



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

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*This study provides information designed to encourage sectoral social dialogue in the personal services–hair and beauty sector. The aim of Eurofound’s series of studies on representativeness is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. Top-down and bottom-up analyses of the sector in the EU28 covered in the study show that the UNI Europa’s Hair and Beauty Section and Coiffure EU are the most important European-level social partner organisations in the sector. The report is divided into three parts: a summary of the sector’s economic background; an analysis of the social partner organisations in all the EU Member States, including their membership, role in collective bargaining, social dialogue and public policy, and national and European affiliations; and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.*

## Introduction

The aim of this representativeness study is to identify the relevant national and supranational social players (that is, the trade unions and employer organisations) in the field of industrial relations in the personal services–hair and beauty sector, and to show how these players relate to the sector’s European interest associations of labour and business. The impetus for this study, and for similar studies in other sectors, arises from the European Commission’s aim to identify the representative social partner associations to be consulted under the provisions of the [Treaty on the Functioning of the European Union](#) (TFEU) and to be eligible for participation in the European social dialogue committees.

This study therefore seeks to provide the basic information needed to assess the existing sectoral social dialogue in the personal services–hair and beauty sector. The relevance and – probably – the efficiency of European social dialogue depend on whether its participants are sufficiently representative in terms of the sector’s relevant national players across the EU Member States.

To accomplish this aim, the study first identifies the relevant national social partner organisations in the personal services–hair and beauty sector before analysing the structure of the sector’s relevant European organisations and, in particular, their membership composition. This involves clarifying the unit of analysis at both the national and European level of interest representation. The study includes only organisations whose membership domain is classed as ‘sector-related’ (Table 1).

**Table 1: Determining the ‘sector-relatedness’ of an organisation**

Scope	Question in the standardised questionnaire to all correspondents	Possible answers	Note and explanations
<b>Domain of the organisation within the sector</b>	Does the domain of the trade union/employer organisation potentially cover ... the entire personal services–hair and beauty sector, including all of its sub-activities as a whole?	Yes/No	This question refers to the economic sub-activities of the NACE code chosen. Some organisations may delimit their domain to only part of the sub-activities.
	... all occupations within the personal services–hair and beauty sector among both blue-collar workers and white-collar workers?	Yes/No	Some trade unions may delimit their domain to certain occupations or categories of workers only.
	... all forms and size classes of enterprises (for instance: public ownership, private ownership, multinationals, domestic companies and small and medium-sized enterprises (SMEs) – only insofar as they exist in the sector)?	Yes/No	Some organisations may delimit their domain, for instance, to public sector companies/employees or SMEs only.
	... employees/companies, within the sector, in all regions of the country?	Yes/No	Some organisations may delimit their domain to certain regions instead of the entire territory of the country.

Scope	Question in the standardised questionnaire to all correspondents	Possible answers	Note and explanations
<b>Domain of the organisation outside the sector</b>	... employees/companies/business activities outside the personal services–hair and beauty sector?	Yes/No	Some organisations may enlarge their domain to other activities not included in the hair and beauty sector.

*Source: Standardised questionnaire sent to Eurofound’s Network of European correspondents (2016)*

At both national and European levels, many associations exist that are not considered social partner organisations as they do not essentially deal with industrial relations. Thus, there is a need for criteria to distinguish the social partner organisations clearly from other associations.

For the **national level associations**, classification as a sector-related social partner organisation implies fulfilling one of the following two criteria:

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

Taking affiliation to a European social partner organisation as a sufficient criterion for determining a national association as a social partner does not necessarily imply that the association is involved in industrial relations in its own country. Hence, this selection criterion may seem odd at first glance. However, if a national association is a member of a European social partner organisation, it becomes involved in industrial relations matters through its membership of the European organisation – through informal communication, consultation procedures and eventually the implementation of agreements concluded by the European social partners at national level.

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

For the purpose of this study, a **European association** is considered a relevant sector-related interest organisation if it meets the following criteria:

- it is on the Commission’s list of interest organisations to be consulted on behalf of the sector under Article 154 TFEU;
- it participates in the sector-related European social dialogue;
- it has asked to be consulted under Article 154 TFEU.

In addition, this study considers any other European association with sector-related national social partner organisations – as defined above – under its umbrella.

Thus, the aim of identifying the sector-related national and European social partner organisations applies both a ‘top-down’ and a ‘bottom-up’ approach.

## Definitions

For the purpose of this study, the sector is defined in terms of the [Statistical Classification of Economic Activities in the European Community](#) (NACE) to ensure the cross-national comparability of the findings. The NACE code reflects the field of activities covered by the relevant European Sectoral Social Dialogue Committee.

More specifically, the sector is defined as embracing the NACE (Rev. 2) class 96.02: Hairdressing and other beauty treatment. This class includes, in particular, the following activities:

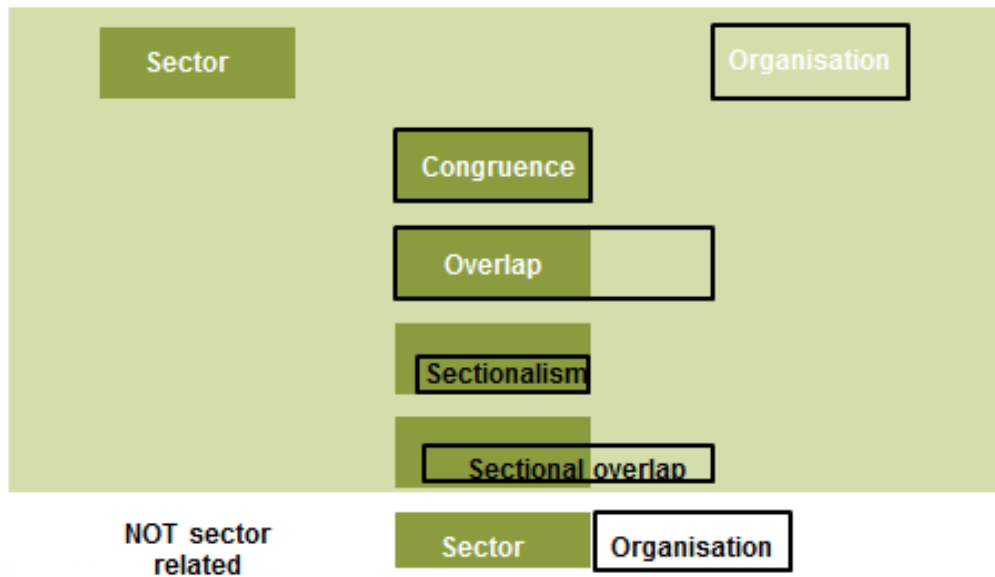
- in the hairdressing subsector: hair washing, trimming and cutting, setting, dyeing, tinting, waving, straightening and similar activities for men and women, as well as shaving and beard trimming;
- in the beauty treatment subsector: facial massage, manicure and pedicure, make-up application and so on.

Class 96.02 excludes the manufacture of wigs – see NACE (Rev. 2) class 32.99.

The domains of the trade unions and employer organisations, and the scope of the relevant collective agreements, are likely to vary from this precise NACE definition. The study therefore includes all trade unions, employer organisations and collective agreements that are ‘sector-related’ in terms of any of the following four patterns (Figure 1 and Table 2):

- congruence – the domain of the organisation or purview of the collective agreement is identical to the NACE demarcation;
- sectionalism – the domain or purview covers only a certain part of the sector as demarcated by NACE classification, while no group outside the sector is covered;
- overlap – the domain or purview covers the entire sector together with (parts of) one or more other sectors. However, it is important to note that the study does not include general associations which do not deal with sector-specific matters;
- sectional overlap – the domain or purview covers part of the sector plus (parts of) one or more other sectors.

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



**Table 2: Domain pattern and purview of the organisation’s domain**

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the domain of the union/ employer organisation embrace potentially all employees/ companies in the personal services–hair and beauty sector?	Does the union/ employer organisation also represent potentially employees/ companies outside the personal services–hair and beauty sector?
<b>Congruence (C)</b>	Yes	No
<b>Sectionalism (S)</b>	No	No
<b>Overlap (O)</b>	Yes	Yes
<b>Sectional overlap (SO)</b>	No	Yes

### European Sectoral Social Dialogue Committee

At European level, the European Sectoral Social Dialogue Committee (ESSDC) for the personal services sector was set up in 1999 following a joint request by UNI Europa on the employees’ side and Association Coiffure EU (Coiffure EU) on the employers’ side (see the ESSDC’s [Rules of procedure](#)). The personal services sector includes business activities – apart from hairdressing and beauty treatment – such as the washing and cleaning of textile and fur products, funeral activities, physical well-being activities and other smaller personal activities according to NACE (Rev. 2) Division 96. In actual fact, however, social dialogue in the personal services sector covers only activities defined by NACE (Rev. 2) class 96.02, that is, hairdressing and other beauty treatment activities as defined above.

In line with the conceptualisation of this study as outlined above, affiliation to one of these two European organisations (UNI Europa and Coiffure EU) is a sufficient criterion for classifying a national association of one of the 28 EU Member States as a relevant social partner organisation for the purpose of this study. However, it should be noted that the constituent criterion is one of sector-related membership. This is important, in particular, in the case of UNI Europa due to its sector-overlapping membership domain. Thus the study includes only those affiliates to UNI Europa whose domain relates to the personal services–hair and beauty sector. These affiliates are organised in the Hair and Beauty Section of UNI Europa.

## Collection of data

The collection of quantitative data, such as those on membership, is essential for investigating the representativeness of the social partner organisations. Unless cited otherwise, this study draws on country reports provided by Eurofound’s Network of European correspondents. These national industrial relations experts complete a standard questionnaire by contacting the sector-related social partner organisations in their countries. The contact is generally made via telephone interviews in the first place, but in certain cases might also be via email. In cases where no representative is available, the national correspondents are asked to fill out the relevant questionnaire based on secondary sources, such as information given on the social partner’s website, or derived from previous research studies.

