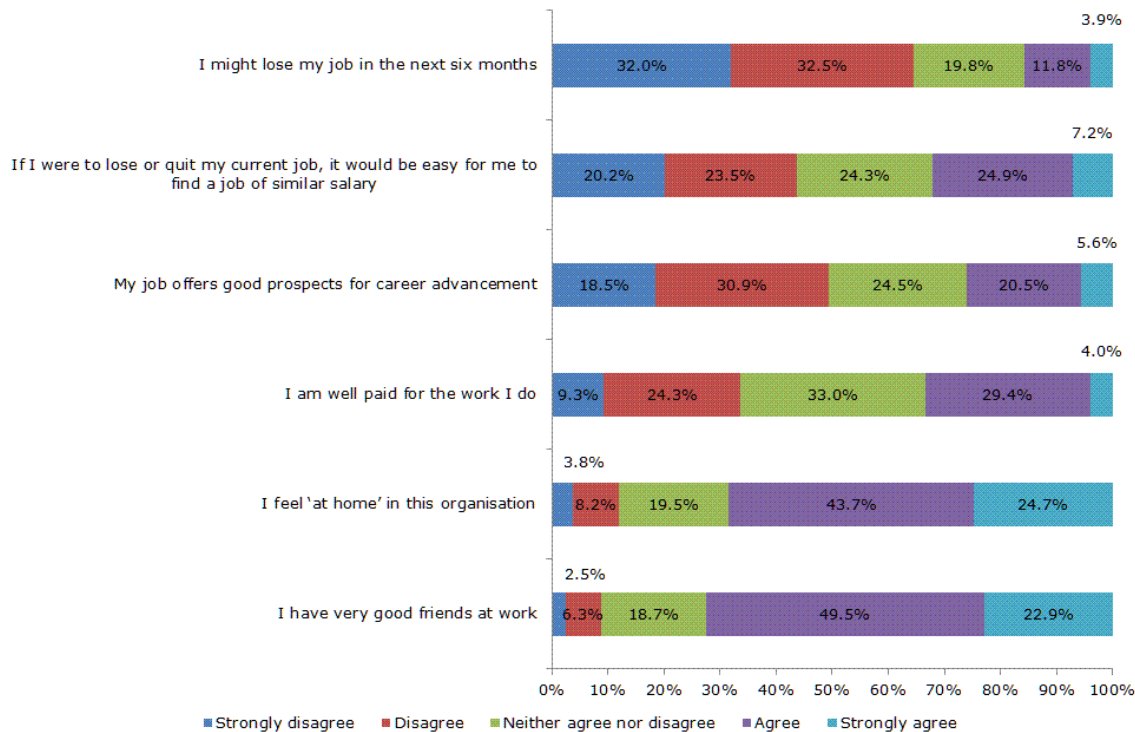


Figure 8: Job aspects with an impact on health, EU27, 2010 (%)

Source: EWCS, 2010

Correlations on the 5th EWCS microdata are strongly significant and consistent with a wide body of scientific evidence (see for instance Hasle et al, 2011). Increasing uncertainty over work perspectives has a negative impact on health (measured according to the indicators reported in the heading of Table 42), while feelings of being well paid, good career perspectives, good relationships at work, good alternatives and motivating organisation all have a positive impact on health (Table 42). See Annex 2 for codification of the variables.

Table 42: Health state and perception about work (correlation coefficients)

	My health or safety is at risk because of my work	My health is (good/bad)–	My work affects my health
I might lose my job in the next six months	-0.07**	0.13**	0.09**
I am well paid for the work I do	0.16**	-0.15**	-0.15**

	My health or safety is at risk because of my work	My health is (good/bad)–	My work affects my health
My job offers good prospects for career advancement	0.13**	-0.21**	-0.12**
I feel ‘at home’ in this organisation	0.15**	-0.10**	-0.10**
I have very good friends at work	0.08**	-0.17**	-0.09**
If I were to lose or quit my current job, it would be easy for me to find a job of similar salary	0.04*	-0.12**	-0.04*
The organisation I work for motivates me to give my best job performance	0.14**	-0.13**	-0.13**

Notes: * significant at 95%; ** significant at 99%

Source: EWCS, 2010

Women report worse conditions than men for all these factors, but especially for wage and career opportunities (Table 43). This confirms findings in previous sections about their worse career opportunities and lower wages, while limited support at work may increase the impact on their health from the misbehaviour of third parties.

Table 43: Job aspects in the retail sector with an impact on health by gender, EU27 (%)

	2005			2010		
	Men	Women	Total	Men	Women	Total
I might lose my job in the next six months	71.6	68.4	69.5	71.5	59.8	64.5
I am well paid for the work I do	32.1	32.3	32.3	30.7	35.5	33.6
My job offers good prospects for career advancement	47.5	53.4	51.4	44.2	52.8	49.4
I feel ‘at home’ in this organisation	14.5	16.9	16.1	8.6	14.3	12
I have very good friends at work	13.3	11.7	12.3	7.6	9.8	8.8

	2005			2010		
	Men	Women	Total	Men	Women	Total
If I were to lose or quit my current job, it would be easy for me to find a job of similar salary				41.8	45	43.7
The organisation I work for motivates me to give my best job performance				14	16.8	15.7

Note: Percentage is those who 'disagree' and 'strongly disagree'

Source: EWCS, 2005 and 2010

According to data from the 5th EWCS, non-permanent employees in the retail sector were the most dissatisfied with their pay (40.2%), while there is little difference in job satisfaction between the self-employed and those on permanent contracts (33.7% and 34.3% respectively were satisfied with their pay). The self-employed were the most motivated to give their best performance (this applied to 74.6% of them), followed by the 60.4% of the employees with permanent contracts. However, half the workers with a fixed term or temporary agency contract were not as motivated as workers without contracts or with another kind of contracts (Table 44).

Table 44: Job aspects in the retail sector having an impact on health by occupational status (%)

	Well paid	Motivating organisation
Self-employed	32.4	9.0
Employee: permanent contract	33.1	15.1
Employee: fixed term or temporary agency contract	40.2	23.3
Employee: no or other contract	26.4	18.9
Total	33.5	15.6

Note: Percentage is those who 'disagree' and 'strongly disagree'

Source: EWCS, 2010

Accidents at work

The average annual number of accidents at work in the commerce sector fell by 1.7% between 1998 and 2007 in the EU15 countries (Table 45), although there is a difference in the trend for men, which decreased significantly (-9.0%) and women, which increased considerably (+38.7%). The decrease in the average number of accidents is below the EU15 trend for all sectors (-17.0% between 1998 and 2007). Fatal accidents in the EU15 declined from 515 deaths at work in 1998 to 299 in 2007, accounting for 8.1% of total fatal accidents. Most deaths were male.

