

Representativeness of the European social partner organisations: Personal services–hair and beauty sector

Introduction

This study aims to provide the necessary information to encourage sectoral social dialogue in the personal services–hair and beauty sector. Eurofound’s series of representativeness studies, carried out at the request of the European Commission, sets out to identify the relevant social partner organisations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU). The study thus identifies the relevant national social partner organisations in the personal services–hair and beauty sector by means of both a top-down approach (listing the members of the relevant European associations) and a bottom-up approach through Eurofound’s Network of European correspondents.

A national association is considered to be a relevant sector-related interest association if it meets the following criteria: a) the association’s domain relates to the sector; b) the association is either regularly involved in sector-related collective bargaining and/or is affiliated to a relevant European interest association. A European association is considered to be a relevant sector-related interest organisation if it is on the Commission’s list of interest organisations to be consulted on behalf of the sector under Article 154 of the TFEU and/or participates in sector-related European social dialogue and/or has requested consultation under Article 154.

Defining the sector

For the purpose of this study, the personal services–hair and beauty sector is defined in terms of the Statistical Classification of Economic Activities in the European Community (NACE) system, to ensure the cross-national comparability of the findings. More specifically, the sector is delineated by NACE (Rev.2) code 96.02: Hairdressing and other beauty treatment. In the hairdressing subsector, this class includes activities such as hair washing, trimming and cutting, setting, dyeing, tinting, waving, straightening

and similar activities for men and women, as well as shaving and beard trimming for men. In the beauty treatment subsector, this class includes activities such as facial massage, manicure and pedicure, and make-up application.

Economic background

The personal services–hair and beauty sector employs more than one million workers (including employees, self-employed and agency workers) and is characterised by high labour intensity and a clear predominance of small and medium-sized enterprises (SMEs). Overall, the sector recorded a small growth (around 1.3%) in terms of companies and workers in the EU28 during the past 10 years. This growth is mainly attributable to the establishment of micro-enterprises and the increase in the number of self-employed hairdressers and beauticians without employees. Another trend in the sector is the increase in the number of franchised salons that mainly offer low-cost services.

Employment characteristics

In terms of employment, the personal services–hair and beauty sector is characterised by a clear majority of young and female workers: about 80% of the EU labour force are women and about 80% under the age of 26. Migrant, part-time and fixed-time work is common and long working hours, evening and weekend work characterise the service-oriented working conditions. Pay levels tend to be low in the sector compared with the national averages of other sectors, although there are considerable differences in this regard between EU Member States. Fluctuation in the sector is high, with an annual staff turnover rate of 15%; health issues related to the occupation may account for a good deal of the reported drop-out. In addition, several Member States report a high incidence of informal and undeclared work in the sector.

National level of interest representation

Trade unions

A total of 35 sector-related trade unions were identified in 18 countries, 31 of which are involved in sector-related collective bargaining. A pluralist associational system was found in 10 Member States. A large proportion of the unions (about two-thirds) have an overlapping membership domain with regard to the sector, covering a broader range of activities such as the entire personal services sector. Some of them have a cross-sectoral domain, including among others the personal services–hair and beauty sector. Nevertheless, overall the domains of the sector-related trade unions do not tend to be very broad, even though their domains often go beyond what is a very narrowly defined sector. Union densities in the sector tend to be relatively low, mainly resulting from the small size of most enterprises, the spread of atypical and self-employment, and high staff turnover.

Employer organisations

The study identified a total of 41 sector-related employer organisations, slightly higher than the number of sector-related trade unions. All Member States apart from Bulgaria, the Czech Republic, Estonia, Latvia, Romania and Slovakia record at least one sector-related employer organisation. In eight countries, more than one sector-related employer organisation can be found. Overall, membership domains tend to be narrower than those of the sector-related trade unions; 49% of the sector-related employer organisations show a sectional domain relative to the personal services–hair and beauty sector, meaning that the domain covers part of the sector but no activities outside. The high degree of specialisation in the sector may enable many employer organisations to perform a very particularistic interest representation on behalf of their members. Seven of the 41 sector-related employer organisations are not involved in sector-related collective bargaining, acting either mainly or exclusively as trade associations rather than employer organisations.

European level of interest representation

In the personal services–hair and beauty sector, the organisations listed by the European Commission as a social partner organisation to be consulted under Article 154 of the TFEU are the Hair and Beauty Section of Union Network International (UNI) Europa representing employees and Coiffure EU representing employers.

Although the membership domain of UNI Europa as a whole is multi-sectoral, the domain of its Hair and Beauty Section is largely congruent with the personal services–hair and beauty sector. It has 23 direct affiliates (66% of the unions identified in the study) in 16 Member States. All affiliates apart from four are engaged in sector-related collective bargaining. Under its statutes, UNI Europa is equipped with an implicit rather than explicit statutory mandate to negotiate on behalf of its members.

Coiffure EU organises only the hairdressing subsector and so its membership domain is sectional relative to the personal services–hair and beauty sector. It has 17 direct and 2 indirect (via a higher order unit) associational members in 18 Member States, together representing 46% of the employer organisations identified in the sector. When adjusted for those employer organisations whose membership domain is confined to the beauty treatment subsector (which Coiffure EU does not represent), this ratio amounts to 59% or more. Twelve of the 19 affiliates are involved in sector-related collective bargaining. Like UNI Europa, Coiffure EU is provided with an implicit rather than explicit negotiation mandate according to its Articles of Association.

Conclusions

Top-down and bottom-up analyses of the personal services–hair and beauty sector in the EU28 shows that the Hair and Beauty Section of UNI Europa on the employee side and Coiffure EU on the employer side are the most important EU-wide representatives of the sector's workforce and businesses. Both organisations tend to organise the most important national players in the sector. They also cover the majority of Member States through affiliations in these countries.

Further information

The report *Representativeness of the European social partner organisations: Personal services–hair and beauty sector* is available at <http://www.eurofound.europa.eu/observatories/european-observatory-of-working-life-eurwork/representativeness-studies>

For more information, contact Catherine Cerf, Workflow Officer, at cce@eurofound.europa.eu