For various reasons it is often difficult to find precise quantitative data. Often the social partner organisations do not hold sectoral membership data themselves or are unwilling to provide them. In such cases, Eurofound’s Network of European correspondents are requested to provide rough estimates rather than leaving a question blank, given the practical and political relevance of this study. However, if there is any doubt over the reliability of an estimate, this is noted in this report.

In principle, quantitative data stems from three sources:

- official statistics and representative survey studies;
- administrative data such as membership figures provided by the respective organisations, which are used to calculate the density rate on the basis of available statistical figures on the potential membership of the organisation;
- personal estimates made by representatives of the respective organisations or by Eurofound’s Network of European correspondents (on the basis of own research or other secondary sources).

While the data sources for the economic figures cited in the report are generally official statistics, the figures in respect of the organisations are usually either administrative data or estimates. Furthermore, several country studies also present data on trade unions and business associations that do not meet the definition given above of a sector-related social partner organisation so as to give a complete picture of the sector’s associational ‘landscape’. For the above substantive reasons, as well as for methodological reasons of cross-national comparability, such trade unions and business associations are not considered in this overview report. However, information of these organisations can be found in the national contributions available on demand from Eurofound. Table 18 and Table 19 in Annex 1 list all these national associations.



## 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. Firstly, combining the top-down with the bottom-up approach, information on the affiliates of the relevant EU level social partners and other sector-related associations was collected from the reports prepared by Eurofound's Network of European correspondents.

Secondly, an overview was produced by Eurofound of the preliminary findings from the national contributions for presentation at the ESSDC meeting on 17 April 2016.

Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions and, if necessary, asked the national correspondents to revise them.

The (revised) national contributions were then sent to the European social partners to allow their affiliates to double check and comment on the information provided. In addition, the national members of the Eurofound governing board were asked to check the consistency of the information in the national contributions to ensure that the bottom-up approach had completely reflected the situation, including whether it had included all the relevant sector-related organisations. This process can be considered as a mutual recognition exercise. Different trade unions can see the reported information of other trade union organisations in the same country and, if necessary, comment on the credibility or correctness of the information of other rival organisations. This is the same for the employer organisations, as well as the recognition aspect between trade unions and employer organisations. Feedback received from the sector-related organisations is taken into account provided it is in line with the study's methodology.

An overview report was then drafted. After checking within Eurofound, the draft was sent to the European social partners and to the European Commission for feedback and comments.

The final report, taking account of these comments, was then evaluated by the European-level sectoral social partners and Eurofound's Advisory Committee on Industrial Relations, which consists of representatives of both sides of industry, governments and the European Commission. After being adopted, the report is edited and published on the Eurofound website.

## Structure of report

The report consists of three main parts, beginning with a brief summary of the sector's economic background. It then analyses the relevant social partner organisations in all EU Member States. The third part considers the representative associations at European level. The second and third parts contain a brief introduction explaining the concept of representativeness in greater detail, followed by the study findings. As representativeness is a complex issue, it requires separate consideration at national and European level for two reasons. Firstly, the method applied by national regulations and practices to capture representativeness has to be taken into account (Eurofound, 2016). Secondly, the national and European organisations differ in their tasks and scope of activities. The concept of representativeness must therefore be suited to this difference.

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

## 1 Economic background

The European personal services–hair and beauty sector, as defined within the NACE classification system (96.02), employs more than one million workers (including employees, self-employed and agency workers) offering services such as hair washing, cutting, dyeing, waving and barbering, as well as beauty treatments such as facial massages, manicures and make-up application for around 350 million potential customers (Eurostat, 2008; European Agency for Safety and Health at Work, 2014; ICF GHK, 2014).

Even though the economic crisis left its mark on the sector with loss of income and jobs in many countries, the overall trend across the EU28 shows growth again in employment and revenues (ICF GHK, 2014). Data for the broader personal services sector – to which the hairdressing and beauty treatment sector is part along with other service professions such as textile and fur cleaning, funeral services and as physical well-being activities – showed a 1.3% annual growth in employment as well as a 1% growth in value added on average across Member States between 2002 and 2012 (European Commission, 2016a). Although the broader personal services sector makes up about 1.3% of total employment in the EU, the overall economic weight remains limited and makes up 0.8% of gross domestic product (EU average). This is said to be characteristic of the labour intensity and low revenue of the service sectors with a high dependence on customers' economic affluence (European Commission, 2016a).

### Sector characteristics

The sector is characterised by SMEs with an average of fewer than three workers in around 400,000 hairdressing salons (European Agency for Safety and Health at Work, 2014; see also Table 3). As identified in the previous representativeness study on the personal services–hair and beauty sector (Eurofound, 2009), growth in the sector is mainly attributable to the formation of micro-enterprises and self-employed hairdressers without employees, leading to a sector broken up into a large number of small units.

**Table 3: Employment characteristics in the personal services–hair and beauty sector**

Country	Number in employment	Number of companies	Average employment per company
AT	n.a.	7,996	n.a.
BE	n.a.	6,048	n.a.
BG	13,850	8,540	1.6
CY	4,262	3,264	1.3
CZ	n.a.	n.a.	n.a.
DE	n.a.	79,703	n.a.
DK	14,026	7,093	2.0
EE	n.a.	n.a.	n.a.
EL	46,379	22,164	2.1
ES	n.a.	n.a.	n.a.
FI	11,362	13,284	0.9

Country	Number in employment	Number of companies	Average employment per company
FR	246,144	122,755	2.0
HR	7,007	3,307	2.1
HU	25,156	25,381	1.0
IE	n.a.	n.a.	n.a.
IT	243,422	123,930	2.0
LT	n.a.	n.a.	n.a.
LU	2,832	816	3.5
LV	8,437	4,668	1.8
MT	1,582	1,232	1.3
NL	71,000	51,015	1.4
PL	220,000	64,135	3.4
PT	n.a.	n.a.	n.a.
RO	22,893	4,426	5.2
SI	5,466	3,687	1.5
SK	13,700	8,936	1.5
SE	n.a.	23,447	n.a.
UK	305,400	29,410	10.4

Note: n.a. = not available

Source: Eurofound's Network of European correspondents (2016), national statistics.  
For a detailed description of sources, please refer to the national contributions.

### Self-employed hairdressers

Self-employed hairdressers work in their own salons, in their homes and/ or offer mobile services for clients in their homes or at their place of work. Self-employed hairdressers make up about 27% on average across the EU28 (ICF GHK, 2014). In response to socioeconomic and demographic changes, services have become flexible: for example, hairdressers attend retirement and care homes as well as weddings or fashion shows (European Agency for Safety and Health at Work, 2014; ICF GHK, 2014). In some Member States, such as Hungary and the UK, the practice of 'chair renting' is widespread; self-employed hairdressers rent a chair or sometimes even a room in a salon, but do not have a fixed contract or receive social benefits such as social insurance (GHK, 2011). Statistical estimates for mobile services and chair renting do not exist for all EU Member States. In some countries, mobile services make up to 23% of the sector's workforce. While chair renting is quite common in some Member States, it barely exists or is even forbidden in other countries such as Denmark and Italy (GHK, 2011; European Agency for Safety and Health at Work, 2014).

Overall, self-employed enterprises often lack the capacity to innovate and increase competitiveness, which leads to the creation of networks in some countries. Self-employed enterprises usually also lack managerial skills as well as marketing capacities (Eurofound, 2014).

### *Franchised salons*

A second trend in the personal services–hair and beauty sector is an increase in the number of franchised salons, for instance, in shopping malls with low-cost services fostered through the recognition of national and international brands in the sector. A report published in 2014 reported that franchised salons made up between 6% (Spain) and 23% (UK) of the sector's companies (ICF GHK, 2014).

### *Informal and undeclared work*

The prevalence of informal and undeclared work, which is reported from quite a number of countries (see the national contributions, for instance, from Croatia, Czech Republic, Greece, Hungary, Romania and Slovenia), places high competitive pressure on the working conditions and wages in the sector (European Commission, 2010). High costs for taxation and charges for business registration compared with low revenue often lead to various forms of undeclared or illegal work. While there are as yet no estimates at EU level, Belgian tax authorities have been reported to assume that around 30% of the sector's overall turnover is undeclared (ICF GHK, 2014).

In debates on the reformation of European VAT regulations, representatives of the personal services–hair and beauty sector argued for the implementation of a reduced VAT rate for the whole sector across Europe in order to confront the shadow economy while increasing employment through increases in demand for services due to price reductions for customers. However, research has questioned the potential employment effects since experimental implementation of reductions in VAT showed that reductions were not passed on to customers (EIM, 2008).<sup>1</sup> Directive 2006/112/EC of 28 November 2006 set a general minimum rate of VAT at 15% with the possibility of Member States setting two reduced rates for certain sectors under specific criteria, of which six Member States (Cyprus, Ireland, Luxembourg, the Netherlands, Poland and Slovenia) included hairdressing services in the lists for a reduced VAT between 5% and 9.5% (EIM, 2008; European Commission, 2016b).

### *Customer relations*

In terms of customer relations, the service sectors in general and the personal services–hair and beauty sector in particular need to respond to consumers' demand for more flexibility in timing as well as the increasing competition to professional hair and beauty treatments from do-it-yourself-products and technologies. With the availability of safe, user-friendly and high-quality products for home use on the consumer market, the sector needs to diversify its activities and foster the development of niche services (European Agency for Safety and Health at Work, 2014). While innovations in the sector have mainly been concerned with hairdressing techniques, skin-friendly products and new styles, the use of information technologies for customer relations have become increasingly important.

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<sup>1</sup> This view was, however, contested by a representative of the Irish Hairdressers Federation, who claimed that the industry did pass the VAT reduction onto consumers in several ways.