Table 45: Average number of accidents at work in the commerce sector, EU15

	1998	2007	% change
Men	355,704	323,575	-9.0
Women	120,373	166,966	38.7
Total	498,926	490,665	-1.7

Source: Eurostat, 2011

Incidence rates take into account different sectoral trends in employment. There was a decrease in the incident rate in the commerce sector from 2,451 accidents per 100,000 workers in 1998 to 2,111 accidents per 100,000 workers in 2007. The rate in the overall economy (that is, all sectors) decreased from 4,089 per 100,000 workers in 1998 to 2,859 per 100,000 workers in 2007. The decline in the commerce sector was more moderate (-14%) than in the overall economy (-29%) but the incident rate itself remained lower.

The incidence rate for women increased at EU15 level, indicating how the occupational expansion of the commerce sector exposed them to more risk factors. The incident rate for the whole workforce in 2008 was higher than the EU15 average for Portugal (3,690 per 100,000 workers), France (3,585), Spain (3,533) and Luxemburg (2,492) (Figure 9). These countries also had for a high rate of accidents for the overall economy. Only in the UK was the incident rate in the commerce sector higher than that in the overall economy (Figure 9).

Figure 9: Standardised incidence rate of accidents at work, 2008

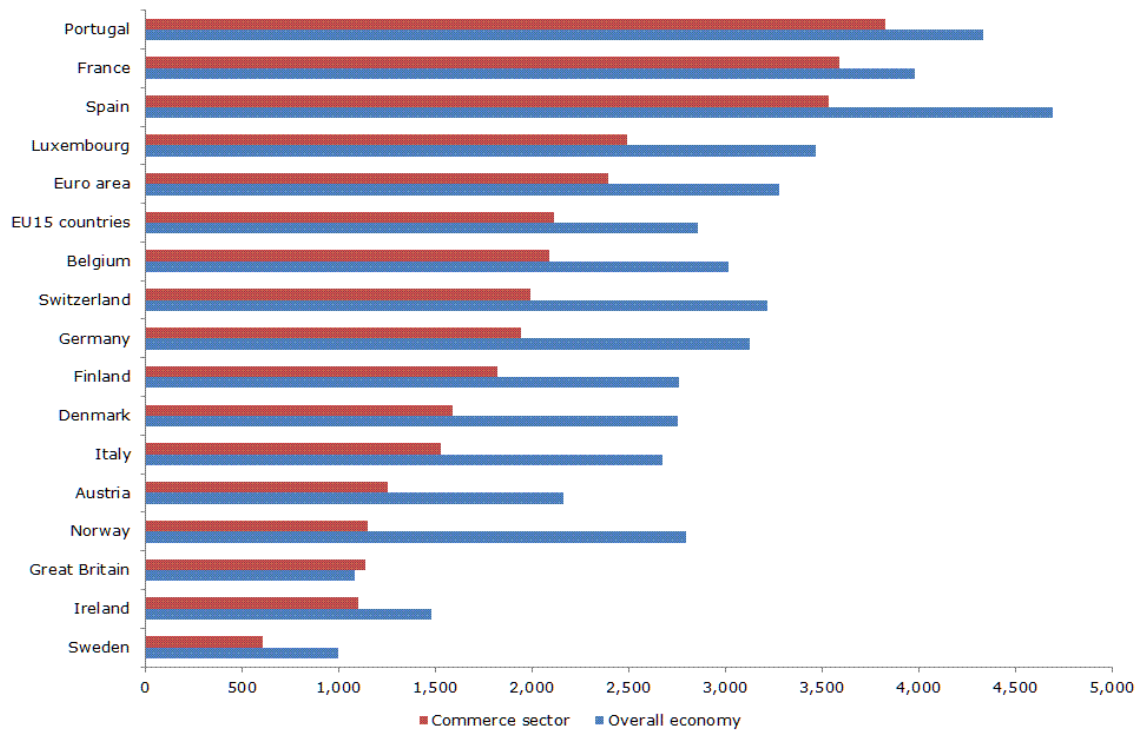


Figure 9: Standardised incidence rate of accidents at work, 2008

Note: Rate per 100,000 workers

Source: Eurostat, 2011

Health problems

Data from the ad hoc module of LFS 2007 show that 11.2% of workers in the commerce sector reported one or more work-related health problems in the past 12 months, which was slightly below the incidence of 12.8% in the overall economy. Only in France, Germany and Malta did workers in the commerce sector report higher work-related health problems (Table 46).

Table 46: Share reporting one or more work-related health problems over the past 12 months (%)

	Commerce sector	Overall economy
EU27	11.2	12.8
Austria	10.0	15.0

	Commerce sector	Overall economy
Belgium	9.0	11.5
Bulgaria	2.7	4.8
Cyprus	7.4	8.4
Czech Republic	7.7	8.5
Denmark	8.8	12.9
Estonia	7.3	9.0
Finland	21.9	24.5
France	51.4	48.8
Germany	5.5	5.2
Greece	3.8	6.4
Hungary	4.7	5.4
Ireland	1.8	3.0
Italy	5.5	6.8
Latvia	2.3	4.0
Lithuania	2.6	4.0
Luxembourg	2.6	3.8
Malta	4.2	4.0
Netherlands	8.2	10.9
Poland	16.9	21.9
Portugal	3.2	4.5
Romania	2.8	5.2
Slovakia	3.2	6.0
Slovenia	7.9	10.2
Spain	4.6	5.8
Sweden	12.6	14.3

	Commerce sector	Overall economy
UK	3.2	4.6
Norway	10.4	11.5
Croatia	2.7	8.1

Notes: NACE G

All health problems

Source: Eurostat, LFS, 2007

Because the design of the question in EWCS about symptoms reported by lifting at work changed between waves, it is not possible to look at trends in their frequency. However, musculoskeletal disorders (MSDs) are the most reported symptoms; this is hardly unsurprising due to their two-fold relationship with work (physical and psychosocial nature).

Health problems in the retail sector were lower than in the overall economy in 2010 (an effect of a younger workforce) part from muscular pains in the lower limbs and stomach ache (Table 47), which may be of a physical or psychosocial origin. While men in the retail sector reported less health problems than in the overall economy (apart from muscular pains in the lower limbs, and depression or anxiety), women in the retail reported higher figures than in the overall economy for backache, muscular pains in the lower limbs and stomach ache (Table 47). There is little national research on working conditions in the retail sector (source: national contributions).

