

Industrial relations

Representativeness of the European social partner organisations: Industrial cleaning sector



**Representativeness of the
European social partner organisations:
Industrial cleaning sector**

When citing this report, please use the following wording: Eurofound (2019), *Representativeness of the European social partner organisations: Industrial cleaning sector*, Dublin.

Authors: Frédéric Turlan and Peter Kerckhofs (Eurofound)

Research Manager: Peter Kerckhofs

Eurofound Research Project: Representativeness studies

© European Foundation for the Improvement of Living and Working Conditions (Eurofound), 2019.

Reproduction is authorised provided the source is acknowledged.

For any use or reproduction of photos or other material that is not under the Eurofound copyright, permission must be sought directly from the copyright holders.

Cover image: © Andrey Popov/Shutterstock.com

Any queries on copyright must be addressed in writing to: copyright@eurofound.europa.eu

The European Foundation for the Improvement of Living and Working Conditions (Eurofound) is a tripartite European Union Agency established in 1975. Its role is to provide knowledge in the area of social, employment and work-related policies according to Regulation (EU) 2019/127.

European Foundation for the Improvement of Living and Working Conditions

Telephone: (+353 1) 204 31 00

Email: information@eurofound.europa.eu

Web: www.eurofound.europa.eu

Country codes EU28

AT	Austria	FI	Finland	NL	Netherlands
BE	Belgium	FR	France	PL	Poland
BG	Bulgaria	HR	Croatia	PT	Portugal
CY	Cyprus	HU	Hungary	RO	Romania
CZ	Czech Republic	IE	Ireland	SE	Sweden
DE	Germany	IT	Italy	SI	Slovenia
DK	Denmark	LT	Lithuania	SK	Slovakia
EE	Estonia	LU	Luxembourg	UK	United Kingdom
EL	Greece	LV	Latvia		
ES	Spain	MT	Malta		

Contents

List of tables	1
List of figures	3
Introduction	4
Objectives of the study	4
European sectoral social dialogue committee for the sector	5
Definitions and methodology.....	5
Data collection and quality control measures.....	8
Structure of the report.....	9
1. Economic background and employment specificities of the sector	11
Business and employment trends in the sector.....	11
Number of companies and employment in each EU Member State	12
Size of the companies in the sector	15
Challenges for companies in the industrial cleaning sector.....	18
Working conditions in the industrial cleaning sector.....	19
How sector specificities impact the level of organisation.....	22
2. National level of interest representation	24
Industrial cleaning sector coverage, sector-relatedness and organisational density of trade unions.....	25
Trade union involvement in collective bargaining	31
Sector-relatedness and membership strength of employer organisations.....	34
Involvement of cleaning employer organisations in collective bargaining	39
Collective bargaining patterns and social dialogue practices	42
Reasons for fragmentation and pluralism in the industrial cleaning sector	53
Methodological considerations.....	60
3. European level of interest representation.....	62
Membership domain of UNI Europa	62
EFCI membership domain	71
Industrial cleaning sector representativeness of UNI Europa and the EFCI.....	82
Other European trade union associations	83
Other European employer organisations and EU business associations	84
Summary	85
UNI Europa and EFCI capacity to negotiate	88
Effective participation in the industrial cleaning sector ESSDC.....	90
4. Conclusions	91
UNI Europa	91
EFCI.....	92
References	94
Annex 1: Industrial cleaning sector trade unions, employer organisations and companies	95
Annex 2: Network of Eurofound Correspondents	106

List of tables

Table 1: Demarcation of the industrial cleaning sector based on NACE codes	6
Table 2: Domain patterns of the members of an organisation.....	7
Table 3: Percentage change in number of companies, turnover and employment, 2009–2016 (%)	12
Table 4: Employment characteristics of the industrial cleaning sector, 2016	13
Table 5: Employees in the industrial cleaning sector in the EU28 and market penetration, 2017–2018.....	14
Table 6: Workforce of the three largest sectoral employers in the 28 Member States	15
Table 7: Proportion of female employees and self-employed workers within the industrial cleaning sector, 2017–2018.....	20
Table 8: Number of sector-related organisations per country, 2018	24
Table 9: NACE code coverage of 57 trade union organisations.....	25
Table 10: Membership domain patterns of sector-related trade unions in the industrial cleaning sector, 2017–2018	29
Table 11: Organisational density	30
Table 12: Collective bargaining involvement of the 57 sector trade unions	32
Table 13: NACE code coverage of 45 employer organisations and business associations	35
Table 14: Domain pattern of employer organisations/business associations	38
Table 15: Involvement in collective bargaining and number of workers covered	40
Table 16: Involvement of trade unions and employer organisations in collective bargaining	43
Table 17: Form/level of bargaining per Member State	43
Table 18: Collective bargaining coverage and level.....	44
Table 19: Frequency of consultation with trade unions and participation in bipartite or tripartite social dialogue.....	45
Table 20: Involvement of employer organisations in policymaking, 2018 (%)	48
Table 21: Tripartite and bipartite sector-specific boards of public policy	49
Table 22: Reasons for fragmentation of trade unions.....	54
Table 23: Reasons for the fragmentation of employer organisations	57
Table 24: Organisations not involved in collective bargaining and not affiliated to an EU social partner organisation.....	60
Table 25: Sector-relatedness and collective bargaining involvement of the 22 trade unions affiliated to UNI Europa	63
Table 26: Sector-related trade union affiliation to UNI Europa.....	64
Table 27: Importance of UNI Europa members at national level	66
Table 28: Sector-relatedness and involvement of EFCI member organisations in collective bargaining, 2018.....	71
Table 29: Employer organisations (and business associations) not affiliated to EFCI	72
Table 30: Sector-related employer organisations affiliated to EFCI, 2018	73
Table 31: Importance of EFCI members at national level.....	75
Table 32: Sectoral coverage of related national employer organisations affiliated to EFCI	79
Table 33: Collective bargaining coverage of related national employer organisations affiliated to the EFCI	80
Table 34: Membership structure of UNI Europa and EFCI.....	82
Table 35: Sector-related trade unions affiliated to UNI Europa and other European associations.....	83
Table 36: Sector-related national employment organisations affiliated to the EFCI and other European associations and supranational affiliate members of the EFCI, 2018	84
Table 37: Affiliations and involvement in collective bargaining in EU Member States with sector employees in excess of 64,000	86

Table 38: Affiliations and involvement in collective bargaining in EU Member States with fewer than 64,000 employees in the sector	87
Table 39: Texts agreed by the EFCI and UNI Europa in the industrial cleaning sector ESSDC	88
Table 40: Effective participation in the ESSDC for the industrial cleaning sector, 2017–2018	90
Table 41: Trade unions in the industrial cleaning sector	95
Table 42: Employer organisations in the industrial cleaning sector	98
Table 43: Companies, employment and employees in the industrial cleaning sector, and industrial cleaning sector employment as a proportion of all employees, of female employees and of self-employed workers, 2016	101
Table 44: Characteristics of the three largest companies in the sector	102
Table 45: Correspondents who contributed to the study	106

List of figures

Figure 1: Four different types of sector-relatedness	7
Figure 2: Employment growth in the industrial cleaning sector (millions)	11
Figure 3: Proportion of persons employed in companies of different sizes, 2016 (%)	18
Figure 4: Domain coverage of trade unions in the industrial cleaning sector (number of organisations)	28
Figure 5: Involvement of trade unions in different forms of collective bargaining (number; % of total)	34
Figure 6: Domain coverage of the 45 employer organisations in the industrial cleaning sector (number of employer organisations)	37
Figure 7: Involvement of employer organisations in collective bargaining (percentage of total)	42
Figure 8: Involvement of trade unions in policymaking (%)	45
Figure 9: Involvement of employer organisations in policymaking (%)	45

Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners (that is, the trade unions and employer organisations) in the industrial cleaning sector, and to show how they relate to the sector's European-level organisations representing employees and employers. The report is divided into three parts: an overview of the economic specificities and the employment trends in the industrial cleaning sector; an analysis of the social partner organisations in the 28 EU Member States; and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

In this section, the objectives of the study are presented along with a brief introduction to the chosen methodology. The context of this study is the European sectoral social dialogue committee (ESSDC) for the industrial cleaning sector, which was established in its current form in 1998 following the reorganisation of the European social dialogue.

Objectives of the study

Representativeness studies are conducted for three reasons:

- the European Commission aims to confirm the representativeness of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU)
- representativeness is one criterion for setting up an ESSDC, or to participate in one
- representativeness means also having the capacity to negotiate agreements that can lead to an implementation by Council decision as provided by Article 155 of the TFEU

Representativeness is defined by the European Commission Decision on the establishment of Sectoral Social Dialogue Committees promoting the dialogue between the social partners at European level (98/500/EC) (European Commission, 1998). It includes the following requirements for an organisation to be recognised as a representative EU social partner organisation:

- to relate to specific sectors or categories and be organised at European level
- to consist of organisations that are themselves an integral and recognised part of Member States' social partner structures and have the capacity to negotiate agreements, and are representative of several Member States
- to have adequate structures to ensure its effective participation in the work of the sectoral social dialogue committees

To accomplish the aim of the study, it first identifies the relevant national social partner organisations in the industrial cleaning sector before analysing the structure of the sector's relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both the national and European levels of interest representation. The study includes only organisations whose membership domain is classed as 'sector related'. In terms of territorial coverage, the study includes the EU28.

European sectoral social dialogue committee for the sector

European social dialogue for the industrial cleaning sector started as an informal working group in 1992. Such informal working groups aimed to promote a pragmatic and flexible form of social dialogue, oriented towards mutual understanding and trust.¹ In those early years, the European social partners involved were Euro-FIET for the trade unions and European Cleaning and Facility Services Industry (EFCI) for the employers. In 2000, Euro-FIET merged into UNI Europa.² The informal social dialogue working group itself became a formalised ESSDC in 1999, as such implementing the European Commission's decision of 1998. In their involvement in the ESSDC, EFCI and UNI Europa officially recognise each other as social partners.

Even before the official establishment of the ESSDC in 1999, the social partners in the sector had been active in formulating joint texts on topics like working time (in 1993), vocational training (in 1995) and undeclared work (in 1998).

Since the official start of the ESSDC in the industrial cleaning sector in 1998, the EFCI and UNI Europa have adopted six work programmes, the latest for the period 2019–2020. These have resulted in 24 initiatives, which are recorded in the EU social dialogue texts database. The texts the two social partners have worked on together as part of the European sector social dialogue for the industrial cleaning sector include the following:

- guides for organisations awarding contracts for cleaning services (2001), selecting best value for the public procurement of cleaning services (2004), and for private and public organisations awarding contracts for cleaning services (2016)
- an input into the European Commission proposal for a draft directive on the enforcement of the Posting of Workers (2012)
- manuals on health and safety (2000) and daytime cleaning (2007)
- joint position on prevention of undeclared work (2014)

A full list of all joint texts is included in Table 39 in the 'European level of interest representation' section.

Definitions and methodology

The methodology applied is linked to the criteria identified in the European Commission (1998) decision: sector-relatedness, membership and organisational capacity. Each of these criteria are defined here, starting with sector-relatedness.

¹ Dufresne et al (2006) distinguish informal working groups from joint committees, which are oriented more towards the development of a European system of industrial relations promoting collective bargaining at European level. In this distinction, the informal working parties were more pragmatic.

² UNI Europa is active in a variety of sectors. The section responsible for the industrial cleaning sector is often referred to as UNI Europa Property Services (and, at the global level, as UNI Property Services). For simplicity, the European-level organisation representing trade unions in the ESSDC is referred to as UNI Europa in this report.

Sector-relatedness

In agreement with the social partners and the European Commission, the industrial cleaning sector is described as covering the following NACE³ codes: 81.21, 81.22 and 81.29 (Table 1).

Table 1: Demarcation of the industrial cleaning sector based on NACE codes

81.2	Cleaning activities
81.21	General cleaning of buildings
81.22	Other building and industrial cleaning activities
81.29	Other cleaning activities

Source: NACE (Rev. 2).

NACE code 81.2 includes ‘the activities of general interior cleaning of all types of buildings, exterior cleaning of buildings, specialised cleaning activities for buildings or other specialised cleaning activities, cleaning of industrial machinery, cleaning of the inside of road and sea tankers, disinfecting and extermination activities for buildings and industrial machinery, bottle cleaning, street sweeping, snow and ice removal’.

NACE code 81.21 includes mainly: 1) general (non-specialised) cleaning of all types of buildings, such as offices, houses or apartments, factories, shops and institutions; and 2) general (non-specialised) cleaning of other business and professional premises and multi-unit residential buildings.

NACE code 81.22 includes: 1) exterior cleaning of buildings of all types, including offices, factories, shops, institutions and other business and professional premises, and multi-unit residential buildings; 2) specialised cleaning activities for buildings such as window cleaning, chimney cleaning and cleaning of fireplaces, stoves, furnaces, incinerators, boilers, ventilation ducts and exhaust units; and 3) cleaning of industrial machinery and other building and industrial cleaning activities.

NACE code 81.29 includes: 1) swimming pool cleaning and maintenance activities; 2) cleaning of trains, buses, planes, etc.; 3) cleaning of the inside of road and sea tankers; 4) disinfecting and exterminating activities; 5) bottle cleaning, street sweeping and snow and ice removal; and 6) other cleaning activities, not covered elsewhere.

It should be noted that domestic cleaning activities are excluded from these NACE codes.

Where the membership domains of trade unions and employer organisations both fall within this demarcation of the sector, this is a type of sector-relatedness called ‘congruent’ in this report. If the membership domain of an organisation goes beyond the industrial cleaning sector as described here, it is called an ‘overlap’. ‘Sectionalism’ occurs when an organisation covers a part of the industrial cleaning sector (and nothing else), whereas ‘sectional overlap’ is when an organisation covers part of the industrial cleaning sector and also has membership in other sectors (Table 2).

³ NACE refers to the ‘statistical classification of economic activities in the European Community’ – specifically, NACE Rev. 2. In the demarcation of a specific sector, reference is made to a number of NACE codes.

Table 2: Domain patterns of the members of an organisation

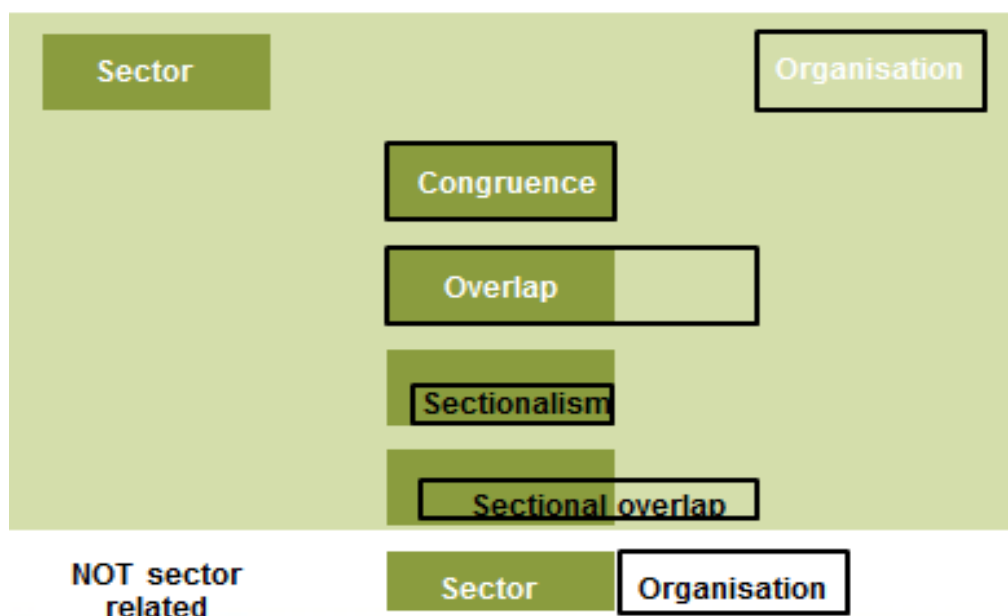
Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the domain of the union/employer organisation potentially represent all employees/companies in the industrial cleaning sector?	Does the union/employer organisation potentially represent employees/companies outside the industrial cleaning sector?
Congruent	Yes	No
Overlap		Yes
Sectional	No	No
Sectional overlap		Yes

Source: Eurofound.

The demarcation of the sector means that many sector-related trade unions have an overlapping membership domain, as they also have members in other sectors, like private security, contract catering or facilities management. It was observed that the largest companies in the sector in many EU Member States share activities in the same sectors outside industrial cleaning. The employer organisations identified in this study often cover only a section of the entire industrial cleaning sector and overlap with other sectors is more exceptional among these organisations.

Figure 1 presents the four different types of sector-relatedness graphically.

Figure 1: Four different types of sector-relatedness



Source: Eurofound.

Membership

Membership constitutes another important aspect of representativeness. Two levels of membership are examined here: first, the geographical coverage of the EU-level organisations (Member States in which the

EU-level trade union/employer organisation has affiliates); and, second, the organisational density of the national affiliates. An important aspect to be assessed is whether the EU-level players organise most, or at least the most significant, national-level players (in relation to their membership strength in the sector and their involvement in collective bargaining) or whether there are major gaps in their membership domain.

Membership of a social partner organisation requires the regular payment of membership fees; however, some organisations are reluctant to inform third parties about such payments.

Organisational capacity

The organisational capacity of the European social partners is analysed in terms of their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates. For this assessment of capacity to negotiate, the actors, their objectives and the decision-making structures provided in their statutes are considered along with the outcome, in terms of texts agreed, and the processes through which the organisations obtained mandate, support and approval from their member organisations in the negotiation process.

The involvement of their members in national-level collective bargaining is important as it shows that the affiliates are able to obtain a mandate to negotiate on behalf of their members (at least at the national level, which could then also translate to a mandate to negotiate at EU level). Where such a mandate is in place, either implicitly or explicitly, for European negotiations, these could potentially result in binding agreements or the drafting of European autonomous agreements which require implementation by social partners at the national level in line with their respective practices and traditions. The capacity to act autonomously in this way is an important contribution to the effectiveness of the ESSDC.

Finally, representativeness also depends upon the organisations' structures and resources and their capacity to mobilise the active participation of their members, aggregate the different interests of member organisations and improve their ability to act autonomously at European level. Effective participation in the ESSDC meetings is assessed in terms of presence at meetings in the two years prior to the year of publication of this report. Involving internal structures within the European organisations in the preparation for ESSDC meetings and discussion of social affairs linked to EU-level dialogue can increase efficiency and can also result in more organisations (other than those that are directly participating in the meetings) feeling represented.⁴

Data collection and quality control measures

Representativeness studies combine top-down and bottom-up approaches to data collection. The top-down approach targets all sector-related affiliates of the European associations EFCI and UNI Europa. The bottom-up approach involves looking for other organisations involved in collective bargaining related to the industrial cleaning sector in the EU Member States as well as their membership in other European-level organisations.

Unless otherwise cited, this study draws on the country studies provided by the Network of Eurofound Correspondents. Where precise quantitative data could not be obtained, estimates are provided rather than leaving a question blank.

⁴ More information on definitions of key terms can be found in Eurofound's Industrial Relations Dictionary; see <https://www.eurofound.europa.eu/observatories/eurwork/industrial-relations-dictionary>.

Thus, quantitative data may stem from three sources, namely:

- official statistics and representative survey studies
- administrative data, such as membership figures provided by the respective organisations (for example, to calculate density rates)
- estimates, expert opinions and assessments made by Eurofound national correspondents or representatives of the respective organisations

Other sources include the social dialogue texts database and data from Eurostat (Structural Business Statistics, SBS and the EU Labour Force Survey, LFS). Apart from an EFCI (2016) study with data on turnover and employment within the industrial cleaning sector in Europe, there is no other comparative data available covering the sector. However, the EFCI plans to carry out more in-depth studies in the coming years. Some national employer organisations have published interesting materials; for instance, the French employer organisation's report on the issue of digitalisation (FEP, 2018).

Quality assurance

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of drawing up this study. A preparation meeting was held with the EFCI and UNI Europa at the start of the process, in January 2018, at the premises of the European Commission.

First, combining top-down and bottom-up approaches, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents between May 2018 and July 2018. Subsequently, the Eurofound Research Manager and the authors of this report checked the consistency of the national contributions and, if necessary, asked the national correspondents to revise these during the second half of 2018.

An overview of the national contributions was made available to the European social partners to allow their affiliates to double-check the information and provide comments. As different social partner organisations were able to see the information reported by other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information provided by organisations representing similar membership, this process includes an element of mutual control and recognition.

Draft versions of the overview report were shared with the EFCI, UNI Europa and the European Commission in April 2019 for feedback and comments. The final report, considering these comments, was evaluated and approved on 17 June 2019 at Eurofound's Advisory Committee on Industrial Relations (which consists of representatives from both sides of industry as well as governments and the European Commission) in the presence of the European-level sectoral social partners identified in the report.

Structure of the report

The remainder of this report consists of three main parts. The first part provides a brief summary of the economic background and specificities of the industrial cleaning sector. The second part is an analysis of the relevant social partner organisations in the 28 EU Member States. The third part considers the representative associations at European level.

It is important to note the difference between the research and political aspects of this study. While the report offers data on the representativeness of organisations under consideration, it does not reach any definite conclusion on whether the representativeness of the European social partner organisations and their national affiliates is sufficient for participation in the European social dialogue. The actors and

decision-makers can, however, with the information and analyses provided in this report, make further statements, proclamations or decisions and develop an action plan for capacity building if necessary.

1. Economic background and employment specificities of the sector

The industrial cleaning sector in the EU provides employment to 3.8 million persons, which is 1.7% of the overall EU workforce. In terms of both the number of companies and the level of employment, the sector has expanded year after year, with the exception of the years after the 2008 crisis. From 2016 onwards, employment in the sector exceeded the pre-crisis level.

In 2016 there were about 270,876 cleaning sector companies in the EU. Besides many small companies, there are a small number of very large companies in the sector, some of which operate in several EU Member States. About 54% of the cleaning sector workforce works in companies with more than 250 employees, while 15% of the sectoral workforce is employed in companies with fewer than 20 employees. The three largest cleaning sector employers in each of the 28 EU Member States together provide employment to 29% of the sectoral workforce.

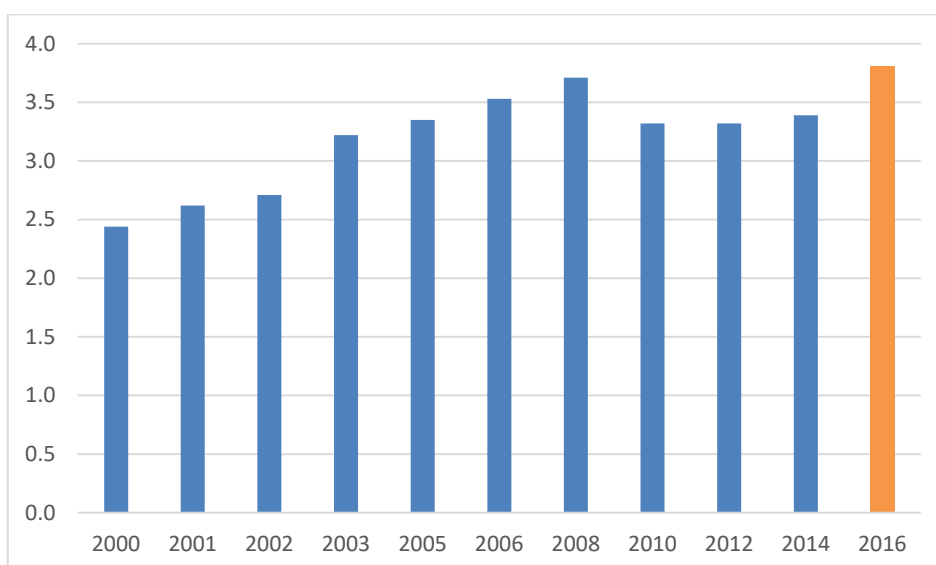
This chapter presents the trend in numbers of companies in the sector and persons employed in the sector, with a breakdown per EU Member State, and the size characteristics of companies in the cleaning sector. Subsequently, challenges for companies in the cleaning sector are considered, along with characteristics of the working conditions, and both these aspects can affect the level of organisation within the sector.

Business and employment trends in the sector

Slightly more than half of the industrial cleaning activities relate to office cleaning. Other main industrial cleaning activities are those conducted in schools and leisure accommodation (9%); hospitals (8%); industrial sites (8%); shops and commercial sites (7%); public transport (4%); and window cleaning (4%) (EFCI, 2016, p. 9).

Over time, both the number of companies and the level of employment in the sector have increased significantly. Employment increased by 50% between 1989 and 1999, and there was a further increase of 50% between 1999 and 2008. A decrease followed the economic crisis in 2008, and it was only in 2016 that employment topped the pre-crisis level (Figure 2).

Figure 2: Employment growth in the industrial cleaning sector (millions)



Source: EFCI, 2016; reference year: 2014.

In terms of the number of companies in the sector, growth has been much stronger, including in the period after 2008. This means that the average number of employees per company has fallen. EFCI data indicate that the average number of employees per company was 50 in 1990, falling to 44 in 1995, 35 in 2000 and 19 in 2012 (EFCI, 2016). In 2016, there was an average of 14 employees per company (Eurostat SBS).

Table 3 shows the percentage change between 2009 and 2016 in the number of companies, turnover and employment for each of the 28 EU Member States. The comparison of the situation in 2016 to that in 2009 reflects recovery since the economic crisis and can be viewed together with the longer-term trend illustrated in Figure 2.

Table 3: Percentage change in number of companies, turnover^a and employment, 2009–2016 (%)

Member State	EU 28	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU
Percentage change in number of companies	43	17	77	37	198	-29	57	-1	101	-18	29	-5	128	30	18
Percentage change in turnover	38	64	73	43	105	29	74	17	93	-48	12	38	34	10	46
Percentage change in employment	15	22	116	35	108	-5	29	15	26	-18	2	22	15	4	-11

Member State	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	UK
Percentage change in number of companies	15	17	177	48	415	-22	100	27	9	9	36	53	800	39
Percentage change in turnover	40	9	96	46	78	n.d. ^b	24	65	3	80	60	28	168	53
Percentage change in employment	12	3	12	24	69	n.d.	-4	-9	-7	12	30	0	2	9

Notes: ^aFor percentage change in turnover, the period is 2009–2017. n.d. = no data.

Source: Eurostat SBS

Another important trend in the industrial cleaning sector is the degree of market penetration. This is defined as the share of the global cleaning services that are contracted out to specialised industrial cleaning companies (as opposed to cleaning activities being performed by in-house employees). While there is significant variation between countries, overall the EU market penetration rate increased from 52% in 1994 to 60% in 2005 and 65% in 2014 (EFCI, 2016, p. 6).

Number of companies and employment in each EU Member State

The largest number of persons employed in the industrial cleaning sector can be found in Germany, Spain, France, the United Kingdom (UK) and Italy (Table 4). The sum of persons employed in those five countries in 2016 corresponds to a workforce of 2.9 million, or 76%, of the overall EU sectoral workforce. Taking into account Belgium and the Netherlands, the share reaches 83% of the overall EU sectoral workforce. This is partly due to the size of the workforce in the whole economy of these countries – they are the five largest countries in terms of total workforce (62% of the total EU workforce) – but it is also the case that market penetration is relatively high in those countries.

Table 4: Employment characteristics of the industrial cleaning sector, 2016

Country	Total workforce (all activities)	Employment in NACE 81.2	Number of companies in NACE 81.2	Average workers per company ^a	Sectoral employment (% of total workforce)	Employment in NACE 81.2 (% of sectoral workforce)
EU28	218,972,000	3,810,000	270,876	14	1.7	100.0
DE	40,165,100	1,075,628	38,495	28	2.6	28.2
ES	18,182,700	493,004	30,623	16	2.7	12.9
FR	26,243,400	459,485	44,609	10	1.7	12.1
UK	30,423,800	441,575	19,590	23	1.4	11.6
IT	22,241,100	437,485	33,422	13	1.9	11.5
NL	8,223,400	151,733	15,204	10	1.8	3.9
BE	4,540,600	119,166	7,471	16	2.6	3.1
PL	15,901,800	84,950	16,975	5	0.5	2.2
SE	4,735,600	78,489	10,909	7	1.6	2.0
AT	4,142,700	67,286	3,098	22	1.6	1.7
PT	4,371,200	58,385	3,694	16	1.6	1.5
DK	2,747,700	45,917	5,524	8	1.6	1.2
FI	2,379,500	44,797	4,194	11	1.8	1.1
CZ	5,015,900	34,797	6,583	5	0.6	0.9
HU	4,309,400	34,687	6,986	5	0.8	0.9
EL	3,610,300	33,095	4,948	7	0.9	0.8
RO	8,166,100	30,606	2,956	10	0.3	0.8
IE	2,066,400	28,177	2,203	13	1.3	0.7
LT	1,317,700	16,314	1,060	15	1.2	0.4
SK	2,471,700	12,481	3,976	3	0.5	0.3
BG	2,954,300	11,258	1,296	9	0.5	0.2
LU	259,400	10,494	196	53	4.0	0.2
HR	1,566,600	9,546	1,072	9	0.6	0.2
EE	612,300	9,068	594	15	1.4	0.2
LV	862,300	9,051	2,317	4	1.0	0.2
SI	902,500	8,274	2,109	4	0.9	0.2
MT	204,600	4,092	237	17	2.0	0.1
CY	353,900	2,188	587	4	0.6	0.06

Notes: Sorted by employment in NACE 81.2. Blue = countries where industrial cleaning employment corresponds to 2% or more of the total national workforce. This indicates that the sector can have relatively high importance in smaller countries in terms of the proportion of the overall workforce (Belgium, Lithuania, Malta) and in terms of higher market penetration. However, some countries with a relatively large total workforce, such as Poland and Romania, have a very small proportion employed in the industrial cleaning sector (0.5% and 0.3%, respectively). ^a'Average workers per company' is somewhat misleading as it combines many very small companies and a few very large companies. The proportion of the workforce in the largest companies is presented in Table 6.

Source: Eurostat SBS.

There is a large difference between the numbers of employees shown in Table 5 (based on data collected by the Network of Eurofound Correspondents) and the employment data in Table 4, especially for

Germany, with the number of persons in employment in the sector being 1,075,628 (Table 4, column 3) and the number of employees being 527,799 (Table 5, column 2). In Germany, the employee data (Table 5) correspond to workers who are fully liable to social security contributions, whereas the employment data (Table 4) take account of an additional 547,829 workers who are not fully liable for social security contributions and held a so-called 'mini-job' contract (see 'Part-time employment contracts and mini-jobs') or were self-employed.