### *Future challenges*

Trends and drivers in the hairdressing sector in the EU were identified in a 2014 Eurofound study based on eight country studies with a focus on how the quality of work and employment conditions can be improved through social partnership strategies (Eurofound, 2014). Four scenarios were developed based on factors that potentially have a high impact but are highly uncertain. In addition to aspects discussed above, future challenges to the sector include:

- the impact of automation and technological advances;
- the impact of the growth of out-of-town shopping malls at the expense of central shopping streets;
- the need to adapt to economic uncertainties;
- higher charges for water consumption and stricter regulations on waste in response to climate change.

All these could have a severe impact on working conditions.

The study produced recommendations for improvements in the quality of work and employment conditions in a sector dominated by female employees. These recommendations covered aspects such as:

- balancing the work–life relationship;
- options for return to work after maternity leave;
- inclusion of self-employed workers in the representational domain of the social partners;
- engaging in skills development;
- flexible working time schedules for workers.

### **Employment characteristics**

The personal services–hair and beauty sector is characterised by a clear majority of young and female workers. About 80% of the labour force are women and about 80% are under the age of 26 years-old with mid-range educational qualifications at International Standard Classification of Education (ISCED) level 3 or 4 (upper secondary education and post-secondary non-tertiary education, respectively) (European Agency for Safety and Health at Work, 2014; ICF GHK, 2014). Some sources indicate a trend towards an increase in immigrant workers in the sector (European Agency for Safety and Health at Work, 2014). Part-time employment (33%–40%) and fixed-term work contracts are common. Long working hours, evening and weekend work characterise the service-oriented working conditions (ICK GHK, 2014).

Across the EU, pay levels are low compared with national averages for other sectors, although there are considerable differences in salaries among EU countries (Eurofound, 2014). As the prevalence of young workers indicates, fluctuation in the sector across the EU seems to be relatively high with an annual ‘staff turnover rate of 15%, which is around twice the average measured across all sectors’ (ICF GHK, 2014). Health issues related to the occupation may account for up to 45% of drop-out; especially mentioned here are skin diseases (ICF GHK, 2014). In addition, demanding working conditions with low remuneration, and few development and promotion possibilities in the profession are perceived as a burden to remaining in the sector (Eurofound, 2014).

Health and safety risks are a severe issue in the sector and have been thematised in past years by European social partners and recognised by the European Agency for Safety and Health at Work (EU-OHSA) as one of the prime issues for improving working conditions. As a result of two collaborative research projects (SafeHair 1.0 and SafeHair 2.0) with the University of Osnabrück, a common guideline on skin protection for the hairdressing sector in the EU – known as the Declaration of Dresden – was published by social partners in the sector in 2010 (UNI Europa Hair and Beauty et al, 2010). Health issues have been included in educational programmes through the development of a modular toolbox (Safe Hair Skin & Beauty) and various online resources.

## Employment trends since 2008

Table 8 and Table 9 in Annex 1 give an overview of the development in employment in the sector from approximately 2008 to approximately 2014. They present data from both national sources and Eurostat on the number of companies and on employment and employees in the sector and in relation to the national economy.

Table 4 shows trends in the number of companies and employment between 2008 and 2014. In 19 of the 22 Member States for which related data are available, the number of companies more or less increased. In the three other countries (Belgium, Croatia and Greece), numbers declined. Although only part of the sector is considered in at least one country (for example, Austria), a clear tendency of increasing numbers of companies/business units can nevertheless be observed. Whereas the increase in terms of absolute numbers is remarkable in several countries, such as France, the Netherlands and Poland, where at least 5,000 companies were created in each, some other countries, such as Bulgaria and Latvia where the number of companies rose by about 50% or even more within the six-year period, stand out in relative terms.

Ten (Bulgaria, Cyprus, Italy, Latvia, Luxembourg, Malta, Poland, Romania, Slovenia and the UK) of the 17 countries with available data recorded a gain in overall employment within the sector in the six-year period from 2008 to 2014. In seven countries (Croatia, Denmark, Greece, Finland, Hungary, the Netherlands and Slovakia), employment fell; of these countries, Greece recorded the highest job losses in terms of absolute numbers. Losses in employment in relative terms were most outstanding in Croatia, where more than one-third of the sectoral jobs were made redundant (Table 4).

**Table 4: Trends in the numbers of companies and employment in the period 2008–2014 (% difference)**

Country	Change in number of companies	Change in employment
AT	13	n.a.
BE	-2	n.a.
BG	69	55
CY	28	5
CZ	n.a.	n.a.
DE	3	n.a.
DK	11	-5
EE	n.a.	n.a.
EL	-27	-29
ES	n.a.	n.a.
FI	11	-9
FR	41	n.a.
HR	-27	-36
HU	-36	-12
IE	n.a.	n.a.
IT	4	4
LT	n.a.	n.a.
LU	22	8
LV	49	6
MT	18	21
NL	31	-9
PL	9	10
PT	10	n.a.
RO	3	7
SE	9	n.a.
SI	25	6
SK	12	-4
UK	19	16



*Notes: Periods of observation may deviate somewhat from 2008–2014 in some countries. Figures/developments for some countries (Bulgaria, Croatia) appear to be questionable and require some explanation. n.a. = not available*

*Source: Eurofound's Network of European correspondents (2016) – national statistics. For a detailed description of sources, please refer to the national contributions.*

In terms of the number of sectoral employees, 10 countries recorded an increase and decrease during the period in question; for eight countries no comparable data are available. Interestingly, there are at least two countries (for example, Latvia and Slovenia) where the number of sectoral employees decreased while the number of sectoral employment rose; in contrast, two countries (Hungary and Slovakia) saw the converse development (see Table 8 and Table 9 in Annex 1). In the first group of countries, this may indicate a tendency to replace standard employment by self-employment, while the development in the second group of countries may correspond to the growing importance of large personal services chains to the detriment of self-employed hairdressers and beauticians without employees.

In all countries with available data on both measures, perhaps with the exceptions of Luxembourg and Romania, the number of employees with a contractual relationship lags far behind the total number of employment. In most countries, the total number of employment in the sector is more than twice as high as the number of employees. These findings corroborate the considerations above about the high incidence of self-employment in the personal services–hair and beauty sector.

Table 8 and Table 9 in Annex 1 also corroborate the finding that women represent a clear majority of workers in the personal services–hair and beauty sector. In all countries with available data, women clearly (and in most countries by far) outnumber male employment/ employees; in almost all countries with available data, women represent at least three times as many workers as men. The tables also indicate that the sector is not very large. In terms of employment shares, the sector proved quite dynamic during 2008–2014 in most countries with available data. Nine countries showed an upward and four countries showed a downward trend in the share of sectoral employment to total employment in a national economy, while in three countries this share remained largely unchanged over the six-year period.

The sector's share in the number of aggregate employment (employees, self-employed, agency workers etc.) ranges from 0.3% in Romania to 1.3% in Greece, while for several countries no related data for 2014 (or the most recent year for which data are available) have been reported. In terms of absolute numbers of sectoral workers, there are four countries (France, Italy, Poland and the UK) recording more than 200,000 people who were gainfully employed in the sector in 2013 or 2014. Note that no information on total employment is available in Germany.

Detailed and country-specific reference to Eurostat data is problematic in the case of the personal services–hair and beauty sector because Eurostat only provides employment data for the entire 'Other personal service activities' sector according to NACE (Rev.2) 96, of which 'Hairdressing and other beauty treatment' according to the NACE class 96.02 forms only a relatively small part. The author's own estimates on the basis of national and Eurostat data suggest that employment in the hair and beauty sector accounts for about one-third of total employment in the entire Other personal service activities sector, comprising about three million workers. Since the whole Other personal service activities sector according to NACE 96 is composed of very diverse business activities (for example, hair and beauty activities, washing and cleaning of textiles, funeral activities, physical well-being and a range of other personal service activities), it therefore appears advisable to not use the Eurostat database in the case of this representativeness study.



## 2 National level of interest representation

The method for conducting the representativeness studies combines a top-down and a bottom-up approach to identify national level sector-related organisations in the personal services–hair and beauty sector as defined by NACE code 96.02. The top-down approach includes all the sector-related affiliates of the European associations, of UNI Europa Hair and Beauty Section and Coiffure EU, while the bottom-up approach includes all other associations with a sector-related membership domain involved in sector-related collective bargaining.

A total of 35 sector-related trade unions were identified in 18 EU Member States and a total of 41 sector-related employer organisations were identified in 22 different Member States (Table 5).

**Table 5: Number of sector-related organisations per country**

Number of sector-related organisations	EU Member States with respective number of trade unions	EU Member States with respective number of employer organisations
0	BG, CY, CZ, EE, HU, LV, LT, PO, RO, SK	BG, CZ, EE, LV, RO, SK
1	DE, DK, FI, HR, LU, SE, SI, UK	CY, DE, DK, EL, FI, HR, HU, LT, LU, MT, NL, PL, SE, UK
2	AT, EL, ES, IE, MT, NL, PT	AT, IE
3	IT	BE, SI
4	BE	ES, IT, PT
5		FR
6	FR	

Source: Eurofound's Network of European correspondents (2016)

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

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

Under these circumstances, representativeness is normally measured by the membership strength of the organisations. For instance, in many countries recognition of trade unions and/or employer organisations as a social partner organisation is contingent on membership strength. For example, a threshold of 10% of possible members at peak, sector, regional or workplace level must be reached in countries such as the Czech Republic, Hungary, Ireland, Poland, Slovenia and Spain. In several other countries, statutory extension provisions allow for the extension of collective agreements to unaffiliated employers only when the signatory trade union and/or employer association represent a certain proportion of the employees within the agreement's domain (for example, at least 50% in countries such as Finland, Germany, Latvia and Portugal) (Eurofound, 2016).