Table 47: Main health problems reported, EU27 (%)

	Retail sector			Overall economy		
	Men	Women	Total	Men	Women	Total
Backache	42.7	47.0	45.1	45.6	46.6	46.0
Muscular pains in shoulders, neck and/or upper limbs	36.9	41.5	39.5	41.2	44.4	42.6
Muscular pains in lower limbs	30.8	33.4	32.0	30.2	29.7	30.0
Headaches, eyestrain	29.3	41.3	36.2	33.1	45.5	38.7
Stomach ache	11.7	15.7	13.9	12.3	15.4	13.7

	Retail sector			Overall economy		
	Men	Women	Total	Men	Women	Total
Injury(ies)	10.1	5.2	7.2	11.4	5.7	8.8
Depression or anxiety	7.3	9.0	8.3	7.2	10.4	8.7
Overall fatigue	32.7	36.4	35.1	32.9	39.2	35.7
Insomnia or general sleep difficulties	14.2	15.0	14.7	15.9	20.6	18.0

Source: EWCS 2010

The most relevant reported health problems are MSDs. Low back pain was reported by 35.9% of the Spanish workers ([Sixth national survey on working conditions, 2007 \(in Spanish, 1.55Mb PDF\)](#)) and 75% of the Cypriot sectoral workforce, as well as many risks related to the manual handling of loads and objects (cf. Eurostat, LFS, 2007), while MSDs account for a quarter of total days of absence in Germany at sectoral level. There are similar findings in Finland where pain in the neck and shoulders was the most often experienced physical symptom by almost half of employees, and from a 2006 survey investigating working conditions and health in a large Italian retailer where backache was the most common symptom (reported by 44.7% of respondents), followed by headaches (30.8%) and articular diseases (25.3%), affecting women more than men ([IT0605019I](#)). According to the [Labour Inspectorate's 2010 working environment review \(in Estonian, 412 Kb, PDF\)](#), employees of the commerce sector in Estonia were diagnosed mostly with carpal tunnel syndrome and inflammation of the elbow joint.

Such figures are hardly unsurprising, as Prunier-Poulmaire (2000) demonstrated that cashiers' job intensity increased substantially after the introduction of scanners which were claimed to lighten their workloads. As pointed out by Carré et al (2010), only part-timers can cope with such pace of work.

Many studies have identified high levels of stress among workers in the retail sector, in particular associated with the strict regulation of work organisation and worker's psychosocial health and the diffused risk of exploitation related to the small size and fragmentation of companies. Such studies include:

- research for the Confederation of Independent Trade Unions in Bulgaria ([KNSB](#));
- [survey on the quality of work \(in German\)](#) by the German Confederation of Trade Unions ([DGB](#));
- Danish 2009 report, [HK'ernes psykiske arbejdsmiljø \(in Danish\)](#);
- [Sixth national survey on working conditions, 2007 \(in Spanish, 1.55Mb PDF\)](#);

- [employees report from the Irish national workplace surveys of 2009](#) carried out by the National Centre for Partnership & Performance (since dissolved and its work incorporated into the National Economic and Social Council, [NESC](#));
- regional survey carried out in 2006 for the Italian Federation of Commerce, Tourism and Service Workers ([Filcams-Cgil](#)) ([IT0605019I](#));
- two surveys of the Polish KARAT Coalition on [Work conditions and respecting of employees' rights in supermarkets in Poland from the gender equality perspective \(244Kb PDF\)](#) and [Situation of female employees in super- and hypermarkets \(547Kb PDF\)](#);
- [2009 survey \(in Swedish, 3.78Mb PDF\)2009](#) by the Swedish Work Environment Authority ([AV](#));
- [2007 study \(475Kb PDF\)](#) by the Universities of Bolton and Manchester on the retail sector in England.

Psychological symptoms are a second group of health problems found in retail workers. A study by the Finnish Institute of Occupational Health ([FIOH](#)), tiredness was the most often reported psychological symptom, with one-third of employees often feeling tired. Stress was experienced 'very much' by 5% and 'rather much' by 16% of employees; a quarter also reported that they had problems in social well-being (that is, they often had to neglect home issues because of work) (Kandolin et al, 2009).

Work-related well-being is associated with working time arrangements that function well. The FIOH study found that well-being was at a lower level among those employees who had to be flexible because of their tasks or superiors (for example, company-controlled flexibility), which is often achieved by overtime work and different shifts; frequent time pressures (52%) and little possibility of influencing work (20%) were also associated with reduced well-being. A well-functioning work community, including considerable support from colleagues (73%) and superiors (53%) was connected with the well-being of its members (Kandolin et al, 2009).

In the Filcams-Cgil 2006 survey investigating working conditions and health at a large Italian retailer, 8.3% of respondents reported insomnia, 13.4% stomach ache and 11.4% anxiety among stress-related symptoms. In general, women reported more illnesses than men – particularly headaches, anxiety and stomach ache, which may reflect the psychological stress of working with customers. Men responding to the survey complained of insomnia slightly more than do women. Use of the Karasek (1979) model by the researchers suggested that high strain jobs were more widespread among cashiers and butchers (33%), while active workers were more widespread among employees involved in cooking, baking and food preparation. Low strain jobs were concentrated among administrative staff (50%), while passive workers were more widespread among cashiers (51.9%) and warehouse workers (48.1%).

The 2009 survey on sectoral work environment by AV found that 41% of retail employees in Sweden could not disconnect work worries during their free time, 16% suffered from some sort of insomnia due to work-related issues and 17% felt physical discomfort when they went to work. In general, women suffered more often than men from psychosocial-related diseases. These findings were validated by a report from the Swedish Federation of Trade Unions ([LO](#)) which found that the share of female blue-collar employees aged 30–44 years experiencing anxiety, insomnia and other psychosocial-related diseases had increased dramatically between 1988 and 2006.

Although the number of Dutch workers with a chronic psychological disease was found in the Netherlands Working Condition Survey to be slightly below the average for other sectors between 2005 and 2010, such complaints were increasing – especially in the retail sector. However, absenteeism due to psychological complaints declined in over the same period.

Nevertheless, sickness absence statistics from the Norwegian Labour and Welfare Administration ([NAV](#)) and surveys conducted by the Norwegian Labour Inspection Authority ([Arbeidstilsynet](#)) show that women in the retail sector in general have a higher sickness absence than men and are more likely to report emotional exhaustion, burnout, the presence of pressure, job stress and general health problems. Their dual role as an employee and responsibility for small children, coupled with strenuous jobs (such as checkouts), are alleged to be the most likely factors. Similarly, according to a Finnish report, employees reporting absent for health reasons in the retail sector increased from 52% in 1998 to 76% in 2008.

Government and social partner initiatives

Flexibility

Social partners in the retail sector seek to regulate flexibility in a way that safeguards companies' needs for flexibility and employees' search for better quality of work, especially in terms of work–life balance and career opportunities in terms of more stable and /or jobs with longer hours, ensuring higher earnings and better integration at their workplace. Working times and transitions from non-permanent and/or part-time jobs towards permanent and/or jobs with longer hours are the two main issues.