Table 5: Employees in the industrial cleaning sector in the EU28 and market penetration, 2017–2018

Country	Number of employees	Employees in the sector (as % of total workforce)	Market penetration (%) (EFCI, 2016)
EU28	3,079,252	1.39	65
DE	527,799	1.65	68
FR	485,288	1.95	70
UK	472,000	1.74	75
IT	397,547	3.40	65
ES	351,535	1.89	79
NL	256,200	2.90	87
PT	69,586	1.87	80
SE	65,974	1.29	67
PL	64,430	0.51	51
AT	61,917	1.71	82
DK	47,244	1.81	56
BE	44,765	1.14	55
FI	35,000 (est.)	1.78	70
RO	29,752	0.46	n.d.
CZ	28,700	0.67	43
IE	26,000 (est.)	1.71	n.d.
HU	21,405	0.71	50†
EL	20,029	0.82	n.d.
LT	15,066	1.31	n.d.
HR	9,760	0.87	n.d.
LU	9,500	2.40	80
EE	8,922	2.00	n.d.
LV	7,485	1.27	n.d.
BG	7,206	0.30	n.d.
SI	5,561	0.76	55
SK	4,700	0.22	n.d.
MT	3,894	2.30	n.d.
CY	1,887	0.56	n.d.

Notes: Ordered by number of employees. Green shading = significantly higher than the EU average of 1.39% of the total EU workforce that is employed in the industrial cleaning sector. Yellow shading = relatively low proportion of employees in the industrial cleaning sector. n.d. = no data.

Source: Network of Eurofound Correspondents national contributions to this study (2018); market penetration percentages based on EFCI, *The Cleaning Industry in Europe, 2016* (data of 2014).

The percentages marked green are significantly higher than the EU average of 1.39% of the total EU workforce that is employed in the industrial cleaning sector. In other words, the countries with a percentage marked green have a relatively higher proportion of employees in the industrial cleaning sector, while the countries with percentages marked yellow have a relatively low proportion of employees in the industrial cleaning sector.

In the largest Member States where the industrial cleaning sector made a significant contribution to overall employment in 2016, it can be seen that the proportion of industrial cleaning employees as a percentage of total number of employees is higher than the proportion of employment as a percentage of total employment in the economy, except for Denmark and Sweden. An explanation for this can be that, in proportion, the sector employs fewer people on a self-employed basis than the total economy.

Size of the companies in the sector

The average number of employees per company in the industrial cleaning sector (Table 4) demonstrates a dual reality, with many very small companies and a few very large companies. According to EFCI data for 2014, 77% of industrial cleaning companies have fewer than 10 employees, while only 1.4% have more than 500 employees (EFCI, 2016, p. 10). To grasp the importance of these very large companies, Table 6 provides the sum of the workforce in the three largest industrial cleaning employers for each EU Member State. This corresponds to 29% of the total sectoral workforce in the EU.

Of the 270,876 industrial cleaning companies recorded in 2016, there may be a significant amount of one-person companies or self-employed workers. Even though there is no precise data available on the number of self-employed people in the sector, this reality will also have a downwards effect on the average number of employees per company.

Table 44 in Annex 1 lists the three largest companies in the industrial cleaning sector in each Member State (only two companies were recorded for Cyprus, Ireland and Malta). In total, 81 companies were recorded. The table shows that some large groups cover several countries. For instance, group ISS appears as 1 of the 3 largest companies in 11 Member States (Austria, Belgium, Czechia, Denmark, Estonia, Finland, Ireland, Portugal, Slovakia, Slovenia, Sweden), Dussmann is 1 of the 3 largest in 6 countries (Austria, Germany, Estonia, Hungary, Italy, Lithuania) and Atalian in 4 countries (Croatia, Czechia, France, Luxembourg). In over half of the companies (47), trade unions are involved, while no trade union is identified for 25 companies. Data are not available for the remaining companies. Of the 57 companies affiliated to an employer organisation, almost half (28) are affiliated to an EFCI member. Forty-nine large companies are involved in collective bargaining, mainly in multi-employer bargaining (MEB) (27) but also in single-employer bargaining (SEB) (8) or in both kinds of collective bargaining (14).

Table 6: Workforce of the three largest sectoral employers in the 28 Member States

Country	Total employees within the three largest companies	Total employment within NACE code 81.2	Share of industrial cleaning sector employment of the three largest companies (%)
AT	20,737 ^a	67,286	30.8
BE	10,631	119,166	8.92
BG	1,500	11,258	13.32
CY	700 ^b	2,188	31.99
CZ	3,500	34,797	10.05
DE	n.d.	1,075,628	n.d.
DK	10,313 ^c	45,917	22.46

Representativeness of the European social partner organisations: Industrial cleaning sector

EE	3,984	9,068	43.93
EL	1,850	33,095	5.58
ES	71,871	493,004	14.57
FI	23,272	44,797	51.94
FR	115,531	459,669	25.09
HR	3,050	9,546	31.95
HU	1,985	34,687	5.72
IE	10,000 ^d	28,177	35.48
IT	36,898	437,485	8.43
LT	3,277	16,314	20.08
LU	5,000	10,494	47.64
LV	1,395	9,051	15.41
MT	1,160	n.d.	n.d.
NL	32,973	151,733	21.73
PL	6,840 ^e	84,950	8.05
PT	11,200	58,385	19.18
RO	1,992	30,606	6.50
SE	14,974	78,489	19.07
SI	1,612	8,274	19.48
SK	1,888	12,481	15.12
UK	561,939 ^f	n.d.	n.d.
EU total	1,108,069	3,810,000	29.00

Notes: Blue = countries above the EU average. n.d. = no data. Due to lack of data, it has not been possible to calculate the share of industrial cleaning sector employment of the three largest companies in Germany, Malta or the UK. ^aTotal employees within the three largest companies (20,737) includes the total workforce of the three companies that overlap the industrial cleaning sector (also active in catering and in private security). ^bTotal number of employees within the three largest companies (700) is the total number of employees in the two largest companies. ^cTotal employees within the three largest companies (10,313) includes the total workforce of the three companies that also overlaps the industrial cleaning sector (also active in catering and in private security). ^dTotal employees within the three largest companies (10,000) is the total number of employees of the two largest companies. ^eOnly some employees within the three largest companies are industrial cleaning workers. ^fOnly some employees within the three largest companies are industrial cleaning workers.

Source: The total employees within the three largest companies is calculated based on the Network of Eurofound Correspondents (2018); data on total employment in the sector are extracted from the SBS database (2016).

The industrial cleaning sector is mainly composed of small and very small companies. According to the EFCI, in 2014 about 91.61% of companies in the sector had fewer than 50 employees and only 8.39% had more than 50 employees (in comparison to 10% in the previous representativeness study of 2012, representing a decrease in the proportion of medium and large companies). Just over three-quarters (77.5%) of the companies had fewer than 10 employees. In France, companies with fewer than 20 employees made up 80% of those having at least 1 employee in 2015, representing just 11% of employment in the sector. In Germany, 99% of companies had 0–249 employees in 2016. In the Netherlands, about 94% of companies (except for those falling under NACE code 81.22) had fewer than 10 employees. In Sweden, the sector consisted of 2,882 companies, 79.1% of which had 9 or fewer employees. Most of the companies in Spain were micro companies (fewer than 10 employees), representing 87% of all firms.

In France, the sector has large groups with more than 500 industrial cleaning employees which in 2015 accounted for 0.8% of companies and employed half of the sector's employees⁵. There is a similar situation in Belgium, where the 10 largest companies accounted for almost half of the sector's employment. In Spain, the 15 largest companies in the sector employed 42% of the workforce. In Sweden, the three largest companies in the sector employed 27% of the employees in the sector. In Portugal, the five largest companies held a market share of 28% and employed 36% of the workforce. In Germany, about 300 companies employed more than 250 workers; in total these companies employed almost half of all workers (according to the Company register). In Austria, 32 companies, recorded under NACE code 81.21, had 30,677 employees in 2015, while 2,427 small and micro companies employed just 6,092 people. In Italy, 35% of employees worked in large companies with over 250 employees as compared to 11% in the whole economy.

For the EU on average, the sector employs 1.39% of the total number of employees. However, this figure hides some important differences between the Member States, as shown in Table 5. In the largest countries, which employ over 200,000 employees, the average is slightly higher (2.25%) than the EU average. The lowest rates (under 1%) are all recorded in the new Member States. In some countries, a low rate can be explained by a significant number of undeclared workers, as in Bulgaria, Romania or Slovakia. The reason may also be related to market penetration. The countries with the highest average of employees in comparison to the total employees in the economy in the industrial cleaning sector also have rates of market penetration which are higher than the EU average (Italy, Luxembourg, the Netherlands), while the countries with lower averages have limited market penetration rates (Czechia, Hungary, Poland, Slovenia).

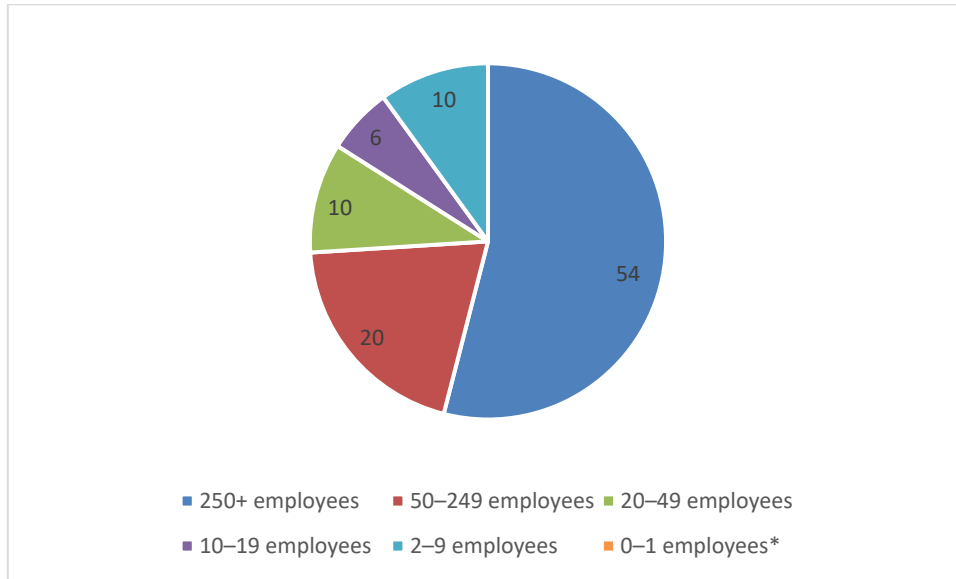
According to the EFCI, in terms of absolute numbers, Germany is the country with the largest workforce (18.18% of the total cleaning industry workforce within the EU), followed by France, the UK, Italy and Spain (all between 14.2% and 9.74% of the workforce in the EU). Together, about 68% of the total workforce of the cleaning industry is employed in these five countries.⁶

From the perspective of the employees, in 2016, 54% of the sectoral workforce were employed in a company with more than 250 employees, while 10% worked for a company with fewer than 10 employees (see Figure 3).

⁵ Companies with less than 50 employees (threshold to create a trade union) represent 92% of companies with at least one employee and 21% of employment in the sector. The high number of SMEs makes it difficult for trade unions to organise the sector and to have a strong membership. However, trade unions are organising in the 350 largest companies with over 500 employees that represent 50% of the workforce in 2015, and 0.8% of the 44,609 French industrial cleaning companies.

⁶ As mentioned earlier, based on Eurostat SBS data, the sum of persons employed in those five countries in 2016 corresponds to 76% of the overall EU sectoral workforce. Here, the figure given is 68%, but this is based on data provided by national correspondents.

Figure 3: Proportion of persons employed in companies of different sizes, 2016 (%)



Note: * Data for companies with 0–1 employee were not available.

Source: Eurostat SBS.

Challenges for companies in the industrial cleaning sector

Aspects like digitalisation, specialisation, diversification and attention to the environment may present challenges for some companies in the industrial cleaning sector.

- **Digitalisation:** Even if robots do not significantly replace employees, companies have to address this issue, which is transforming the market. As mentioned, in the study by the French employer organisation FEP (2018) the automation and robotisation of administrative tasks and the simplest trades make it possible to concentrate activities on tasks with higher added value that develop activities and improve customer relations. Management platforms and mobile solutions, coupled with the Internet of Things and opportunities for gathering data, are levers to promote business optimisation by only cleaning where and when it is necessary. Digitalisation makes it possible to develop a new economic model, with cleaning services that are as close as possible to the real needs of users and the development of new services with higher added value. Companies that are missing out on the digital transition, that are not able to innovate and offer solutions adapted to new needs, will quickly become outdated. They will lack attractiveness in the labour market and face difficulties in recruiting younger and more qualified employee profiles. Customers will have a relatively poor image of these companies, which will only provide services with low added value and will give the impression of lacking professionalism and modernity; in turn, this will lead these companies to offer ever lower prices. In this scenario, customers may be tempted to use robots or other solutions without going through a cleaning company.
- **Specialisation:** As mentioned above, there has been constant growth in specialised service markets (hospitals, industrial sites, schools and leisure locations, etc.), with an overall increase of 18.6% since 1995. To implement cleaning services in these segments, companies need to develop new skills and train their employees to cope with environmental and health and safety regulations that are more than those required for office cleaning.
- **Diversification:** Another trend, pushed by the largest companies, is to cover all tasks related to facilities management and to offer a range of services that overlap with the single cleaning market.

- Environment: A European Commission (2018) decision establishes EU ecolabel criteria for indoor cleaning services and the use of cleaning products. This, along with EU circular economy legislation, has important impacts on the sector. To clarify the challenges, the French employer organisation FEP is about to launch a study of the different impacts of the cleaning industry on the environment. It will examine air quality, lifespan of buildings, clients' well-being and water consumption. This is a wide topic, and a significant amount of information is required to summarise the most important effects. The research concerns not only France but also Europe as a whole and North America.

Working conditions in the industrial cleaning sector

This section presents some characteristics of the working conditions in the industrial cleaning sector, based on the national contributions from the Network of Eurofound Correspondents, who have highlighted some specificities in their respective countries. For instance, the workforce is characterised by a large number of part-time employees and people with a migrant background. Posted workers, temporary workers and self-employed people are not particularly prominent in the sector.

Presence of female workers

One feature of employment in the industrial cleaning sector is that it is female dominated: women make up about 65% of the sectoral workforce in the EU (Table 7). In the 26 Member States for which data are available, the share of female employees is always over 50% (except in Denmark), with peaks of over 80% in Lithuania, Luxembourg, Portugal, and the UK. Data provided by the EFCI (2016) indicate significantly higher levels, but also highlight that the proportion of women in the sector has been decreasing since 2006: from 77% in 2006 to 72% in 2014. For these eight years, it is clear that although women continue to dominate in this industry, male employment in this sector has increased slightly.

Day- vs night-time cleaning

With some exceptions, cleaning services are predominantly performed outside the usual periods of occupation of premises (EFCI, 2016). This is particularly true for office cleaning, but also applies to commercial premises or buildings with public access. Indeed, according to the EFCI (based on reasonable estimations given by the relevant national associations), on average in the EU, cleaning services are performed either early in the morning before normal working hours (30%), during normal day-time working hours (17%), in the late afternoon/beginning of the evening (45%) or after normal working hours (8%). With the exception of Spain, where night work represents 25% of industrial cleaning work, this phenomenon remains limited (8% of cleaning work).

Self-employment

Data related to self-employed people are quite heterogeneous (Table 7). In 24 Member States national correspondents provided estimates regarding the proportion of self-employed workers in the industrial cleaning sector – based on whether the proportion is less than or more than that for the whole economy. In 14 Member States the proportion of workers in the sector who are self-employed was estimated to be less than that for the total economy (Austria, Denmark, Estonia, Greece, Italy, Lithuania, Malta, the Netherlands, Poland, Romania, Slovakia, Slovenia, Spain, Sweden), while the proportion was estimated to be higher in 10 Member States (Belgium, Croatia, Cyprus, Czechia, Denmark, France, Hungary, Latvia, Portugal, the UK). Self-employed workers represent a significant share of the workforce in Czechia (25%), in the UK (16%) and in the Netherlands and Portugal (both 12%).

Table 7: Proportion of female employees and self-employed workers within the industrial cleaning sector, 2017–2018

Member State	Proportion of female employees (%)	Proportion of self-employed workers (%)
AT	66.5	4.6
BE	57	
BG	65	
CY	70 (est.)	
CZ	66	25
DE	64	
DK	34	10
EE	n.d.	
ES	74.6	4
FI	70	
FR	65	5
EL	68	10
HR	63	
HU	61	
IE	n.d.	4
IT	65	
LT	80–90 (est.)	
LU	83	
LV	53	
MT	60 (est.)	
NL	76	12
PL	70 (est.)	
PT	90	12
RO	59	0.12
SE	70–80	
SI	76	8
SK	64	
UK	82	16

Source: Network of Eurofound Correspondents, 2018.

Part-time employment contracts and mini-jobs

One of the main characteristics of the sector is the frequent use of part-time employment contracts (especially for Austria, Belgium, the Netherlands, the UK), with employees often working under several contracts simultaneously. Part-time work remains the most frequent form of employment in the industry, covering 66% of the workforce (EFCI, 2016). As a result of the high level of part-time work, the weekly working hours per person in the industrial cleaning industry is relatively low. According to the EFCI, employees work for 23 hours per week on average in the EU, with some countries having relatively low averages, such as the UK (13 hours) or Germany (15 hours).

'Mini-jobs' are especially prevalent in Germany: while 527,799 workers fully liable for social security contributions are recorded under NACE 81.2, another 516,088 workers were not fully liable for social security contributions and held a so-called mini-job contract. This means that about one-half of the workers within the sector work for a very limited number of hours. In France, 36% of employees have at least two employers and, as is the case in some other countries (Czechia, Greece, the UK), have precarious job security. In Austria, 61% of employees in the sector work part time. In the Netherlands, 56% work fewer than 20 hours, compared to 19% in the entire national economy.

Migrant workers and diversity

Some countries reported large numbers of migrant workers (Austria, Denmark, Germany, Malta and the UK), workers occasionally employed by temporary work agencies (Cyprus, Malta) or foreign background employees (Belgium). In London, 37% of the sectoral workforce is considered 'migrant'. EFCI estimation of migrant workers in the sector indicates an overall average of 40%, though with enormous differences between countries – from 1% in Poland to 96% in Luxembourg. Rates in the largest countries are as follows: Germany (35%), France (29%), the UK (24%), Italy (15%) and Spain (17%). The importance of undeclared workers is also mentioned in Belgium, Bulgaria, Greece, Romania. However, the sector is also seen positively as one that integrates migrants into the labour market (Finland) and provides training (France) and positions for disabled employees (Poland).

Vocational training

In general, vocational training is mainly provided in the largest groups operating within the sector and less frequently in the SMEs that dominate the sector. Training is considered an important issue by the EU social partners. The EFCI is to launch an EU-funded project, with the support of UNI Europa, that will focus on digital skills training and development. In some countries, the social partners jointly or the employer organisations individually have launched some interesting initiatives.

In France, companies contribute to vocational training through compulsory social contributions paid to specific bipartite bodies, managed by social partners (OPCAs) that will be merged with other sectoral bodies within the framework of the vocational training reform adopted in 2017. French social partners work together to improve skills within the sector and, thus, increase its visibility and competitiveness. This also makes positions more attractive to new employees. In addition, professional diplomas have been created that are recognised at national level (CAP Agent de Propreté et d'Hygiène, BAC PRO Hygiène Propreté et Stérilisation, BTS Métiers des Services à l'Environnement, Titre Certifié de Niveau II 'Responsable de Service Hygiène et Propreté').

In the UK, the British Institute of Cleaning Science is the largest independent professional and educational body within the cleaning industry, with over 30,000 individual and corporate members around the world. Its mission is to raise the standards of education and build awareness of the cleaning industry through professional standards and accreditation training. In Austria, the employer organisation BIG has built a training centre to increase the offer of training for its members. However, such initiatives do not exist in most of the Member States, including larger States like Italy and Spain. The EFCI is to launch a comparative study of the different practices within the EU during 2019–2020.

Temporary work and posting of workers

Data about the proportion of temporary agency workers and posted workers are generally missing. In the main Member States (based on number of employees), the proportion of temporary workers in the industrial cleaning sector is higher than that for the entire national economy (for example, in the Netherlands 14% of workers in the sector are temporary compared to 4% in the national economy as a

whole). In France, temporary agency workers are mainly used in the recruitment process, with trial periods leading to fixed-term employment contracts. In Germany, temporary agency work is of low importance, as is posting of workers. This may be because of the strong role of mini-job contracts, which are an important instrument of flexibilisation. In Spain, the share of temporary workers reaches 8% within the sector in comparison to 19% in the entire economy.

The largest part of the workforce, by far, consists of cleaners operating at clients' premises. These figures have remained quite stable over the years, at around 88–89% (EFCI, 2016).

According to the national correspondents, the proportion of posted workers in the sector is higher than for the national economy as a whole in Poland (estimate, no data available) but lower in France, Germany, Italy, Spain and Sweden. There is no evidence of significant use of posted workers in the other countries.

Health and safety issues

Regarding health and safety at work in the sector, in 2018 the Austrian employer organisation WKO-BID published a comprehensive handbook (WKO, 2018a, 2018b).

How sector specificities impact the level of organisation

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

In France, companies with fewer than 50 employees (the threshold to create a trade union within the company) represent 92% of companies with at least 1 employee and 21% of employment in the sector. This high number of SMEs makes it difficult for trade unions to organise the sector. However, unions are present in the largest group, which has more than 500 employees and represents 50% of the workforce. In the Netherlands, it is also more difficult in industrial cleaning than in other sectors for trade unions to organise employees, due to the large number of small companies and the high number of part-time workers. Furthermore, lack of education opportunities and language challenges faced by employees can make it difficult for trade unions to communicate efficiently with their affiliates. In Belgium, trade unions highlight that part-time workers and migrants are harder to reach. In Austria, it is also difficult for trade unions to organise cleaning workers since vulnerable workers in particular, like this group, can easily be replaced and are often not inclined to join a union. Moreover, works councils are rare in the industry. In Poland, as the sector is composed of private companies that mostly employ low-skilled workers, the industrial cleaning sector is not a good 'environment' for trade unions. The practice of outsourcing also explains the difficulties in joining a union. For instance, in Italy, subcontracting agreements usually encompass different workplaces, and cleaning workers are generally highly isolated, working in small numbers in dispersed locations; this makes it difficult for trade unions to organise them. The same is true in Portugal, where union organisation is much more difficult in workplaces where working hours are outside normal business hours, because workers are isolated.

The situation is diverse when it comes to employer organisations. In some countries (such as Austria), membership of an employer organisation is compulsory; in others (such as Poland), companies seem not to be interested in establishing an employer organisation at all. In France, it is difficult for employer organisations to organise the sector. This may be due to the high number of self-employed companies (27,301 are recorded as self-employed under the status of 'auto-entrepreneur') and SMEs with fewer than 50 employees, as these employers might be reluctant to pay membership fees to an employer organisation.

Similarly, in Sweden, the high proportion of small companies makes it difficult to organise the sector, as they do not necessarily want to join an employer organisation, and so the employer organisation mainly represents the largest companies.

In Belgium, ABSU-UGBN – the only employer federation within Joint Committee 121 (where social partners negotiate collective agreements) – has approximately 176 members. Compared to the total number of companies in the sector (more than 2,000), this is relatively small. However, these 176 companies employ approximately 37,000 workers out of the sector total of around 44,500. Thus, it is clear that it is especially the larger companies that are affiliated to employer organisations, while a significant number of SMEs and microenterprises are not. The situation is comparable in Portugal, where the only existing employer association involved in collective bargaining (APFS) has 50 members with approximately 40,000 workers; that is, 1% of the companies and 71% of the workers in the sector. All members of the APFS board represent companies with more than 1,000 workers. Furthermore, almost two decades ago, a second employer organisation in the sector signed a collective agreement (CCT ANEL – STAD), but this agreement was never revised and due to the lack of internal elections during a period of six years, the association was dissolved in 2011. It was reported that recently this situation has further evolved. Generally, however, this can be seen as a symptom of the difficulty in representing companies in the sector, as can the number of countries with no sector-related trade unions or employer organisations (see Table 8 in the ‘National level of interest representation’ section).

2. National level of interest representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the industrial cleaning sector.

Table 8 shows, for each Member State, how many trade unions and how many employer organisations there are in the industrial cleaning sector, as identified by the Network of Eurofound Correspondents. There are 55 sector-related trade unions across 21 EU Member States and 39 sector-related employer organisations across 16 EU Member States. Additional business associations are also identified in Bulgaria, Czechia, Estonia, Greece, Hungary, Latvia, Malta and Poland that are not considered to be employer organisations for the purposes of this assessment of the representativeness of European social partners (see ‘Methodological considerations’ in the ‘European level of interest representation’ section).

Table 8: Number of sector-related organisations per country, 2018

Number of sector-related organisations	EU Member States with respective number of trade unions in the industrial cleaning sector overall	EU Member States with respective number of employer organisations in the industrial cleaning sector overall
0	CZ, EE, HR^a , HU^b , LV, RO, SK	BG, CZ^c , EE ^d , EL ^e , HR, HU , LT, LV ^f , MT ^g , PL , RO ^h , SKⁱ
1	EL, IE, LT, MT, PL	BE, CY, IE, LU, PT, UK
2	BG, DE, DK, ES, LU, NL	AT, DE, DK, ES, FR, NL
3	BE, CY, FI, PT, SI	FI
4	AT, IT, UK	SE
5	SE	SI
6	FR	
7		
8		
9		IT

Notes: Red text = countries where there are sector-related trade unions or employer organisations but they have not been included in this report because they are not involved in collective bargaining or are not affiliated to a European social partner organisation. ^{a+b}These trade unions (HR and HU) are not involved in collective bargaining and are not affiliated to UNI Europa. If these had not been included in this report, there would be no sector-related trade unions in Croatia or Hungary, bringing the total number of sector-related trade unions to 55 instead of 57. In Table 24, some trade unions and business associations are mentioned that were not included in this study and in the table above. Especially for some countries where no trade union or employer organisation could be identified, it is recommended to read Table 8 in combination with Table 24 and the methodological considerations before and after Table 24. HR: The trade union SCIO is neither involved in collective bargaining nor affiliated to the EFCI. It has members in the largest cleaning sector company, which employs about half of the cleaning sector workforce in Croatia. HU: The trade union HVDSZ 2000 reported being involved in SEB in a company outside of the cleaning sector. ^cSK ČR, the employer organisation in Czechia, only covers chimney-sweeping activities; it is not involved in collective bargaining, nor is it affiliated to the EFCI. This means that there is no employer organisation covering the entire cleaning sector in Czechia. ^dThe employer organisation EKKL includes the largest industrial cleaning sector companies in the country; however, in principle, the association itself covers companies active in NACE 81.1 activities. A separate cleaning service is available in their service package; thus, we have included those companies in Table 6 on the three largest companies, but we have excluded the association as an employer organisation as it is not sector-related according to its status. ^eThe employer organisation PENEKA does not participate in collective bargaining in the industrial cleaning sector, and it is not affiliated to an EU employer organisation. Thus, PENEKA is not included in the representativeness study even though some large companies in the sector are affiliated to this organisation. ^fLPUAA is not involved in sector-level collective bargaining or affiliated to a European sector-related organisation. Thus, the employer organisation has not been included in this representativeness study. However, the three largest companies are affiliated to LPUAA (see Table 44 in Annex 1). ^gThere is an employer organisation (MCCA), but it does not participate in collective bargaining in

the industrial cleaning sector and is not affiliated to an EU employer organisation. Thus, MCCA is not included in the representativeness study even though some large companies in the sector are affiliated to it. ^bA collective agreement was signed by the largest employer in the sector and the employee representative elected to take part in collective bargaining. There is no works council and no trade union. ¹In Slovakia there is also KKS which is not included in this study as it is not involved in collective bargaining and not affiliated to any European social partner organisation. KKS is a member of ESCHFOE and the European Federation of Chimney Sweeps.

Source: Network of Eurofound Correspondents, 2018.

As shown in Table 8, 7 EU Member States (Croatia, Czechia, Estonia, Hungary, Latvia, Romania, Slovakia) were identified as having no trade unions in the industrial cleaning sector, 12 (Bulgaria, Croatia, Czechia, Estonia, Greece, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia) have no employer associations, and 7 (Croatia, Czechia, Estonia, Hungary, Lithuania, Romania, Slovenia) have neither a trade union nor an employer organisation.

In 11 countries, one or two trade unions have members within the sector. There are five countries with three trade unions (Belgium, Cyprus, Finland, Portugal, Slovenia), three with four trade unions (Austria, Italy, the UK), one with five trade unions (Sweden) and, finally, France, which has six trade unions within the industrial cleaning sector. On the employer side, sector-related employer organisations were identified in 16 Member States. Most countries have only one or two of these, while there are three in Finland, four in Sweden, five in Slovenia and nine in Italy. Additionally, some business associations are not considered sector-related employer organisations for the purposes of this study (see ‘Methodological considerations’ in the ‘European level of interest representation’ section).

Industrial cleaning sector coverage, sector-relatedness and organisational density of trade unions

Of the 57 trade unions active in the industrial cleaning sector, 41 cover all three NACE codes encompassing the industrial cleaning sector (81.21, 81.22 and 81.29) (Table 9). Of the 23 Member States with sector-related trade unions, 22 have at least 1 trade union that covers the entire sector within its membership domain. In some countries, chimney cleaning historically belongs to a single trade union that does not cover any other activities in the industrial cleaning sector. That is why some general trade unions only partially cover NACE code 81.29 (GBH in Austria; PAM in Finland; Fastighets, Ledarna and Unionen in Sweden; and Unison and PCS in the UK) and other trade unions cover only chimney cleaning (ZDS in Germany).