As outlined previously, the representativeness of the national social partner organisations is of interest to this study in terms of the capacity of their European umbrella organisations to participate in European social dialogue. Hence, the role of the national players in collective bargaining and public policymaking constitutes another important component 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 to influence national public policies affecting the sector.

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

In the personal services–hair and beauty sector, however, the dominant mode of employment regulation is multi-employer bargaining, as SMEs and one-person enterprises by far prevail. Single-employer bargaining as the prevalent (and only!) mode of employment regulation only occurs in Malta (where multi-employer bargaining is absent).

In summary, representativeness is a multidimensional concept that embraces three basic elements:

- the membership domain and strength of the social partner organisations;
- their role in collective bargaining;
- their role in public policymaking.

These elements are discussed below.

## **Membership domains and strength**

The membership domain of an organisation, as formally established by its constitution or name, distinguishes its potential members from other groups which the organisation does not claim to represent. This study considers only organisations whose domain relates to the personal services–hair and beauty sector. However, there is insufficient room in this report to describe the domain demarcations of all the organisations in detail. Instead, the report notes how they relate to the sector by classifying them according to the four patterns of sector-relatedness (see Figure 1 and Table 2).

There is a difference between strength in terms of the absolute number of members and strength in relative terms. Research usually refers to relative membership strength as the density; in other words, as regards the trade union side, the ratio of trade union members (in a sector) to all employees (in the sector).

A difference also arises between trade unions and employer organisations in relation to measuring membership strength. Trade union membership simply means the number of unionised persons. Measuring the membership strength of employer organisations is more complex since they organise collective entities, namely companies that employ employees. In this case, there are two possible measures of membership strength – one referring to the companies themselves and the other to the employees working in the member companies of an employer organisation.

For a sector study such as this, measures of membership strength of trade unions and employer organisations generally also have to consider how the membership domains relate to the sector. If a domain is not identical with the sector demarcation, the organisation’s total density (that is, the density referring to its overall domain) may differ from the sector-specific density (that is, the organisation’s density referring to the sector).

This report first presents data on the domains and membership strength of the trade unions in the sector and then considers those of the employer organisations. For sectoral membership numbers, sectoral densities can be calculated provided the number of employees within the sector is given.

### *Trade unions*

Table 10 in Annex 1 presents data on trade union domains and membership strength. It lists all the trade unions that meet at least one of the two criteria for classification of a sector-related social partner organisation as defined above.

A total of 35 sector-related trade unions could be identified and at least one sector-related trade union was identified in 18 of the 28 Member States. The fact that 10 Member States (Bulgaria, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania and Slovakia) lack any relevant collective interest representation on the employee side indicates that, overall, trade union presence is relative weak in the sector.

Information on their membership domain pattern relative to the personal services–hair and beauty sector is available for all the 35 sector-related trade unions.

DFKF of Denmark, SGFOSCE of France and FNV Mooi of the Netherlands have a domain demarcation largely congruent to the sector as defined above.

About two-thirds of the trade unions (a total of 23) organise a broader range of activities and thus ‘overlap’ the sector. Overlap by and large arises from three different modes of demarcation:

- general or at least cross-sectoral (covering several business sectors of the economy) domains – as is the case of ACLVB/CGSLB in Belgium, OIYE in Greece, GWU in Malta and CNV Vakmensen in the Netherlands;
- domains covering the broader (personal) services sector – as is the case of HSMP in Croatia, PAM in Finland, FS-CFDT in France, ver.di in Germany, CESP and SITESE in Portugal, SOPS in Slovenia and FES-UGT in Spain);
- domains including activities that are not directly related to the personal services–hair and beauty sector, such as construction (as is the case of CSC-Bie/ACV-Bie in Belgium and CCOO-CYS in Spain), the hotel and restaurant (Horeca) and tourism sectors (as is the case of FILCAMS-CGIL, FISASCAT-CISL and UILTUCS-UIL in Italy) and the commerce/retail sector (as is the case of FCS-CGT, FCS-UNSA and CFTC-CSFV in France, SC-OGBL in Luxembourg, Handels in Sweden and USDAW in the UK).

Sectional overlaps occur in eight cases (slightly less than a quarter of the cases). This mode usually emanates from domain demarcations that focus on certain categories of employees or employees of a particular region, which are then organised across several or all sectors. Employee categories are specified by various parameters such as:

- employment status – for example, white-collar workers (as is the case of GPA-djp in Austria, BBTK-SETCA in Belgium and FNECS CFE-CGC in France) or blue-collar workers (as is the case of vida in Austria and ACCG in Belgium);

- geographical region – for example, Ireland’s SIPTU and Unite both organise hairdressers located only in Dublin and Cork.

There are also a few trade unions which organise only workers of a certain ownership structure across several sectors, such as only publicly owned enterprises (for example, UHM in Malta), or of a distinct occupation in the sector, while generally organising all occupations across several sectors (for example, Ireland’s SIPTU and Unite).

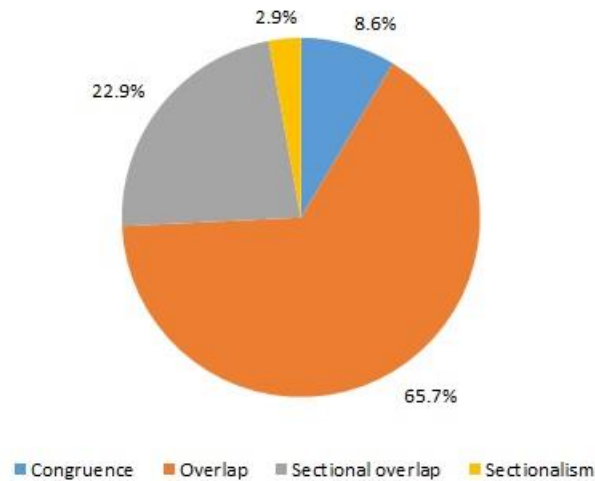
Last, but not least, only one case of a trade union with a domain sectionalist relative to the sector can be found, that is, UECC in Greece. This union organises and represents only workers employed by companies in the cosmetics subsector and does not claim to organise workers in the hairdressing subsector or outside the sector.

Those trade unions whose membership domain does not cover the entire personal services–hair and beauty sector have delimited their domain primarily in terms of occupations rather than economic activities, (legal) form/size of enterprise and region. Eight out of 10 of the trade unions with a domain sectionalist or sectionally overlapping relative to the sector have a domain which does not cover all occupations within the sector. Only Ireland, as a particularity in the sector, records two trade unions (SIPTU and Unite) which do not organise sectoral workers outside the cities of Dublin and Cork. Moreover, membership domains demarcated in terms of economic activities occur only in the case of Greece’s UECC, which only organises workers in the cosmetics subsector. All other sector-related trade unions organise sectoral workers of all economic subsectors. This is due to the small size of the sector such that trade union membership demarcations in terms of economic activities within the sector are – for practical reasons of interest representation – most unlikely.

Of the 35 sector-related trade unions, a total of 26 (74%) have a domain that includes the entire sector and 31 (89%) show a domain overlapping relative to the sector. There are many sector-related trade unions that also cover – aside from hair and beauty activities – the broader services sector, but also construction, Horeca and tourism activities. Alternatively, overlaps also arise due to cross-sectoral (general) domains of trade unions. Sectionalism in most instances means that trade unions largely organise the entire personal services–hair and beauty sector in terms of economic activities but do not represent a particular employee group. Nevertheless, despite these findings (see Figure 2 and Table 10), it cannot be concluded that overall the domains of the sector-related unions tend to be relatively broad. This is because the evidence only suggests that the trade unions’ domains often go beyond what is a very narrowly defined sector. Only four trade unions (ACLVB/CGSLB in Belgium, OIYE in Greece, GWU in Malta and CNV Vakmensen in the Netherlands) can be identified as having a cross-sectoral or general membership domain. So despite the fact that almost two-thirds of the trade unions have a domain overlapping with regard to the sector, the domains of most of the unions do not tend to be very broad.

Membership of the sector-related trade unions is voluntary in all cases.

**Figure 2: Distribution of membership domain patterns of sector-related trade unions for the personal services–hair and beauty sector**



Notes: N = 35. Percentages are rounded.

Source: Eurofound's Network of European correspondents (2016)

The absolute numbers of members (within their overall membership domain) in the sector-related trade unions show considerable variation, ranging from more than two million (in the case of Germany's ver.di) to only about 800 (in the case of Croatia's HSMP). This variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the ability to attract members. Hence, density is the measure of membership strength that is more appropriate to a comparative analysis.<sup>2</sup> Therefore this report considers densities referring to the sector (sectoral density), given that both a trade union's membership within the sector and the number of employees in the sector are provided. Sectoral density figures refer to net ratios, which means that they are calculated on the basis of active employees only rather than taking all union members (those in job and those who are not) into account. This is mainly because research usually considers net union densities as more informative than gross densities, since the former measure tends to reflect unionisation trends among the active workforce more quickly and more appropriately than the latter. Only the active workforce is capable of taking industrial action and active members tend to pay higher membership fees than retirees, unemployed and students.

More than 80% of the 23 trade unions with available data record a sectoral density (calculated as the ratio of the number of members within the sector to the total number of employees within the sector) lower than 10%. The rest of the trade unions record a sectoral density of between 10% and 50%, which means that there is no single trade union with a sectoral density higher than 50%. Hence, overall the sectoral densities of the sector-related trade unions tend to be very low. Logically, the sectoral densities of individual associations of interest representation tend to fall with the emergence and growing numbers of sectoral competitors (they compete for the same members) and thus become less significant as a measure for individual organisational strength relative to the sector. However, since only one or two sector-related trade unions can be identified

<sup>2</sup> This holds true despite the fact that the density figures gathered and calculated for the purpose of this study may in some cases be unreliable.

in 16 countries, fragmentation of the associational landscape (which can be found only in France and Belgium with six and four sector-related trade unions, respectively) appears not to be an adequate argument for the low sectoral densities of individual associations. Hence, it is more likely that the sectoral domain densities<sup>3</sup> of the sector-related trade unions tend to be low, indicating that the individual unions indeed face difficulties in recruiting members. Overall, since for more than one-third of the 35 sector-related trade unions sectoral density data cannot be calculated and the reliability of some data may be doubtful, conclusions from the available figures on sectoral density have to be drawn with the utmost caution.