Work organisation

In all European countries, there is a much debate about the transformation of working time arrangements in the retail sector. This debate considers both the impact on workers' well-being and the problems related to competitiveness between companies. In all countries, there is general pressure to increase shop opening hours (see, for example, [Spanish plan for the improvement of productivity and competitiveness in the commerce sector \(in Spanish, 303Kb\)](#)

[PDF](#)). On one hand, there is a need to increase flexibility in working time arrangements and, on the other, to improve the collective framework agreements and national and local bargaining on this issue. Unions usually try to oppose any increase in flexibilisation and extension of working time but they are often defeated (for example in the Czech Republic, [CZ09110191](#)). In most cases, therefore they try to find the best agreement to cope with this trend in working time arrangements.

Thus, flexibility in working time and regulation appear as two complementary strategies. However, major problems arise when there is a gap between the increase in flexible working time and opportunities to negotiate this working time organisation – both at national and company level. For this reason, national legislation is also a key tool in improving the guarantees for workers' health.

It is also important to improve cooperation at company level, as in the case of [Superquinn](#) supermarkets in Ireland where the social partners have collaborated to response to a very difficult economic situation (that is, by introducing 'banded hours' contracts under which employees can be contracted to work 18–25 or 25–39 hours per week), even this demands a major confrontation and continuous cooperation between employers' and employee' associations. In Italy, the [Auchan agreement 2008 \(in Italian, 1.88MB PDF\)](#) and [Coop Nordest agreement 2008 \(in Italian, 3.14Mb PDF\)](#) introduced the opportunity for part-time workers to partly consolidate overtime into their normal working time (for example, from 20 to 24 hours a week). The Unicoop Toscana, Coop Nordest and Coop Adriatica 2007–2008 agreements introduced the so-called 'time islands' (*isole del tempo*), that is, self-management of working times among cashiers.

The difficulties in a cooperation between social partners seeking flexibilisation of working time arrangements are evident in the case of the Observatory of Trade Distribution (*Observatorio de la Distribución Comercial*) in Spain, whose members include public administrations, national experts, representatives of different entities and institutions in the retail sector (such as consumers' associations, chambers of commerce and employers' associations) but not trade unions.

The European initiative, [Work-free Sunday](#), promoted by Czech, German and Romanian Christian organisations and trade unions and the Commission of the Bishops' Conferences of the European Community ([COMECE](#)), aims to maintain Sunday as a day off for workers in the retail sector, by either revising the European Working Directive or promoting a new legislative framework that recognises Sunday as a work-free day in order to facilitate the balance between work and family life.

In addition, the international level is becoming more and more relevant given the transnational character of many large companies in the retail sector. For this reason, the Commerce Workers Free Trade Union Federation ([FSLC](#)) started a project in Romania in 2008 to create unions in the

big retail stores. With the help of [UNI Europa](#), the first trade union in a multi-national company, [Metro](#), was set up and a place gained on the Metro European Work Council.

Contractual arrangements

In Germany where there is a welfare system in support of unemployed and poor people, in order to prevent transitions from standard part-time to marginal part-time, the sectoral agreement regulates that part-timers are subject to working-time reductions by the employer, but that working time cannot be cut below the threshold of the unemployment insurance contribution (mini job level).

Furthermore, in the 2011 bargaining round, the United Services Union ([Ver.di](#)) demanded equal pay for temporary agency workers and, in North Rhine-Westphalia (NRW), a collective agreement on temporary agency work was called for. However, none of the negotiations in the regional bargaining rounds produced a result on this topic. The results of the 2011 bargaining round included elimination of age discrimination in holiday provision (36 days for all). In NRW, the results also included the elimination of age discrimination in holiday payments and in the wages of unskilled workers. In Finland, the collective labour agreement in 2005 stipulated that part-time employees must have the same rights for occupational healthcare as full-timers.

Given that part-time work is wanted by companies but not always by workers, trade unions generally ask for priority to be given to increase the working hours of part-time workers when they request this and there is the opportunity. For example, in the [Danish collective agreement for shops of 2010 \(in Danish, 969Kb PDF\)](#), companies are required to inform temporary employees about options for permanent employment and training.

In Italy, where the sector has many temporary workers, company-level agreements in most cooperatives reserve a significant share of new recruitment on a permanent basis for non-permanent workers by setting priority lists based on seniority, usually setting a nine or 12 months' eligibility threshold. This is the case, for example, in the [2007 Coop Adriatica \(in Italian, 4.39Mb PDF\)](#), [2006 Unicoop company \(in Italian, 278Kb PDF\)](#), [2011 Coop Estense \(in Italian, 137Kb PDF\)](#) and [2006 Feltrinelli \(in Italian, 1.07Mb PDF\)](#) agreements.

In Latvia, temporary employment is widespread in the retail sector, although the Labour Law states that only under specific conditions can people be employed on the basis of a terminated contract and the trade union insists that the Labour Law must be observed. At the same time, the Latvian trade union tries to reduce the share of forced part-time in order to improve full-time opportunities.

In general, trade unions are engaged in attempting to unify the rights and opportunities in a sector characterised by a high degree of fragmentation of companies and by a high diversification of the type of working contract used.

Given the spread of temporary jobs in the UK, the Union of Shop, Distributive and Allied Workers ([USDAW](#)) has targeted agency workers, particularly in supermarkets, launched a campaign, Putting Agency Workers on Fair Ground, to raise awareness of the rights of agency workers and to inform permanent workers about the potential effects of increased use of agency workers on their own working conditions.

Another example of the need for unify working conditions among the various different types of working contracts is in Norway where the trade union LO proposed ratification in 2008 of the International Labour Organization ([ILO](#)) [Occupational Health Services Convention, 1985 \(No. 161\)](#) and an extension/change of occupational health services to cover all workers, leading to the introduction of a mandatory certification scheme for occupational health services.

Irregular work is a problematic issue in the retail sector, with a high concentration in small companies. There are different graduation of irregularity in work, from the total absence of a contract to no respect for workers' rights (for example, using a part-time contract instead of a full-time one or masking as 'autonomous work' a subordinate salaried employee as in Italy).

In Italy, labour market policies over the past decade have promoted employment growth by reducing constraints and employment protection in favour of non-permanent and part-time jobs, and by introducing new non-permanent labour contracts such as staff leasing and on-call jobs. In addition, some companies try to use autonomous workers instead of employing subordinate staff. In Italy, the organisation, New Employment Identities ([NidiL](#)), which is affiliated to General Confederation of Italian Workers [CGIL](#)), and Filcams-Cgil started a campaign called [Dissociati!](#) (Dissociate yourself!) against the use of *associazione in partecipazione* (a type of autonomous working contract) in the retail sector. In the most cases, the subordinate salaried are forced to use this kind of contract to work in a shop with a high degree of subordination, allowing the company to reduce their pay and escape from the need to comply with national agreements.