Table 9: NACE code coverage of 57 trade union organisations

Country	Trade union	NACE 81.21	NACE 81.22	NACE 81.29
AT	Vida	Yes	Partially (not 81.22-1 or 81.22-9)	Yes
	GPA-djp	Yes	Yes	Yes
	Yunion	Yes	Yes	Partially (not 81.29-1)
	GBH	No	Partially (not 81.22-9)	Partially (not 81.29-1 or 81.29-9)
BE	AC-CG	Yes	Yes	Yes
	ACV V&D-CSC A&S	Yes	Yes	Yes
	ACLVB-CGSLB	Yes	Yes	Yes

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Trade union	NACE 81.21	NACE 81.22	NACE 81.29
BG	FITUGO	No	No	Yes
	Podkrepa CL	No	No	Yes
CY	OIYK-SEK	Yes	Yes	Yes
	SEBETTYK-PEO	Yes	Yes	Yes
	PASEY-PEO	No	Partially (only in two airports)	No
CZ	None	Not relevant	Not relevant	Not relevant
DE	IG BAU	Yes	Yes	Yes
	ZDS	No	No	Partially (only chimney cleaning)
DK	3F	Yes	Yes	Yes
	Serviceforbundet	Yes	Yes	Yes
EE	None	Not relevant	Not relevant	Not relevant
EL	OIYE	Yes	Yes	Yes
ES	CCOO CS	Yes	Yes	Partially (not railway cleaning)
	FeSMC-UGT	Yes	Yes	Yes
FI	PAM	Yes	Yes	Partially (not street cleaning or chimney sweeping)
	PRO	Yes	Yes	Partially (not street cleaning or road cleaning)
	JHL	Yes	Yes	Yes
FR	FNPD-CGT	Yes	Yes	Yes
	FS CFDT	Yes	Yes	Yes
	FEETS-FO	Yes	Yes	Yes
	CFTC-CSFV	Yes	Yes	Yes
	FNECS CFE-CGC	Yes	Yes	Yes
	UNSA	Yes	Yes	Yes
HR	SCIO ^a	Yes	Yes	Yes
HU	HVDSZ 2000 ^b	Yes	Yes	Yes
IE	SIPTU	Yes	Yes	Yes
IT	FILCAMS CGIL	Yes	Yes	Yes
	FISASCAT CISL	Yes	Yes	Yes
	UIL Trasporti	Yes	Yes	Yes
	Fesica Confsal	Yes	Yes	Yes
LT	JKUDPS	Yes	Yes	Yes
LU	OGBL	Yes	Yes	Yes
	LCGB	Yes	Yes	Yes
LV	None	Not relevant	Not relevant	Not relevant
MT	GWU	Yes	Yes	Yes
NL	CNV Vakmensen	Yes	Yes	Yes
	FNV	Yes	Yes	Yes

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Trade union	NACE 81.21	NACE 81.22	NACE 81.29
PL	MOZ NSZZ Solidarność POCS	Yes	Yes	Yes
PT	STAD	Yes	Yes	Yes
	SITese	Yes	Yes	Yes
	CESP	Yes	Yes	Yes
RO	None	Not relevant	Not relevant	Not relevant
SE	Kommunal	Yes	Yes	Yes
	Fastighets	Partially (not domestic services workers)	Yes	Partially (not chimney sweeping)
	Ledarna	Yes	Yes	Partially (not chimney sweeping)
	Unionen	Yes	Yes	Partially (not chimney sweeping)
	SEKO ^c	Yes	n.d.	n.d.
SI	SOPS	Yes	Yes	Yes
	SKVNS	Yes	Yes	Yes
	KNSS	Yes	Yes	Yes
SK	None	Not relevant	Not relevant	Not relevant
UK	Unison	Yes	Yes	Partially (not chimney sweeping)
	GMB	Yes	Yes	Yes
	Unite the Union	Yes	Yes	Yes
	PCS	Yes	Yes	Partially (not chimney sweeping)

Notes: **Bold** = member of UNI Europa. **Blue text** = affiliated to UNI Europa according to the national correspondents, but UNI Europa has confirmed that they are only affiliated because of cover for their members in other service sectors. **Red text** = not involved in collective bargaining, nor affiliated to UNI Europa; if they had not been included in this report, there would have been no sector-related trade unions for Croatia or Hungary. ^aSCIO is the only trade union in the sector in Croatia, but it is very small and without any influence at sectoral level. Its 105 members are employed in the largest firm (Atalian, 2,200 employees), but there is no company-level collective bargaining at this level. ^bDespite not being affiliated to UNI Europa and, as of August 2019, not being involved in collective bargaining, HVDSZ 2000 has been included because it is involved in single-employer bargaining in another sector and could potentially participate in collective bargaining at company level in the future as it has members within the cleaning sector. ^cThe national correspondent received no answer from SEKO; therefore, data are missing.

Source: Network of Eurofound Correspondents, 2018.

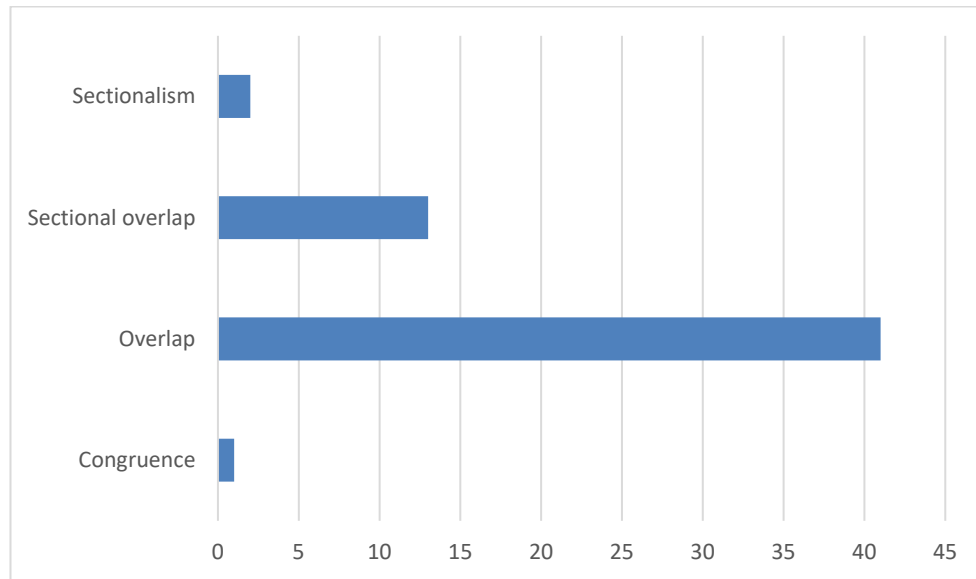
Trade unions were assessed on how they relate to the sector according to the four patterns of sector-relatedness (see Figure 4 and Table 10). Only one trade union demarcates its domain in a way that is perfectly congruent with the industrial cleaning sector as defined for this study (Denmark). In addition, there are 41 trade unions with an overlap domain – that is, covering the whole of the industrial cleaning sector while also having members in other sectors (these are found in Austria, Belgium, Cyprus, Denmark, Finland, France, Greece, Hungary, Ireland, Italy, Lithuania, Malta, the Netherlands, Poland, Portugal, Slovenia, Sweden, the UK).

Two trade unions (Croatia, Germany) cover only parts of the sector, as they only organise chimney cleaners (though there may be sectional trade unions in other countries that only represent chimney cleaners). The

remaining 13 trade unions partially cover the industrial cleaning sector as well as providing representation beyond it.

In summary (see Figure 4), 41 (72%) of the 57 sector-related trade unions cover the entire industrial cleaning sector plus workers outside the sector (overlap), while 13 (23%) have a sectional overlap domain pattern. For 2 (3.5%) trade unions out of the 57, there is a sectional pattern, and 1 (1.75%) has a congruent pattern. For the remainder, the domain demarcation is one of over-sectionalism.

Figure 4: Domain coverage of trade unions in the industrial cleaning sector (number of organisations)



Source: Network of Eurofound Correspondents, 2018.

All the trade unions with an overlapping or a sectional overlapping membership domain have members in other sectors. This is the case for 54 (98%) of the 57 sector-related trade unions. In addition to the industrial cleaning sector, these trade unions cover private security, contract catering or other facilities services. For instance, private security is covered by FNECS CFE-CGC and FEETS-FO in France; the FNV in the Netherlands; Vida in Austria; MOZ NSZZ Solidarność POCS in Poland; ACV-CSC and ACLVB-CGSLB in Belgium; STAD in Portugal; Fesica Confisal in Italy, and CCOO CS and FeSMC-UGT in Spain. Some other trade unions cover private security or catering, such as the Italian trade unions FILCAMS CGIL and FISASCAT CISL, the French UNSA and the two Belgian trade unions previously mentioned. On the employer side, it seems that these are mainly specialised by section, but some of them also cover private security or catering. In Sweden, Almega covers all aspects of facilities management. In Spain, ASPEL covers private security. In Portugal, APFS covers all facilities services. In Poland, PIGC covers private security, catering and all other facilities services. In Italy, Legacoop Servizi and Federlavoro cover both the catering sector and cleaning sector. In Spain, facilities management companies are trying to create their own employer organisation.

The same overlapping trend is also found among the largest companies within the sector (see Table 44 in Annex 1). Besides their activities in the industrial cleaning sector, these often cover different kinds of services, including other facilities management services, catering or private security. In Austria, market-related activities have been diversified towards integrated services and facilities management rather than just cleaning services.

Table 10: Membership domain patterns of sector-related trade unions in the industrial cleaning sector, 2017–2018

Country	Congruent	Sectional	Overlap	Sectional overlap
AT			GPA-djp	Vida, Younion, GBH
BE			ACV V&D-CSC A&S, AC-CG, ACLVB-CGSLB	
BG				FITUGO, Podkrepa CL
CY			SEBETTYK-PEO, OIYK-SEK	PASEY-PEO
CZ				
DE		ZDS		IG BAU
DK	Serviceforbundet		3F	
EE				
EL			OIYE	
ES				CCOO CS, FeSMC-UGT
FI			PAM, PRO, JHL	
FR			FS CFTD, CFTC-CSFV, UNSA, FNECS CFE-CGC, FEETS-FO, FNPD-CGT	
HR		SCIO ^a		
HU			HVDSZ 2000 ^b	
IE			SITPU	
IT			FILCAMS CGIL, FISASCAT CISL, UIL Trasporti, Fesica Confsal	
LT				JKUDPS
LU			OGBL, LCGB	
LV				
MT			GWU	
NL			FNV, CNV Vakmensen	
PL			MOZ NSZZ Solidarność POCS	
PT			STAD, SITESE, CESP	
RO				
SE			Kommunal, Ledarna, Unionen, SEKO ^c	Fastighets
SI			SOPS, SKVNS, KNSS	
SK				
UK			Unite the Union, GMB	Unison, PCS

Notes: Bold = member of UNI Europa. Blue text = affiliated to UNI Europa according to the national correspondents, but UNI Europa has confirmed that they are only affiliated because of cover for their members in other service sectors. Red text = not involved in collective bargaining, nor affiliated to UNI Europa. ^aSCIO is the only trade union in the sector in Croatia, but it is very small and without any influence at sectoral level. Its 105 members are employed in the largest firm (Atalian, 2,200 employees), but there is no company-level collective bargaining at this level. ^bDespite not being affiliated to UNI Europa and, as of August 2019, not being involved in collective bargaining, HVDSZ 2000 has been included because it is involved in single-employer bargaining in another sector and could potentially participate in collective bargaining at company level in the future as it has members within the cleaning sector. ^cThe national correspondent received no answer from SEKO; therefore, data are missing. We estimate that SEKO overlaps the sector.

Source: Network of Eurofound Correspondents, 2018.

In what follows, the membership strength (organisational density) of trade unions in the industrial cleaning sector is assessed. Table 11 presents information for trade unions for which relevant data are available (data are missing for 15 out of 57 organisations). The incompleteness of the available data means that it is difficult to compare the relative membership strength of each individual trade union. However, the density rate is high (over 50%) in Belgium, Finland, Italy, Malta and the Netherlands. Overall, with few exceptions, the organisational density of trade unions in the industrial cleaning sector is rather low; although it should be borne in mind that for some countries, data for the largest unions in the sector are missing (such as Denmark, France, Germany). Table 11 is, therefore, likely to underestimate the organisational density of trade unions in the industrial cleaning sector. The next section considers the relevance of each trade union in the sector depending on its involvement in sector-related collective bargaining.

Table 11: Organisational density

Country	Total sector employees	Trade union members in the sector (how many unions covered by data)	Density (%)
AT	61,917	13,500 (all)	21.8
BE	47,765	31,400–41,400 (all)	65.0–86.0
BG	7,206	119 (all)	10.4
CY	1,887	1,707 (all)	6.3
CZ	28,700	0	0.0
DE	527,799	6,500 (1 out of 2)	1.2
DK	47,244	800 (1 out of 2)	1.7
EE	8,922	0	0.0
EL	20,029	1,000 (all)	5.0
ES	351,535	4,805 (all)	1.3
FI	35,000 (est.)	39,600 (all)	89.0
FR	485,288	10,179 (1 out of 7)	2.0
HR	9,760	100 (all)	1.0
HU	21,405	n.d.	n.d.
IE	26,000 (est.)	n.d.	n.d.
IT	397,547	231,577 (3 out of 4)	52.8
LT	15,066	100 (all)	0.6
LU	9,500	5,210 (all)	54.0
LV	7,485	0	0.0
MT	3,894	2,415 (all)	62.0
NL	256,000	160,000 (1 out of 2)	62.5
PL	64,430	2,200 (all)	3.4
PT	69,586	6,226 (all)	8.9
RO	29,752	0	0.0
SE	65,974	27,230 (all)	41.2
SI	5,661	1,600 (2 out of 3)	28.2
SK	4,700	0	0.0
UK	472,000	11,000 (1 out of 4)	2.3

Note: n.d. = no data.

Source: Network of Eurofound Correspondents, 2018.

Trade union involvement in collective bargaining

In the previous section, sector-relatedness and membership strength of sector-related trade unions was considered, while in this section the involvement of the unions in collective bargaining is analysed. Table 12 shows whether trade unions are involved in MEB (generally covers all member organisations of the employer organisations which are party to an agreement) or SEB (covers only the workforce in this employer) and indicates the share and the number of workers covered by such agreements. It should be noted that this table is based on estimates that have been provided by members of the Network of Eurofound Correspondents or inferred from general information about collective bargaining coverage (particularly where such coverage is near universal) and systems for the extension of collective agreements (see, for example, Eurofound, 2015; Oesingmann, 2016).

Almost all trade unions in Table 12 reported being involved in collective bargaining. For 72% this is either MEB at sector level only (42%) or MEB in combination with SEB at company level (30%). Meanwhile, 23% of trade unions are only involved in SEB. This is the case in Bulgaria, Cyprus, Lithuania, Malta, Poland and the UK, all of which are countries without established sector-level collective bargaining practices.

Table 12 shows the collective bargaining involvement of the 57 sector trade unions.

Table 12: Collective bargaining involvement of the 57 sector trade unions

Country	Trade union	MEB	SEB	Percentage covered	Number of workers covered by collective bargaining agreements
AT	Vida	x		>95	59,000
	GPA-djp	x	x		
	Younion	x	x		
	GBH	x			
BE	AC-CG	x	x	100	44,765
	ACV V&D-CSC A&S	x	x		
	ACLVB-CGSLB	x	x		
BG	FITUGO		x	<10	700
	Podkrepa CL		x		
CY	OIYK-SEK		x	5	94
	PASEY-PEO		x		
	SEBETTYK-PEO		x	1.2	22
CZ	None			Not relevant	0
DE	IG BAU	x	x	100	527,000
	ZDS	x			
DK	3F	x		30	47,244
	Serviceforbundet	x			
EE	None			Not relevant	0
EL	OIYE			Not relevant	0
ES	CCOO CS	x	x	90	316,381
	FeSMC-UGT	x	x		
FI	PAM	x		90–100	30,000 (est.)
	PRO	x			
	JHL	x			
FR	FNPD-CGT	x	x	100	485,288
	FS CFTD	x	x		
	FEETS-FO	x	x		
	CFTC-CSFV	x	x		
	FNECS CFE-CGC	x	x		
	UNSA		x	–	n.d.
HR	SCIO^a			Not relevant	0
HU	HVDSZ 2000^b			Not relevant	0
IE	SIPTU	x	x	100	28,000
IT	FILCAMS CGIL	x	x	90	377,669
	FISASCAT CISL	x	x		
	UIL Trasporti	x	x		
	Fesica Confsal	x			n.d.
LT	JKUDPS		x	3	2,500
LU	OGBL	x		100	9,500
	LCGB	x			

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Trade union	MEB	SEB	Percentage covered	Number of workers covered by collective bargaining agreements
LV	None			Not relevant	0
MT	<i>GWU</i>		x	30	1,168
NL	CNV Vakmensen	x		39	100,000 of a total sectoral workforce of 256,200
	FNV	x			
PL	MOZ NSZZ Solidarność POCS		x	0.3	193
PT	STAD	x		100	69,586
	SITese	x			
	CESP	x			
RO ^c	None			2.5	699
SE	Kommunal	x		90	62,675
	Fastighets	x			
	Ledarna	x			
	Unionen	x			
	SEKO	x			
SI	SOPS	x		97	4,175
	SKVNS	x			
	KNSS	x			
SK	None			Not relevant	0
UK	Unison		x	n.d.	n.d.
	GMB		x		
	Unite the Union		x		
	PCS		x		

Notes: **Bold** = member of UNI Europa. *Blue text* = affiliated to UNI Europa according to the national correspondents, but UNI Europa has confirmed that they are only affiliated because of cover for their members in other service sectors. *Red text* = not involved in collective bargaining, nor affiliated to UNI Europa; if they had not been included in this report, there would have been no sector-related trade unions for Croatia or Hungary. *n.d.* = no data. ^aSCIO is the only trade union in the sector in Croatia, but it is very small and without any influence at sectoral level. Its 105 members are employed in the largest firm (Atalian, 2,200 employees), but there is no company-level collective bargaining at this level. ^bDespite not being affiliated to UNI Europa and, as of August 2019, not being involved in collective bargaining, HVDSZ 2000 has been included because it is involved in single-employer bargaining in another sector and could potentially participate in collective bargaining at company level in the future as it has members within the cleaning sector. ^cA collective agreement was signed by the largest employer within the sector and the representative of the employees that was elected and appointed for collective bargaining. There is no works council and no trade union.

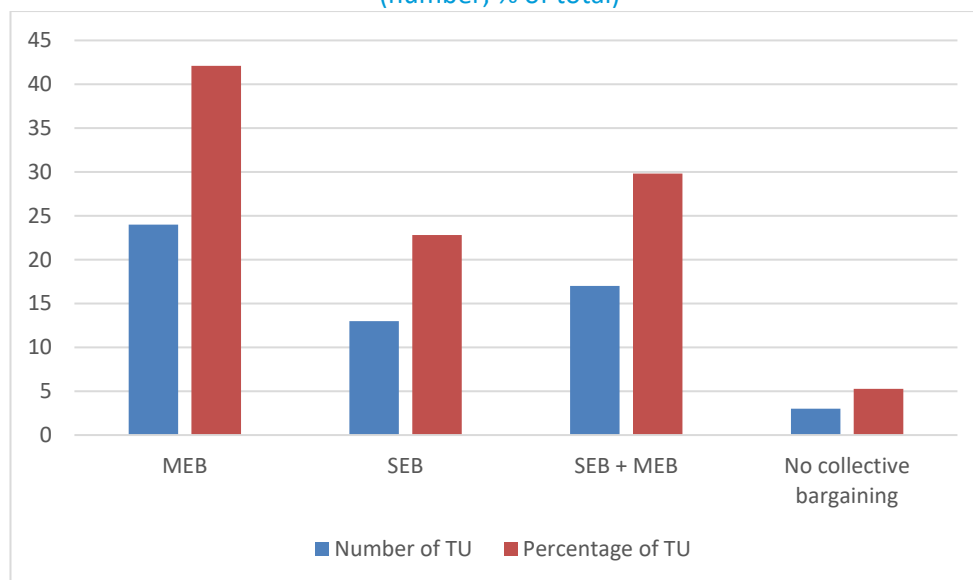
Source: Network of Eurofound Correspondents, 2018.

Figure 5 shows the involvement of trade unions in collective bargaining. Thirty per cent of trade unions in the industrial cleaning sector are involved in both MEB and SEB. A further 23% engage only in SEB, and 42% participate only in MEB. In total, 95% of the trade unions identified within the sector participate in collective bargaining (and 72% participate in MEB). Five per cent of the trade unions do not participate in collective bargaining. As no trade unions were recorded in Czechia, Estonia, Latvia, Romania or Slovakia, there were obviously no trade unions involved in collective bargaining in these countries.

Practices in this sector tend to follow the general industrial relations practices in their Member States. For instance, trade unions in Austria, Belgium, France, Germany, Italy and Spain are generally involved in both

MEB and SEB, trade unions in the Nordic countries are only involved in MEB (Denmark, Finland, Sweden) and, in the Baltic states and a number of central and eastern European countries, when trade unions are identified, SEB is more common. All but one of the 22 trade unions affiliated to UNI Europa participate in collective bargaining.

Figure 5: Involvement of trade unions in different forms of collective bargaining (number; % of total)



Source: Network of Eurofound Correspondents, 2018.

In six countries the collective agreement coverage reaches 100% (Belgium, France, Germany, Ireland, Luxembourg, Portugal), mainly because the practice of extending collective agreements is pervasive, while in six other countries the coverage is nearly 100% (Austria, Finland, Italy, Slovenia, Spain, Sweden) because of compulsory membership in the employer organisations (chambers) or due to extension of collective agreements⁷ (Belgium, France, Luxembourg, the Netherlands, Spain). In the Nordic countries (Finland, Sweden) coverage is generally good due to high levels of membership in trade unions and employer organisations.

Only SEB takes place in Bulgaria, Cyprus, Lithuania, Malta, Poland and the UK – countries without established sector-level collective bargaining practices. Because of the focus on company-level collective bargaining in these countries, a check was carried out to ascertain whether there are any company-level trade unions involved in collective bargaining. This did not appear to be the case within the largest industrial cleaning sector companies in these countries.

Sector-relatedness and membership strength of employer organisations

A total of 45 employer organisations involved in collective bargaining or affiliated to the EFCI were identified in the industrial cleaning sector by the Network of Eurofound Correspondents. These cover 20

⁷ ‘Extension’ of collective agreements refers to a practice by which such agreements are applied to workers and employers not party to collective bargaining agreements. This is usually done through specific administrative procedures.

Member States. No employer organisations were found in Croatia, Estonia, Greece, Latvia, Lithuania, Malta, Romania or Slovakia.

With the exception of Finland, Italy, Slovenia and Sweden, the degree of fragmentation among employer organisations is quite low in the sector. In general, there is 1 organisation (in 9 of the 28 Member States) or 2 organisations (in 8 Member States) covering the sector. The limited degree of fragmentation can, in general, be explained by sectionalism (i.e. where one organisation covers only a part of the sector) and this is mainly the case for chimney-cleaning activities, which in some countries are represented by a specific employer organisation. The organisations covering only chimney cleaning are BIRB in Austria, SK ČR in Czechia, ZIV in Germany, MOKÉSZ in Hungary and SSR in Sweden. Another reason is the existence of one organisation that covers all companies and a second one covering mainly SMEs. For instance, in nine Member States, employer organisations covering only SMEs or mainly SMEs were identified: Austria (BIRB), Bulgaria (BCA), Denmark (Dansk Erhverv), France (SNPRO), Germany (ZIV), Hungary (MOKÉSZ), the Netherlands (SITO), Slovenia (ZDOPS-GIZ, GDZ-ZKG, GZS-PTZ, ZDS) and Spain (AFELIN).

Higher degrees of fragmentation, as in Italy, can be explained by different company structures; for instance, some organisations covering private companies and others covering cooperatives. Of the 45 employer organisations for which this information is available, 31 (69%) cover the entire industrial cleaning sector, 1 organises employers in 2 whole NACE codes and 3 organise employers in only 1 whole NACE code. In four Member States (Czechia, Germany, Hungary, Sweden), employer organisations exist that only have members in part of a sector (mainly NACE 81.29) and these cover mainly chimney-cleaning activity. Table 13 illustrates the NACE coverage of each employer organisation for which such information is available.

Of the 45 sector-related employer organisations, there are 31 (69%), in 16 EU Member States, whose membership domains cover all parts of the cleaning sector (NACE 81.21, 81.22 and 81.29) (Table 13).

Table 13: NACE code coverage of 45 employer organisations and business associations

Country	Employer organisations and business associations	NACE 81.21	NACE 81.22	NACE 81.29
AT	BICGDFG	Yes	Partially (not 81.22-1)	Partially (not 81.29-1)
	BIRB	No	Partially (not 81.22-9)	Partially (not 81.29-9)
BE	ABSU-UGBN	Yes	Yes	Yes
BG	BPCA	No	No	Yes
	BCA	Yes	Yes	Yes
CY	CACH	Yes	Yes	Yes
CZ	SK ČR	No	No	Partially (only chimney cleaning)
DE	BIV	Yes	Yes	Partially (not chimney cleaning)
	ZIV	No	No	Partially (only chimney cleaning)
DK	SBA-DI ^a	Yes	Yes	Yes
	Dansk Erhverv	Yes	Yes	Yes
EE				

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Employer organisations and business associations	NACE 81.21	NACE 81.22	NACE 81.29
EL				
ES	ASPEL	Yes	Yes	Yes
	AFELIN	Yes	Yes	Yes
FI	KITA	Yes	Yes	Yes
	KT	Yes	No	Yes
	AVAINTA	Yes		
FR	FEP	Yes	Yes	Yes
	SNPRO	Yes	Yes	Yes
HR				
HU	MATISZ^b	Yes (mostly in central Hungary)	Yes	Yes
IE	ICCA	Yes	Yes	Yes
IT	Legacoop Servizi^c	Yes	Yes	Yes
	Federlavoro	Yes	Yes	Yes
	AGCI Servizi	Yes	Yes	Yes
	ANIP – Confindustria	Yes	Yes	Yes
	FNIP – Confcommercio	Yes	Yes	Yes
	Confartigianato	Yes	Yes	Yes
	Casartigiani	Yes	Yes	Yes
	CNA – Servizi alla comunità	Yes	Yes	Yes
	CLAAI	Yes	Yes	Yes
LT				
LU	FLEN	Yes	Yes	Yes
LV				Not relevant
MT				
NL	OSB	Yes	Yes	Yes
	SITO	Yes	Partially (not office cleaning)	Yes
PL	PIGC	Yes	Yes	Yes
	ZPB PSC	Yes	Yes	Yes
PT	APFS	Yes	Yes	Yes
RO				
SE	Almega	Yes	Yes	Partially (not chimney cleaning)
	KFO	Yes	No	No
	SKL	Yes	Yes	Yes
	SSR	No	No	Partially (only chimney cleaning)
SI	OZS	Yes	Yes	Yes
	ZDOPS-GIZ	Yes	Yes	Yes
	GZS-ZKG	No	No	Yes
	GZS-PTZ	Yes	Yes	Yes
	ZDS	Yes	Yes	Yes

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Employer organisations and business associations	NACE 81.21	NACE 81.22	NACE 81.29
SK				
UK	BCC^d	Yes	Yes	Yes

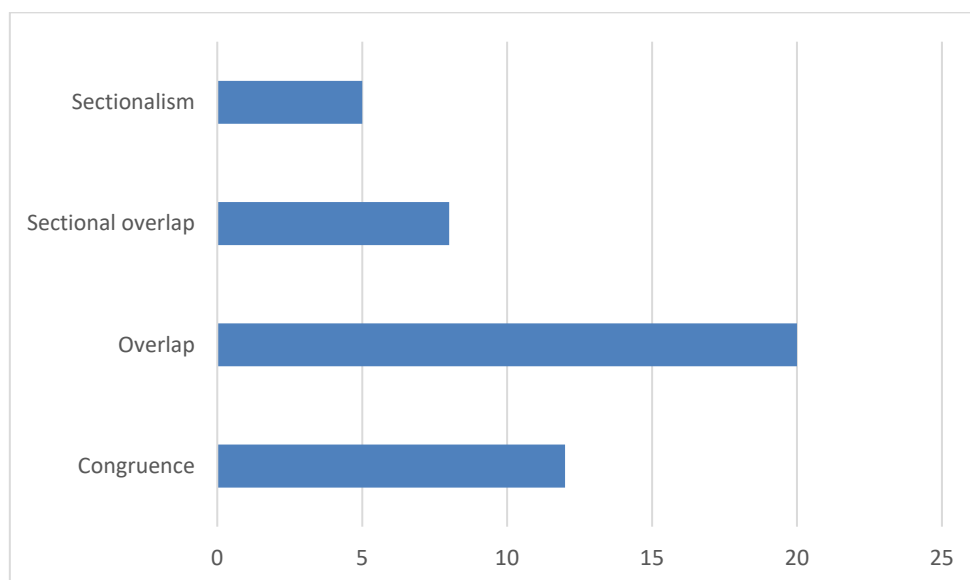
Notes: **Bold** = affiliated to EFCI (2018), according to EFCI and the national correspondents. ^aSBA-DI was affiliated to the EFCI in 2018, but not in 2019. ^bMATISZ was affiliated to the EFCI in the previous representativeness study in 2012 but is no longer affiliated. ^cA change in the EFCI statutes means that cooperatives are no longer able to be members. Thus, Legacoop Servizi, which was affiliated in 2018 (and figures as an affiliate in the representativeness study), is not affiliated to the EFCI in 2019. ^dBCC was affiliated to EFCI in 2018, but not in 2019; however, negotiations are ongoing for it to rejoin.

Source: Network of Eurofound Correspondents, 2018.

Of the employer organisations identified: 11% cover only part of the sector (either because they only cover one or two relevant NACE codes or because they do not cover all types of business, for example, large and small, private companies and cooperatives) and do not have membership outside the industrial cleaning sector (sectionalism); 44% of the employer organisations cover the whole of the industrial cleaning sector and have members outside this sector (overlap); 27% are congruent with the entire industrial cleaning sector (so that all NACE codes are covered); and a further 18% represent employer organisations which only cover part of the sector and have membership within as well as outside the industrial cleaning sector (sectional overlap).

Figure 6 shows the domain coverage of the employer organisations identified in the industrial cleaning sector.

Figure 6: Domain coverage of the 45 employer organisations in the industrial cleaning sector (number of employer organisations)



Source: Network of Eurofound Correspondents, 2018.

Table 14 shows the domain pattern of employer organisations and business associations in 2018.

Table 14: Domain pattern of employer organisations/business associations

Country	Congruent	Sectional	Overlap	Sectional overlap
AT				BICGDFG, BIRB
BE	ABSU-UGBN			
BG		BPCA	BCA	
CY			CACH	
CZ		SK ČR		
DE		BIV, ZIV		
DK			Dansk Erhverv, SBA-DI^a	
EE				
EL				
ES			ASPEL, AFELIN	
FI			KITA, AVAINTA	KT
FR	FEP, SNPRO			
HR				
HU			MATISZ^b	
IE	ICCA			
IT	FNIP – Confcommercio, Confartigianato, CNA – Servizi alla comunità, CLAAI		Legacoop Servizi^c, Federlavoro , AGCI Servizi, ANIP – Confindustria, Casartigiani	
LT				
LU	FLEN			
LV				
MT				
NL	OSB			SITO
PL			PIGC, ZPB PSC	
PT			APFS	
RO				
SE		SSR		Almega , SKL, KFO
SI	OZS		ZDOPS-GIZ, GZS-PTZ, ZDS	GZS-ZKG
SK				
UK ^d	BCC			

Notes: Bold = employer organisation and member of EFCI. ^aSBA-DI was affiliated to EFCI in 2018 but is not in 2019.