In conclusion, in the personal services–hair and beauty sector, a number of occupational trade unions co-exist with a number of trade unions with multi-sector and thus relatively broad domain demarcations. This means that only a proportion of the unions may pursue a particularistic representation of collective interests on behalf of small professional groups – a strategy generally deemed to be favourable for member recruitment. In line with this, neither the quantitative data gathered in this study nor anecdotal evidence drawn from the national contributions suggest high unionisation rates in the sector. This may partially be due to the shortcomings in data availability and the existing dataset. Nevertheless, relatively low densities within the sector appear to be plausible and can be explained by a range of factors including:

- the small size of the companies on average;
- the spread of atypical employment (including part-time work as well as informal employment);
- the high fluctuation of workers;
- (possibly) the prevalence of women (although gender effects on union density are generally highly disputed – see Schnabel, 2013);
- the high incidence of self-employment.

### *Employer organisations*

Table 12 and Table 13 in Annex 1 present the membership data for the employer/business organisations in the personal services–hair and beauty sector. Overall, 41 sector-related employer/business organisations were identified – slightly more than the number of sector-related trade unions (35). In the hairdressing subsector alone, there are at least 29 sector-related employer organisations; for three organisations in Spain no information on their membership domain in relation to the subsectors is available.

At least one sector-related employer organisation is documented in 22 Member States; the exceptions are Bulgaria, the Czech Republic, Estonia, Latvia, Romania and Slovakia.<sup>4</sup> In 14 countries (Croatia, Cyprus, Denmark, Finland, Germany, Greece, Hungary, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Sweden and the UK), only one sector-related employer organisation matching at least one of the two criteria for inclusion (see above) was identified. In the remaining eight countries, pluralist associational systems exist, that is, at least two sector-related employer/business organisations can be found. Thus, compared with the

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<sup>3</sup> The sectoral domain density (in contrast to sectoral density) is the density referring only to that part of the sector covered by the union's membership domain.

<sup>4</sup> Looking at the hairdressing subsector alone there is a sector-related employer organisation in at least 20 EU Member States. For Spain, the situation is unclear due to a lack of information.



situation on the labour side, where pluralist associational systems exist in 10 Member States, on the employer side the number of countries with pluralist associational systems is lower. This is despite the fact that the number of sector-related employer/business organisations across the Member States outweighs the number of sector-related trade unions. Overall, as is the case on the trade union side, the employer/business organisations are relatively unevenly distributed among the Member States. In 14 countries, only one sector-related employer/business organisation is recorded, whereas in four countries (France, Italy, Portugal and Spain), four or more such organisations have been established.

Seven Member States (Cyprus, Hungary, Latvia, Luxembourg, Malta, Poland and the UK) record just one employer/business organisation that is not a party to collective bargaining (see Table 13 in Annex 1). These associations not involved in sector-related collective bargaining are classified as social partner organisations in this report only due to their affiliation to the sector-related European-level employer organisation Coiffure EU. Conversely, in 15 Member States at least one organisation is engaged in sector-related collective bargaining. All associations that are not involved in collective bargaining according to Table 13 are considered as trade associations<sup>5</sup> in their country. Due to the decision to include all national affiliates to a European social partner (Coiffure EU), they are included in this study. Overall, there are 19 employer/ business organisations in 18 Member States that are directly or indirectly (via a higher order unit) affiliated to Coiffure EU.

The membership domains of employer/business organisations tend to be narrower than those of the trade unions. In contrast to organised labour, where membership domains that are sectionalist relative to the sector are almost non-existent, this mode is the most common among the employer organisations, with 48.7% of the cases for which related information is available; 7.7% and 23.1%, respectively, of the associations rest on overlapping and sectionally overlapping domains relative to the sector. Cases of domain overlaps (in the case of organisations with domains either overlapping or sectionally overlapping relative to the sector) are caused by domains covering:

- all or at least several sectors of the economy (cross-sectoral domains), as is the case of MOSZI in Hungary, Ibec in Ireland, ACISTDS in Portugal and ZDOPS in Slovenia;
- SMEs and/or the crafts sector of (part of) the economy, as can be found with CB, CNA-UBS, Casartigiani and CLAAI in Italy and ZRP in Poland;
- only part of the personal services–hair and beauty sector in terms of business activities (which is nevertheless the core of the representational domain), with an additional focus on the manufacture of wigs (see BIF in Austria), on medical services (see BIFKM in Austria) or the manufacture of cosmetics (see PSVAK in Greece).

Sectionalism is caused by domain demarcations that focus on a particular subsector of the personal services–hair and beauty sector, without covering areas of business activity outside the sector. Such subsectors may be defined by:

- specialisation in terms of business activities within the personal services–hair and beauty sector such as hairdressing activities (see UBK-UCB in Belgium, CHF in Cyprus, UNEC and CNEC in France, FPC in Luxembourg, ANKO in the Netherlands, SF OZS in Slovenia and SFSAB in Sweden) or beauty treatment activities (see BESKO and UNEB in Belgium, CNAIB, FIEPPEC and UNIB in France, SK OZS in Slovenia, and FEIP and FNAE in Spain);

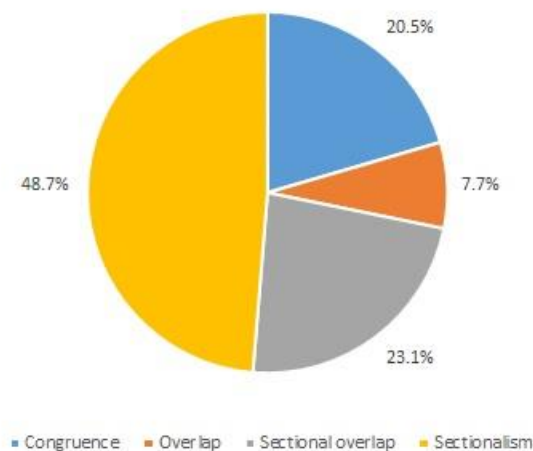
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<sup>5</sup> Put simply, trade associations' main reference is the 'product' market (where business has interests in relation to customers and suppliers) rather than the labour market.

- geographical region – as is the case of BESKO and UNEB in Belgium (representing companies in Flanders and Wallonia/Brussels, respectively) and APBCIB, ACP and APCEB in Portugal (representing companies in the southern/central, the northern regions of Portugal and the Districts of Braga and Viana do Castelo, respectively).

Finally, 20.5% of the associations show a membership domain that is more or less congruent with the sector definition. This means that the domain of these organisations focuses largely on the personal services–hair and beauty sector as defined for the purpose of this study.

**Figure 3: Distribution of membership domain patterns of sector-related employer organisations with regard to the personal services–hair and beauty sector**



Notes:  $N = 39$ . Percentages are rounded.

Source: Eurofound's Network of European correspondents (2016)

In several countries, the sectoral employers have managed to establish specific employer/business organisations as a particular voice of narrow and clearly distinct business activities within the personal services–hair and beauty sector. Accordingly, almost 49% of the employer/business organisations with available information (and most of these organisations with a domain sectional or sectionally overlapping relative to the sector) have delimited their domain in terms of business activities, such that they do not cover all activities within the personal services–hair and beauty sector. Moreover, about 13% of the organisations for which information has been provided do not represent all (legal) forms of companies in the sector (in all cases focusing on SMEs and craft enterprises), while domain demarcations in terms of territorial coverage occur in about 16% of the cases with available information. In most countries, the associations' domains tend to be tailor-made for a particular subgroup of employers and businesses within the sector. This may enable these associations to perform a particularistic interest representation on behalf of their members, although their membership strength may widely vary from one organisation to the other.

A comparison of the distribution of membership domain patterns of the sector-related employer organisations with that of the trade unions indicates that the former are found to be more frequently congruent (20.5%) with the sector definition than trade unions (8.6%) (Table 6). The proportion of trade union organisations covering the entire sector (congruence + overlap) amounts to 74.3% for the trade unions, while for employer organisations in this sector this is



28.2%. Conversely, on the employers’ side a higher proportion of organisations not covering the entire sector (71.8%) can be found than on the employees’ side (25.8%). The proportion of organisations with domains overlapping with regard to other sectors is much higher for trade unions (88.6%) than for employer organisations (30.8%).

**Table 6: Distribution of membership domain patterns of sector-related organisations in the personal services–hair and beauty sector**

	Congruence	Overlap	Sectionalism	Sectional overlap
<b>Trade unions</b>	8.6%	65.7%	2.9%	22.9%
<b>Employer organisations</b>	20.5%	7.7%	48.7%	23.1%

Source: Eurofound’s Network of European correspondents (2016)

As subunits of the Austrian Federal Economic Chamber (WKÖ), both BIF and BIFKM in Austria rely on compulsory membership. Likewise, CHF in Cyprus is based on obligatory membership, although no information about the legal basis of this arrangement has been provided. From the related information available, all other sector-related employer/business organisations are voluntary associations.