Other actions aim to increase transparency among labour pools, thus reducing segmentation. The 2005 Finnish collective agreement requires employers to provide information on vacancies in accordance with generally adopted practice in the enterprise or at the workplace in order to ensure that part-time and fixed-term employees have the same opportunity to apply for full-time and /or permanent positions, with a priority where they have suitable skills. Unfortunately, no evidence about its impact has been reported. Such an approach seems to be shared by a 10-point action plan presented in 2011 by the Norwegian government to social partners aimed at reducing involuntary part-time work. This plan includes measures such as new legislation, strengthening the individual's right to full-time work and grant schemes.

Promoting training

Training and continuous training is fundamental in a dynamic sector such as retail. In general, public programmes, with collaboration between institutional actors and social partners, are devolving to regulate the link between education and job profiles. These tend to seek standardisation of competencies and the direct involvement of workers in their educational programmes.

Skill needs

According to the sector report for distribution and trade (2.27Mb PDF) published in 2009 as part of the New Skills for New Jobs initiative, the major transformation of the retail sector over the past decade with the increased role played by large retailers has a substantial impact on the skills' mix in the scenarios envisaged under the [Europe 2020](#) strategy, especially in those driven by ICT innovation. Some professional profiles, such as specialist managers and sales and marketing professionals, are expected to increase in most scenarios, while others such as administrative clerks face less favourable perspectives. Similarly, paragraph 4.4.7 of the [EESC opinion](#) on the retail market monitoring report, *Towards more efficient and fairer retail services in the internal market for 2020*, points out that:

Modernisation, technological development and increased use of ICT in retail has led to an increasing mismatch between skill needs of companies and those of staff in retail.

This makes actions taken in Member States of utmost importance.

According to an [analysis of the Danish retail sector \(in Danish\)](#) carried out by Aalborg University in 2007, skills profiles and skill needs depend heavily on the type of retailers. While those characterised by automation, easy recognition and low prices primarily require low-skilled workers, with standardised job profiles, those characterised by special products, special knowledge and customer experience require more qualified employees with specialist knowledge. Notwithstanding such an increasing polarisation of the qualification structure in the sector, the report outlines an overall tendency towards higher competence requirements among retail employees in terms of IT systems, dealing with demanding customers and undertaking multiple job tasks. Increasing recourse to ICT is also outlined by the Belgian national contribution.

Initial training

Government initiatives

Most countries have made significant efforts to develop initial training by establishing job profiles, accreditation systems and vocational pathways (as in most Member States) or to update them (as in EU15 countries) with a consolidated initial vocation training (IVT) system.

Skills accreditation has also been developed at sectoral level in Cyprus (Human Resources Development Authority of Cyprus, [HRDA](#)), Greece ([EKEPIS](#)) and Latvia (supported by [European Social Fund](#) financing), integrated with social partners' training agencies. Notwithstanding such efforts, the most reported complaint by social partners is that new recruits often have no qualifications or employers have their own qualification systems.

Apprenticeships are a key gateway for skilled positions in Austria and Germany where the retail sector is the main provider, while in other countries such as Italy and the UK, they play a rather minor role. In the UK, non-permanent contracts have tended to be the usual entry point for low-skilled and unskilled workers.

In Germany, the federal states agreed to a modernisation and modularisation of IVT to enable unplaced training applicants (school–training transfer measures) or unemployed persons (integration into sales services) to benefit from some training.

Tripartite initiatives

Government initiatives have been often integrated into tripartite action. This is the case in Germany where social partners together with the Federal Institute for Vocational Education and Training ([BIBB](#)) reached an [agreement \(in German\)](#) in 2006 on facilitating access to IVT for unskilled workers and for unemployed persons by fostering multi-media training materials and e-learning. Finally, in 2009, the IVT curriculum (management assistant), including a module on self-employment, was applied to a shorter two-years apprenticeship introduced for sales assistants for retail services. Similarly, in Austria updating of the curricula of apprenticeships and training content is carried out on a regular basis by the tripartite Federal Vocational Advisory Council (*Bundes-Berufsausbildungsbeirat*).

In Estonia, skills accreditation has been carried out by the tripartite Professional Councils of the Estonian Qualifications Authority, although differences between the profiles of large retailers hamper such efforts.

Social partner initiatives

In some countries, employers' associations actively promote vocational training for high-skilled positions, especially managerial ones. This is the case in Greece where the [Athens University of Economics and Business](#) launched a new vocational training programme in 2007 aimed at managers and professionals. A similar scheme was introduced by the Association of Lithuanian Trade Enterprises ([LPIA](#)) in 2008.

The initiatives of the Swedish Retail and Wholesale Development Council (HU) adopt a wide spectrum of training measures aimed at promoting career opportunities in the retail sector. The website, [Career in commerce \(in Swedish\)](#) has an umbrella role as its contents include comprehensive descriptions of the industry, career advice from human resources (HR) managers and suggestions for further sectoral education. The apprenticeship programme 'Retail Store Apprentice' targeted at students undertaking secondary education outlines an approach that seeks to cover strategic sectoral skills' needs.

Several national contributions identified a feeling among students (especially for clerical and professional positions) that the retail sector does not offer attractive opportunities, apart from being an entry point to the labour market, due to its below average pay. Countries like Bulgaria, Greece and Latvia display a supply of qualified profiles matching the sectoral skills required, but because of low pay (or, as the case of Greece, extensive recourse to undeclared work), they successfully turn their search to other sectors, thus leaving only a non-qualified workforce supply.

However, social partners in the UK indicate that there are relatively few dedicated qualifications available for entry into the sector, apart from fashion retail, as described in the 2007 [Skillsmart Retail report \(253Kb PDF\)](#); [Skillsmart Retail](#) is a sectoral skills council which includes both social partners and government. In conjunction with a range of employers and awarding bodies, Skillsmart Retail started in 2009 a simplification of the qualifications by reducing the number from 150 to 10 and creating a new national framework for retail skills. [Skills priorities for the retail sector in the UK and its four nations \(315Kb PDF\)](#), published in December 2010, provides an overview of the sector's skills.

Continuous vocational training and ICT

Government initiatives

Some countries have consolidated training systems providing the skills required by the retail sector while others only set up their continuous vocational training (CVT) system during the past decade.

In Denmark, the state's adult vocational training system ([AMU](#)) provides a wide catalogue of courses including over 100 different courses targeted at the sector, ranging from conflict management and coaching to managing customer complaints and personal sales. These courses are widely used by retailers.

In Norway, some retail chains have their own schools for their employees, including part-time employees.