^bMATISZ was affiliated to the EFCI in the previous representativeness study in 2012 but is no longer affiliated. ^cA change in the EFCI statutes means that cooperatives are no longer able to be members. Thus, Legacoop Servizi, which was affiliated in 2018 (and figures as an affiliate in the representativeness study), is not affiliated to the EFCI in 2019.

^dThere is a second organisation in the UK, the Cleaning and Support Services Association (CSSA) that has 105 member companies – mostly SMEs though one of their member companies (LCC Services) has 2,000 employees. CSSA is not involved in collective bargaining and is not affiliated to the EFCI and, therefore, was not included in this report. BCC was affiliated to the EFCI in 2018 but not in 2019. However, negotiations are ongoing for it to rejoin.

Source: Network of Eurofound Correspondents, 2018.

In what follows, the membership strength (organisational density) of employer organisations in the industrial cleaning sector is assessed. This can be assessed in two different ways: by looking at the share of

employers in the sector represented by different organisations or by the share of employees in the sector working in companies organised by specific employer organisations. With the first way of calculating organisational density, each company is considered equal, whereas in reality some companies are far more important for the sector than others. Therefore, it is more meaningful to combine the company-based calculation with a workforce-based calculation of organisational strength. This is done by dividing the total workforce of all the affiliated companies by the total number of employees within the sector.

This is also important because the data available on the coverage of employers in the sector are more limited. More information is available on the share of employees in the sector covered by member organisations.

The calculation of employer density in relation to the number of employers covered can be misleading (even in countries where data are available for all employer organisations). In all the countries except Germany (no data available for the largest employer organisation), the share of employees covered is significantly higher than the share of employers covered.

A low density of coverage of employers vis-à-vis all companies in the sector in countries where density (as measured by share of employees covered) is rather high simply demonstrates that many of the largest employers in the country are members of employer organisations, whereas smaller employers are less likely to be members. This is particularly striking in Belgium, Cyprus, France and Spain, but also in Luxembourg, Portugal and Sweden. However, in a number of countries where data are available for all employer organisations, coverage of employees in the sector is relatively low (such as Belgium, Estonia and Poland, where it is under 10%) or not available (Austria, Croatia, Czechia, Finland, Greece, Lithuania, Romania, Slovakia, the UK). Overall, these figures should be assessed with caution in light of missing data.

Involvement of cleaning employer organisations in collective bargaining

Sector-relatedness and membership strength of employer organisations was considered in the previous section. This section considers their involvement in collective bargaining and the number of employees covered by collective bargaining agreements signed by the employer organisations in the sector. Figure 5 provides an overview of the share of SEB and MEB in the sector. Four in every five (80%) of the employer organisations are involved in multisector collective bargaining (see Figure 7). Some organisations are involved in both multi- and cross-sectoral employer bargaining (Slovenia). However, 15.5% of employer organisations do not participate in collective bargaining. This happens in countries where there is no collective bargaining at all in the industrial cleaning sector (Belgium, Cyprus, Czechia, Poland, the UK). Furthermore, there are no employer organisations in Croatia, Estonia, Greece, Latvia, Lithuania, Malta, Romania, or Slovakia. This means that in 13 Member States out of 28, there is no collective bargaining within the industrial cleaning sector.

Table 15 shows employer organisation involvement in collective bargaining and the number of workers covered.

Trade unions in Bulgaria and Poland were found only to be involved in SEB, while in Czechia there is no trade union and also no collective bargaining taking place (Table 12). Without any form of sector-related collective bargaining, there is also no opportunity for employer organisations to be involved in collective bargaining – other than in an advisory role for affiliated companies involved in SEB, which does not appear in the industrial cleaning sector.

Table 15: Involvement in collective bargaining and number of workers covered

Country	Employer organisations	Total individual companies in membership	Total employees in these companies	Involvement in collective bargaining	Number of workers covered by bargaining
AT	BICGDFG	1,918	n.d.	MEB	55,725
	BIRB	621	1,857	MEB	1,857
BE	ABSU-UGBN	176	35,812	MEB	44,765
BG	BPCA	23	360	No	Not relevant
	BCA	15	n.d.	No	Not relevant
CY	CACH	35	1,320	No	Not relevant
CZ	SK ČR^a	720–750	n.d.	No	Not relevant
DE	BIV	2,500	n.d.	MEB	429,400
	ZIV	7,600	20,000	MEB	20,000
DK	SBA-DI^b	113		MEB	n.d.
	Dansk Erhverv	n.d.	16,971	MEB	n.d.
EE	None				
EL	None				
ES	ASPEL	15	150,000	MEB	n.d.
	AFELIN	n.d.	n.d.	MEB	n.d.
FI	KITA	350	n.d.	MEB	n.d.
	KT	124	n.d.	MEB	n.d.
	AVAINTA ^c	600	45,000	MEB	45,000
FR	FEP	2,200	363,966	MEB	485,288
	SNPRO	300	121,322	MEB	485,288
HR	None				
HU	MATISZ	n.d.	n.d.	No	n.d.
	MOKÉSZ^d	n.d.	n.d.	No	n.d.
IE	ICCA	19	(majority of the workforce)	MEB	28,000
IT	Legacoop Servizi^e	n.d.	n.d.	MEB	n.d.
	Federlavoro	n.d.	n.d.	MEB	n.d.
	AGCI Servizi	n.d.	n.d.	MEB	n.d.
	ANIP – Confindustria	50	31,841	MEB	n.d.
	FNIP – Confcommercio	n.d.	n.d.	MEB	n.d.
	Confartigianato	n.d.	n.d.	MEB	n.d.
	Casartigiani	n.d.	n.d.	MEB	n.d.
	CNA – Servizi alla comunità	n.d.	n.d.	MEB	n.d.
CLAAI	n.d.	n.d.	MEB	n.d.	
LT	None				
LU	FLEN	44	8,075	MEB	9,500
LV	None				
MT	None				
NL	OSB	300	100,000	MEB	265,200

Representativeness of the European social partner organisations: Industrial cleaning sector

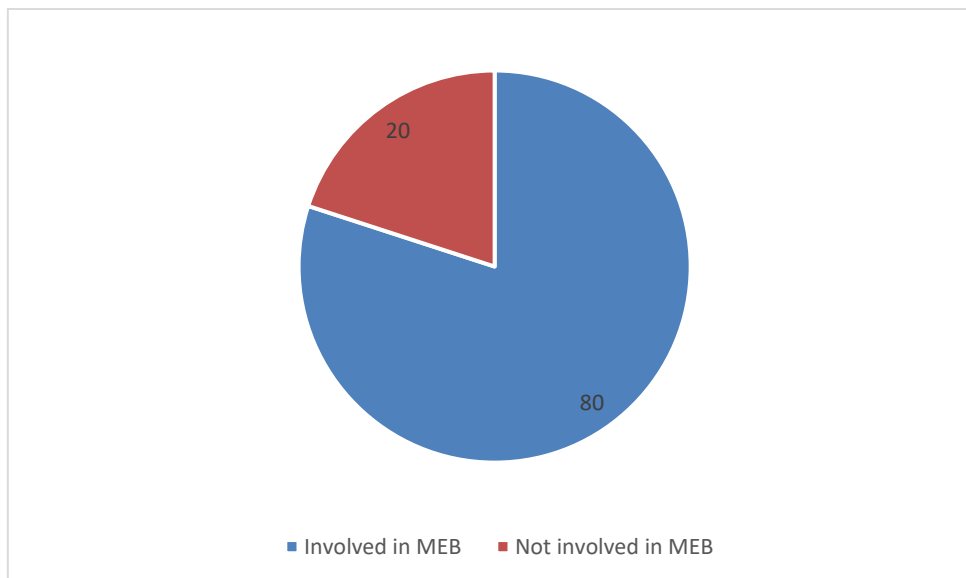
Country	Employer organisations	Total individual companies in membership	Total employees in these companies	Involvement in collective bargaining	Number of workers covered by bargaining
	SITO	60	1,400	MEB	265,200
PL	PIGC	60	32,215–45,101	No	Not relevant
	ZPB PSC	10	4,510	No	Not relevant
PT	APFS	50	40,000	MEB	69,596
RO ^f	None				
SE	Almega	1,100	40,000	MEB	40,000
	KFO	23	2,600	MEB	2,600
	SKL	310	18,400	MEB	18,400
	SSR	171	1,400	MEB	1,400
SI	OZS	609	3,396	MEB	n.d.
	ZDOPS-GIZ	n.d.	n.d.	n.d.= no data.	n.d.
	GZS-ZKG	15	283	MEB	540
	GZS-PTZ	n.d.	n.d.	MEB	5,491
	ZDS	n.d.	n.d.	MEP	540
SK	None				
UK ^g	BCC	n.d.	n.d.	No	Not relevant

Notes: **Bold** = affiliated to EFCI (2018). **Red text** = only covers chimney cleaning. **Yellow shading** = not involved in collective bargaining and not affiliated to EFCI. **n.d.** = no data. ^aSK ČR is included in this table only; it is not included in the rest of the report because it is only related to chimney-sweeping activities, is not involved in collective bargaining and is not affiliated to the EFCI. ^bSBA-DI was affiliated to the EFCI in 2018 but not in 2019. ^cThese data overlap the cleaning sector as AVAINTA is a nationwide multifunctional private sector employer organisation for joint-stock companies and foundations controlled by municipalities and joint municipal boards, and municipalities providing services to private companies and other communities. ^dMOKÉSZ is included in this table only; it is not included in the rest of the report because it is only related to chimney-sweeping activities, is not involved in collective bargaining and is not affiliated to the EFCI. ^eA change in the EFCI statutes means that cooperatives are no longer able to be members. Thus, Legacoop Servizi, which was affiliated in 2018 (and figures as an affiliate in the representativeness study), is not affiliated to the EFCI in 2019. ^fA collective agreement was signed by the largest employer within the sector and the representative of the employees that was elected and appointed to take part in collective bargaining. There is no works council and no trade union. ^gThere is a second organisation in the UK, the CSSA that has 105 member companies, mostly SMEs, though one of their member companies (LCC Services) has 2,000 employees. CSSA is not involved in collective bargaining and not affiliated to the EFCI and, therefore, was not included in this report. BCC was affiliated to EFCI in 2018 but is not in 2019. However, negotiations are ongoing for it to rejoin.

Source: Network of Eurofound Correspondents, 2018.

Figure 7 shows employer organisation involvement in collective bargaining and the number of workers covered in 2018.

Figure 7: Involvement of employer organisations in collective bargaining
(percentage of total)



Source: Network of Eurofound Correspondents, 2018.

Collective bargaining patterns and social dialogue practices

As outlined previously, the representativeness of the national social partner organisations is of interest in this study in terms of the capacity of their European umbrella organisations to participate in European social dialogue. Similarly, it is important for the implementation of any agreements made by European-level organisations at the national, regional and local levels. The roles played by social partners in collective bargaining, social dialogue and public policymaking are therefore important components of representativeness. The relevance of the European sectoral social dialogue tends to increase with the growing ability of the national affiliates of the European organisations to regulate employment terms and influence national public policies affecting the sector (Perin and Léonard, 2011).

A cross-national comparative analysis shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy (Traxler, 2004). This is also borne out by the analysis of the involvement of industrial cleaning sector organisations in bipartite and tripartite bodies presented in this section. MEB tends to have a greater significance in this regard, primarily because of the macroeconomic impact of such agreements (unless of course there are single-employer agreements in place with very large employers that serve to set an industry 'standard' or signalling effect). As well as looking at their formal role on bipartite and tripartite bodies, it is also important to ascertain the regularity of their involvement and whether they wield any significant influence in this arena.

As demonstrated above, the vast majority of the 57 trade unions identified in the sector are involved in collective bargaining (95%) (see Figure 5), while on the employer side 20% are not involved in any form of collective bargaining (see Figure 7). Information on the coverage and nature of collective bargaining is summarised in Table 16. A significant share (42%) of trade unions in the industrial cleaning sector are

involved in both MEB and SEB, a further 23% are only engaged in SEB, and 30% are only involved in MEB. Among the employer organisations, about five in Slovenia and Hungary also participate in cross-sectoral collective bargaining.

Table 16: Involvement of trade unions and employer organisations in collective bargaining

	Trade unions		Employer organisations	
	%	Number	%	Number
No collective bargaining involvement	5	57	20	45
SEB only	23			
MEB only	30		80	
SEB and MEB	42			

Source: Network of Eurofound Correspondents, 2018.

Table 17 presents information on collective bargaining on a country-by-country basis, illustrating the different national collective bargaining patterns and collective bargaining coverage. It shows the levels of SEB and MEB, taking into account that SEB can also take place without the involvement of the employer organisation (which is not the case for Table 16). This shows that although there are a number of countries where employer organisations are not involved in collective bargaining, there are a majority of countries where they are involved. In this case, collective bargaining coverage is high.

As usual, collective bargaining coverage is high in the largest 'old' Member States. This is largely due to the extension of existing collective agreements to the majority of the sector (for instance, Germany, France, Luxembourg) or to a high degree of union density (Belgium, Finland). The highest rates of collective bargaining coverage can be found in Austria, Belgium, Finland, France, Germany, Ireland, Italy, Luxembourg, the Netherlands, Portugal, Slovenia, Spain and Sweden.

In the 'new' Member States, collective bargaining is either non-existent (Croatia, Czechia, Estonia, Greece, Latvia, Slovakia) or low (Bulgaria) and, when collective bargaining is recorded, it mainly exists only at company level (Bulgaria, Cyprus, Lithuania, Malta, Poland and this is also the case in the UK). The rate of collective bargaining coverage remains low in these countries (usually below 25%, except in Malta). This is partly due to the relatively low rate of organisation among the workforce in the sector as well as the lack of extension of collective agreements.

Table 17: Form/level of bargaining per Member State

Form/level of bargaining	Member States
MEB (at sector level)	DK, FI, LU, NL, PT, SE, SI
MEB and SEB	AT, BE, DE, ES, FR, IE, IT
SEB (at company level)	BG, CY, LT, MT, PL, UK
No collective bargaining	CZ, EE, EL, HR, HU, LV, RO, SK

Source: Network of Eurofound Correspondents, 2018.

Table 18 shows collective bargaining coverage and level.

Table 18: Collective bargaining coverage and level

	Collective bargaining coverage				Information not available
	90% or more	50–80%	25–50%	1–25%	
SEB sole level or prevailing level			MT	BG, CY, LT, PL	UK
MEB sole level or prevailing level	AT, BE, DE, ES, FI, FR, IE, IT, LU, NL, PT, SE, SI		DK	RO ^a	
No collective bargaining	CZ, EE, EL, HR, HU, LV, SK				

Note: ^aA collective agreement was signed by the largest employer within the sector and the representative of the employees that was elected and appointed to carry out collective bargaining. There is no works council and no trade union.

Source: Network of Eurofound Correspondents, 2018.

Participation in public policy

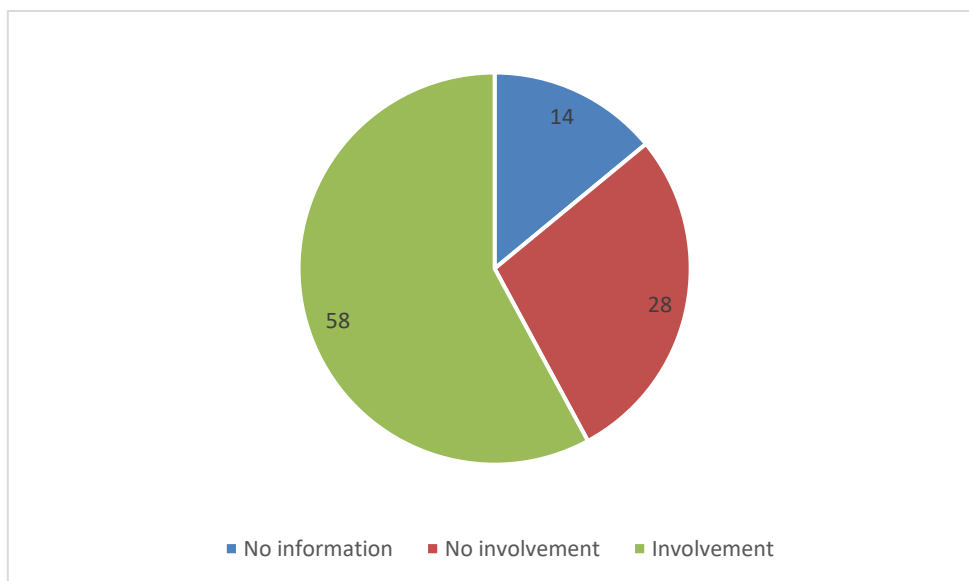
In a significant number of Member States (particularly in northern and western Europe), the participation of social partners in public policymaking has long been established. In a number of other countries (particularly in central and eastern Europe) such involvement is more recent. Even so, in many of these countries, it is already rather formalised, for instance in tripartite bodies at the central level. As indicated above, involvement in policymaking is a relevant indicator of the representativeness of national social partner organisations in the sector.

Such policy dialogue can be formal or informal and, irrespective of its institutional set-up, the level of influence wielded by social partner organisations in this arena is an important point to consider. The members of the Network of Eurofound Correspondents were asked to provide information on the involvement of the various employer and trade union organisations in public policymaking with a particular focus on the industrial cleaning sector, including an assessment of the nature of their influence.

Trade unions or interest representations

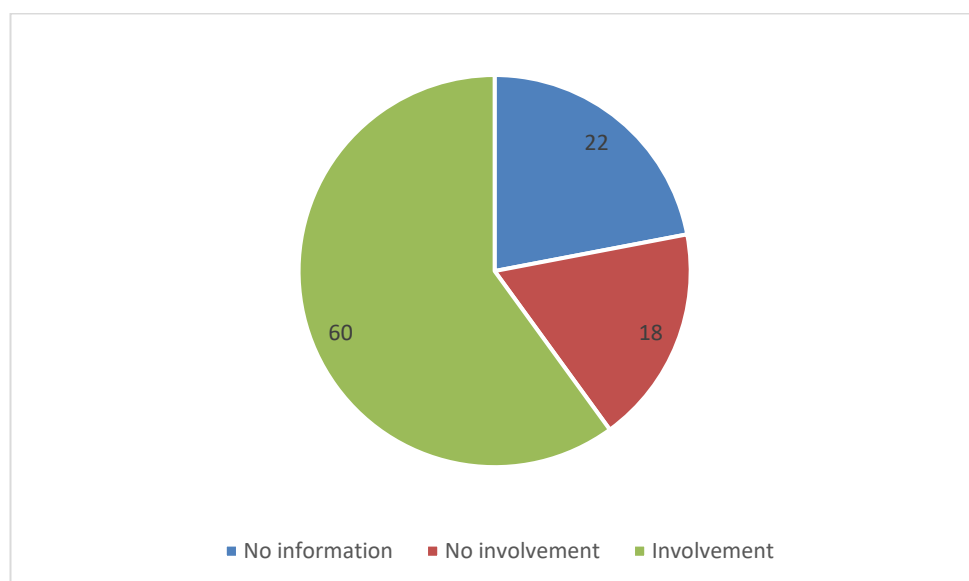
Figures 8 and 9 provide an overview of the nature and level of involvement of social partner organisations in relevant policymaking at Member State level. This shows that a majority of trade unions are consulted in relation to sectoral policymaking (42% on an ad hoc basis, 11% on a regular basis and 5% both ad hoc and regularly), but more than a quarter are never consulted (28%). For the remaining trade unions (14%) this information is not available.

Figure 8: Involvement of trade unions in policymaking (%)



Source: Authors' own calculations based on data from Network of Eurofound Correspondents.

Figure 9: Involvement of employer organisations in policymaking (%)



Source: Authors' own calculations based on data from Network of Eurofound Correspondents.

As shown in Table 19, in most cases where this information is available, consultation on sectoral matters takes place on an ad hoc basis. Consultation is only considered to be regular in nine cases.

Table 19: Frequency of consultation with trade unions and participation in bipartite or tripartite social dialogue

Country	Trade union	Regular	Ad hoc	Bipartite	Tripartite
AT	Vida	No	Yes	No	No
	GPA-djp	n.d.	n.d.	No	No
	Younion	n.d.	n.d.	No	No

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Trade union	Regular	Ad hoc	Bipartite	Tripartite
	GBH	No	Yes	No	No
BE	AC-CG	Yes	No	Yes	No
	ACV V&D-CSC A&S	Yes	No	Yes	No
	ACLVB-CGSLB	Yes	No	Yes	No
BG	FITUGO	No	No	No	No
	Podkrepa CL	No	No	No	No
CY	OIYK-SEK	No	Yes	No	Yes
	PASEY-PEO	No	Yes	No	Yes
	SEBETTYK-PEO	No	No	No	No
CZ	None				
DE	IG BAU	No	Yes	No	No
	ZDS	n.d.	n.d.	Yes	No
DK	3F	No	No	Yes	No
	Serviceforbundet	No	No	Yes	Yes
EE	None				
EL	OIYE	No	No	No	No
ES	CCOO CS	No	No	Yes	No
	FeSMC-UGT	No	No	Yes	No
FI	PAM	No	Yes	Yes	Yes
	PRO	No	Yes	Yes	Yes
	JHL	No	Yes	Yes	Yes
FR	FNPD-CGT	n.d.	n.d.	Yes	n.d.
	FS CFDT	No	Yes	Yes	Yes
	FEETS-FO	No	Yes	Yes	No
	CFTC-CSFV	n.d.	n.d.	Yes	Yes
	FNECS CFE-CGC	No	No	Yes	No
	UNSA	No	No	Yes	No
HR	SCIO	No	No	No	No
HU	HVDSZ 2000	No	No	Yes	No
IE	SIPTU	No	Yes	Yes	No
IT	FILCAMS CGIL	Yes	Yes	Yes	No
	FISASCAT CISL	Yes	Yes	Yes	No
	UIL Trasporti	Yes	Yes	Yes	No
	Fesica Confsal	n.d.	n.d.	n.d.	No
LT	JKUDPS	No	Yes	No	No
LU	OGBL	No	No	No	No
	LCGB	No	No	No	No
LV	None				
MT	GWU	Yes	No	No	No
NL	CNV Vakmensen	Yes	No	Yes	Yes
	FNV	Yes	No	Yes	Yes
PL	MOZ NSZZ Solidarność POCS	No	Yes	No	No

Country	Trade union	Regular	Ad hoc	Bipartite	Tripartite
PT	STAD	No	Yes	No	No
	SITSE	No	Yes	No	No
	CESP	n.d.	n.d.	No	No
RO	None				
SE	Kommunal	No	Yes	Yes	No
	Fastighets	No	Yes	Yes	No
	Ledarna	No	No	No	No
	Unionen	No	Not directly	No	No
	SEKO	n.d.	n.d.	n.d.	n.d.
SI	SOPS	No	Yes	No	Yes
	SKVNS	No	Yes	No	Yes
	KNSS	No	Yes	No	No
SK	None				
UK	Unison	No	Yes	No	Yes
	GMB	No	Yes	No	No
	Unite the Union	No	Yes	No	Yes
	PCS	No	Yes	No	No

Notes: See notes for Table 12.

Source: Network of Eurofound Correspondents, 2018.

Table 19 indicates that trade unions are mainly involved in bipartite social dialogue bodies or structures (35%) and less frequently in tripartite social dialogue bodies or structures (11%). In eight (14%) cases, trade unions are involved in both bipartite and tripartite social dialogue bodies. But 23 (40%) trade unions out of a total of 57 are not involved at all. Out of the five countries where there is no trade union (Czechia, Estonia, Latvia, Romania, Slovakia – as indicated in Table 8), no form of involvement (consultation or involvement in bipartite or tripartite bodies) has been recorded in Croatia, Greece and Luxembourg. Focusing on UNI Europa affiliates, about 20 (71.4%) of 28 are consulted on a regular or ad hoc basis and 19 (67.8%) participate in a bipartite or tripartite body.

Employer interest representation

Sixty per cent of the employer organisations reported being consulted on a regular or ad hoc basis, while 18% reported never having been consulted. Data are missing for the remaining 22%. Among the 32 employer organisations that are consulted, this is on a regular basis for 14, an ad hoc basis for 16, and both ad hoc and regularly for 3.

In terms of participation in bipartite or tripartite social dialogue bodies or structures, 57% of the employer organisations reported being involved in bipartite or tripartite social dialogue bodies or structures (39% in a bipartite structure, 4% in a tripartite structure and 13% in both). Forty-one per cent are not involved at all in any bipartite or tripartite social dialogue bodies or structures. Data are missing for the remaining 2%. Out of a total of 14, 9 (64%) EFCI member organisations participate in bipartite or tripartite bodies, and 11 (78.5%) reported being consulted on a regular or ad hoc basis. EFCI member organisations are more likely to be consulted on sectoral policies or to take part in bipartite or tripartite bodies. Table 20 depicts employer organisation involvement in policymaking in 2018.

Table 20: Involvement of employer organisations in policymaking, 2018 (%)

Country	Employer organisation	Regular	Ad hoc	Bipartite	Tripartite
AT	BICGDFG	Yes	No	No	No
	BIRB	Yes	No	No	No
BE	ABSU-UGBN	Yes	No	Yes	No
BG	BPCA	Yes	No	No	No
	BCA	No	No	No	No
CY	CACH	No	No	No	No
CZ	SK ČR	Yes	No	No	No
DE	BIV	n.d.	n.d.	No	No
	ZIV	n.d.	n.d.	Yes	No
DK	SBA-DI^a	No	Yes	Yes	Yes
	Dansk Erhverv	No	No	No	No
EE	None				
EL	None				
ES	ASPEL	Yes	No	Yes	Yes
	AFELIN	Yes	No	Yes	No
FI	KITA	No	Yes	Yes	Yes
	KT	Yes	Yes	Yes	Yes
	AVAINTA	n.d.	n.d.	n.d.	n.d.
FR	FEP	No	Yes	Yes	No
	SNPRO	No	No	Yes	No
HR	None				
HU	MOKÉSZ	No	Yes	Yes	Yes
IE	ICCA	Yes	No	No	Yes
IT	Legacoop Servizi^b	n.d.	n.d.	Yes	No
	Federlavoro	Yes	Yes	Yes	No
	AGCI Servizi	n.d.	n.d.	Yes	No
	ANIP – Confindustria	Yes	Yes	Yes	No
	FNIP – Confcommercio	n.d.	n.d.	Yes	No
	Confartigianato	n.d.	n.d.	Yes	No
	Casartigiani	n.d.	n.d.	Yes	No
	CNA – Servizi alla comunità	n.d.	n.d.	Yes	No
	CLAAI	n.d.	n.d.	Yes	No
LT	None				
LU	FLEN	No	Yes	No	No
LV	None				
MT	None				
NL	OSB	Yes	No	Yes	Yes
	SITO	No	Yes	No	No
PL	PIGC	No	Yes	No	No

Country	Employer organisation	Regular	Ad hoc	Bipartite	Tripartite
	ZPB PSC	No	Yes	No	No
PT	APFS	No	Yes	No	No
RO	None				
SE	Almega	No	Yes	Yes	No
	KFO	Yes	No	Yes	No
	SKL	Yes	No	Yes	No
	SSR	No	No	Yes	No
SI	OZS	No	Yes	No	Yes
	ZDOPS-GIZ	No	No	No	No
	GZS-ZKG	No	No	No	No
	GZS-PTZ	No	No	No	No
	ZDS	No	No	No	No
SK	KKS	No	Yes	No	No
UK	BCC^c	No	Yes	No	No

Notes: **Bold** = affiliated to EFCI (2018). *n.d.* = no data. ^aSBA-DI was affiliated to the EFCI in 2018 but is not in 2019. ^bA change in the EFCI statutes means that cooperatives are no longer able to be members. Thus, Legacoop Servizi, which was affiliated in 2018 (and figures as an affiliate in the representativeness study), is not affiliated to the EFCI in 2019. ^cBCC was affiliated to the EFCI in 2018, but not in 2019; however, negotiations are ongoing for it to rejoin.

Source: Authors' own calculations based on data from Network of Eurofound Correspondents, 2018.

Table 20 shows that no trade unions are consulted on sectoral matters in Belgium, Croatia, Denmark, Greece, Hungary, Lithuania or Spain. In Cyprus, this is the case for employer organisations only. In a number of Member States, there is at least one organisation which reported that they are not consulted. There are a number of countries where all trade unions in the sector considered that they are consulted (Belgium, Finland, Ireland, Italy, Lithuania, Malta, the Netherlands, Poland, Portugal, Slovenia, the UK), but this list cannot be considered exhaustive due to missing data for some organisations in some countries. Among employer organisations, all bodies in 12 Member States reported that they are consulted (Austria, Belgium, Czechia, Finland, Hungary, Ireland, Lithuania, the Netherlands, Poland, Portugal, Slovakia, Spain, the UK). Again, due to missing data, this list cannot be considered exhaustive.

Tripartite/bipartite participation

Table 21 identifies sector-related tripartite and bipartite bodies along with the participating trade unions and employer organisations. In total, 10 countries have such sector-related bodies. In all these countries, at least one trade union affiliated to UNI Europa participates in these bodies, while in six of the countries, at least one employer organisation affiliated to the EFCI participates in these bodies (Belgium, France, Italy, Spain, Sweden, the UK).