As indicated by the figures on membership totals (Table 12 in Annex 1) and density (Table 13 in Annex 1), membership strength in terms of both companies and employees varies widely with regard to the membership domain in general and the sector. Again, as outlined earlier in the context of the trade unions, density figures rather than absolute membership numbers are informative in terms of membership strength. In the case of the sector-related employer/business organisations, sectoral densities in terms of both companies and employees (employed by these companies) can be calculated. However, due to a lack of absolute numbers of sectoral members in terms of both companies and employees in the case of many associations (and due to a lack of sectoral company and employment data in some countries), sectoral densities can be calculated only for a relatively small part of them. According to the figures available, about 45% and about 27%, respectively, of the employer/business organisations record a sectoral density in terms of companies and employees of 10% or below; one-third of the employer/business organisations with available data record a sectoral density in terms of employees of 50% or higher. Whereas the median of the organisations’ sectoral densities in terms of companies lies at 11.5%, the corresponding median in terms of employees stands at 31.0%. This does not indicate overall low densities of the sector-related employer/business organisations and corresponds with the relatively low level of associational fragmentation in the sector. Higher sectoral densities in terms of employees compared with those in terms of companies indicate a greater propensity by the larger companies to associate than their smaller counterparts.

## Collective bargaining and its players

The data presented in Table 14 in Annex 1 provide an overview of the system of sector-related collective bargaining in the 28 Member States. The importance of collective bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain sector of the economy (Traxler et al, 2001). Accordingly, the sector’s rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

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

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

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

### *Collective bargaining coverage*

In terms of the collective bargaining coverage of the personal services–hair and beauty sector, 9 of the 26 countries with available data (Austria, Belgium, Finland, France, Germany, Italy, the Netherlands, Slovenia and Spain) record a coverage of 80% and more (Table 14 in Annex 1). All these countries apart from Austria register a coverage rate as high as 97% or more.

A total of 13 countries with no collective bargaining in the sector have been identified, namely Bulgaria, Croatia,<sup>6</sup> Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Luxembourg, Poland, Romania, Slovakia and the UK. Denmark, Malta, Portugal and Sweden record either very low (Malta) or medium to higher range rates of between about 50% and 70%. For Greece and Ireland, no data have been provided. Overall, the sector is characterised by a high polarisation of countries with regard to collective bargaining across the EU, in that high collective bargaining rates are concentrated – with the only exception of Slovenia – among 'old' Member States, while a lack of sector-related collective bargaining can only be found – with the notable exceptions of Luxembourg and the UK – among countries that have joined the EU since 2004.

In Greece, the social partners have since 1994 managed to conclude a multi-employer collective agreement only in the beauty treatment subsector. As a result of the recent financial and economic

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<sup>6</sup> The sectoral social partners in Croatia have, however, announced their intention to launch collective bargaining in the sector in the course of 2016.

crisis, pay cuts and a new regulation according to which newly recruited employees have to pass a six-month trial period before they are eventually hired have been provided for in this agreement. Until 2011, when the extension mechanism was in force, this agreement covered all companies and employees in the beauty treatment subsector; now it is applicable only to members of the signatory employer organisation (PSVAK). This is due to the introduction of the Economic Stability Mechanism and the First and Second Memoranda of Understanding of 2011 and 2012 agreed with the so-called Troika (International Monetary Fund, European Central Bank, European Commission) (see Eurofound, 2012). Hence, the sector's collective bargaining coverage rate has declined to an indefinite extent since 2011. Moreover, the sector's workforce (at least in the beauty treatment subsector) has had to face losses of income for several years.

In the case of Ireland, the Joint Labour Committee (JLC) system was for many years the only collective bargaining mechanism applicable in the personal services–hair and beauty sector. The JLC is a multi-employer, regionally based bargaining platform, operating in the past in the two major cities of Dublin and Cork by issuing so-called Employment Regulation Orders (ERO). However, the JLC system was found to be unconstitutional by a High Court decision of 2011. On the basis of the Industrial Relations Act 2012, the re-establishment of the JLC for the hairdressing sector was recommended in 2013, albeit with a focus on just hairdressers rather than the whole sector. The hairdressing JLC convened in May 2016 with the intention of forming a new ERO soon.

In most of the countries with available information, several factors – which sometimes interact with each other – account for higher coverage rates:

- the predominance of multi-employer bargaining (see Table 14 in Annex 1);
- the presence of (relatively) strong sector-related trade unions and employer/business organisations;
- the existence of pervasive extension practices (see Table 14 in Annex 1).

The group of Member States where sector-related multi-employer bargaining is completely absent consists of the 13 countries without any collective bargaining in the sector (see above) and Malta where coverage is very low and based exclusively on company-level arrangements. This group of countries mainly consists of 'new' Member States (that is, those countries which joined the EU in 2004, 2007 and 2013). Due to the lack of strong, encompassing social partners on at least one of the two sides of industry within the sector in virtually all of these countries, sectoral industrial relations tend to be poorly developed or absent.

However, there is a group of 14 countries (Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Portugal, Slovenia, Spain and Sweden) with exclusive or prevailing multi-employer arrangements in the sector (Table 14 in Annex 1). As far as information is available, most of them record very high or even full collective bargaining coverage rates in the sector. It is only in countries such as Denmark, Portugal and Sweden that the predominant multi-employer arrangements in the sector do not prevent significant parts of the sector from remaining uncovered. This may result from the lack of comprehensiveness of the main industrial relations players in terms of membership domain relative to the sector in these countries, partly in combination with a lack of (Denmark) or currently not applicable (Portugal) extension procedures. In the case of Ireland, the multi-employer JLC system is the only mode of collective bargaining in the sector; however, its scope of influence is limited to the cities of Dublin and Cork, meaning that the sector's collective bargaining coverage rate is – albeit indefinite – far from being complete.

Taking the collective bargaining coverage rate and the share of multi-employer bargaining as indicators for the effectiveness and strength of sectoral industrial relations structures, it can be inferred from these findings that the sector's industrial relations structures are quite well-established in about half of the EU28 Member States. In some countries such as Denmark, France, Greece and Spain, a multi-level bargaining system is established which combines more or less comprehensive multi-employer bargaining with single-employer agreements. In such cases, the single-employer settlements either complement the multi-employer agreements in matters not regulated by the latter or contain more favourable employment terms than the multi-employer agreements.

The prevalence of multi-employer settlements in the sector is in some countries backed by a significant use of extension practices. Pervasive extension practices in the personal services–hair and beauty sector are reported for a number of countries, namely Belgium, Finland, France, Germany, the Netherlands, Portugal, Slovenia, Spain and Sweden (Table 14 in Annex 1). As the aim of extension provisions is to make multi-employer agreements generally binding, the provisions for obligatory membership system in Austria should also be noted. Obligatory membership creates an extension effect, since WKÖ and its subunits are parties to multi-employer bargaining. Another functional equivalent to statutory extension schemes can be found in Italy. According to the country's constitution, minimum conditions of employment must apply to all employees. The country's labour court rulings relate this principle to multi-employer agreements, to the extent that they are regarded as generally binding.

## Participation in public policymaking

Interest associations may partake in public policy in two basic ways. Firstly, they may be consulted by the authorities on matters affecting their members, or secondly, they may be represented on 'corporatist' (in other words tripartite) committees and boards of policy cooperation. This study considers only cases of consultation and corporatist participation which explicitly relate to sector-specific matters. Consultation processes are not necessarily institutionalised and, therefore, the organisations consulted by the authorities may vary according to the issues to be addressed and also over time, depending on changes in government. Moreover, the authorities may initiate a consultation process on occasional rather than a regular basis. Given this variability, Table 11 and Table 13 in Annex 1 flag up only those sector-related trade unions and employer organisations that are usually consulted.

### *Trade unions*

In 11 of the 18 Member States recording at least one sector-related trade union at least some of the sector-related trade unions are usually (that is, on a regular basis or on occasion) consulted by the authorities. In total, 67% of the sector-related trade unions for which information is available are consulted through participation in existing tripartite structures and/or in the form of unilateral consultation by the authorities. For around 38% of those trade unions for which related information has been provided, consultation is carried out on a regular basis (generally at least once a year); about 62% are consulted occasionally.

Since 10 out of the 19 Member States with sector-related trade unions have a multi-union system, the possibility that the authorities may favour certain trade unions over others or that the unions compete for participation rights cannot be ruled out. In at least four (Belgium, Ireland, Malta and the Netherlands) of these 10 countries, any of the existing trade unions may take part in the consultation process. In contrast, in at least one country (France) only some of the sector-related trade unions are usually consulted and at least another union is not. For a few countries such as Austria, Italy and Portugal, no conclusions on possible (un)equal consultation practices can be

drawn due to a lack of information for at least one trade union. In the pluralist cases of Greece and Spain, none of the sector-related trade unions is usually consulted by the authorities.

### *Employer organisations*

The vast majority (almost 94%) of sector-related employer/business organisations for which related information is available are involved in consultation procedures. In terms of consultation frequency, about 43% of the employer/business organisations for which information is available are consulted on a regular basis, while about 57% are consulted on occasion. As outlined above, eight countries with a multi-organisation system on the employer side have been identified. In the multi-organisation systems of Austria and Belgium, where related data on all employer/business organisations are available, all the sector's organisations are consulted.

No country with a pluralist associational system with unequal consultation practices can be identified. However, for some countries such as France, Ireland, Italy, Portugal, Slovenia and Spain with a pluralist system of employer representation, no information about consultation practices is available for at least some of the organisations, such that it remains unclear for these countries whether consultation rights are being attributed to the national organisations in a selective manner or not. Overall, in at least 19 of the 22 Member States recording at least one sector-related employer/business organisation at least one organisation is usually consulted.

As far as information is provided, in nine countries which record sector-related associations of interest representation on both sides of industry consultation rights are symmetrically attributed to organised labour and business, in that at least one organisation on each side is consulted. This situation applies to Austria, Belgium, Denmark, Finland, France, Ireland, Malta, the Netherlands and Sweden. In five countries (Croatia, Luxembourg, Slovenia, Spain and the UK), consultation rights are attributed to only one side, while on the other side no organisation is consulted. For Germany, Italy and Portugal, however, no evidence can be provided in this respect due to a lack of information for at least one interest organisation.