In the Netherlands, employees have the option to obtain a so-called 'experience certificate', issued by training institutes, which recognises skills acquired at work (that is, without formal training) and in the end may even lead directly to a recognised diploma.

In 2007, the French government introduced an initiative, [Gestion Prévisionnelle de l'emploi et des compétences \(2.82Mb PDF\)](#) (GPEC), which places an obligation on employers to undertake strategic workforce planning with social partners every three years to foresee any changes through restructuring and provides a tool for employers to anticipate and manage change. Retail sector employers have therefore entered into negotiations with social partners to introduce this initiative at company level.

In some countries there is widespread view that middle managers are a priority target for CVT as they would act as mainstreamers. This is the case in Cyprus and a recent trend in Estonia, where there have been a shift in training towards supervisors and managers.

Tripartite initiatives

Countries with consolidated CVT systems have updated their structure by revising qualifications, evaluating ways of supplying training and checking tools for balancing individuals' competences and training needs.

Measures such as revisions of professional profiles, modularisation of training units and e-learning tools, devised in Germany for apprentices, can be transferred to CVT activities. These measures are integrated in experimental projects such as the EU-funded project European Commerce Competence ([EuCoCo](#)) to develop and implement the first European qualification system for commerce in cooperation with sectoral social partners, BIBB and the German Chamber of Industry and Commerce ([DIHK](#)).

Social partner initiatives

A number of countries have developed their lifelong learning systems in two ways. The first involves establishing and updating professional standards and training centre accreditation. This is generally carried out at national level by a public authority after having consulted social partners or by tripartite committees or bodies established at both national and sectoral level. The second involves triggering training by promoting training centre accreditation; in some

countries this is integrated by bilateral institutions mutualising funds from enterprises at sectoral level which support training programmes at local level (see also [Contribution of collective bargaining to continuing vocational training](#)).

Recent innovations are noted in Denmark and Italy. In 2010, Danish sectoral social partners signed an agreement introducing a competence development fund, which sets out the right after nine months of employment for employees to undertake two weeks of relevant training per year of their choice. In Italy, interprofessional training funds were established in the late 2000s, complemented by the training activities of bilateral bodies focused on compulsory training such as occupational health and safety.

As the reported by Skillsmart Retail in the UK, 13% of customer service staff and 8% of retail managers do not hold any formal qualification. In Italy, standards for these skills have not yet been established but national level bipartite bodies of social partners promote guidelines for specific professional profiles.

In the UK, learning opportunities promoted by Skillsmart Retail include qualifications ranging from compliance level training (for example, certificates in food handling) to diplomas and degree-level qualifications. An [online skills assessment tool](#) has been developed by the [National Skills Academy for Retail](#) for employers to gauge whether or not employees require further skills training.

Sectoral skills councils such as [Afresco](#) in France, HDB in the Netherlands, HU in Sweden and Skillsmart Retail in the UK provide key information about sectoral trends and act as expert systems for training policies. Skillsmart Retail is a government–employers partnership led by the latter which coordinates a range of learning opportunities through training providers across the UK. HDB, which was founded by social partners in 1956, acts as a veritable sectoral ‘knowledge base’ in a broader sense by including measures against retail crime, working on the accessibility and attractiveness of shopping, training, and encouraging innovation and sustainability. The bipartite HU carries out sectoral research and promotes sectoral projects, such as those for apprentices and those aim to encourage career opportunities in the retail sector.

In some countries about to structure their training systems, training agencies related to the social partners have contributed actively to the establishment of the system both in terms of contributing to sectoral professional profiles, as in Greece (mentioned above) and Cyprus, and in promoting projects and training courses for most required competences (such as computer use and specialist skills).

Examples of good practice at company or local level

In Slovakia, Tesco launched a plan offering employees the possibility of developing their own potential and knowledge through training and development programmes. Within the framework of their professional and personal growth, employees can choose from a wide range of training

programmes that react to their professional needs. As part of the internal training within this framework, employees share experiences gained by Tesco in the UK. In May 2005, Tesco was awarded the prize for the best personnel project of 2005 development programmes in the Slovakian 'Employer of 2005' competition.

Belgian large retailers generally offer good possibilities for career promotion of low-skilled people by devising internal recruitment policies and promotion opportunities: the case of Colruyt is particularly valued. However, there is no specific information about whether such opportunities are also offered to part-time and non-permanent employees.

The French group, Carrefour, is among those most active in France in this field. For example, training programmes for its employees include Carrefour's professional certificate. Workers who complete this course are awarded a certificate to demonstrate they have been trained to a level 4, achieved by over 1,000 employees since the certificate's introduction in 2005. This is complemented by an evolution programme which provides workers with basic skills in a number of areas. This initiative began in 2009 by being tested at two sites and was then rolled out in 2010 across 10 further sites. To date over 600 workers have completed this course. Both initiatives work alongside a web-based toolkit for internal vacancies introduced in 2008 following negotiations with the trade unions, thus making training effective for career progression.

In most countries, the proportion of enterprises covered by training programmes increases as the size of enterprise increases. Projects that aim to promote training in small and micro companies have been launched in Portugal while in Italy the costs of compulsory training on health and safety at work are mutualised by bilateral bodies, which were promoted by social partners in the early 1990s and then integrated into training funds.

Risk of robbery

Being present when a shop is targeted by robbers is considered a risk for physical health but also a source of psychological trauma, and many interventions focus on this issue both in terms of prevention and in post-traumatic actions.

A [2011 newsletter on robberies \(in German, 2.36Mb PDF\)](#) from Berufsgenossenschaft Handel und Warendistribution ([BGHW](#)), the German sectoral insurance against work accidents and occupational diseases, highlights the risk of psychological trauma. Fears, anxieties and concentration disturbances are considered typical reactions and, if they persist for more than four weeks, BGHW recommends consulting a psychotherapist in order to avoid long-lasting trauma.

In Denmark, the number of reported robberies in the retail sector increased from 638 in 2007 to 1162 in 2009 before declining slightly just over 1,000 in 2010 thanks to increased investment in video surveillance, cashless payment systems and more security personnel. Danish trade unions

and representatives from the Danish Working Environment Authority ([AT](#)) stress that robberies represent one of the largest problems for the work environment in the retail sector. In order to cope with the escalation, the Danish Chamber of Commerce ([Dansk Erhverv](#)) signed an [agreement \(in Danish, 42Kb PDF\)](#) with member companies in 2011 that includes immediate psychological crisis help to their employees if they are being exposed to violence or robbery at work.