Table 21: Tripartite and bipartite sector-specific boards of public policy

Country	Name of the body and scope of activity	Bipartite or tripartite	Origin: Agreement or statutory	Trade unions participating	Employer organisations participating
BE	Joint committee(s): Responsible for sectoral negotiations and signing	Bipartite	Statutory	AC-CG, ACV V&D-CSC A&S, ACLVB-CGSLB	ABSU-UGBN

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Name of the body and scope of activity	Bipartite or tripartite	Origin: Agreement or statutory	Trade unions participating	Employer organisations participating
	sectoral collective agreements				
	Sociaal fonds voor schoonmaak en ontsmettings-ondernemingen/Fonds social pour les entreprises de nettoyage Social fund for cleaning and disinfection companies (Extralegal benefits, pensions)	Bipartite	Statutory	AC-CG, ACV V&D-CSC A&S, ACLVB-CGSLB	ABSU-UGBN
DK	Det Faglige Udvalg for Serviceassistent-Uddannelsen – LUU Rengørings-service The Vocational Committee for the Service Assistance Education – The Local Vocational Committee for Cleaning	Bipartite	Statutory	3F, Serviceforbundet, FOA	SBA-DI, Danish Regions
	BAR Service Branch Work Environment Council in Service (Sectoral health and safety council)	Tripartite	Statutory	Serviceforbundet, FOA, United Federation of Danish Workers, 3F, The Police Union, The Central Organisation of Regulars, Prison Employees' Union	SBA-DI, Ministry of Finance, HORESTA, Local Government Denmark, KL, The Organisation of Managerial and Executive Staff in Denmark, LH
ES	National Observatory of the Industrial Cleaning Sector	Bipartite	Agreement	CCOO CS, FeSMC-UGT	ASPEL, AFELIN
FI	Työturvallisuuskeskuksen palveluryhmä The Centre for Occupational Safety's sector group for the services sector (Occupational safety within the sector and developing working life at workplaces)	Bipartite	Agreement	PRO, Service Union United, PAM, JHL	KITA
	Työturvallisuuskeskuksen kuntaryhmä The Centre for Occupational Safety's sector group for the municipal sector (Occupational safety within the sector and developing working life at workplaces)	Bipartite	Agreement	JHL	KT, KITA

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Name of the body and scope of activity	Bipartite or tripartite	Origin: Agreement or statutory	Trade unions participating	Employer organisations participating
	Osaamisen ennakoitfoorumi: rakennettu ympäristö National Forum for Skills Anticipation: The working group for built environment (Expert body for educational anticipation)	Tripartite	Statutory	PRO , Service Union United, PAM , JHL	KITA
	Opetushallituksen Puhtaus – ja kiinteistöpalvelualan työelämätoimikunta) The Finnish National Agency for Education’s Sectoral Working Life Committee for Cleaning and Facility Support Services (Quality assurance of the degree of qualification recognition)	Tripartite	Statutory	Service Union United, PAM	KITA
	Puhtaus – ja kiinteistöpalvelualan ammattikoulutuksen yhteistyöfoorumi The Finnish National Agency for Education’s sectoral cooperation forum for vocational education in cleaning and facilities support services (Cooperation forum for vocational education)	Tripartite	n.d.	Service Union United, PAM	
FR	OPCA – Transports et Services délégation propreté (organisme collecteur des fonds de formation) (Financing vocational training)	Bipartite	Agreement	CFTC-CSFV, FS CFDT , FNPDCGT, FEETS-FO	FEP , SNPRO
	OC Propreté (organisme certificateur) (Certification of branch-level diploma – CQP)	Bipartite	Agreement	CFTC-CSFV, FS CFDT , FNPDCGT, FEETS-FO	FEP , SNPRO
	Commission paritaire nationale santé et sécurité (Health and safety)	Bipartite	Agreement	CFTC-CSFV, FS CFDT , FNPDCGT, FEETS-FO	FEP , SNPRO
	Commission paritaire nationale de l’emploi (CPNE) National bipartite commission on	Bipartite	Agreement	CFTC-CSFV, FS CFDT , FNPDCGT, FEETS-FO	FEP , SNPRO

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Name of the body and scope of activity	Bipartite or tripartite	Origin: Agreement or statutory	Trade unions participating	Employer organisations participating
	employment and professional training (Employment, skills, vocational training issues)				
	Commission paritaire permanente de négociation et d'interprétation (CPNI) (Collective bargaining)	Bipartite	Statutory and agreement	CFTC-CSFV, FS CFDT , FNPD-CGT, FEETS-FO	FEP , SNPRO
IE	Contract Cleaning Joint Labour Committee (Employment issues, collective bargaining, minimum wage)	Bipartite	Statutory	SIPTU	ICCA
IT	Organismo Nazionale Bilaterale Servizi Integrati (ONBSI) National Bilateral Body of Integrated Services (Labour market, training, health and safety, research and analysis of the sector)	Bipartite	Agreement	FILCAMS CGIL , FISASCAT CISL , UIL Trasporti	Fise – Confindustria, Legacoop Servizi , Federlavoro , AGCI Servizi, Unionservizi – Confapi
	Ente Bilaterale Nazionale dell'Artigianato (EBNA) National Bilateral Body of the Craft Sector (Covers all craft companies, not only industrial cleaning; coordination of regional bilateral bodies, coordination of contractual welfare funds, labour market, training, health and safety, research and analysis of the sector)	Bipartite	Agreement	FILCAMS CGIL , FISASCAT CISL , UIL Trasporti	Confartigianato, CNA – Servizi alla comunità, Casartigiani, CLAAI
NL	Orsima (Collective agreements, working conditions, education and training of employees, 'sustainable employability')	Bipartite	Agreement	FNV , CNV Vakmensen	SITO
	RAS (Advisory role towards the sector with regards to complying with and applying the collective agreements, initiating and financing activities and projects around terms of employment, working conditions and education)	Bipartite	Agreement	FNV , CNV Vakmensen	OSB

Country	Name of the body and scope of activity	Bipartite or tripartite	Origin: Agreement or statutory	Trade unions participating	Employer organisations participating
	SIR (Setting up guidelines to ensure a safe workplace with regards to use of tools and materials; however, it is not involved in negotiations for working conditions of employees itself)	Tripartite	Agreement	Unknown	SITO, Orsima and several others (SIR, undated)
SE	SRY – Service branschens yrkesnämnd A training board for the services sector	Bipartite	Agreement	Kommunal, Fastighets	Almega
	A training board for chimney sweeps	Bipartite	Agreement	Kommunal	SSR
	A work environment council called 'Ett sunt arbetsliv' (in English 'a healthy working life')	Bipartite	Agreement	Kommunal	SKL
UK	Cleaning Industry Liaison Forum (Health and safety)	Tripartite		Unison, Unite the Union	BCC

Notes: **Bold** = member of UNI Europa (trade unions) or EFCI member organisation (employer organisations). *Blue text*: affiliated to UNI Europa according to the national correspondents but not in the list provided by UNI Europa. In some cases, the trade union may be affiliated to UNI Global Union Property Services but not UNI Europa (for example, PL) or is affiliated to UNI Europa but not specifically for the industrial cleaning sector (for example, Younion in AT).

Source: Network of Eurofound Correspondents, 2018.

Reasons for fragmentation and pluralism in the industrial cleaning sector

'Fragmentation' is where different organisations cover different segments of the industrial cleaning sector. This makes those organisations complementary, as their membership domains do not overlap.

'Pluralism' on the other hand denotes a situation where organisations coexist in the same (or very similar) segment, representing the same types of employees. This section provides an overview of the reasons for organisational fragmentation and pluralism in the sector.

Examples of trade union pluralism can be found, for example, in Belgium, with different national cross-sector affiliations to either the socialist (ABVV-FGTB), the Catholic (ACV V&D-CSC A&S) or the liberal (ACLVB-CGSLB) trade union federations. Another example is in Spain with sectoral organisations affiliated to the ideologically different cross-sectoral federations UGT and CCOO CS. Similar situations exist in Italy and France, with affiliations to CGIL, CISL and UIL Trasporti in Italy and FS CFDT, CGT and FEETS-FO in France, respectively.

In the industrial cleaning sector, the majority of organisations, either trade unions or employer organisations, cover the whole sector. The majority of trade unions also organise employees in other sectors (often catering or private security). The majority of employer organisations are congruent or

sectional. A specific aspect of fragmentation in the industrial cleaning sector relates to organisations (on both employer and employee sides) covering only the subsector of chimney cleaners.

A number of trade unions only cover certain (types of) companies and occupations. For instance, four trade unions were identified that only (or mainly) organise workers in the public sector or public services. A distinction between white-collar and blue-collar membership is drawn in some organisations, whereas others organise only managerial staff (Austria, Finland, Sweden).

Table 22: Reasons for fragmentation of trade unions

Country	Trade union	Reasons for fragmentation of trade unions				
		The whole sector (all NACE codes)	All regions of the country	Employees outside the sector	Blue and white collar	All occupations and companies
AT ^a	Vida	No	Yes	Yes	No (only blue collar)	Yes
	GPA-djp	Yes	Yes	Yes	No (only white collar)	Yes, only private sector
	Younion	No (not 81.29-1 snow clearance)	Yes	Yes	Yes	No (only public sector)
	GBH	No	Yes	Yes	No (only blue collar)	Yes
BE	AC-CG	Yes	Yes	Yes	No (exceptionally some white collar)	Yes
	ACV V&D-CSC A&S	Yes	Yes	Yes	Yes, but mainly blue collar	Yes
	ACLVB-CGSLB	Yes	Yes	Yes	Yes	Yes
BG	FITUGO	No (not 81.21 or 81.22)	Yes	Yes	No (only blue collar)	No (only public sector)
	Podkrepa CL	No (not 81.21 or 81.22)	Yes	Yes	No (only blue collar)	No (only public sector)
CY	OIYK-SEK	Yes	Yes	Yes	Yes, but mainly blue collar	Yes
	PASEY-PEO	Yes	Yes	Yes	Yes, but mainly blue collar	Yes
	SEBETTYK-PEO ^b	No	No	Yes	Yes, but mainly blue collar	No
CZ	None					
DE	IG BAU	Yes, except chimney cleaning	Yes	Yes	Yes	Yes

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Trade union	Reasons for fragmentation of trade unions				
		The whole sector (all NACE codes)	All regions of the country	Employees outside the sector	Blue and white collar	All occupations and companies
	ZDS	No, only chimney cleaning	Yes	No	No	Yes
DK	3F	Yes	Yes	Yes	No (only blue collar)	Yes
	Serviceforbundet	Yes	Yes	Yes	No (only blue collar)	Yes
EE	None					
EL	OIYE	Yes	Yes	Yes	Yes	Yes, only private sector
ES	CCOO CS	Yes, except railway cleaning	Yes	Yes	Yes	Yes
	FeSMC-UGT	Yes	Yes	Yes	Yes	Yes
FI ^c	PAM	No	Yes	Yes	No (only blue collar)	Yes, only private sector
	PRO	No	Yes	Yes	No (only white collar)	Yes, only private sector
	JHL	Yes	Yes	Yes	No (only blue collar)	No (only public sector)
FR	FNPD-CGT	Yes	Yes	Yes	Yes	Yes
	FS CFDT	Yes	Yes	Yes	Yes	Yes
	FEETS-FO	Yes	Yes	Yes	Yes	Yes
	CFTC-CSFV	Yes	Yes	Yes	Yes	Yes
	FNECS CFE-CGC	Yes	Yes	Yes	Yes, but mainly white collar	Yes
	UNSA	Yes	Yes	Yes	Yes	Yes
HR	SCIO ^d	Yes	No	No	Yes, but mainly blue collar	Yes
HU	HVDSZ 2000 ^e	Yes	Yes	Yes	Yes, but mainly blue collar	Yes
IE	SIPTU	Yes	Yes	Yes	Yes, but mainly blue collar	Yes
IT	FILCAMS CGIL	Yes	Yes	Yes	Yes	Yes
	FISASCAT CISL	Yes	Yes	Yes	Yes	Yes
	UIL Trasporti	Yes	Yes	Yes	Yes	Yes
	Fesica Confsal	n.d.	Yes	Yes	n.d.	Yes
LT	JKUDPS	No ^f	Yes	Yes	Yes	Yes

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Trade union	Reasons for fragmentation of trade unions				
		The whole sector (all NACE codes)	All regions of the country	Employees outside the sector	Blue and white collar	All occupations and companies
LU	OGBL	Yes	Yes	Yes	Yes	Yes
	LCGB	Yes	Yes	Yes	Yes	Yes
LV	None					
MT	GWU	Yes	Yes	Yes	Yes	Yes
NL	CNV Vakmensen	Yes	Yes	Yes	Yes, but mainly blue collar	Yes
	FNV	Yes	Yes	Yes	Yes, but mainly blue collar	Yes
PL	MOZ NSZZ Solidarność POCS	Yes	Yes	Yes	Yes	Yes
PT	STAD	Yes	Yes	Yes	Yes	Yes
	SITSESE	Yes	Yes	Yes	Yes	Yes
	CESP	Yes	Yes	Yes	Yes	Yes
RO	None					
SE ⁶	Kommunal	Yes	Yes	Yes	No (only blue collar)	No
	Fastighets	No	Yes	Yes	No (only blue collar)	No
	Ledarna	Yes	Yes	Yes	No (only white collar and management)	Yes
	Unionen	Yes	Yes	Yes	No (only white collar)	Yes, only private sector
	SEKO	n.d.	Yes	Yes	Yes	No (only public sector)
SI	SOPS	Yes	Yes	Yes	Yes	Yes
	SKVNS	Yes	Yes	Yes	Yes	Yes
	KNSS	Yes	Yes	Yes	Yes	Yes
SK	None					
UK	Unison	Yes	Yes	Yes	Yes	Yes, but mainly public sector
	GMB	Yes	Yes	Yes	Yes, but mainly blue collar	Yes
	Unite the Union	Yes	Yes	Yes	Yes	Yes
	PCS	Yes	Yes	Yes	No (only white collar)	No (only public sector)

Notes: **Bold** = member of UNI Europa. **Blue text** = affiliated to UNI Europa according to the national correspondents but not in the list provided by UNI Europa. **Red text** = not involved in collective bargaining, nor affiliated to UNI Europa. *n.d.* = no data. ^aVida does not cover NACE codes 81.22-1 (chimney sweeping) or 81.22-9. Younion is affiliated to UNI Europa, but not specifically for the industrial cleaning sector and mainly covers municipal workers and employees of enterprises run by the local state. GBH only covers NACE codes 81.21, 81.22-9, 81.29-1 and 81.29-9. ^bSEBETTYK-PEO only covers cleaning activities in the airports of Larnaca and Paphos (see columns 4, 5, and 7). ^cPAM does not have members working in street sweeping (under NACE 81.29) or chimney sweeping. PRO probably does not have members working in street and road cleaning activities (under NACE 81.29). ^dSCIO is the only trade union in the sector in Croatia, but it is very small and without any influence at sectoral level. Its 105 members are employed in the largest firm (Atalian, 2,200 employees), but there is no company-level collective bargaining at this level. ^eDespite not being affiliated to UNI Europa and, as of August 2019, not being involved in collective bargaining, HVDSZ 2000 has been included because it is involved in SEB in another sector and could potentially participate to collective bargaining at company level in the future as the trade union has members within the cleaning sector. ^fJKUDPS partially covers NACE codes 81.21 and 81.22 but does not cover 81.29. ^gKommunal includes municipalities and county councils, churches and cooperatives (column 7). One exception in the private sector is for domestic services workers. Fastighets does not represent domestic services workers (NACE 81.21) or chimney sweeps (NACE 81.22), nor does it represent workers in the public sector.

Source: Network of Eurofound Correspondents, 2018.

In the industrial cleaning sector, fragmentation can be found among both trade unions and employer organisations. However, fragmentation among employer organisations in the sector is quite low – except in Italy, where several organisations cover only cooperatives and others cover only private companies.

Table 23 shows that the main reason for the fragmentation of interest representation on the employer side within the industrial cleaning sector is linked to the fact that some employer organisations focus only or mainly on large companies and others only or mainly on SMEs, craft workers or cooperatives (see ‘Sector-relatedness and membership strength of employer organisations’). There is a slight preponderance of employer organisations which organise businesses outside the sector (62%).

Table 23: Reasons for the fragmentation of employer organisations

Country	Employer organisation	Reasons for fragmentation			
		Companies/business activities outside the sector	All legal forms/size classes	The whole sector (all NACE codes)	All regions of the country
AT	BICGDFG	Yes	Yes	No ^a	Yes
	BIRB	Yes	No (SMEs)	No (only chimney cleaning)	Yes
BE	ABSU-UGBN	No	Yes	Yes	Yes
BG	BPCA	No	Yes	No (only part of 81.29)	Yes
	BCA	Yes	Yes, mainly SMEs	No (not chimney cleaning)	Yes
CY	CACH	Yes	Yes	Yes	Yes
CZ	SK ČR	No	Yes	No (only chimney cleaning)	Yes

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Employer organisation	Reasons for fragmentation			
		Companies/business activities outside the sector	All legal forms/size classes	The whole sector (all NACE codes)	All regions of the country
DE	BIV	No	Yes	No (not chimney cleaning)	Yes
	ZIV	No	No (SMEs)	No (only chimney cleaning)	Yes
DK	SBA-DI	No	Yes	Yes	Yes
	Dansk Erhverv	Yes	Yes, mainly SMEs	Yes	Yes
EE	None				
EL	None				
ES	ASPEL	Yes	Yes, but mainly large companies	Yes	Yes
	AFELIN	Yes	No (mainly SMEs)	Yes	Yes
FI	KITA	Yes	Yes	Yes	Yes
	KT	Yes	No (public sector)	No (not 81.22)	Yes
	AVAINATA	Yes	No (public sector)	Yes	Yes
FR	FEP	No	Yes	Yes	Yes
	SNPRO	No	Yes, but mainly SMEs	No (46, 47)	Yes
HR	None				
HU	MATISZ	Yes	Yes	Yes	Yes, but mostly only central Hungary
IE	ICCA	Yes	Yes	Yes	Yes
IT	Legacoop Servizi	Yes	No (only cooperatives)	Yes	Yes
	Federlavoro	Yes	No (only cooperatives)	n.d.	Yes
	AGCI Servizi	Yes	No (only cooperatives)	n.d.	Yes
	ANIP – Confindustria	No	No (not cooperatives or craft workers)	Yes	Yes
	FNIP – Confcommercio	No	No (not cooperatives or craft workers)	Yes	Yes
	Confartigianato	No	No (only craft workers)	Yes	Yes

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Employer organisation	Reasons for fragmentation			
		Companies/business activities outside the sector	All legal forms/size classes	The whole sector (all NACE codes)	All regions of the country
	Casartigiani	Yes	No (only craft workers)	Yes	Yes
	CNA – Servizi alla comunità	No	No (only craft workers)	Yes	Yes
	CLAAI	No	No (only craft workers)	Yes	Yes
LT	None				
LU	FLEN	No	Yes	Yes	Yes
LV	None				
MT	None				
NL ^b	OSB	Yes	Yes	No	Yes
	SITO	Yes	Yes, but mainly SMEs	No	Yes
PL	PIGC	Yes	Yes, but mainly large companies	Yes	Yes
	ZPB PSC	Yes	No (only large companies)	Yes	Yes
PT	APFS	Yes	Yes, but mainly large companies	Yes	Yes
RO	None				
SE ^c	Almega	Yes	No	No	Yes
	KFO	Yes	No	No	Yes
	SKL	Yes	No (only public sector)	Yes	Yes
	SSR	No	Yes	No	Yes
SI	OZS	No	Yes	Yes	Yes
	ZDOPS-GIZ	Yes	No (SMEs)	Yes	Yes
	GZS-ZKG	Yes	No (SMEs)	No (chimney cleaning)	Yes
	GZS-PTZ	Yes	No (SMEs)	Yes	Yes
	ZDS	Yes	No (SMEs)	Yes	Yes
SK	None				
UK	BCC	No	n.d.	Yes	Yes

Notes: **Bold** = EFCI member organisation (2018). *n.d.* = no data.^aBICGDFG does not cover NACE code 81.22-1 or part of 81.29-1. ^bOSB does not cover companies involved in cleaning within the heavy or chemical industries. In general, SITO does not cover cleaning of offices and buildings. ^cAlmega does not organise companies in the public sector (municipalities and county councils) and does not organise chimney sweep companies (NACE 81.22). KFO covers only cooperatives, NGOs and social movements. It does not cover NACE 81.22 or 81.29. SSR does not cover NACE 81.21 or 81.29.

Source: Network of Eurofound Correspondents, 2018.

Methodological considerations

A number of organisations were identified in the previous sections even though, as of August 2019, they are not involved in collective bargaining and are not affiliated to a European social partner organisation participating in the ESSDC. These organisations are listed in Table 24. As these cannot be considered sector-related trade unions or employer organisations, they are not included in the final assessment of the representativeness of the European social partner organisations in the next chapter.

The Hungarian trade union HVDSZ 2000 reported being involved in SEB in a company outside of the cleaning sector. Unie úklidu ČR was affiliated to the EFCI at the time of the previous representativeness study for this sector (2011–2012), but it is no longer affiliated. Also, MATISZ in Hungary was affiliated to the EFCI in the past but is not as of August 2019.

Table 24: Organisations not involved in collective bargaining and not affiliated to an EU social partner organisation

Country	Trade unions/Worker or professional associations	Employer organisations/Business associations
BG		BPCA – Bulgarian Pest Control Association BCA – Bulgarian Cleaning Association
CZ		SK ČR – Společenstvo kominíků České republiky CAC – Česká asociace úklidu a čištění UU ČR – Unie úklidu ČR
EE		EKKL – Association of Estonian Facilities Maintenance KPEL – Association of Chimney Sweepers and Stove Builder Service Providers EKK – Estonian Chamber of Chimney Cleaners
EL		PENEKA – Pan-Hellenic Association of Cleaning Companies
HR	SCIO	
HU	HVDSZ 2000 ^a	MATISZ – Association of Hungarian Cleaning Technology MOKÉSZ – Hungarian Federation of Chimney Sweepers
LV		LPUAA – Professional Cleaning and Facility Management Association PTUA TB – Professional Floor Cleaners Association
MT		MCCA – Malta Cleaning Contractors Associations
PL		PIGC – Polish Cleaning Chamber of Commerce ZPB PSC – Sectoral Employers Association PSC KKP – Polish Chimney Sweeps Corporation
RO	Collective bargaining, but no trade union ^b	

Notes: ^aHVDSZ 2000 is involved in SEB in a company that is not active in the industrial cleaning sector. ^bA collective agreement was signed by the largest employer within the sector and the representative of the employees that was elected and appointed for collective bargaining. There is no works council and no trade union.

Source: Network of Eurofound Correspondents, 2018.

To consider the relevance of these organisations,⁸ the following indicators are considered:

- their involvement in bipartite or tripartite social dialogue bodies
- their membership domain and their membership strength in the sector, and whether the largest employers in the sector are affiliated
- their uniqueness (the organisations are the only ones identified in that country – without them, there would no organisation for that country); if they are not unique, their relative organisational strength can be compared with the other organisations
- their affiliation to another European association

None of the organisations in Table 24 are involved in sector-related social dialogue. The Hungarian trade unions HVDSZ 2000 and MOKÉSZ both participate in the Council of Municipal Service Provision, which is not related solely to the cleaning sector. In Table 20, we see that the BPCA, SK ČR in Czechia and PIGC and ZPB PSC in Poland all reported regular involvement in sector-related policymaking.

Regarding membership strength, the largest companies (employers) in Czechia are affiliated to CAC, in Estonia to EKKL, in Greece to PENEKA, in Latvia to LPUAA, in Malta to MCCA and in Poland to both PIGC and ZPB PSC and in (see Table 44 in the Annex). The cleaning sector companies affiliated to PIGC correspond to about 60% of the sectoral workforce, while for ZPB PSC this is 7%.

Of the organisations listed in Table 24, five cover only a small section of the cleaning sector. SK ČR in Czechia, EKK and KPEL in Estonia and MOKÉSZ in Hungary only cover chimney-sweeping activities. Also, the BPCA has a sectional membership domain.

On the other hand, three employer organisations are involved in sector-related MEB but, with their membership domain, cover only the small section of the cleaning sector relating to chimney-sweeping activities. These three employer organisations are BIRB in Austria, ZIV in Germany and SSR in Sweden. Because of their involvement in sector-related collective bargaining, these organisations are included in this study as employer organisations.

Regarding uniqueness, there would be no sector-related trade unions for Hungary and Croatia if HVDSZ 2000 and SCIO were not included. HVDSZ 2000 reported having members in all cleaning-sector activities and being involved in SEB in a company outside of the cleaning sector. The Croatian trade union for cleaning and maintenance (SCIO) only has members in one company (Atalian), which is the largest industrial cleaning sector employer in Croatia with a workforce of 2,200 employees (22% of the sectoral workforce in Croatia). Also, for all the business associations, it is true that there are no other sector-related associations.

Finally, we can look at the European affiliation of these business organisations. The BPCA is affiliated to CEPA, the Confederation of European Pest Management Associations. SK ČR in Czechia, KPEL in Estonia, MOKÉSZ in Hungary and KKP in Poland are all members of the European Federation of Master Chimney Sweeps (ESCHFOE). MATISZ in Hungary, MCCA in Malta and PIGC in Poland are affiliated to ISSA (International Sanitary Supply Association). LPUAA in Latvia is a member of the European Facility Management Network.

⁸ To avoid unnecessary complexity in this report, all organisations representing the interests of workers are referred to as trade unions and business associations are referred to as employer organisations.

3. European level of interest representation

In this chapter, the representativeness of the social partners at European level is assessed in three ways. First, the membership strength of both UNI Europa and the EFCI is described, based on the collective coverage of their national affiliates in each of the EU Member States.

Second, the European social partners' 'capacity to negotiate' is analysed; this is their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates. This capacity to negotiate is affected by the involvement of their affiliates in collective bargaining at national level, which ensures they can not only provide an effective mandate for discussion and negotiation at European level but are also in a position to implement European-level agreements.

Finally, every representativeness study also measures the limits of the representativeness of social partners involved in ESSDC, by weighing this against the representativeness of other European associations and the national organisations not represented by UNI Europa and the EFCI in the ESSDC for the sector.

As outlined in greater detail below, the study presents detailed data on two sector-related European associations – namely UNI Europa on the employee side and EFCI on the employer side. Both are listed by the European Commission as social partner organisations to be consulted under Article 154 of the TFEU. Supplementary information will be provided for other organisations (potentially) involved in social dialogue in the sector, where this information has become available in the course of the study.

Membership domain of UNI Europa

UNI Europa is affiliated to the European Trade Union Confederation (ETUC) at cross-sector level. Through its national affiliates, UNI Europa covers all relevant industrial cleaning sector NACE codes (81.21, 81.22 and 81.29). UNI Europa covers a wide range of service sectors. Besides its involvement in the ESSDC for the industrial cleaning sector, it also operates in ESSDCs for the following sectors:

- audiovisual
- banking and insurance
- commerce
- personal services
- live performance
- post and logistics
- private security
- sports
- temporary and agency workers

As such, the membership domain of UNI Europa as a whole is multisectoral, and its membership in the industrial cleaning sector overlaps with other sectors as trade unions organising industrial cleaning workers may also have members in other sectors (see 'Industrial cleaning sector coverage, sector-relatedness and organisational density of trade unions'). In the UNI Europa statutes, membership is defined in Article 4, which states that membership of UNI Europa is open to all members of national trade union centres affiliated to the ETUC that fall within its jurisdiction. The Regional Executive Committee makes recommendations to the UNI World Executive Board regarding affiliation of new organisations.

UNI Europa has 22 affiliated trade unions in the industrial cleaning sector, which corresponds to 38.5% of the 57 sector-related trade unions that were identified in the previous chapter. Through these 22 affiliates,

UNI Europa has member organisations in 15 EU Member States. Table 25 displays the sector-relatedness and collective bargaining involvement of the 22 trade unions affiliated to UNI Europa.

Among the 22 member organisations, there are 15 sector-related trade unions (in 12 different Member States) whose membership domain covers all industrial cleaning activities. The largest part of the industrial cleaning sector (general cleaning of buildings – NACE 81.21) is, however, covered by all the 22 trade unions affiliated to UNI Europa. Table 9 provides details about the sector-relatedness of each of the trade unions.

Table 25: Sector-relatedness and collective bargaining involvement of the 22 trade unions affiliated to UNI Europa

Country	Trade union	NACE 81.21	NACE 81.22	NACE 81.29		MEB	SEB
AT	Vida					x	
	GPA-djp					x	x
	Younion					x	x
BE	AC-CG					x	x
	ACV V&D-CSC A&S					x	x
	ACLVB-CGSLB					x	x
CY	OIYK-SEK						x
DE	IG BAU					x	x
DK	3F					x	
	Serviceforbundet					x	
EL	OIYE						
ES	CCOO CS					x	x
	FeSMC-UGT					x	x
FI	PAM					x	
	PRO					x	
FR	FS CFDT					x	x
	FEETS-FO					x	x
IE	SIPTU					x	x
IT	FILCAMS CGIL					x	x
	FISASCAT CISL					x	x
LU	OGBL					x	
	LCGB					x	
MT	GWU						x
NL	FNV					x	
PT	STAD					x	
SE	Fastighets					x	
UK	Unison						x
	PCS						x
	Unite the Union						x

Note: Bold = member of UNI Europa. Blue text = affiliated to UNI Europa through representation of members in other sectors, not for their members in the industrial cleaning sector. Dark green shading = full activity. Yellow shading = partial activity.

Source: Network of Eurofound Correspondents, 2018.

All but 1 (OIYE in Greece) of the 22 affiliated trade unions are involved in sector-related collective bargaining. The UK affiliate Unite the Union only participates in SEB, while members in Austria, Denmark, Finland, Luxembourg, the Netherlands, Portugal and Sweden are involved in MEB at sector level. The member organisations in Belgium, France, Germany, Italy and Spain participate in both MEB at sector level and SEB in individual industrial cleaning companies.

In five EU Member States, no trade unions that organise workers in the industrial cleaning sector were identified (Czechia, Estonia, Lithuania, Romania, Slovakia). Of the 23 EU Member States where sector-related trade unions were identified, UNI Europa has an affiliate in 15 (65%). In five EU Member States, all the sector-related trade unions identified are affiliated to UNI Europa (Denmark, Greece, Ireland, Spain, the UK).

In Bulgaria, Croatia, Cyprus, Greece, Hungary, Lithuania, Malta, Poland and Slovenia there are sector-related trade unions but none are affiliated to UNI Europa. The non-affiliated trade unions in Belgium, Cyprus, Lithuania, Malta and Poland are involved in SEB at company level only. The Slovenian trade unions that are not affiliated to UNI Europa are involved in MEB, and the non-affiliated trade unions in Croatia and Hungary reported not being involved in any form of collective bargaining.

In Austria, Belgium, Finland, France, Germany, Italy, Luxembourg, the Netherlands, Portugal and Sweden, some trade unions are affiliated to UNI Europa while others are not. For these countries, Table 26 indicates whether the most representative trade unions in the sector are affiliated to UNI Europa.

In 17 Member States, the trade unions with the most members in the sector (based on the data available) are members of UNI Europa (the exceptions are Belgium, Croatia, France, Hungary, Latvia, Lithuania, Slovenia).