### *Tripartite participation*

Strikingly, only one single genuine sector-specific tripartite body can be identified in the EU28, the National Education and Training Committee for the Beauty Sector of Finland (Table 15 in Annex 1). The legal basis of this body is a statute. Although its role (and scope of activities) is not fully clear, from its name it can be assumed that this is primarily to provide advice to, and consult with, administrative bodies dealing with matters related to skills and training in the sector. The fact that only one sector-specific tripartite body can be found is likely to be due to two main characteristics of the hair and beauty sector:

- its small size in terms of both companies and employees;
- the poorly developed industrial relations structures in many countries, in particular among the those Member States which joined the EU in 2004.

Other bodies listed in some national contributions have not generally been taken into account in this study because they are bipartite rather than tripartite in terms of composition, or sector-unspecific (in other words, cross-sectoral) tripartite bodies for discussions on economic and social policy. These bodies may also address the sector, depending on the particular circumstances and issues that may arise. Sector-specific bipartite (rather than tripartite) bodies, which are composed of sector-related representatives of the two sides of industry, deal regularly with issues such as:

- health and safety (in Belgium, France and Italy);

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- equal opportunities (in Belgium);
- (vocational) training and education (in Denmark, France, Italy, the Netherlands and Sweden);
- overall working conditions (in the Netherlands);
- certification (in Greece and Sweden).

### 3 European level of interest representation

At European level, eligibility for consultation and participation in social dialogue is linked to three criteria, as defined by the Commission Decision on the establishment of Sectoral Dialogue Committees promoting the Dialogue between the social partners at European level (98/500/EC) (European Commission, 1998).

Social partner organisations to be admitted to the European sectoral social dialogue must therefore have the following attributes. They must

- They must relate to specific sectors or categories and be organised at European level.
- They must 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 which are representative of several Member States.
- They must have adequate structures to ensure their effective participation in the work of the Sectoral Dialogue Committees.

In terms of social dialogue, the constituent feature is the ability of such organisations to negotiate on behalf of their members and to conclude binding agreements. This chapter on European associations of the personal services – hair and beauty sector therefore analyses these organisations' membership domain, the composition of their membership and their ability to negotiate.

As explained below, the study presents detailed data on two sector-related European associations:

- Hair and Beauty Section of UNI Europa on the employee side;
- Coiffure EU on the employer side.

Both are listed by the European Commission as a social partner organisation to be consulted under Article 154 of the TFEU. Hence, the analysis below concentrates on these two organisations, while providing supplementary information on others that are linked to the sector's national industrial relations players.

#### Membership domains

##### *UNI Europa Hair and Beauty*

UNI Europa is affiliated to the European Trade Union Confederation (ETUC). Its Hair and Beauty Section organises both the hairdressing and the beauty treatment segments of the economy. The membership domain of its Hair and Beauty Section, largely coincides with the personal services–hair and beauty sector. With regard to the overall organisation, UNI Europa's domain comprises the skills and services sector, including as well as hair and beauty, activities such as cleaning and security, commerce, finance, gaming, graphical and packaging, information, the communication, technology and services industry, media, entertainment and arts, post and logistics, social insurance, sport, temporary and agency work, and tourism industries. UNI Europa particularly represents professionals and managers, women and young people. The membership domain of UNI Europa as a whole is thus multi-sectoral and therefore overlaps the sector under consideration.



## Coiffure EU

On the employers' side, according to its name and Article 5 of its Articles of Association, Coiffure EU represents the interests of 'hairdressing organisations and employers in the hairdressing sector'. Active membership is limited to associations that:

*... may be the most representative national employers' organisations in the hairdressing sector, located in countries that are members or candidate members of the European Union and/or the EFTA.*

(Article 6/3)

Since, in terms of business activities, Coiffure EU organises only the hairdressing segment of the economy rather than the entire personal services–hair and beauty sector, its membership domain is classified as sectional in relation to the sector under scrutiny. Moreover, Coiffure EU organises only associations rather than individual companies.

## Membership composition

Members of UNI Europa Hair and Beauty Section and Coiffure EU are found in countries beyond the EU28 Member States covered by this study. With regard to UNI Europa whose membership domain overlaps relative to the sector under consideration, only those members with a domain related to the personal services–hair and beauty sector (who are members of the Hair and Beauty Section) are included in this overview report.

## Representativeness of UNI Europa in the hair and beauty subsectors

Table 16A in Annex 1 lists the sector-related trade unions that are members of the Hair and Beauty Section of UNI Europa.<sup>7</sup> Accordingly, at least one direct affiliation is recorded in 16 countries (Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Malta, the Netherlands, Portugal, Spain, Sweden and the UK). There are no sector-related trade unions in 10 EU Member States (Bulgaria, Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania and Slovakia). There are sector-related trade unions in Croatia and Slovenia, but they are not affiliated to UNI Europa's Hair and Beauty Section. This means that 16 of the 18 EU Member States with sector-related trade unions are covered through affiliations (Table 7a).

Multiple memberships occur in four countries (Belgium, France, Italy and Spain). On aggregate, 23 of the 35 sector-related trade unions at national level are affiliated to the Hair and Beauty

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<sup>7</sup> The list of sector-related affiliates to UNI Europa's Hair and Beauty Section in Table 16 compiled on the basis of the national contributions differs somewhat from the list of sectoral members provided by the European confederation itself. This report includes Unite in Ireland and USDAW in the UK, which were not considered as sector-related members in the initial list provided by UNI Europa but whose membership has been confirmed retrospectively; Unite has been affiliated to UNI Europa's Hair and Beauty Section only since the beginning of 2016. LKKDPS in Lithuania, however, is not taken into account in this report, even though it is still reported to be a member of UNI Europa's Hair and Beauty Section because, according to the national correspondent in Lithuania, it has not organised any members in the sector for some time.



Section of UNI-Europa. The Section thus covers about 66% of the trade unions listed in Table 10 and Table 11 in Annex 1 through direct affiliation.

All members of UNI Europa’s Hair and Beauty Section apart from OIYE in Greece, SC-OGBL in Luxembourg, SITESE in Portugal and USDAW in the UK are involved in collective bargaining related to the personal services–hair and beauty sector. Thus, they cover collective bargaining in 12 of the 16 Member States (75%) where there is a sector-related trade union involved in collective bargaining (Table 7a).

Insofar as available data on sectoral membership of the national trade unions provide sufficient information on their relative strength, it can be concluded that the Hair and Beauty Section of UNI Europa tends to cover the sector’s most important labour representatives. Cases of major trade unions in the sector not covered involve only a few unions, such as GPA-djp in Austria and SIPTU in Ireland (see Table 16B). Some of the sector-related trade unions listed in Table 10 and Table 11 in Annex 1 are affiliated to UNI Europa but to a section other than Hair and Beauty.

### *Representativeness of Coiffure EU in the hair and beauty subsectors*

Members of Coiffure EU are listed in Table 17A in Annex 1. Coiffure EU has affiliates in 18 EU Member States (comprising Austria, Belgium, Cyprus, Denmark, Finland, France, Germany, Hungary, Ireland, Italy, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Slovenia, Sweden and the UK). Of the larger countries, only Spain is not covered by Coiffure EU. In four Member States (Croatia, Greece, Portugal and Spain), sector-related employer organisations exist but none is affiliated to Coiffure EU. In six countries there are no sector-related employer organisations (Bulgaria, the Czech Republic, Estonia, Latvia, Romania and Slovakia). In Bulgaria, the Bulgarian National Association of Hairdressers (BNAH) exists but has not been affiliated to Coiffure EU since 2015 and is not involved in collective bargaining. It is therefore no longer considered to be a sector-related employer organisation. Therefore, even though this organisation still exists there is no longer a sector-related employer organisation in Bulgaria.

Multiple memberships, as a matter of principle, do not occur because, according to Article 7 of its Articles of Association, Coiffure EU claims to represent only ‘each most representative national organisation’ in the hairdressing sector, but no other one. In the case of Italy, however, this study distinguishes between two employer organisations both organising crafts and SMEs, and both affiliated to the Italian Chamber of Coiffure (CIA) which, in turn, is a member of Coiffure EU. For methodological reasons, these indirect Coiffure EU affiliates rather than the direct member of the European confederation are considered as relevant industrial relations players in this report, since they both operate as independent social partner organisations (with a mandate in collective bargaining) in the sector, which CIA does not. This is why this report identifies 17 direct and 2 indirect (both affiliated via a higher order unit) associated members from the EU28 on aggregate.<sup>8</sup> Table 13 in Annex 1 indicates that associations affiliated to Coiffure EU and unaffiliated associations co-exist in a series of countries. Sectoral membership data on the respective organisations of these countries do not provide a clear indication of whether the most important associations are affiliated.

In almost all countries with a pluralist associational landscape in the sector, some important employer organisations that conduct collective bargaining are not affiliated to Coiffure EU. These include: BIFKM in Austria; BESKO and UNEB in Belgium; CNAIB, CNEC, FIEPPEC and

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<sup>8</sup> In this respect Table 17A deviates from the membership list provided by Coiffure EU in January 2016, since two affiliates of the direct Coiffure EU member in Italy are considered instead of just the latter.

UNIB in France; Ibec in Ireland; Casartigiani and CLAAI in Italy; and SK OZS and ZDOPS in Slovenia. In the cases of BIFKM in Austria, BESKO and UNEB in Belgium, CNAIB, FIEPPEC and UNIB in France, and SK OZS in Slovenia, their domain relates only to the beauty/cosmetics subsector rather than to the hairdressing subsector and, as such, these organisations do not fall within the domain of Coiffure EU.