In Belgium and the UK, employers' associations representing small retailers carry out regular surveys about crime and safety, especially robberies. About 50% of Flemish small retailers were confronted with theft in 2010 but only 18% of these retailers reported the theft to the police, while in the UK violent and anti-social behaviour declined from 58 incidents per 1,000 retail staff in 2004–2005 to 14 incidents per 1,000 staff in 2009–2010. In Sweden, shop robberies display a long-term upwards trend. An increase in robberies was also pointed out by Cypriot stakeholders, especially in shops open round the clock such as bakeries and kiosks; the majority of robberies (violence or extortion) occurred in convenience stores and the majority of thefts occurred in clothing shops and supermarkets.

Violence, threats and robbery are a growing concern for employees, social partners and public agencies in the retail sector and a constant issue in bargaining rounds and sectoral debates in Sweden. Most victims are young (19–29-years-old) and work in small shops on evenings and at night; lone migrant employees in suburban metropolitan areas are especially exposed. In a report published by the Commercial Employees' Union ([Handels](#)), six out of 10 retail stores stated that they conducted some sort of safety training for their staff and 24% of all union members expressed concerns about violence at work – women more than men even though they are less likely to experience violence at work.

Surveillance is seen as a problem by trade unions when it is used to control individual workers. In general, national laws guarantee workers' rights and privacy and there are many restrictions on the use of video surveillance, with regulations about when it is permitted, the legal use of the recordings by the company and communication of its presence. The regulation of these aspects has generated much debate on the need to protect companies against robberies and the privacy of workers, including a ban on video surveillance to monitor the work-effectiveness of employees. Examples include the [annual report on data protection activity for 2009 and 2010 \(in German\)](#) from the Federal Commissioner for Data Protection and Freedom of Information ([BfDI](#)), the [Federal Data Protection Act](#) in Germany, and the [2009 agreement \(in Danish, 1.08Mb PDF\)](#) between the Danish Chamber of Commerce and HK Handel. However, further restrictions and guidelines regarding the use of video surveillance have been introduced to protect employees against infringement and misuse in Denmark.

The importance of avoiding distorted use of surveillance at company level was also a recurring theme of the national contributions. In Italy, for example:

Under the [2006 Ikea agreement \(in Italian, 1.71Mb PDF\)](#), video surveillance systems cannot be located in spaces reserved for staff;

The [2007 Castorama agreement \(in Italian, 2.79Mb PDF\)](#) states that the cupboard containing the video surveillance system can only be opened for any reason in the presence of both the shop manager and the delegated workers' representative.

The [2003 Mercatone Uno agreement \(in Italian, 14Kb PDF\)](#) requires the delegated workers' representative to have a second password, which must be inserted before the video recordings can be inspected.

Sector-related initiatives on well-being

The national contributions report a number of sector-related initiatives on the issue of well-being, mostly in response to the 2007 [Framework agreement on harassment and violence at work \(4.79Mb PDF\)](#) signed by European social partners, which considers harassment and violence at work to be issues of 'mutual concern of employers and workers, which can have serious social and economic consequences'. The agreement aims to:

- significantly increase the awareness and understanding of workplace harassment and violence among employers, workers and their representatives;
- provide them with an efficient and action-oriented framework to identify, prevent and manage such problems, which can potentially affect any worker and any workplace.

The [working environment guidelines for shops \(in Danish\)](#) produced by AT gives information on how to reduce stress and promote well-being for workers in shops by focusing on how shops can deal with some of the main issues in the sector leading to stress such as harassment, irregular working hours, conflicts with customers and low involvement.

In Ireland, the trade union Mandate launched a [Respect Retail Workers](#) campaign aimed at promoting employee well-being and preventing abuse from customers. This ongoing campaign came about as a result of an increase in complaints from retail workers about the amount of verbal and physical abuse from customers.

In Malta, the Association of General Retailers and Traders ([GRTU](#)) has a programme, [Addressing Third Party Violence in Retail](#), which organises events and publishes guidelines that aim to help workers cope with this problem.

In 2010, the French National Agency for the Improvement of Working Conditions ([ANACT](#)) led a campaign to visit 1,300 hypermarkets and supermarkets in order to implement recommendation R440, which covers repetitive lifting of goods by cashiers at checkouts. During these visits ANACT representatives found that almost eight out of 10 locations had established

preventative measures such as the introduction of detachable labels on packs of water or mobile readers to read barcodes on heavy products while they sit in the customer's trolley.

Particularly active on this issue is the Independent and Self-Governing Trade Union Solidarność ([NSZZ Solidarność](#)) in Poland with the campaign [Smiling Cashier \(in Polish\)](#) of 2010, supported by a number of non-governmental organisations including the KARAT Coalition and the Network of East–West Women Poland ([NEWW-Polska](#)), with a petition addressed to management boards of retail chains for the improvement of work conditions in super and hypermarkets. The campaign was also promoted through networking portals where educational actions aimed at improving working in large shops were presented. Another Polish campaign is 'Don't shop on Christmas Eve' by the All-Poland Alliance of Trade Unions ([OPZZ](#)), NSZZ Solidarność and the Free Trade Union August '80 ([WZZ Sierpień '80](#)). This campaign was targeted at customers and the management boards of retail chains. Its aim was to reduce work time to make it possible for employees in the retail sector to prepare for the family holiday. These campaigns were initiated because work conditions in the retail sector in Poland were some of the hardest.

In Portugal, the Confederation of Trade and Services of Portugal ([CCP](#)) is promoting an [campaign \(in Portuguese\)](#) to raise awareness of emerging psychosocial risks in the commerce and services sector on psychosocial risks and emerging in the commerce and services sector with the support of the Authority for Working Conditions ([ACT](#)). Still in Portugal, the [Stress at Workplaces Project](#) was carried out in 2008–2010 in the commerce and transport sectors by a partnership of a variety of organisations including CCP and the Union of Commerce, Office and Service Workers of Portugal ([CESP](#)).

In Sweden, all major sectoral social partners cooperate in the Commercial Work Environment Committee ([HAK](#)), a joint organisation established to produce information and education materials, to initiate research projects and to promote an improved working environment in the Swedish service sector. The members of HAK are the Swedish Trade Federation ([Svensk Handel](#)), the Cooperative Movement Bargaining Organisation ([KFO](#)), Handels and [Unionen](#) (a trade union for professionals in the private sector).

Works agreements on health prevention exist in all large retail companies and are rare in SMEs. However, psychosocial risk factors are often not considered in preventive programmes (or in a very limited way) and it is very difficult for trade unions to negotiate the organisation of work so as to enhance working conditions. In most cases, the support action follows the psychological damage. However, it is helpful to support those workers with psychosocial problems rather than leaving them to suffer alone. The Trade Union of Commercial Employees ([KASZ](#)) in Hungary gives active support to those members who are under psychological pressure from their employer. In a case in 2010 reported by the trade union, it achieved dismissal of a shop manager who had caused some of its employees to require the help of a psychiatrist.