Table 26: Sector-related trade union affiliation to UNI Europa

Country	Trade unions affiliated to UNI Europa	Trade unions affiliated to UNI Europa, but not for their members in the cleaning sector	Trade unions not affiliated to UNI Europa	Is the trade union with most members in the sector affiliated?
AT	Vida	GPA-djp, Younion	GBH	Yes
BE	AC-CG, ACV V&D-CSC A&S	ACLVB-CGSLB		Yes
BG			FITUGO, Podkrepa CL	No
CY		OIYK-SEK	SEBETTYK-PEO, PASEY-PEO	Yes
CZ				
DE	IG BAU		ZDS	Yes
DK	3F, Serviceforbundet			Yes
EE				
EL	OIYE			Yes
ES	CCOO CS, FeSMC-UGT			Yes
FI	PAM, PRO		JHL	Yes
FR	FS CFDT, FEETS-FO		FNPD-CGT, CFTC-CSFV, FNECS CFE-CGC, UNSA	No
HR			SCIO	No
HU			HVDSZ 2000	No
IE	SIPTU			Yes

Representativeness of the European social partner organisations: Industrial cleaning sector

IT	FILCAMS CGIL	FISASCAT CISL	UIL Trasporti, Fesica Confasal	Yes
LT			JKUDPS	No
LU	OGBL	LCGB		Yes
LV				No
MT		GWU		Yes
NL	FNV		CNV Vakmensen	Yes
PL	None		MOZ NSZZ Solidarność POCS	Yes
PT	STAD		SITese, CESP	Yes
RO				
SE	Fastighets		Kommunal, Ledarna, Unionen, SEKO	Yes
SI			SOPS, SKVNS, KNSS	No
SK				
UK	Unison, Unite the Union, PCS		GMB	Yes

Note: In some cases, the trade union may be affiliated to UNI Global Union Property Services but not UNI Europa (for example, PL) or is affiliated to UNI Europa but not specifically for the industrial cleaning sector (for example, Yunion in AT).

Source: Network of Eurofound Correspondents, 2018.

Some sector-related trade unions that are not affiliated to UNI Europa may be affiliated to another EU trade union federation (see 'Other European trade union associations'), mainly because the national trade union also has members in other sectors, such as public services (which explains affiliation of Podkrepa CL, JHL and GMB to EPSU) or the transport sector (which explains affiliation of FNPD-CGT⁹ and GMB to ETF). However, these EU trade unions cannot be seen as competitors of UNI Europa within the industrial cleaning sector. In some cases, the trade unions that overlap the industrial cleaning sector may also be affiliated to UNI Global Union Property Service but not UNI Europa or affiliated to UNI Europa but not for the Property Services section.

⁹ According to interviews with social partners, the industrial cleaning sector should leave the FNPD-CGT to the Federation of CGT Services.

Table 27: Importance of UNI Europa members at national level

Country	Most representative trade union(s)	Sector coverage	Covers all types of employee	Involved in collective bargaining	Member of UNI Europa	Importance of trade unions affiliated to other EU federations	Evaluation of UNI Europa representativeness
AT	Vida	Not covering NACE codes 81.22-1 (chimney sweeping) or 81.22-9	Yes, but probably few white-collar and public law local government employees	Yes	Yes	GBH that represents only chimney sweepers (3% of the workforce) is affiliated to EFBWWW. Younion , affiliated to EPSU and UNI Europa, represents an uncertain number of employees of municipalities who are engaged in snow clearing, street cleaning and cleaning of public transport vehicles and stations. DPA-djp is affiliated to UNI Europa.	High representativeness
BE	ACV V&D-CSC A&S	All	Only blue collar	Yes	Yes	The second main trade union AC-CG is also affiliated to UNI Europa. The third one ACLVB-CGSLB is as well.	High representativeness
BG	FITUGO	No members in NACE 81.21 or NACE 81.22 No members in the private sector	Only blue collar	Yes	No	The second-largest trade union is not affiliated to UNI Europa.	No representativeness
CY	OIYK-SEK	All	Only blue collar	Yes	Yes	The two other trade unions are not affiliated to UNI Europa and represent 60% of the trade union members within the sector (72 out of a total of 119). However, OIYK-SEK represents workers in all sectors, while the second-largest trade union, PASEY-PEO, represents only cleaning employees of the two airports.	Medium representativeness
CZ	None	Not relevant	Not relevant	Not relevant	Not relevant	Not relevant.	No representativeness
DE	IG BAU	All	All	Yes	Yes	ZDS, the second-largest trade union, is not affiliated to UNI Europa. It is a smaller organisation representing only chimney sweepers. ZDS is affiliated to EPSU.	High representativeness
DK	3F	All	Only blue collar	Yes	Yes	Serviceforbundet , although smaller, is also affiliated to UNI Europa. Therefore, the two	High representativeness

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Most representative trade union(s)	Sector coverage	Covers all types of employee	Involved in collective bargaining	Member of UNI Europa	Importance of trade unions affiliated to other EU federations	Evaluation of UNI Europa representativeness
						existing trade unions are affiliated to UNI Europa.	
EE	None	Not relevant	Not relevant	Not relevant	Not relevant	Not relevant.	No representativeness
EL	OIYE	All, but only in the private sector	All	No	Yes	OIYE is the only recognised representative trade union. By its constitution, it organises the sector, and no other trade union has disputed its authority in that regard.	High representativeness
ES	CCOO CS	All, except railways cleaners	All	Yes	Yes	FeSMC-UGT , which is the second-largest trade union, is also affiliated to UNI Europa. There is no other trade union.	High representativeness
FI	JHL	All, but only in the public sector	Only blue collar	Yes	No	The second-largest trade union, PAM , has 17,100 members, fewer than JHL with 20,000 members. PAM covers the private sector, participates in collective bargaining and is affiliated to UNI Europa. PRO , the third-largest trade union, has about 2,500 members and is affiliated to UNI Europa also. Therefore, the two affiliates to UNI Europa represent together almost 50% of the trade union members in Finland.	Important representativeness
FR	FNPD-CGT	All	All	Yes	No	According to the last measure of representativeness in the framework of the NCA of the cleaning industry (2017), the FNPD-CGT is the largest trade union within the branch with 38.57% of the votes in the workplace election, coming before FS CFDT (28.32%), FEETS-FO (21.51%) and CFTC-CSFV (11.59%). FS CFDT and FEETS-FO both participate in collective bargaining and to bipartite institutions and are affiliated to UNI Europa. They represent together 49.83% of the votes. The four other trade unions within the sector that are not affiliated to UNI Europa are not affiliated to any other EU trade union federation.	Important representativeness

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Most representative trade union(s)	Sector coverage	Covers all types of employee	Involved in collective bargaining	Member of UNI Europa	Importance of trade unions affiliated to other EU federations	Evaluation of UNI Europa representativeness
HR	SCIO ^a	All	All, but mainly blue collar	No	No	SCIO is the only trade union in the sector, but it is very small and without any influence. Members are employed in only one firm (Atalian) and it does not participate in collective bargaining.	No representativeness
HU	HVDSZ 2000 ^b	Not relevant	Not relevant	Not relevant	Not relevant	Not relevant.	No representativeness
IE	SIPTU	All	All, but mainly blue collar	Yes	Yes	SIPTU is the only union in the sector.	High representativeness
IT	FILCAMS CGIL	All	All	Yes	Yes	The second-largest trade union is FISASCAT CISL. The two main trade unions have about 150,000 to 170,000 members, while the third-largest trade union, UIL Trasporti, which is affiliated to ETF, has between 30,000 and 40,000 members.	High representativeness
LU	OGBL	All		Yes	Yes	The second-largest trade union, LCGB, is affiliated to UNI Europa but not to UNI Europa Property Services. It takes part in collective bargaining, but has fewer members.	High representativeness
LT	JKUDPS	It mainly organises workers cleaning multi-unit residential buildings, and partially covers 81.21 and 81.22 but not 81.29	All	Yes	No	There is only one trade union that is not affiliated to UNI Europa.	No representativeness
LV	None	Not relevant	Not relevant	Not relevant	Not relevant	Not relevant.	No representativeness
MT	GWU	All	All	Yes	Yes	The second-largest trade union, UHM, has only 15 members in the sector, which amounts to 0.4% of the total employees in the sector, while	High representativeness

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Most representative trade union(s)	Sector coverage	Covers all types of employee	Involved in collective bargaining	Member of UNI Europa	Importance of trade unions affiliated to other EU federations	Evaluation of UNI Europa representativeness
						the GWU has 2,400 members, which amounts to 62% of the total employees in the sector.	
NL	FNV	All	All	Yes	Yes	Next to CNV Vakmensen, FNV is the only and most important trade union in the sector. From 1,000 collective bargaining agreements signed, FNV is involved in 900 agreements being made. CNV Vakmensen, the second-largest trade union, is not affiliated to any EU trade union federation. Both trade unions are of similar importance but with a difference in ideology.	Important representativeness
PL	MOZ NSZZ Solidarność POCS	All	All	Yes	No	No other trade union within the sector.	No representativeness
PT	STAD	All	All	Yes	Yes	There are two other smaller trade unions, SITESE and CESP. SITESE is probably not the second-largest trade union, but due to its important role in collective bargaining, it is clearly the second-most important. The trade union is affiliated to UNI Global but not to UNI Europa Property Services. CESP is a small union with no EU Federation affiliation.	High representativeness
RO	None	Not relevant	Not relevant	Not relevant	Not relevant	Not relevant.	No representativeness
SE	Fastighets	Only the public sector, with the exception of domestic services workers	Only blue collar	Yes	Yes	Kommunal, which is the second-largest trade union (600 members within the sector) covering also public sector and blue-collar workers, is behind Fastighets (10,500 members in the sector) and is not affiliated to UNI Europa (nor to any other EU trade union federation). There are two other smaller trade unions, Unionen (2,300 members), which is affiliated to UNI Global but not to UNI Europa Property Services, and SEKO (250 members) with no EU Federation affiliation.	Important representativeness
SI	SOPS	All	All	Yes	No	SKVNS is the second-largest trade union (600 members) behind SOPS (1,000) and KNSS. None	No representativeness

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Most representative trade union(s)	Sector coverage	Covers all types of employee	Involved in collective bargaining	Member of UNI Europa	Importance of trade unions affiliated to other EU federations	Evaluation of UNI Europa representativeness
						are affiliated to UNI Europa or any other EU trade union federation.	
SK	None	Not relevant	Not relevant	Not relevant	Not relevant	Not relevant.	No representativeness
UK	Unite the Union	All	All	Yes	Yes	Out of two small trade unions (IWGB, IWW), the second-largest trade union is GMB, followed by Unison and PCS . These two trade unions are affiliated to UNI Europa Property Services. They also have other EU trade union federation affiliation as they are general unions (GMB is affiliated to EFFAT, ETF and IndustriAll).	High representativeness

Notes: Green shading = involved in collective bargaining. Light blue shading = important representativeness. Dark blue shading = high representativeness. In some cases, the trade union may be affiliated to UNI Global Union Property Services but not UNI Europa (for example, PL) or is affiliated to UNI Europa but not specifically for the industrial cleaning sector (for example, Younion in AT). Bold = member of UNI Europa. Blue text = affiliated to UNI Europa according to the national correspondents but not in the list provided by UNI Europa. Red text = not involved in collective bargaining, nor affiliated to UNI Europa. ^aSCIO is the only trade union in the sector in Croatia, but it is very small and without any influence at sectoral level. Its 105 members are employed in the largest firm (Atalian, 2,200 employees), but there is no company-level collective bargaining at this level. ^bDespite not being affiliated to UNI Europa and, as of August 2019, not being involved in collective bargaining, HVDSZ 2000 has been included because it is involved in single-employer bargaining in another sector and could potentially participate in collective bargaining at company level in the future as it has members within the cleaning sector.

Source: Network of Eurofound Correspondents, 2018.

EFCI membership domain

The EFCI aims to represent its members in the entire industrial cleaning sector (NACE codes 81.21, 81.22 and 81.29). Through its national member organisations, the EFCI covers a membership domain that is congruent with the industrial cleaning sector as defined by the NACE codes. Therefore, the EFCI is only involved in the ESSDC for the industrial cleaning sector.

The EFCI has 16 affiliated national employer organisations representing employers in the industrial cleaning sector – 14 affiliates in 13 different EU Member States and 2 outside the EU (Norway and Switzerland).

Table 28 illustrates that 11 affiliated organisations from 10 EU Member States cover the entire cleaning sector with their membership domain, while all of the 14 affiliated employer organisations have members covering NACE code 81.21 (corresponding to general cleaning of buildings), which is the largest part of the sector. The table shows the sector-relatedness and the involvement in collective bargaining of the 14 EFCI-affiliated organisations in 13 Member States. It was shown in the ‘National level of interest representation’ section that there are no sector-related employer organisations in Croatia, Estonia, Greece, Latvia, Lithuania, Malta, Romania or Slovakia. The EFCI has an affiliate in 13 (65%) of the 20 Member States where there is a sector-related employer organisation.

Table 28: Sector-relatedness and involvement of EFCI member organisation in collective bargaining, 2018

Country	Employer organisation	NACE 81.21	NACE 81.22	NACE 81.29	MEB
AT	BICGDFG				MEB
BE	ABSU-UGBN				MEB
CY	CACH				
DE	BIV				MEB
DK	SBA-DI ^a				MEB
ES	ASPEL				MEB
FI	KITA				MEB
FR	FEP				MEB
IT	Legacoop Servizi ^b				MEB
	ANIP – Confindustria				MEB
LU	FLEN				MEB
SE	Almega				MEB
SI	OZS				MEB
UK	BCC ^c				

Notes: Blue shading = status changes by country as noted. Green shading = NACE codes are entirely covered in the membership domain of the organisation. Yellow shading = NACE code activities are only partly covered. ^aAccording to the EFCI website, in the first half of 2019, SBA-DI was no longer affiliated to the EFCI. It was, however, confirmed by the EFCI that SBA-DI will remain affiliated in 2019. ^bLegacoop Servizi was a member of the EFCI until 2018. Due to a change in the statutes, cooperatives are no longer able to be direct members of the EFCI. As a result, as of 2019, ANIP – Confindustria is the only Italian member organisation of the EFCI. ^cBCC was affiliated to the EFCI in 2018. In May–June 2019, there were negotiations ongoing for a renewed membership, though for the first half of 2019, BCC was not affiliated to the EFCI.

Source: EFCI and confirmed by Network of Eurofound Correspondents, 2018.

As for involvement in collective bargaining, there are 12 affiliated employer organisations from 11 different Member States involved in MEB. In Hungary, Ireland, the Netherlands and Portugal, there are employer organisations not affiliated to the EFCI that are involved in collective bargaining.

All of the 31 sector-related employer organisations not affiliated to the EFCI are included in Table 29. The marked country codes indicate countries where there is no EFCI member organisation, while the unmarked country codes indicate that there is one EFCI member organisation, but also other employer organisations that are not affiliated.

Table 29: Employer organisations (and business associations) not affiliated to EFCI

Country	Employer organisation	81.21	81.22	81.29	MEB
AT	BIRB				MEB
BG	BPCA				
	BCA				
CZ	SK ČR				
DE	ZIV				MEB
DK	Dansk Erhverv				MEB
ES	AFELIN				MEB
FI	KT				MEB
	AVAINTA				MEB
FR	SNPRO				MEB
HU	MATISZ				MEB
IE	ICCA				MEB
IT	Federlavoro				MEB
	AGCI Servizi				MEB
	FNIP – Confcommercio				MEB
	Confartigianato				MEB
	Casartigiani				MEB
	CNA – Servizi alla comunità				MEB
	CLAAI				MEB
NL	OSB				MEB
	SITO				MEB
PL	PIGC				
	ZPB PSC				
PT	APFS				MEB
SE	KFO				MEB
	SKL				MEB
	SSR				MEB
SI	ZDOPS-GIZ				MEB
	GZS-ZKG				MEB
	GZS-PTZ				MEB
	ZDS				MEB

Notes: Grey shading = No EFCI member organisation within the country. In all other cases, there is one EFCI member organisation within the country, but also other employer organisations that are not affiliated. Organisations not affiliated to EFCI that are not involved in collective bargaining are considered as business associations and not as employer organisations. Green shading = activities are entirely covered in the membership domain of the organisation. Yellow shading = activities are only partly covered. Red shading = activities are not covered.

Source: Network of Eurofound Correspondents, 2018.

Of the 39 employer organisations (see Table 34), recorded in the industrial cleaning sector, 14 (36%) are affiliated to the EFCI (see Table 28) and 31 (79%) are not affiliated (see Table 29).

In Belgium, Cyprus, Luxembourg and the UK, as there is only one employer organisation in the sector, all existing employer organisations in the sector are affiliated to the EFCI.

There are sector-related employer organisations in Belgium, Czechia, Hungary, Ireland, the Netherlands, Poland and Portugal, none of which are affiliated to the EFCI (see Table 29). There are also eight Member States where there is an EFCI member organisation but also another employer organisation that is not affiliated (Austria, Finland, France, Germany, Italy, Slovenia, Spain, Sweden).

For these Member States, it is relevant to assess whether the EFCI member organisations are the most representative employer organisations in the sector in their countries. In 10 Member States, the largest employer in the sector is also a member of the EFCI (Table 30).

Table 30: Sector-related employer organisations affiliated to EFCI, 2018

Country	Employer organisations affiliated to the EFCI	Employer organisations not affiliated to the EFCI	Is the largest employer organisation a member of the EFCI (based on number of employees in member companies)?	Is the largest employer in the sector a member of the EFCI affiliate?
AT	BICGDFG	BIRB	Yes	Yes
BE	ABSU-UGBN		Yes	Yes
BG		BPCA, BCA	No	No
CY	CACH		Yes	Yes
CZ		SK ČR	No	No
DE	BIV	ZIV	Yes	n.d.
DK	SBA-DI	Dansk Erhverv	No	Yes
EE			No	n.d.
EL		None	No	No
ES	ASPEL	AFELIN	Yes	Yes
FI	KITA	KT, AVAINTA	Yes	Yes
FR	FEP	SNPRO	Yes	Yes
HR		None	Not relevant	No
HU		MATISZ	No	No
IE		ICCA	No	No
IT	ANIP – Confindustria, Legacoop Servizi	Federlavoro, AGCI Servizi, FNIP – Confcommercio, Confartigianato, Casartigiani, CNA – Servizi alla comunità, CLAAI	Yes	No

Country	Employer organisations affiliated to the EFCI	Employer organisations not affiliated to the EFCI	Is the largest employer organisation a member of the EFCI (based on number of employees in member companies)?	Is the largest employer in the sector a member of the EFCI affiliate?
LT			Not relevant	No
LU	FLEN		Yes	Yes
LV			No	No
MT			No	No
NL		SITO, OSB	No	No
PL		ZPB PSC, PIGC	No	No
PT		APFS	No	No
RO			Not relevant	No
SE	Almega	SKL, KFO, SSR	Yes	Yes
SI	OZS	ZDOPS-GIZ, GZS-ZKG, GZS-PTZ, ZDS	Yes	Yes
SK			Not relevant	No
UK	BCC		Yes	Yes

Note: n.d. = no data.

Source: Network of Eurofound Correspondents, 2018.

As indicated in Table 29, the EFCI has members covering the entire industrial cleaning sector in Belgium, Cyprus, Denmark, Finland, France, Italy, Lithuania, Slovenia, Spain and the UK. Where members do not cover the whole sector, this is because there is an employer organisation with a sectional domain covering only chimney cleaning (Austria, Germany, Sweden). The remaining employer organisations are in general not affiliated to any EU federation, except at least six of them that cover chimney cleaning and are affiliated to the European Federation of Chimney-Sweeps (Austria, Germany, Hungary, the Netherlands, Poland, Slovenia). In some countries, such as the Netherlands and Poland, there are also employer organisations that belong to the European Federation of Master Chimney Sweeps but do not participate in any collective bargaining; therefore, they were not fully included in the study (fact sheets were not provided).

In terms of domain coverage, five EFCI member organisations have congruent coverage (Belgium, France, Lithuania, Slovenia, the UK), five have overlapping coverage (Cyprus, Finland, two in Italy, Spain), one organises employers in only part of the sector and not outside the industrial cleaning sector (Germany) and one only covers part of the sector but has membership outside the industrial cleaning sector (Austria).

Table 31: Importance of EFCI members at national level

Country	Most representative employer organisation	Sector coverage	Involved in collective bargaining	Member of the EFCI	Importance of employer organisations affiliated to other EU organisations	Evaluation of EFCI representativeness
AT	BICGDFG	Does not cover NACE codes 81.22-1 and part of 81.29-1	Yes	Yes	The second-largest employer organisation is BIRB, but it represents only chimney sweepers. BIRB is affiliated to the European Federation of Master Chimney Sweeps (ESCHFOE). ESCHFOE is only representative with regard to the chimney-sweeping segment; overall, with regard to the entire industrial cleaning sector, EFCI is unmatched.	High representativeness
BE	ABSU-UGBN	All	Yes	Yes	ABSU-UGBN represents 176 companies and 80% of the sectoral workforce. The second-largest employer organisation is FRBW, but it represents only chimney sweepers. FRBW is affiliated to ESCHFOE.	High representativeness
BG	BPCA	Does not cover NACE 81.21 and NACE 81.22	No	No	The employer organisation is affiliated to the Confederation of European Pest Management Associations (CEPA). The second employer organisation is the BCA; this is not affiliated to EFCI.	No representativeness
CY	CACH	All	No	Yes	CACH is not an employer organisation; it is merely a lobbying business association. From this perspective, the issue of recognition is not relevant. There is no precise data about its importance. There is no other employer organisation related to the sector.	Representative
CZ	SK ČR	Only chimney sweeping	No	No	CAC was affiliated to EFCI until 2016. The second-largest employer organisation is Unie úklidu ČR, which is not affiliated to EFCI. The third-largest employer organisation is SK ČR, but it represents only chimney sweepers. SK ČR is affiliated to ESCHFOE.	No representativeness
DE	BIV	All, except chimney sweeping	Yes	Yes	The second-largest employer organisation is ZIV, but it represents only chimney sweepers. ZIV is affiliated to ESCHFOE. BIV signed a sectoral collective agreement with IG BAU that applies to 100% of the sectoral workforce.	High representativeness
DK	SBA-DI	All	Yes	Yes	The Danish Chamber of Commerce, which is the second-largest employer organisation but with some distance from SBA-DI , is not affiliated to UNI Europa or another EU employer organisation. SBA-DI covers about 33% of the sectoral workforce.	Important representativeness

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Most representative employer organisation	Sector coverage	Involved in collective bargaining	Member of the EFCI	Importance of employer organisations affiliated to other EU organisations	Evaluation of EFCI representativeness
EE	None	None	Not relevant	Not relevant	Not relevant.	No representativeness
EL	PENEKA	All, mainly in 81.2	No	No	There is no other employer organisation.	No representativeness
ES	ASPEL	All	Yes	Yes	ASPEL covers 43% of the sectoral workforce. AFELIN is the second-largest employer organisation and covers a smaller part of the sector. AFELIN is not affiliated to any EU employer organisation.	Important representativeness
FI	KITA	Only the private sector	Yes	Yes	KT , the second-largest employer organisation, which covers local government employers, is not affiliated to UNI Europa but is affiliated to other EU employer organisations (CEEP , CEMR , HOSPEEM , EFEE). Two smaller employer organisations represent chimney sweepers and a few SMEs.	Important representativeness
FR	FEP	All	Yes	Yes	FEP is by far the largest employer organisation with about 2,200 members, coming before SNPRO , with 300 members, which is not affiliated to any EU employer organisation.	High representativeness
HR	None	Not relevant	Not relevant	Not relevant	There is no employer organisation.	No representativeness
HU	MATISZ	Yes	Yes	No	MATISZ was affiliated to EFCI (included in the former representativeness study) but left a few years ago. MOKÉSZ represents only chimney sweepers and is affiliated to ESCHFOE . There is no other employer organisation.	No representativeness
IE	ICCA	All	Yes	No	ICCA is the only employer organisation and is not affiliated to any EU employer organisation.	No representativeness
IT	Legacoop Servizi	Only cooperatives	Yes	Yes	The ANIP – Confindustria is the second-largest employer organisation and covers the private sector. It is affiliated to EFCI. The third one, Federlavoro , which covers only cooperatives, is not affiliated to EFCI. There are six smaller employer organisations that are not affiliated to EFCI. Both EFCI members represent at least 15–20% of the sectoral workforce.	Representative
LU	FLEN	All	Yes	Yes	FLEN represents 85% of the sectoral workforce. There is no other employer organisation.	High representativeness

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Most representative employer organisation	Sector coverage	Involved in collective bargaining	Member of the EFCI	Importance of employer organisations affiliated to other EU organisations	Evaluation of EFCI representativeness
LT	None	Not relevant	Not relevant	Not relevant	There is no other employer organisation.	No representativeness
LV	None	Not relevant	Not relevant	Not relevant	There is no other employer organisation.	No representativeness
MT	None	Not relevant	Not relevant	Not relevant	There is no other employer organisation.	No representativeness
NL	OSB	All, except cleaning within the heavy or chemical industry	Yes	No	OSB represents about 33% of the workforce and 70% of the market turnover. A second employer organisation, SITO, is less important. Neither are members of EFCI. It was one of the founding members of EFCI but is no longer affiliated.	No representativeness
PL	PIGC	All	No	No	PIGC represents 50–70% of the sectoral workforce. A second employer organisation, ZPB PSC, is less important (7% of the workforce). Neither are members of EFCI.	No representativeness
PT	APFS	All	Yes	No	APFS seems to be the only employer organisation in the sector. APFS is the only employer association that signs collective agreements in the industrial cleaning sector. It was one of the founding members of EFCI but is no longer affiliated.	No representativeness
RO	None	Not relevant	Not relevant	Not relevant	There is no other employer organisation.	No representativeness
SE	Almega	Not the public sector (municipalities and country councils) or chimney-sweeping companies (81.22)	Yes	Yes	Almega represents about 60% of the sectoral workforce. The second-largest employer organisation, SKL, covers only the public sector and 24% of the sectoral workforce. SKL is affiliated to CEEP and CEMR.	Important representativeness
SI	OZS	All	Yes	Yes	OZS covers 60% of the sectoral workforce. The second-largest trade union, ZDOPS-GIZ, covers 53% of the workforce and is not affiliated to any EU employer organisation. A smaller employer organisation, GZS-ZKG, is affiliated to ESCHFOE. Two other employer organisations exist and are not affiliated to EFCI.	Important representativeness
SK	KKS	Part of 81.2, only chimney sweepers	No	No	KKS is affiliated to ESCHFOE. There is no other employer organisation.	No representativeness
UK	BCC	All	No	Yes	The second-largest employer organisation, CSSA, covers mainly SMEs and is affiliated to BCC. So CSSA is indirectly affiliated to EFCI.	High representativeness

Representativeness of the European social partner organisations: Industrial cleaning sector

Note: Bold = EFCI member organisation (2018). Green shading = member of the EFCI. Light blue shading = representativeness/important representativeness. Dark blue shading = high representativeness.

Source: Network of Eurofound Correspondents, 2018.

Table 32 shows sectoral coverage of related national employer organisations affiliated to EFCI.

Table 32: Sectoral coverage of related national employer organisations affiliated to EFCI

Country	Congruent	Sectional	Overlap	Sectional overlap
AT				BICGDFG , BIRB
BE	ABSU-UGBN			
BG		BPCA	BCA	
CY			CACH	
CZ		SK ČR		
DE		BIV , ZIV		
DK			Dansk Erhverv, SBA-DI	
EE				
EL				
ES			ASPEL , AFELIN	
FI			KITA	KT, AVAINTA
FR	FEP , SNPRO			
HR				
HU				MATISZ
IE	ICCA			
IT	FNIP – Confcommercio, Confartigianato, CNA – Servizi alla comunità, CLAAI		Legacoop Servizi , Federlavoro, AGCI Servizi, ANIP – Confindustria , Casartigiani	
LT				
LU	FLEN			
LV				
MT				
NL	OSB			SITO
PL			PIGC, ZPB PSC	
PT			APFS	
RO				
SE		SSR		Almega , SKL, KFO
SI	OZS		ZDOPS-GIZ, GZS-PTZ, ZDS	GZS-ZKG
SK				
UK	BCC			

Note: Bold = EFCI member organisation (2018).

Source: Network of Eurofound Correspondents, 2018.

As shown in Table 33, 12 of the 14 EFCI member organisations are involved in MEB (in Austria, Belgium, Denmark, Finland, France, Germany, Italy, Lithuania, Slovenia, Spain, Sweden), and two employer organisations (Cyprus, the UK) are not involved in any collective bargaining. It is also worth noting that in Croatia, Estonia, Greece, Latvia, Lithuania, Malta, Romania and Slovakia, there are no employer organisations in the sector involved in collective bargaining.

In Austria, Belgium, Denmark, France, Germany, Luxembourg and Sweden, the collective agreements negotiated by EFCI members are those covering the greatest number of workers in the sector. Data that would allow assessment of the weight of EFCI members in Finland, Italy, Slovenia, Spain and the UK are missing.

Table 33: Collective bargaining coverage of related national employer organisations affiliated to the EFCI

Country	Employer organisation	Total individual companies in membership	Total employees in these companies	Involvement in collective bargaining	Number of workers covered by bargaining
AT	BICGDFG	1,918	n.d.	MEB	55,725
	BIRB	621	1,857	MEB	1,857
BE	ABSU-UGBN	176	35,812	MEB	44,765
CY	CACH	35	1,320	No	Not relevant
DE	BIV	2,500	n.d.	MEB	429,400
	ZIV	7,600	20,000	MEB	20,000
DK	Dansk Erhverv	n.d.	n.d.		
	SBA-DI	113	16,976	MEB	16,971
ES	ASPEL	15	42.67	MEB	n.d.
	AFELIN	n.d.	n.d.	MEB	n.d.
FI	KITA	350	n.d.	MEB	n.d.
	KT	124	n.d.	MEB	n.d.
	AVAINTA ^a	600	45,000	MEB	45,000
FR	FEP	2,200	363,966	MEB	485,288
	SNPRO	300	121,322	MEB	485,288
IT	Legacoop Servizi	n.d.	n.d.	MEB	n.d.
	Federlavoro	n.d.	n.d.	MEB	n.d.
	AGCI Servizi	n.d.	n.d.	MEB	n.d.
	ANIP – Confindustria	50	31,841	MEB	n.d.
	FNIP – Confcommercio	n.d.	n.d.	MEB	n.d.
	Confartigianato	n.d.	n.d.	MEB	n.d.
	Casartigiani	n.d.	n.d.	MEB	n.d.
	CNA – Servizi alla comunità	n.d.	n.d.	MEB	n.d.
CLAAI	n.d.	n.d.	MEB	n.d.	
LU	FLEN	44	8,075	MEB	9,500
SE	Almega	1,100	40,000	MEB	40,000
	KFO	23	2,600	MEB	2,600
	SKL	310	18,400	MEB	18,400
	SSR	171	1,400	MEB	1,400
SI	OZS	609	3,396	MEB	n.d.
	ZDOPS-GIZ	800	3,000	MEB	n.d.
	GZS-ZKG	15	283	MEB	540
	GZS-PTZ	n.d.	n.d.	MEB	5,491

Representativeness of the European social partner organisations: Industrial cleaning sector

	ZDS	n.d.	n.d.	MEP	540
UK	BCC	n.d.	n.d.	No	Not relevant

Notes: *Bold and green shading = EFCI member organisation (2018). n.d. = no data. ^aFor AVAINTA these data overlap the cleaning sector.*

Source: *Network of Eurofound Correspondents, 2018.*

Industrial cleaning sector representativeness of UNI Europa and the EFCI

With details of their respective affiliated trade unions and employer organisations, Table 34 summarises the representativeness of both UNI Europa and the EFCI in the industrial cleaning sector.

There are 57 industrial cleaning sector trade unions in 23 EU Member States where trade unions are recorded, of which 22 (38.5%) are members of UNI Europa. Of the 54 industrial cleaning sector trade unions for which information is available and which are involved in collective bargaining, 21 (39%) are affiliated to UNI Europa. UNI Europa has members involved in collective bargaining in 14 out of the 15 Member States where it has members (only its affiliate in Greece does not take part in collective bargaining).

There are 39 employer organisations in the industrial cleaning sector in 16 countries. Of these organisations, 14 (36%) are members of the EFCI. The EFCI has at least 1 member organisation in 13 Member States. Of the 39 employer organisations, 32 are involved in collective bargaining, 12 (38%) of which are members of the EFCI.

Table 34: Membership structure of UNI Europa and EFCI

Organisations	Number of organisations	Number of Member States with organisations	Number of organisations involved in collective bargaining	Number of Member States with organisations involved in collective bargaining
All trade unions	57 trade unions	23 (no trade unions in CZ, EE, LV, RO, SK)	54 trade unions	20 (trade unions in CZ, EL, HU are not involved in collective bargaining)
All sector-related trade unions	55 trade unions	21 (no trade unions in HR and HU)	54 trade unions	20 (trade unions in CZ, EL, HU are not involved in collective bargaining)
Trade unions affiliated to UNI Europa in 2018 (number)	22 trade unions	15 (no affiliates in BG, CY, LT, MT, PL, SI)	21 trade unions	14 (trade unions involved in collective bargaining but not affiliated in BG, CY, LT, MT, PL, SI)
Trade unions affiliated to UNI Europa in 2018 (%)	40	71 ^a	39	70
All sector-related employer organisations	39 employer organisations	16 (no employer organisations in BG, CZ, EE, EL, HR, HU, LT, LV, MT, PL, RO, SK)	32 employer organisations	14 (employer organisations in CY and UK are not involved in collective bargaining)
Employer organisations affiliated to the EFCI (national members and affiliated members) in 2018 (number)	14 employer organisations	13 (no affiliate in IE, NL, PT)	12 employer organisations	11 (employer organisations involved in collective bargaining but not affiliated in IE, NL, PT)
Employer organisations affiliated to the EFCI in 2018 (%)	36	81	38	79
Employer organisations affiliated to the EFCI in 2019 (number)	12 employer organisations ^b	12 Member States	11 employer organisations	11
Employer organisations affiliated to the EFCI in 2019 (%)	31	71	34	79

Notes: ^aIncluding affiliates figuring in the list of affiliates provided by UNI Europa and national correspondents. ^bAs of 2019, there is only one Italian employer organisation (ANIP – Confindustria) affiliated to the EFCI. The UK member organisation BCC was a member until 2018 but is not affiliated in 2019.

Source: Authors' own calculations based on Network of Eurofound Correspondents data, 2018.

Other European trade union associations

As demonstrated in Table 35, some sector-related trade unions are not affiliated to UNI Europa, and some may be affiliated to other EU trade union federations. This is mainly because the national trade union also has members in other sectors, such as the public sector (which explains the affiliation of Podkrepa CL, JHL, SEKO and GMB to EPSU) or the transport sector (which explains affiliation of FNPD-CGT and GMB to the ETF). However, even if these EU trade unions may slightly overlap the industrial cleaning sector, they have no significant role within the sector.

Table 35: Sector-related trade unions affiliated to UNI Europa and other European associations

Country	Trade unions affiliated to UNI Europa for their industrial cleaning members	Trade unions affiliated to UNI Europa for other sectors but not for industrial cleaning	Trade unions not affiliated to UNI Europa	Organised in which other European sectoral or cross-sectoral trade union organisation?
AT	Vida	GPA-djp, Younion	GBH	EFBWW
BE	AC-CG, ACV V&D-CSC A&S	ACLVB-CGSLB		
BG			FITUGO	
			Podkrepa CL	EPSU PSI
CY		OIYK-SEK	SEBETTYK-PEO PASEY-PEO	
CZ				
DE	IG BAU		ZDS	EPSU
DK	3F, Serviceforbundet			
EE				
EL		OIYE		
ES	FeSMC-UGT, CCOO CS			
FI	PAM, PRO		JHL	EPSU
FR	FS CFDT, FEETS-FO		CFTC-CSFV, UNSA, FNECS CFE-CGC FNPD-CGT	ETF, UNI Europa
HR			SCIO ^a	
HU			HVDSZ 2000 ^b	
IE	SIPTU			
IT	FILCAMS CGIL	FISASCAT CISL	UIL Trasporti Fesica Confsal	
LT			JKUDPS	
LU	OGBL	LCGB		
LV				
MT		GWU		
NL	FNV		CNV Vakmensen	
PL			MOZ NSZZ Solidarność POCS	
PT	STAD		SITESE, CESP	
RO			None	

Country	Trade unions affiliated to UNI Europa for their industrial cleaning members	Trade unions affiliated to UNI Europa for other sectors but not for industrial cleaning	Trade unions not affiliated to UNI Europa	Organised in which other European sectoral or cross-sectoral trade union organisation?
SE	Fastighets		Kommunal, Unionen	
			Ledarna	CEC
			SEKO	EPSU
SI			SOPS, SKVNS, KNSS	
SK				
UK	Unison, PSC, Unite the Union		GMB	EPSU, EFFAT, IndustriALL, ETF

Notes: ^aSCIO is the only trade union in the sector in Croatia, but it is very small and without any influence at sectoral level. Its 105 members are employed in the largest firm (Atalian, 2,200 employees), but there is no company-level collective bargaining at this level. ^bDespite not being affiliated to UNI Europa and, as of August 2019, not being involved in collective bargaining, HVDSZ 2000 has been included because it is involved in SEB in another sector and could potentially participate to collective bargaining at company level in the future as the trade union has members within the cleaning sector.

Source: Network of Eurofound Correspondents, 2018.

Other European employer organisations and EU business associations

Similar to sector-related trade unions, in relation to the representation of employers in the industrial cleaning sector, some other European-level actors are present (Table 36). Outside of the EFCI, the only significant EU employer organisation within the industrial cleaning sector is the European Federation of Master Chimney Sweeps (ESCHFOE), which covers part of NACE code 81.29. According to the Network of Eurofound Correspondents, this organisation has affiliates in Austria, Belgium, Czechia, Estonia, Germany, Hungary, Slovakia and Slovenia, albeit in small member numbers. There is also an employer organisation that covers cleaning activities along with a broader remit – the European Facility Management Network, which is a platform organisation that brings together educators, researchers and practitioners in the field of facility management. Some large companies, such as Sodexo, are affiliated to organisations like the WKO in Austria; however, the WKO is not an employer organisation and has no involvement in the fields of collective bargaining or social dialogue.

Table 36: Sector-related national employment organisations affiliated to the EFCI and other European associations and supranational affiliate members of the EFCI, 2018

Country	Employer organisations affiliated to the EFCI	Employer organisations not affiliated to the EFCI	Represented in other European sectoral or cross-sectoral employer organisation
AT	BICGDFG	BIRB	ESCHFOE
BE	ABSU-UGBN		
BG		BPCA, BCA	
CY	CACH		
CZ		SK ČR	
DE	BIV	ZIV	ESCHFOE
DK	SBA-DI	Dansk Erhverv	
EE			

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Employer organisations affiliated to the EFCI	Employer organisations not affiliated to the EFCI	Represented in other European sectoral or cross-sectoral employer organisation
EL			
ES	ASPEL	AFELIN	
FI	KITA	KT	CEEP, HOSPEEM, CEMR, EFEE
		AVAINTA	
FR	FEP	SNPRO	
HR			
HU		MATISZ	
		MOKÉSZ	ESCHFOE
IE		ICCA	
IT	ANIP – Confindustria, Legacoop Servizi	Federlavoro	
		AGCI Servizi	
		FNIP – Confcommercio	
		Confartigianato	
		Casartigiani	
		CNA – Servizi alla comunità	
		CLAAI	
LT			
LU	FLEN		
LV			
MT			
NL		OSB	
		SITO	
PL		ZPB PSC, PIGC	
PT		APFS	
RO		None	
SE	Almega	SKL	
		KFO	
		SSR	
SI	OSZ	ZDOPS-GIZ, GZS-PTZ, ZDS	
		GZS-ZKG, KKS	ESCHFOE
SK			
UK	BCC		

Source: Network of Eurofound Correspondents, 2018.

Summary

Tables 37 and 38 demonstrate that despite a significant number of trade unions and employer organisations in the industrial cleaning sector at Member State level not being affiliated to the EFCI or UNI Europa, the organisations that are members are those with the most members and the highest collective bargaining coverage in their countries (where collective bargaining exists in the sector). Except

for Poland and, partially, the Netherlands, all the EU Member States with the largest industrial cleaning sector workforce (more than 64,000) are represented by both UNI Europa and EFCI in the ESSDC for the industrial cleaning sector (Table 37).

Table 37: Affiliations and involvement in collective bargaining in EU Member States with sector employees in excess of 64,000

Country	Total employees in the industrial cleaning sector (2016)	At least one trade union affiliated to UNI Europa	At least one UNI Europa affiliate involved in collective bargaining	At least one employer organisation affiliated to EFCI	At least one EFCI affiliate involved in collective bargaining
DE	527,799	Yes	Yes	Yes	Yes
FR	485,288	Yes	Yes	Yes	Yes
UK	472,000	Yes	Yes	Yes	No
IT	397,547	Yes	Yes	Yes	Yes
ES	351,535	Yes	Yes	Yes	Yes
NL	256,200	Yes	Yes	No	No
SE	65,974	Yes	Yes	Yes	Yes
PL	64,430	No	No	No	No

Note: Ordered by total number of employees in the industrial cleaning sector.

Source: Network of Eurofound Correspondents, 2017–2018.

As can be seen from Table 38, the two organisations have good coverage in most countries that have between 30,000 and 63,999 sector employees – the exception being Portugal, where the EFCI has no affiliates. However, there is a contrasting situation in the 15 Member States with fewer than 30,000 employees in the sector. Among these countries, both organisations are representative only in Luxembourg. UNI Europa has at least one member in four such countries (Cyprus, Greece, Ireland, Malta), with three of these participating in collective bargaining (Cyprus, Ireland, Malta). The EFCI has only one member in two of these Member States (Cyprus, Slovenia), and only one participates in collective bargaining (Slovenia). In eight of these Member States, no organisations are affiliated to the EFCI or UNI Europa.

Thus, overall, nine Member States (including Poland from the group of countries with 64,000+ sector employees) have no affiliates to either organisation. While this is a significant number of Member States lacking representation, the share of the workforce which is not covered by the two organisations is only slightly over 6% of the total number of employees in the sector: in the total EU sector workforce of 3,066,454 employees, 197,426 are not covered by the EFCI or UNI Europa.

Table 38: Affiliations and involvement in collective bargaining in EU Member States with fewer than 64,000 employees in the sector

Country	Total employees in the industrial cleaning sector (2016)	At least one trade union is affiliated to UNI Europa	At least one UNI Europa affiliate is involved in collective bargaining	At least one employer organisation affiliated to the EFCI	At least one EFCI affiliate is involved in collective bargaining
AT	61,917 (2015)	Yes	Yes	Yes	Yes
PT	56,788	Yes	Yes	No	No
DK	47,244	Yes	Yes	Yes	Yes
BE	44,765	Yes	Yes	Yes	Yes
FI	35,000 (est.)	Yes	Yes	Yes	Yes
RO	29,752	No	No	No	No
CZ	28,700	No	No	No	No
IE	26,000 (est.)	Yes	Yes	No	No
HU	21,405	No	No	No	No
EL	20,029	Yes	No	No	No
LT	15,066	No	No	No	No
HR	9,760	No	No	No	No
LU	9,500	Yes	Yes	Yes	Yes
EE	8,922	No	No	No	No
LV	7,485	No	No	No	No
BL	7,206	No	No	No	No
SI	5,661	No	No	Yes	Yes
SK	4,700	No	No	No	No
MT	3,894	Yes	Yes	No	No
CY	1,887	Yes	Yes	Yes	No
Total	3,066,454	17 Member States	16 Member States	13 Member States	11 Member States
Percent		60.5	57	46.5	39

Source: Network of Eurofound Correspondents, 2017–2018.

UNI Europa and EFCI capacity to negotiate

Since the establishment of the industrial cleaning sector ESSDC in 1998, 24 joint texts have been agreed. These are listed in Table 39.

Table 39: Texts agreed by the EFCI and UNI Europa in the industrial cleaning sector ESSDC

Date	Agreed text
23 November 2017	Joint statement by the European social partners of the cleaning industry regarding the European Commission proposals and the IMCO-Committee draft reports on the European Services e-card
31 December 2016	Selecting best value – A guide for private and public organisations awarding contracts for cleaning services
08 March 2016	Responsible procurement declaration for the cleaning industry
28 November 2014	Joint position by the European social partners of the cleaning industry regarding the Commission proposal for the establishment of a European platform on undeclared work
12 December 2014	Joint position by the European social partners of the cleaning industry regarding the European Commission 2nd Stage Consultation of Social Partners under Article 154 TFEU on enhancing EU cooperation in the prevention and deterrence of undeclared work
06 December 2012	Joint position by the European social partners of the cleaning industry regarding the European Commission proposal for a draft directive on the enforcement of the Posting of Workers Directive {COM (2012) 131final} as well as the draft report of Mrs Danuta Jazłowiecka (2012/0061(COD))
15 October 2007	Rules of procedures – Cleaning industry
25 June 2007	Ergonomics in cleaning operations
02 March 2007	Joint declaration on daytime cleaning
14 March 2005	European Initiative for Youth – Letter to President Barroso
17 September 2004	Joint declaration: Selecting best value for the public procurement of cleaning services
01 March 2004	Framework programme of the social dialogue committee in the cleaning industry
01 March 2004	Common recommendations of the European social partners for the cleaning industry
12 March 2002	Selecting best value – A guide for organisations awarding contracts for cleaning services
27 March 2001	Selecting best value – A guide for organisations awarding contracts for cleaning services
20 February 2001	Joint contribution on employment
31 January 2001	Report on the study into key issues of the industrial cleaning sector in Europe
01 June 2000	Health and safety in the office industrial cleaning sector. European manual for employees
03 April 2000	The social partners of the cleaning industry and the EU enlargement towards the Central and Eastern European Countries (CEECs)
18 December 1998	Agreement between EFCI and Euro-FIET on establishing a committee for social dialogue in the industrial cleaning sector
04 December 1998	Common declaration from EFCI and Euro-FIET on undeclared work
21 October 1996	Social dialogue: Cleaning industry. Joint memorandum on new sources of employment
09 February 1995	Guidelines on vocational training
17 December 1993	Recommendation on the application of certain provisions of the Directive on the organisation of working time

Source: ESSDC.

UNI Europa statutes provide a mandate for regional organisation of UNI Europa to negotiate on behalf of its members in relation to the ESSDC (though the latter is not specifically referred to). The statutes in Article 3 oblige UNI Europa to fulfil its obligations in relation to its objectives in:

- deciding policy and action with respect to the institutions of the EU to ensure that there is a social and democratic dimension to European integration
- representing affiliates in European institutions whose activities affect the social, economic and cultural conditions of affiliates and their members
- coordinating the activities of UNI affiliates in Europe and offering assistance and support as appropriate
- undertaking crucial collective bargaining and negotiating agreements in the region upon mandate of the UNI Europa Executive Committee

It is therefore the UNI Europa Regional Executive Committee, which meets once a year, that has the power to provide a mandate. The composition of the Regional Executive Committee is clearly outlined in Article 9 of the statutes. In addition, this article states that:

[W]here issues of concern to a particular sector are involved, a nominee or nominees of the group concerned may be invited to attend meetings of the Regional Executive Committee in an advisory capacity.

Article 10 of the statutes also provides the opportunity to establish a Regional Management Committee.

There are no clear provisions regarding responsibility for the approval of texts agreed within the remit of the ESSDC.

The EFCI has a statutory capacity to negotiate and represent its members in the ESSDC for the industrial cleaning sector. In the 2018 EFCI statutes, the purpose of the association is set out; this includes: to participate as the employer representative in European negotiation platforms (Article 2, paragraph 6). On the EFCI website, four core objectives are mentioned, the first of which refers to the organisation's role in the European sectoral social dialogue.

The Social Affairs and Vocational Training Committee (SAVET) within the EFCI also organises social dialogue meetings, held during the mornings of ESSDC meetings. In the rest of the year it operates via email exchanges and phone or video conference calls or through meetings in person when necessary.

The EFCI has a secretariat, staffed by two to three persons, that ensures the daily functioning of the organisation, including the running of the organisation's three committees. Besides the SAVET, there is the Economic Affairs Committee and the Technical, Innovation and Quality Committee. The EFCI statutory bodies are the EFCI General Assembly, the EFCI Board of Directors and the EFCI Bureau. It is the EFCI Board of Directors that gives the green light to the result of negotiations by the SAVET in the ESSDC, especially for the adoption of joint positions or the launching of new projects. The EFCI Bureau is the executive body of the EFCI, which meets and ensures the functioning of the association between board meetings. The bureau would be informed on an initiative if something urgent arose or if a meeting of the bureau was held before a board meeting, in case it is necessary to adopt a decision urgently. Furthermore, email consultations of all member organisations are a usual practice for the EFCI secretariat, normally providing enough time for reflection. The EFCI General Assembly is informed about ESSDC activities, but it is the Board of Directors that approves ESSDC initiatives.

The EFCI disseminates the results of its activities in the ESSDC through its website, LinkedIn, Twitter and internal communications with its members and other stakeholders (including the European Employers Network and the European Business Services Alliance) as well as through newsletters.

Effective participation in the industrial cleaning sector ESSDC

Looking at participation in the ESSDC for the industrial cleaning sector for the years 2017 and 2018 (Table 40), on the trade union side, participants from 12 Member States took part, all from western European Member States. On the employer delegation, participants came from 11 Member States, mainly from western European Member States (10) with one from central and eastern Europe (Slovenia).

Table 40: Effective participation in the ESSDC for the industrial cleaning sector, 2017–2018

Member States with trade union participation in the ESSDC for the industrial cleaning sector	AT, BE, DK, ES, FI, FR, IE, IT, NL, PT, SE, UK
Member States with employer participation in the ESSDC for the industrial cleaning sector	AT, BE, DE, DK, ES, FR, IT, LU, SE, SI, UK

Source: Eurofound and European Commission.

UNI Europa has affiliates from trade unions for the industrial cleaning sector in Austria, Belgium, Cyprus, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Lithuania, Malta, the Netherlands, Portugal, Spain, Sweden and the UK (see Table 25). In three of these Member States (Germany, Greece, Lithuania) no delegate from the affiliated organisations participated in ESSDC meetings in 2017 or 2018.

The EFCI has an affiliated employer organisation in the industrial cleaning sector in Austria, Belgium, Cyprus, Denmark, Finland, France, Germany, Italy, Lithuania, Slovenia, Spain, Sweden and the UK (see Table 30). Among these, no delegate from Cyprus or Finland participated in any ESSDC meeting in 2017 or 2018.

Member organisations that are not directly represented in meetings of the ESSDC are normally kept informed about developments in the committee via their participation in the meetings of statutory bodies of their European organisation, or via the ESSDC intranet or website.

4. Conclusions

The industrial cleaning sector provides employment for 3.8 million persons in the EU, which is 1.7% of the overall EU workforce. In terms of both employees and companies, the sector is expanding year after year. Of the 270,876 companies in the industrial cleaning sector, 77% have fewer than 10 employees. From the employee perspective, only 9% work in a company with fewer than 10 employees. Slightly more than half of the employees work in the larger industrial cleaning companies, those with more than 250 employees. The industrial cleaning sector thus combines a large number of small companies with a small number of very large companies. Some of them have an increasingly European (or global) profile (e.g. Dussmann, ISS, Onet). The countries with the largest industrial cleaning sector workforce are Germany, France, the UK, Italy, Spain, the Netherlands, Portugal, Sweden and Poland.

There were 57 sector-related trade unions identified in 21 EU Member States. No sector-related trade unions were found in Czechia, Estonia, Latvia, Romania or Slovakia. In Croatia and Hungary, while trade unions were identified, because they were not affiliated to UNI Europa and not involved in collective bargaining in the industrial cleaning sector, they were not considered as sector-related trade unions in the final assessment of representativeness in this study. Of the 57 sector-related trade unions, 54 are involved in collective bargaining in 20 Member States.

As for sector-related employer organisations, 39 were identified in this study, covering 16 Member States. No sector-related employer organisations were found in Bulgaria, Croatia, Czechia, Estonia, Greece, Hungary, Latvia, Lithuania, Malta, Poland, Romania or Slovakia. Of the 39 sector-related employer organisations, 32 were involved in collective bargaining in 14 EU Member States. Additionally, a number of business associations were identified (see 'Methodological considerations' in the 'European level of interest representation' section) but were not included as sector-related employer organisations in this study.

Regarding sector-relatedness, there were relatively low proportions of trade unions (26%) and employer organisations (29%) whose membership domains cover only a part of the industrial cleaning sector. An overlapping membership domain, including also members in other sectors, is much more prevalent: 77% of the trade unions and 62% of the employer organisations (see Figures 4 and 6).

At the European level, UNI Europa and the EFCI are the mutually recognised sectoral social partners in the ESSDC for the industrial cleaning sector.

UNI Europa

Of the 55 national industrial cleaning sector trade unions, 22 are affiliated with UNI Europa. UNI Europa has affiliated trade unions in 15 of the 21 Member States where sector-related trade unions were identified. There are trade unions that are not affiliated to UNI Europa in Bulgaria, Cyprus, Lithuania, Malta, Poland and Slovenia. Also, in Hungary and Croatia there are two trade unions that are not affiliated to UNI Europa, but these are not involved in sector-related collective bargaining.

In 12 Member States, UNI Europa has members covering the entire sector. UNI Europa has an affiliate in 15 Member States covering all industrial cleaning activities except for chimney sweeping (Austria, Belgium, Denmark, France, Germany, Greece, Ireland, Italy, Lithuania, the Netherlands, Portugal, Spain, Sweden, the UK) or a large part of the sector (Finland). In 14 of the 15 countries where UNI Europa has members, the national member organisations are involved in collective bargaining. Only the Greek affiliate is not involved in sector-related collective bargaining.

UNI Europa is particularly representative in terms of coverage of countries with the largest industrial cleaning workforce. Apart from Poland, all the Member States with a sector workforce of more than 64,000 employees are represented by UNI Europa (Table 37). The situation is much different in the 15 Member States with fewer than 30,000 employees in the sector. In this group, UNI Europa has an affiliated trade union in Cyprus, Greece, Ireland, Lithuania and Malta, with four of them participating in collective bargaining (Cyprus, Ireland, Lithuania, Malta). In six Member States, there are sector-related trade unions that are not affiliated to UNI Europa (see Table 38). This is the case in Bulgaria, Croatia, Cyprus, Hungary, Lithuania, Malta,¹⁰ Poland and Slovenia.

UNI Europa has the capacity to participate effectively in the ESSDC and to negotiate on behalf of its members. It has proven its capacity to participate in and contribute effectively in the ESSDC.

There is no other EU trade union federation with significant membership in the sector, thus making UNI Europa the only representative European trade union organisation in the industrial cleaning sector.

EFCI

There are 39 employer organisations in the industrial cleaning sector in 16 Member States. Of these, 14 are members of the EFCI. The EFCI has at least 1 affiliate in 13 Member States. In each of these 13 Member States, the EFCI member organisation is considered to be the most representative employer organisation. Due to a change in its statutes, Legacoop Servizi, the Italian organisation representing cooperatives, will no longer be directly affiliated; but as of 2019, Italy is indirectly represented through the other Italian affiliate: ANIP – Confindustria. As for the UK, the BCC ended its affiliation to EFCI in 2018. This means that for 2019, EFCI has 12 Member organisations in 12 different Member States (Austria, Belgium, Cyprus, Denmark, Finland, France, Germany, Italy, Lithuania, Slovenia, Spain, Sweden).

In 2018, the EFCI had members covering the entire industrial cleaning sector in Belgium, Cyprus, Denmark, Finland, Italy, Lithuania, Slovenia, Spain and the UK. The seven EU Member States where there is a sector-related employer organisation but no affiliate of EFCI are Bulgaria, Czechia, Hungary, Ireland, the Netherlands, Poland and Portugal.

In 2018, the EFCI had 12 affiliated employer organisations involved in collective bargaining in Austria, Belgium, Denmark, Finland, France, Germany, Italy, Lithuania, Slovenia, Spain and Sweden. For 2019, there are thus 11 affiliated employer organisations involved in collective bargaining in the same 11 EU Member States (as there will be only 1 affiliate from Italy instead of 2). In Austria, Belgium, Denmark, France, Germany, Luxembourg and Sweden, the collective agreements negotiated by EFCI members are those covering the greatest number of workers in the sector. There are employer organisations involved in sector-related collective bargaining that are not affiliated to EFCI in Ireland, the Netherlands and Portugal. In Cyprus and the UK, the EFCI has an affiliated organisation that is not involved in sector-related collective bargaining.

Nine EFCI member organisations reported being consulted in bipartite and tripartite bodies or on sectoral policies in general.

Despite the significant number of employer organisations in the industrial cleaning sector at Member State level not affiliated to the EFCI, the organisations that are EFCI affiliates are those with the highest number of members and the most collective bargaining coverage in their countries (where collective bargaining

¹⁰The Maltese trade union is affiliated to UNI Europa because of its members in other sectors, not for its members in the industrial cleaning sector.

exists in the sector). Except for Poland and the Netherlands, all the EU Member States with the largest industrial cleaning sector workforce (France, Germany, Italy, Spain, Sweden, the UK) are represented by the EFCI in the ESSDC for the industrial cleaning sector. The EFCI is quite well represented in countries with between 30,000 and 63,999 sector employees (Austria, Belgium, Denmark, Finland, Portugal), except in Portugal, where the EFCI has no affiliate.

However, of the 15 Member States with fewer than 30,000 employees in the sector, the EFCI only has affiliates in 3 (Cyprus, Lithuania, Slovenia) and participates in collective bargaining with two only of them (Lithuania, Slovenia).

The EFCI has the capacity to participate effectively in the ESSDC and to negotiate on behalf of its members. It has proven its capacity to participate in and contribute effectively in the ESSDC.

There are no other EU employer organisations with a significant membership in the sector, making the EFCI the only representative European employer organisation in the industrial cleaning sector.

References

Eurofound publications are available at www.eurofound.europa.eu

Dufresne, A., Degryse, C. and Pochet, P. (2006), *The European sectoral social dialogue: Actors, developments and challenges*, European Interuniversity Press, Brussels.

EFCI (European Cleaning and Facility Services Industry) (2016), *The cleaning industry in Europe*, Brussels.

Eurofound (2015), *Collective bargaining systems in the 21st century*, Publications Office of the European Union, Luxembourg.

European Commission (1998), 'Commission decision of 20 May 1998 on the establishment of Sectoral Dialogue Committees promoting the dialogue between the social partners at European level', Official Journal of the European Union, L 225, 12 August.

European Commission (2018), 'Commission decision of 2 May 2018 establishing EU ecolabel criteria for indoor cleaning services', Official Journal of the European Union, L 114/22, 4 May.

FEP (Fédération des Entreprises de Propreté) (2018), *La transition numérique dans le secteur de la propreté*, Paris.

Oesingmann, K. (2016), 'The extension of collective agreements in Europe', *Journal for Institutional Comparisons*, Vol. 14, No. 2, pp. 59–64.

Perin, E. and Léonard, E. (2011), 'European sectoral social dialogue and national social partners', *Transfer: European Review of Labour and Research*, Vol. 17, No. 2, pp. 159–168.

SIR (Stichting Industriële Reiniging) (undated), *Samenwerking*, web page, available at <https://www.sir-safe.nl/nl/samenwerking>, accessed 17 July 2018.

Traxler, F. (2004), 'The metamorphoses of corporatism: From classical to lean patterns', *European Journal of Political Research*, Vol. 43, No. 4, pp. 571–598.

WKO (Wirtschaftskammern Österreichs) (2018a), *Reinigungstechnik – Arbeitnehmerschutz*, Vienna.

WKO (2018b), *Reinigungstechnik – Handbuch*, Vienna.