In Slovenia, the trade unions are heavily engaged in issues around Sunday and holiday work by employees in shops and shopping centres. At the beginning, the main issue was payment for

weekend and holiday work, but after unsuccessful negotiations with employers in the retail sector, the unions started a public campaign which culminated in September 2003 in a national referendum on the opening hours of shops. There was very low participation in the referendum but the majority voted for shops to be closed on Sundays.

Commentary

The retail sector experienced both a considerable increase and a huge transformation over the past two decades due to technological innovations and the increasing dominance of large retailers. As a result, self-employment in the sector declined significantly while the number of part-time jobs increased considerably due to their greater flexibility in terms of working time. This shift in employment status has affected career patterns, moving from self-employment towards more technicians and professionals, although these labour pools appear quite separate. Both labour market and sectoral regulations have generally favoured such changes.

Although a number of Member States (especially eastern countries and Italy) continue the liberalisation process in the sector, other countries (such as France and Spain) are reversing this trend because of the risks in terms of social cohesion.

Work accidents in the retail sector are less frequent than in the overall economy. The main new risks are anti-social behaviour (from verbal abuse to physical violence and robbery) by third parties, irregular work schedules and increased intensification following the introduction of ICT. Lack of a suitable data source meant it was not possible to identify any trends in physical problems in the sector in this report.

While social partners in several countries have promoted a number of projects aimed at tackling new psychosocial risks, they have been less effective in introducing measures to achieve the transition of part-time and non-permanent workers to full-time and highly qualified jobs (notwithstanding their higher qualification).

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Annex 1: Country groups and codes

Country groups

- EU15** 15 EU Member States before May 2004 (Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, the Netherlands, Portugal, Spain, Sweden and the United Kingdom)
- NMS** 12 New Member States that joined the EU in May 2004 (Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia) and in January 2007 (Bulgaria and Romania)
- EU25** 25 EU Member States including the EU15 and the 10 NMS that joined in 2004
- EU27** 27 EU Member States, comprising the EU15 and the 12 New Member States

Country codes

Country code	Country name
AT	Austria
BE	Belgium
BG	Bulgaria
CY	Cyprus
CZ	Czech Republic
DE	Germany
DK	Denmark
EE	Estonia
EL	Greece
ES	Spain
FI	Finland
FR	France
HU	Hungary

IE	Ireland
IT	Italy
LT	Lithuania
LU	Luxembourg
LV	Latvia
MT	Malta
NL	Netherlands
NO	Norway
PL	Poland
PT	Portugal
RO	Romania
SE	Sweden
SI	Slovenia
SK	Slovakia
UK	United Kingdom

Annex 2: Variable codification for Table 42

q66. Do you think your health or safety is at risk because of your work?

missing values = 8 and 9

Value label information for q66

Value = 1 Label = Yes

Value = 2 Label = No

Value = 8 Label = DK/No opinion

Value = 9 Label = Refusal

q67. Does your work affect your health, or not? (recoded)

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missing values = 8 and 9

Value label information for q67

Value = 1	Label = Yes, mainly positively
Value = 2	Label = No
Value = 3	Label = Yes, mainly negatively
Value = 8	Label = DK/No opinion
Value = 9	Label = Refusal

q68. How is your health in general? Would you say it is –

missing values = 8 and 9

Value label information for q68

Value = 1	Label = Very good
Value = 2	Label = Good
Value = 3	Label = Fair
Value = 4	Label = Bad
Value = 5	Label = Very bad
Value = 8	Label = DK/No opinion
Value = 9	Label = Refusal

q77a. How much do you agree or disagree with statements describing some aspects of your job
- I might lose my job in the next 6 months?

missing values = 7 and 8 and 9

Value label information for q77a

Value = 1	Label = Strongly disagree
Value = 2	Label = Disagree
Value = 3	Label = Neither agree nor disagree
Value = 4	Label = Agree

Value = 5	Label = Strongly agree
Value = 7	Label = Not Applicable
Value = 8	Label = DK
Value = 9	Label = Refusal

q77b. How much do you agree or disagree with statements describing some aspects of your job
- I am well paid for the work I do?

missing values = 7 and 8 and 9

Value label information for q77b

Value = 1	Label = Strongly disagree
Value = 2	Label = Disagree
Value = 3	Label = Neither agree nor disagree
Value = 4	Label = Agree
Value = 5	Label = Strongly agree
Value = 7	Label = Not Applicable
Value = 8	Label = DK
Value = 9	Label = Refusal

q77c. How much do you agree or disagree with statements describing some aspects of your job -
My job offers good prospects for career advancement?

missing values = 7 and 8 and 9

Value label information for q77c

Value = 1	Label = Strongly disagree
Value = 2	Label = Disagree
Value = 3	Label = Neither agree nor disagree
Value = 4	Label = Agree

Value = 5	Label = Strongly agree
Value = 7	Label = Not Applicable
Value = 8	Label = DK
Value = 9	Label = Refusal

q77d. How much do you agree or disagree with statements describing some aspects of your job
- I feel 'at home' in this organisation?

missing values = 7 and 8 and 9

Value label information for q77d

Value = 1	Label = Strongly disagree
Value = 2	Label = Disagree
Value = 3	Label = Neither agree nor disagree
Value = 4	Label = Agree
Value = 5	Label = Strongly agree
Value = 7	Label = Not Applicable
Value = 8	Label = DK
Value = 9	Label = Refusal

q77e. How much do you agree or disagree with statements describing some aspects of your job
- I have very good friends at work?

missing values = 7 and 8 and 9

Value label information for q77e

Value = 1	Label = Strongly disagree
Value = 2	Label = Disagree
Value = 3	Label = Neither agree nor disagree
Value = 4	Label = Agree

Value = 5	Label = Strongly agree
Value = 7	Label = Not Applicable
Value = 8	Label = DK
Value = 9	Label = Refusal

q77f. How much do you agree or disagree with statements describing some aspects of your job -
If I were to lose or quit my current job, it would be easy for me to find a job of similar salary?

missing values = 7 and 8 and 9

Value label information for q77f

Value = 1	Label = Strongly disagree
Value = 2	Label = Disagree
Value = 3	Label = Neither agree nor disagree
Value = 4	Label = Agree
Value = 5	Label = Strongly agree
Value = 7	Label = Not Applicable
Value = 8	Label = DK
Value = 9	Label = Refusal

q77g. How much do you agree or disagree with statements describing some aspects of your job -
The organisation I work for motivates me to give my best job performance?

missing values = 7 and 8 and 9

Value label information for q77g

Value = 1	Label = Strongly disagree
Value = 2	Label = Disagree
Value = 3	Label = Neither agree nor disagree
Value = 4	Label = Agree

Value = 5	Label = Strongly agree
Value = 7	Label = Not Applicable
Value = 8	Label = DK
Value = 9	Label = Refusal

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