Annex 1: Industrial cleaning sector trade unions, employer organisations and companies

Table 41: Trade unions in the industrial cleaning sector

Country	Abbreviation	Full name in English	Full name in original language
AT	GPA-djp	Union of Salaried Private Sector Employees, Graphical Workers and Journalists	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier
	Vida	Vida Trade Union	Vida – Die Lebensgewerkschaft
	Younion	Younion	Younion – Die Daseinsgewerkschaft ^a
	GBH	Union of Construction and Wood Workers	Gewerkschaft Bau-Holz
BE	ACV V&D-CSC A&S	Christian Federation for Food and Services	Christelijke Centrale Voeding en Diensten / Centrale Chrétienne de l'Alimentation et des Services
	AC-CG	General Federation	Algemene Centrale/Centrale Générale
	ACLVB-CGSLB	National Federation of White-Collar Workers and Professionals/High Potential Workers	Algemene Centrale der Liberale Vakverbonden van België/Centrale Générale des Syndicats Libéraux de Belgique
BG	FITUGO	Federation of the Independent Trade Unions of Governmental Organisations	Федерация на независимите синдикати от държавното управление и организации (ФНСДУО)
	Podkrepa CL	National Federation 'Commerce, Services, Customs and Tourism', Podkrepa CL	Национална федерация „Търговия, Услуги, Контролни органи и Туризъм“ на КТ „Подкрепа“ (НФ „ТУКОТ“ на КТ „Подкрепа“)
CY	OIYK-SEK	Cyprus Private Employees Federation	Ομοσπονδία Ιδιωτικών Υπαλλήλων Κύπρου (ΟΙΥΚ-ΣΕΚ)
	SEBETTYK-PEO	Cyprus Industry, Commerce and Press-Printing Houses and General Services Trade Union	Συντεχνία Εργατοϋπαλλήλων Βιομηχανίας, Εμπορίου, Τύπου-Τυπογραφείων και Γενικών Υπηρεσιών Κύπρου (ΣΕΒΕΤΤΥΚ – ΠΕΟ)
	PASEY-PEO	Cyprus Services Employees' Trade Union (PASEY-PEO)	Παγκύπρια Συντεχνία Εργαζομένων στις Υπηρεσίες (ΠΑΣΕΥ-ΠΕΟ)
CZ	None		
DE ^p	IG BAU	Trade Union for Building, Forestry, Agriculture and the Environment	Industriegewerkschaft Bauen-Agrar-Umwelt
	ZDS	Central Federation of German Chimney Sweepers	Zentralverband Deutscher Schornsteinfeger
DK	Serviceforbundet	Union of Employees in Industrial Cleaning and Service (authors translation)	Fagforeningen for Rengøring og Service (Serviceforbundet)
	3F	United Federation of Danish Workers	Fagligt Fælles Forbund
EE	None	None	None
EL	OIYE	Greek Federation of Private Employees	Omospondia Idiotikon Ipallilon Elladas
ES	CCOO CS	Workers Commissions of Construction and Services	Comisiones Obreras de Construcción y Servicios

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Abbreviation	Full name in English	Full name in original language
	FeSMC-UGT	Services, Mobility and Purchase Federation	Federación de Servicios, Movilidad y Consumo
FI	PAM	Service Union United PAM	Palvelualojen ammattiliitto PAM
	PRO	Trade Union Pro	Ammattiliitto Pro
	JHL	Trade Union for the Public and Welfare Sectors JHL	Julkisten ja hyvinvointialojen liitto JHL ry
FR	FS CFDT	Federation for services French Democratic Confederation of Labour	Fédération des Services CFDT
	FEETS-FO	Federation of Equipment, Transport and Services	Fédération de l'Équipement, des Transports et des Services
	FNPD-CGT	National Union of Ports and Dockers/General Confederation of Labour	Fédération Nationale des Ports et Docks/Confédération générale du travail
	CFTC-CSFV	CFTC Federation of Commerce and Sales Forces	Fédération CFTC Commerce service et forces de vente
	FNECS CFE-CGC	National Federation of Managerial Staff of the Retail and Services Sectors – French Confederation of Professional and Managerial Staff/General Confederation of Professional and Managerial Staff/Trade Union of the Services Management staff	Fédération nationale de l'encadrement du commerce et des services – Confédération Générale de l'Encadrement/Confédération générale des cadres/Syndicat National de l'Encadrement des Services
	UNSA	Federation UNSA Commerce and Services	Fédération des Commerces et des Services UNSA
HR	SCIO	Trade Union of Cleaning and Maintenance	Sindikát ciscenja i održavanja
HU	HVDSZ 2000	Trade Union of Municipal and Urban Economy Workers	Helyiipari és Városgazdasági Dolgozók Szakszervezete
IE	SIPTU	Services Industry Professional Technical Union	Services Industry Professional Technical Union
IT	UIL Trasporti	Italian Union of Work – Transport	Unione Italiana del Lavoro – Trasporti
	FILCAMS CGIL	Italian Federation of Workers in the Trade, Tourism and Service Sectors	Federazione Italiana dei lavoratori del Commercio, Alberghi, Mense e Servizi – CGIL
	FISASCAT CISL	Italian Federation of Trade Unions of Workers in the Tourism, Trade Service and Related Sectors	Federazione Italiana Sindacati Addetti Servizi Commerciali Affini Turismo
	Fesica Confsal	Federation Trade Unions Industry, Retail and Artisanal Sector – General Confederation of Autonomous Workers' Trade Unions	Federazione Sindacato Industria, Commercio e Artigianato – Confederazione generale dei sindacati autonomi dei lavoratori
LT	JKUDPS	United Trade Union of Communal Economy Employees	Jungtinė komunalinio ūkio darbuotojų profesinė sąjunga
LU	OGBL	Trade Union Confederation of Luxembourg – Union for Private Cleaning Services	Onofhängege Gewerkschaftsbond Lëtzebuerg – Syndicat services privés de nettoyage
	LCGB	Confederation of Christian Unions in Luxembourg	Lëtzebuenger Chrëschtliche Gewerkschafts-Bond (LCGB)
LV	None	None	None
MT	GWU	General Workers' Union	General Workers' Union
NL	FNV	Federation of Dutch Trade Unions	Federatie Nederlandse Vakbeweging

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Abbreviation	Full name in English	Full name in original language
	CNV Vakmensen	Christian National Union Federation Professionals	Christelijk Nationaal Vakverbond Vakmensen
PL	MOZ NSZZ Solidarność POCS	Intercompany Union Organisation of the Independent Self-Governing Trade Union Solidarność of Security, Catering and Cleaning Workers	Miedzynakladowa Organizacja Zwiaskowa Niezaleznego Samorządneho Zwiasku Zawodowego 'Solidarność' Pracownikow Ochrony, Cateringu i Sprzatania (MOZ NSZZ Solidarność POCS)
PT	STAD	Union of Workers in Reception Services, Private Security, Cleaning, Housekeeping and Diverse Services	Sindicato dos Trabalhadores dos Serviços de Portaria, Vigilância, Limpeza, Domésticas e Atividades Diversas
	SITese	Union of Workers and Service Technicians, Trade, Restoration and Tourism	Sindicato dos Trabalhadores e Técnicos de Serviços, Comércio, Restauração e Turismo
	CESP	Union of Workers in Commerce, Administration and Services of Portugal	Sindicato dos Trabalhadores do Comércio, Escritórios e Serviços de Portugal
RO	None	None	None
SE	Kommunal	Swedish Municipal Workers Union Employees' Union	Kommunal
	Fastighets	Building Maintenance Workers' Union of Sweden	Fastighetsanställdas förbund
	Unionen	Unionen	Unionen
	Ledarna	Swedish Organisation for Managers	Ledarna
	SEKO	Swedish Union for Service and Communications Employees	SEKO
SI	SOPS	Trade Union of Craft and Entrepreneurship of Slovenia	Sindikat obrti in podjetništva Slovenije
	SKVNS	Trade Union of Public Utilities, Security and Estate Business of Slovenia	Sindikat komunale, varovanja in poslovanja z nepremičninami
	KNSS	KNSS – Independence, Confederation of New Trade Unions of Slovenia	KNSS – Neodvisnost, Konfederacija novih sindikatov Slovenije
SK	None	None	None
UK	GMB	General, Municipal and Boilermakers Union	General, Municipal and Boilermakers Union
	Unison	Unison	Unison
	Unite the Union	Unite the Union	Unite the Union
	PCS	Public and Commercial Services Union	Public and Commercial Services Union

Notes: In some cases, the trade union may be affiliated to UNI Global Union Property Services but not UNI Europa (such as PL) or is affiliated to UNI Europa but not specifically for the industrial cleaning sector (such as Younion in AT). ^aIn the previous representativeness study of the industrial cleaning sector, Younion was called GdG-KMSfB. The name was changed in 2015. ^bIn the previous representativeness study, Ver.di (Vereinte Dienstleistungsgewerkschaft/United Services Trade Union) was included. This time, Ver.di was excluded because according to information from this trade union, it is not involved in the industrial cleaning sector. This is because – at least in theory – the domains of the affiliates of the Confederation of German Trade Unions (Deutscher Gewerkschaftsbund, DGB) do not overlap and industrial cleaning is in the domain of IG BAU, not Ver.di. In practice, the public sector collective agreement concluded by Ver.di and the Confederation of Municipal Employers' Associations (VKA) will also cover some cleaning staff employed with public employers, but this is different from the industrial cleaning sector. Furthermore, Ver.di is not interested in being involved in this representativeness study.

Source: Network of Eurofound Correspondents, 2018.

Table 42: Employer organisations in the industrial cleaning sector

Country	Abbreviation	Full name in English	Full name in original language
AT ^a	BICGDFG	Federal Guild of Chemical Crafts and Monument, Façade and Industrial Cleaning	Bundesinnung Chemisches Gewerbe und Denkmal-, Fassaden- und Gebäudereiniger
	BIRB	Federal Guild of Chimney Sweepers and Undertakers	Bundesinnung Rauchfangkehrer und Bestatter
BE	ABSU-UGBN	General Belgian Cleaning Union	Algemene Belgische Schoonmaakunie/L'Union Générale Belge du Nettoyage
BG	BPCA	Bulgarian Pest Control Association	Българска Асоциация по Пест Контрол (БАПК)
	BCA	Bulgarian Cleaning Association	Българска Асоциация „Почистване“
CY	CACH	Cyprus Association of Cleaning and Hygiene	Κυπριακό Σωματείο Καθαριότητας και Υγιεινής (ΚΣΚΥ)
CZ	CAC ^b	Czech Association for Cleaning	Česká asociace úklidu a čištění
	Unie úklidu ČR ^c	n.d.	Unie úklidu ČR
	SK ČR	Czech Chimney Sweeping Guild	Společenstvo kominíků České republiky
DE ^d	BIV	Federal of Guilds in the Building-Cleaning Trade	Bundesinnungsverband des Gebäudereiniger-Handwerks
	ZIV	Federal Association for the Chimney Sweeping Trade	Bundesverband des Schornsteinfegerhandwerks – Zentralinnungsverband
DK	Dansk Erhverv	Confederation of Danish Enterprises	Dansk Erhverv
	SBA-DI	Confederation of Danish Industry	Servicebranchens Arbejdsgiverforening, SBA-DI
EE ^e	EKKL	Association of Estonian Facilities Maintenance	Eesti Kinnisvara Korrashoiu Liit
	EDKTL	Disinfection and Pest Control Association	Eesti Desinfektsiooni- ja Kahjuritõrjeteetvõtete Liit
	KPEL	Association of Chimney Sweep and Stove Builder Service Providers	Korstnapühkimise – ja Pottsepatööde Ettevõtjate Liit
EL	PENEKA ^f	Pan-Hellenic Association of Cleaning Companies	Panellinia Enosi Epihiriseon Katharismou
ES	ASPEL	Professional Association of Cleaning Companies	Asociación Profesional de Empresas de Limpieza
	AFELIN	Associations, Federations and National Cleaning Companies	Asociaciones, Federaciones y Empresas de Limpieza Nacionales
FI	KITA	The Real Estate Employers	Kiinteistöyönantajat ry
	KT	KT Local Government Employers	KT Kuntatyönantajat
	AVAINTA	Avaintyönantajat AVAINTA	Avaintyönantajat AVAINTA
FR	FEP	Federation of Cleaning and Related Services Companies	Fédération des Entreprises de Propreté et services associés
	SNPRO	National Union of Professionals in Cleaning and Associated Services	Syndicat national des professionnels de la propreté et des services associés
HR	None	None	None
HU	MATISZ ^g	Association of Hungarian Cleaning Technology	Magyar Tisztítás-technológiai Szövetség

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Abbreviation	Full name in English	Full name in original language
	MOKÉSZ	Hungarian Federation of Chimney Sweepers	Magyarországi Kéményseprőmesterek Szövetsége
IE	ICCA	Irish Contract Cleaning Association	Irish Contract Cleaning Association
IT	Legacoop Servizi	Legacoop Production and Services	Legacoop produzione & servizi
	Federlavoro	Federlavoro and Services – Confcooperative	Federlavoro e servizi – Confcooperative
	AGCI Servizi	General Association of Italian Cooperatives – Services	Associazione Generale Cooperative Italiane – Servizi
	ANIP – Confindustria	National Association of Cleaning Companies – Confindustria	Associazione Nazionale Imprese di Pulizia – Confindustria
	FNIP – Confcommercio	National Federation of Cleaning Companies	Federazione Nazionale delle Imprese di Pulizia – Confcommercio
	Confartigianato	Confederation of the Artisanal Sector – Cleaning Companies	Confartigianato Imprese di Pulizia
	Casartigiani	House of Craft Companies	Casartigiani
	CNA – Servizi alla comunità	National Confederation of the Craft Sector and of Small and Medium Enterprises – Community Services	Confederazione Nazionale dell’Artigianato e della Piccola e Media Impresa – Servizi alla comunità
	CLAAI	Confederation of the Italian Free Associations of the Craft Sector	Confederazione delle Libere Associazioni Artigiane Italiane
LT	None	None	None
LU	FLEN	Federation of Cleaning Companies	Fédération des entreprises de nettoyage
LV	LPUAA ^h	Professional Cleaning and Facility Management Association of Latvia	Latvijas Profesionālās uzkopšanas un apsaimniekošanas asociācija
MT	MCCA ⁱ	Malta Cleaning Contractors Association	Malta Cleaning Contractors Association
NL	OSB	Entrepreneurial Organisation of Cleaning and Business Services/Facility Management	Ondernemersorganisatie Schoonmaaken Bedrijfsdiensten
	SITO	Association of Employers in Ship, Industry, Environmental and Technical Maintenance Activities	Vereniging van Werkgevers in Scheeps-, Industrie-, Milieu- en Technische Onderhoudsactiviteiten
PL	PIGC	Polish Cleaning Chamber of Commerce	Polska Izba Gospodarcza Czystosci
	ZPB PSC	Sectoral Employers Association PSC	Związek Pracodawców Branżowych PSC
	KKP ^j	Polish Chimney Sweeps Corporation	Korporacja Kominiarzy Polskich
PT	APFS	Portuguese Association of Facility Services	Associação Portuguesa de Facility Services
RO	None	None	None
SE	Almega	Almega Service Association	Almega serviceföretagen
	SKL	Swedish Association of Local Authorities and Regions	Sveriges kommuner och landsting
	KFO	Cooperative Movement Bargaining Organisation	Arbetsgivarföreningen KFO
	SSR	The Employer Association for Swedish Chimney Sweeps	Skorstensfejarförbundet SSR

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Abbreviation	Full name in English	Full name in original language
SI	OZS	Chamber of Craft and Small Business of Slovenia	Obrtno-podjetniška zbornica Slovenije
	ZDOPS-GIZ	Association of Employers in Craft and Small Business of Slovenia	Združenje delodajalcev obrti in podjetnikov Slovenije GIZ
	ZDS	Association of Employers of Slovenia, Service Section	Združenje delodajalcev slovenije, Sekcija za storitve
	GZS-PTZ	Chamber of Commerce and Industry of Slovenia – Chamber of Small Business and Trade	Gospodarska zbornica Slovenije – Podjetniško-trgovska zbornica
	GZS-ZKG	Chamber of Commerce and Industry of Slovenia – Chamber of Public Utilities	Gospodarska zbornica Slovenije – Zbornica komunalnega gospodarstva
SK	KKS ^k	Chamber of Slovak Chimney Sweeps	Komora kominarov Slovenska
UK	BCC	British Cleaning Council	British Cleaning Council
	CSSA ^l	Cleaning and Support Services Association	The Cleaning and Support Services Association

Notes: n.d. = no data. ^aIn the previous representativeness study, the FVAA was included (FVAR), but it is excluded this time as it is neither involved in sector-related collective bargaining within the sector nor affiliated to a relevant EU organisation. However, the organisation may have some members within the sector. ^bIn the previous representativeness study, the CAC was included as member of the EFCI, but it is excluded this time as it is neither involved in sector-related collective bargaining within the sector nor affiliated to the EFCI. However, the organisation may have some members within the sector (the largest company is affiliated). ^cUnie úklidu ČR is mentioned in the national contribution as having members within the sector, but it is neither involved in sector-related collective bargaining nor affiliated to relevant EU organisation. Therefore, it is not considered in the representativeness study. ^dIn the previous representativeness study, the Confederation of Municipal Employers' Associations (VKA) was included. This will also cover some cleaning staff employed with public employers, but this is different from the industrial cleaning sector. ^eNone of the three employer organisations recorded by the national correspondent is involved in collective bargaining, and none of them is affiliated to the EFCI. Therefore, they are not considered in the representativeness study. However, KPEL covers the three largest companies (but there is no collective bargaining). ^fPENEKA was recorded by the national correspondent but is not involved in collective bargaining and is not affiliated to the EFCI. Therefore, it is not considered in the representativeness study. However, PENEKA covers the two largest companies (but there is no collective bargaining according to the national contribution). ^gMATISZ is mentioned in the national contribution as not being involved in collective bargaining and not affiliated to an EU employer organisation. Therefore, it does not appear within the representativeness study. ^hLPUAA is mentioned in the national contribution as not being involved in collective bargaining and not affiliated to an EU employer organisation. Therefore, it does not appear within the representativeness study. However, the three largest companies are affiliated to LPUAA, but there is no company-level collective bargaining. ⁱMCCA is mentioned in the national contribution as not being involved in collective bargaining and not affiliated to an EU employer organisation. Therefore, it does not appear within the representativeness study. ^jKKP is mentioned in the national contribution as not being involved in collective bargaining and not affiliated to an EU employer organisation. Therefore, it does not appear within the representativeness study. ^kKKS is mentioned in the national contribution as not being involved in collective bargaining and not affiliated to an EU employer organisation. Therefore, it does not appear within the representativeness study. ^lCSSA is affiliated to BCC, and therefore indirectly affiliated to the EFCI, so we only took BCC into account in the representativeness study.

Source: Network of Eurofound Correspondents, 2018.

Table 43: Companies, employment and employees in the industrial cleaning sector, and industrial cleaning sector employment as a proportion of all employees, of female employees and of self-employed workers, 2016

Country	Number of enterprises	Persons employed	Employees	Proportion of employees (percentage of total number of employees)	Proportion of female employees (percentage of total number of employees)	Proportion of self-employed workers (percentage of total number of employees)
AT	3,100	64,932 (2015)	61,917 (2015)	1.71	66.5	4.6
BE	2,068	n.d.	44,765	1.14	57	
BG	1,231	n.d.	7,206	0.31	65	n.d.
CY	590	2,188	1,887	0.56	70 (est.)	
CZ	10,614	33,300	28,700	0.67	66	25
DE	42,096	661,000	527,799	1.65–3.20 ^a	64	
DK	9,690 (all NACE 81.0)	52,493	47,244	1.81	34	10
EE	594	9,068	8,922	2.00	n.d.	
EL	n.d.	24,343	20,029	0.82	68	10
ES	30,623	399,663	351,535	1.89	74.6	4
FI	4,194	37,600	35,000 (est.)	<1.70	70	n.d.
FR	11,675	528,818	465,288	1.87	65	5
HR	1,038	9,791	9,760	0.87	63	
HU	6,348	n.d.	21,405	0.71	61	
IE	n.d.	28,600	26,000 (est.)	<1.75	n.d.	4
IT	33,422 (2015)	429,531 (2015)	397,547 (2015)	3.40	65	
LT	824	15,415	15,066	1.30	80–90 (est.)	
LU	388	19,280	9,500	2.41	83	n.d.
LV	2,317	9,051	7,485	1.27	53	
MT	237	4,092	3,894	2.30	60 (est.)	
NL	13,765	338,600	256,200	0.29	76	12
PL	16,364 (2015)	n.d.	64,430	0.51	70 (est.)	
PT	3,694	56,198	69,586	1.87	90	12
RO	2,968	n.d.	29,752	0.46	59	0.12
SI	1,219	6,441	5,661	0.76	76	8
SE	10,909	n.d.	65,974	1.29	70–80	
SK	4,249	5,000	4,700	0.22	64	Estimation
UK	32,000	565,000	472,000	1.74	82	16

Notes: n.d. = no data. ^aIn NACE 81.2 there are 516,088 workers recorded that were not fully liable for social security contributions and held a so-called mini-job contract. Taking them into account increases the percentage of total number of employees to 3.2%.

Table 44: Characteristics of the three largest companies in the sector

Country	Three largest industrial cleaning sector companies	Number of employees	Trade union involved in the company	Employer organisations to which the company is affiliated	In what kind of collective bargaining does the company participate? (SEB, MEB, both)
AT ^a	ISS	7,384	Vida, GPA-djp	BICGDFG	MEB
	Dussmann	7,500		BICGDFG	MEB
	Maschinenring	5,853		BICGDFG	MEB
BE	ISS Facility Services	5,641	AC-CG, ACV V&D-CSC A&S, ACLVB-CGSLB	ABSU-UGBN	Both
	Sodexo Belgium	2,822	AC-CG, ACV V&D-CSC A&S, ACLVB-CGSLB	ABSU-UGBN	Both
	Laurenty	2,168	AC-CG, ACV V&D-CSC A&S, ACLVB-CGSLB	ABSU-UGBN	MEB (SEB unknown)
BG	Mundus Services	1,300–1,400	None	Confederation of Employers and Industrialists in Bulgaria	None
	Omeka Management	n.d.	None	Union for Private Economic Enterprise (UPEE)	None
	DDD-1 Ltd. – Sofia	200	None	BPCA	None
CY	The Best MCC LTD	400	None	n.d.	None
	Hellenic Tzilalis (Cyprus) Ltd.	300	Partially	n.d.	SEB
CZ	Atalian CZ SRO	1,500–1,999	None	CAC	None
	Bartoň a Partner SRO	1,000–1,499	None	None	None
	ISS Facility Services SRO	1,000–1,499	None	None	None
DE	Dussmann	n.d.	IG BAU	Regional affiliate of BIV	MEB
	WISAG	n.d.	IG BAU	Regional affiliate of BIV	MEB
	Piepenbrock	n.d.	IG BAU	Regional affiliate of BIV	MEB
DK ^b	ISS Facility Service	5,313	Yes (name not provided)	SBA-DI	MEB
	AlliancePlus	4,000	Yes (name not provided)	SBA-DI	MEB
	Forenede Service	1,000–2,499	Yes (name not provided)	SBA-DI	MEB
EE	SOL Baltics	1,733	No	EKKL	n.d.
	ISS Eesti	1,500	No	EKKL	n.d.
	P. Dussmann Esti	751	No	EKKL	n.d.
ES	CLECE	32,082	CCOO CS and UGT	ASPEL	Both
	EULEN	23,769	CCOO CS and UGT	ASPEL	Both
	ISS	16,020	CCOO CS and UGT	ASPEL	Both
FI	Lassila & Tikanoja Oyj	8,324 (2016)	PRO, PAM	KITA	Both

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Three largest industrial cleaning sector companies	Number of employees	Trade union involved in the company	Employer organisations to which the company is affiliated	In what kind of collective bargaining does the company participate? (SEB, MEB, both)
	SOL Palvelut Oy	7,875 (2016)	PRO, PAM	KITA	Both
	ISS Palvelut Oy	7,073 (2016)	PRO, PAM	KITA	Both
FR	Onet Services	40,181	FS CFDT, FEETS-FO, FNPD-CGT, FNECS CFE-CGC, CFTC-CSFV	FEP + MEDEF	Both
	Samsic	39,850	FS CFDT, FEETS-FO, FNPD-CGT, FNECS CFE-CGC, CFTC-CSFV	FEP + MEDEF	Both
	Atalian	35,500	FS CFDT, FEETS-FO, FNPD-CGT, FNECS CFE-CGC, CFTC-CSFV	FEP + MEDEF	Both
EL	My Services	750	None	None	n.d.
	Fasma	600	None	PENEKA	n.d.
	Ecological	500	None	PENEKA	n.d.
HR	Atalian	2,200	Yes (name not provided)	None	None
	Adria grupa	550	No	None	None
	Meteor	300	No	None	None
HU	P. Dussmann	1,612	None	None	None
	Janosik Es Tarsai	1,230	n.d.	MATISZ	n.d.
	FM Talent	755	None	None	None
IE	Noonan	7,000	SIPTU	ICCA	MEB
	ISS	3,000	SIPTU	ICCA	MEB
IT	Coopservice	9,146	FILCAMS CGIL, FISASCAT CISL, Uiltrasporti	Legacoop Servizi	Both
	Rekeep (formerly Manutencoop)	13,752	FILCAMS CGIL, FISASCAT CISL, Uiltrasporti	None (affiliated to Legacoop Servizi until May 2018)	Both
	Dussmann	Around 14,000*	FILCAMS CGIL, FISASCAT CISL, Uiltrasporti, UGL Igiene Ambientale	ANIP – Confindustria	Both
LU	Dussmann Services	2,400	OGBL	FLEN	MEB
	Netto Service	1,400	OGBL	FLEN	MEB
	Atalian Temco Euroclean	1,200	OGBL	FLEN	MEB
LT	Mano aplinka	1,213	United Trade Union of Communal Economy Employees	n.d.	SEB
	Vitaresta	1,035	n.d.	n.d.	None
	Socialinė integracija	1,029	n.d.	n.d.	None
LV	Cleanhouse	569	n.d.	LPUAA	None
	Sol Baltics OU Latvia subsidiary	504	n.d.	LPUAA	None
	Impel Serviks	322	n.d.	LPUAA	None
MT	Ozo Group Ltd.	800	GWU	Malta Chamber	SEB
	Servizzi Malta Ltd.	360	GWU	None	SEB

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Three largest industrial cleaning sector companies	Number of employees	Trade union involved in the company	Employer organisations to which the company is affiliated	In what kind of collective bargaining does the company participate? (SEB, MEB, both)
NL	CSU	13,176	CNV & FNV	OSB	MEB
	Hago Nederland	10,609	FNV	OSB	MEB
	Asito	9,188	CNV & FNV	OSB	MEB
PL ^c	Impel Facility Services Ltd.	840	MOZ NSZZ Solidarność POCS, KP	PIGC, ZPB PSC	None
	DGP Dozorbud Grupa Polska Ltd.	3,500	KP	None	None
	Inwemer System Ltd.	2,500	None	PIGC, ZPB PSC	None
PT	ISS Facility Services – Gestao e Manutencao de Edificios	7,000 including 3,500 in cleaning activities	STAD (unknown for SITESE)	APFS	MEB
	Safira Facility Services	4,700	STAD (unknown for SITESE)	APFS	MEB
	Samsic Portugal – Facility Services	3,000	STAD (unknown for SITESE)	Unknown	MEB
RO	Romprest Servicii Integrate	699 (2017)	None	None	SEB
	Romnicon	510 (2017)	None		n.d.
	Libro Events	783 (2017)	None	Romanian National Employers' Organisation	n.d.
SE	ISS Facility Services AB	6,967	Fastighets, Unionen, Ledarna	Almega	MEB
	Sodexo AB	5,033	Fastighets, Unionen, Ledarna	Almega	MEB
	Coor Service Management AB	2,974	Fastighets, Unionen, Ledarna	Almega	MEB
SI	Aktiva čiščenje, doo	786	None	OZS , GZS	MEB
	ISS Facility Services doo	751	None	GZS	MEB
	Sintal Eko doo	75	None	OZS	MEB
SK	ISS Facility Services	1,000–1,999	None	None	None
	CaSS (Cistiace a sprostredkovateľske služby)	638	None	None	None
	GIMAX	250–499	None	None	None
UK	Interserve plc (facilities management)	165,000	GMB	Unknown (not CSSA)	SEB

Representativeness of the European social partner organisations: Industrial cleaning sector

Country	Three largest industrial cleaning sector companies	Number of employees	Trade union involved in the company	Employer organisations to which the company is affiliated	In what kind of collective bargaining does the company participate? (SEB, MEB, both)
	MITIE	460,000	GMB, Unite the Union	Unknown (not CSSA)	SEB
	OCS	84,939	GMB	Unknown (not CSSA)	SEB

Note: n.d. = no data. ^aThere are no company trade unions in Austria. However, both Vida and GPA-djp trade unions are suspected to have members in these companies. Only part of the numbers provided for all three companies are industrial cleaning workers. ^bFor AlliancePlus the number of employees includes facility and catering. For Forenedeservice the number of employees includes workers in health care. ^cFor both DGP Dozorbud Grupa Polska Ltd. and Inwemer System Ltd. only part of the number provided are industrial cleaning workers.

Annex 2: Network of Eurofound Correspondents

Table 45: Correspondents who contributed to the study

Country	Correspondent	Organisation
AT	Georg Adam	FORBA
BE	Dries Van Herreweghe	HIVA–KU Leuven
BG	Violeta Ivanova	Institute of Social and Trade Union Research (ISTUR)
CY	Pavlos Kalosinatos	Cyprus Labour Institute (INEK-PEO)
CZ	Petr Pojer	Research Institute for Labour and Social Affairs
DE	Sandra Vogel Birgit Kraemer	German Economic Institute Institute for Economic and Social Research, Hans Boeckler Foundation
DK	Carsten Jorgensen	FAOS, University of Copenhagen
EE	Ingel Kadarik	Praxis Centre for Policy Studies
EL	Penny Georgiadou	GSEE Labour Institute
ES	Alejandro Godino	Institute for Labour Studies, Universitat Autònoma de Barcelona
FI	Rasmus Firon	Oxford Research AB
FR	Frédéric Turlan	IRShare
HR	Predrag Bejaković	Institute of Public Finance (IPF) - Institut za javne financije
HU	Zsanna Nyírő	Hungarian Academy of Sciences Centre for Social Sciences
IE	Andy Prendergast	IRN Publishing
IT	Lisa Dorigatti	Department of Social and Political Sciences, University of Milan
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Franz Clément	Luxembourg Institute of Socio-Economic Research (LISER)
LV	Raita Karnite	EPC Ltd
MT	Louis Grech	University of Malta
NL	Amber van der Graaf Mandy Goes	Panteia BV
PL	Maciej Pańków	Foundation Institute of Public Affairs
PT	Reinhard Naumann	Friedrich Ebert Foundation (Lisbon)
RO	Valentina Vasile Cristina Boboc	European Institute of Romania
SE	Sirin Celik (Kara)	Oxford Research AB
SI	Barbara Luzar	Faculty of Social Sciences, University of Ljubljana
SK	Rastislav Bednarik	Institute for Labour and Family Research
UK	Claire Evans	Warwick Business School

Getting in touch with the EU

In person

All over the European Union there are hundreds of Europe Direct information centres. You can find the address of the centre nearest you at: <http://europa.eu/contact>

On the phone or by email

Europe Direct is a service that answers your questions about the European Union. You can contact this service:

- by freephone: 00 800 6 7 8 9 10 11 (certain operators may charge for these calls)
- at the following standard number: +32 22999696
- by email via: <http://europa.eu/contact>

Finding information about the EU

Online

Information about the European Union in all the official languages of the EU is available on the Europa website at: <http://europa.eu>

EU publications

You can download or order free and priced EU publications from the EU Bookshop at: <http://publications.europa.eu/eubookshop>. Multiple copies of free publications may be obtained by contacting Europe Direct or your local information centre (see <http://europa.eu/contact>).

EU law and related documents

For access to legal information from the EU, including all EU law since 1951 in all the official language versions, go to EUR-Lex at: <http://eur-lex.europa.eu>

Open data from the EU

The EU Open Data Portal (<http://data.europa.eu/euodp>) provides access to datasets from the EU. Data can be downloaded and reused for free, both for commercial and non-commercial purposes.

This study provides information to allow for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the industrial cleaning sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue, and their capacity to negotiate agreements.

The aim of Eurofound's representativeness studies is to identify the relevant national and European social partner organisations in the field of industrial relations in selected sectors in the EU Member States. This study identified the European Cleaning and Facility Services Industry (EFCI) (representing employers) and UNI Europa (representing employees) as the most representative European-level social partner organisations in the industrial cleaning sector.

The European Foundation for the Improvement of Living and Working Conditions (Eurofound) is a tripartite European Union Agency established in 1975. Its role is to provide knowledge in the area of social, employment and work-related policies according to Regulation (EU) 2019/127.