In Greece, Portugal and Spain (and in the near future also Croatia), all the sector-related employer organisations are involved in sector-related collective bargaining but are not affiliated to Coiffure EU. In the case of PSVAK in Greece and FNAE in Spain, this is because their respective domains relate only to the beauty treatment subsector which is not represented by Coiffure EU; for ANEIP, CEPE and FEIP in Spain, it remains unclear whether their domain relates to the hairdressing subsector or not). Unfortunately, no information about their organisational strength within the sector has been provided.

In seven countries (Cyprus, Hungary, Lithuania, Luxembourg, Malta, Poland and the UK), the Coiffure EU affiliate is not engaged in sector-related collective bargaining. In the remaining 11 countries with affiliations to Coiffure EU (Austria, Belgium, Denmark, Finland, France, Germany, Ireland, Italy, the Netherlands, Slovenia and Sweden), the affiliates are genuine social partner organisations in that they engage in collective bargaining.

Twelve of the 19 Coiffure EU members are involved in sector-related collective bargaining, covering collective bargaining in 11 of the 15 Member States that record an employer organisation involved in sector-related collective bargaining (Table 7a). Nevertheless, as can be seen from Table 13 in Annex 1, as many as 22 sector-related employer organisations across the EU involved in sector-related collective bargaining are not affiliated to Coiffure EU. Hence, a significant proportion of the relevant national players within the sector are not under the umbrella of this European organisation. This is obviously related to the fact that Coiffure EU claims to represent employer and business organisations only in the hairdressing subsector, and within this segment only the most representative player in a country.

Direct and indirect affiliations to Coiffure EU together represent 46% of the total of sector-related employer/business organisations, among which appear to be the most important social partner organisations in those Member States where affiliations are recorded. Adjusted for those at least nine employer organisations whose membership domain with regard to the sector is confined to the beauty treatment subsector, this ratio amounts to at least 59%. This emphasises the outstanding position on the employer side of Coiffure EU in the personal services–hair and beauty sector.

**Table 7a: Membership structure of UNI Europa Hair and Beauty Section and Coiffure EU**

	Number of organisations	Number of Member States with organisation(s)	Number of organisations involved in collective bargaining	Number of Member States with organisation(s) involved in collective bargaining
<b>UNI Europa Hair and Beauty Section</b>				
All sector-related trade unions	35	18	31	16
Number of affiliates	23	16	19	12
% affiliated	66%	89%	61%	75%
<b>Coiffure EU</b>				
All sector-related employer organisations	41	22	34	15
Number of affiliates (direct and indirect)	19	18	12	11
% affiliated	46%	82%	35%	73%

*Note: Percentages are rounded.*

*Source: Eurofound's Network of European correspondents (2016)*

**Table 7b: Membership structure of Coiffure EU for the Hairdressing subsector only**

	Number of organisations	Number of Member States with organisation(s)	Number of Member States with organisation(s) involved in collective bargaining
Hairdresser sector-related employer organisations	29–32*	20 or 21**	13 or 14**
Number of affiliates (direct and indirect)	19	18	11
% affiliated	at least 59%* or 66% max.	at least 86%** or 90% max.	at least 79%** or 85% max.

*Notes: Percentages are rounded. \* For three employer organisations in Spain, coverage of the hairdressing subsector is unclear. \*\* The situation of Spain with regard to the coverage of the hairdressing subsector is unclear, since membership domain data have been provided only partially for Spain's employer organisations. But since the relevant sectoral collective agreement in Spain also covers the hairdressing subsector, it appears likely that at least one of the signing parties on the employer side represents hairdressing companies. Therefore the higher score is more likely to apply and is used when calculating the percentages in this table.*

*Source: Eurofound's Network of European correspondents (2016)*

### *Representativeness of Coiffure EU in the hair subsector only*

Table 7a summarises the membership structure of both UNI Europa's Hair and Beauty section and Coiffure EU with regard to the entire personal services sector – including both the hair and beauty sub-sectors. While UNI Europa's Hair and Beauty Section represents, on the employee side, a higher share of sector-related associations (66%) than Coiffure EU on the employer side (46%), the share of countries covered through affiliations from these countries of all Member States with sector-related associations is nearly equal for both these European organisations.

The membership domain of the two European organisations shows a lower share of sector-related employer organisations affiliated to Coiffure EU than the situation on the employee side; this is likely to result from Coiffure EU's narrower membership domain. In terms of business activities, while the Hair and Beauty Section of UNI Europa organises the entire personal services–hair and beauty sector, Coiffure EU's membership domain covers only the hairdressing subsector (see above).

Table 7b presents the membership structure of Coiffure EU for the Hairdressing subsector only, leaving out the employer organisations that only cover the Beauty subsector.

Adjusted for those employer organisations whose membership domain relates only to the beauty treatment subsector and taking into account only those sector-related employer organisations that have a membership domain covering the hairdressing subsector (irrespective of whether the beauty treatment subsector is covered or not), affiliations to Coiffure EU represent at least 59% of the sector-related employer/business organisations. With regard to their respective membership domain within the personal services–hair and beauty sector, this means that the membership strength of Coiffure EU in terms of share of affiliations of the total number of sector-related

associations (at least 59%) comes close to that of the Hair and Beauty Section of UNI Europa (66%).

On the employee side, a similar disaggregation of the membership data by subsector appears to be useless since the membership domain of UNI Europa’s Hair and Beauty Section covers the entire personal services–hair and beauty sector. Moreover, due to the more encompassing membership domains of the sector-related trade unions compared with the employer organisations, only one trade union (UECC in Greece) can be found with a domain covering only the beauty treatment subsector. All other sector-related trade unions identified cover, in terms of business activities, the whole sector as defined for the purpose of this study.

### **Capacity to negotiate**

The third criterion of representativeness at the European level refers to an organisation’s capacity to negotiate on behalf of its members.

On the side of organised labour, UNI Europa is equipped with an implicit and very general rather than explicit permanent mandate to negotiate on behalf of its members in matters of European social dialogue. According to Article 3 of the UNI Europa statutes, UNI Europa is obliged to represent ‘affiliates in European institutions whose activities affect the social, economic and cultural conditions of affiliates and their members’. UNI Europa’s collective interest representation on behalf of its members is provided for the European region by the Regional Executive Committee for Europe elected by the Regional Conference for Europe which is, in turn, composed of affiliates’ delegates for a four-year period. This implicit mandate covers the representation of all collective interests, including social dialogue.

On the employer side, Article 5 of the Articles of Association of Coiffure EU specifies that the association’s objective ‘is to promote the interests of affiliated hairdressing organisations and employers in the hairdressing sector as an umbrella organisation of the national employers’ organisations’. The collective interest representation on behalf of the Coiffure EU members is exercised by the Board, which is elected by the General Members’ Meeting attended by representatives of the national affiliated organisations. According to Article 12 of the Articles of Association, one of the Board’s tasks is ‘to implement the policy determined by the General Members’ Meeting’, which implicitly includes negotiations in the framework of the European sectoral social dialogue. Thus, it can be concluded that Coiffure EU is equipped with an implicit rather than explicit mandate to conduct negotiations in matters of European social dialogue.

Finally, as a proof of the strong capacity of the sectoral European social partner organisations’ to act, UNI Europa’s Hair and Beauty Section and Coiffure EU have produced a number of joint documents within the framework of social dialogue. Irrespective of their actual substance and impact on the overall working relations in the sector, the sectoral social partners at European level have proved quite productive in launching initiatives and drawing up joint texts of varying commitment. These include three agreements, in particular on issues such as occupational health and safety and the harmonisation of training standards/certification. The ESSDC in the personal services–hair and beauty sector has issued no less than 16 joint texts since 2000.

### **National sector-related organisations of interest representation not affiliated to UNI Europa’s Hair and Beauty Section or Coiffure EU**

Table 16B and Table 17B in Annex 1 list those sector-related trade unions and employer organisations not affiliated to the Hair and Beauty Section of UNI Europa or Coiffure EU. Since an interest organisation has to be either affiliated to a relevant European level organisation or involved in sector-related collective bargaining to be included in this study, non-fulfilment of the

former criterion means that all organisations listed in Table 16B and Table 17B engage in sector-related collective bargaining.

On the side of organised labour, 12 out of the 35 sector-related trade unions are not affiliated to UNI Europa’s Hair and Beauty Section (Table 16B). Only one of these unions (UECC in Greece) has a domain that, in terms of business activities, does not cover the entire personal services–hair and beauty sector, in that this union organises only employees in the beauty treatment subsector. This finding is in line with the fact outlined above that most sector-related trade unions have a membership domain overlapping with regard or congruent to the sector under consideration.

On the employer side, 22 out of the 41 sector-related employer/business organisations are not affiliated to Coiffure EU (Table 17B). For 3 of these 22 organisations, no information on their membership domain has been provided. Another nine show a domain not covering, in terms of business activities, the hairdressing subsector and one does not represent the beauty treatment subsector. Nine other organisations have a domain including, in terms of business activities, the entire personal services–hair and beauty sector.

This means that half of the employer organisations not affiliated to Coiffure EU (which represents only the hairdressing subsector) are made up of organisations that cannot be a member of the European level organisation due to their membership domain being limited to the beauty treatment subsector. As far as information on the membership domain is available, only 9 of the 41 sector-related employer/business organisations are not affiliated to Coiffure EU, although they could be according to their membership domain. As outlined above, adjusted for those nine organisations that cannot be a member of Coiffure EU due to their limited membership domain, affiliations to Coiffure EU represent 59% of the total of sector-related employer/business organisations.

## Other European associations

To assess the relative weight of UNI Europa’s Hair and Beauty Section and Coiffure EU, it is necessary to look at other European organisations which may represent the sector.

The affiliations of the trade unions are listed in Table 11 in Annex 1. European organisations other than the Hair and Beauty Section of UNI Europa represent 9 of the 35 sector-related trade unions and thus a relatively small proportion of both unions and countries. Six of the nine trade unions recording one or more affiliations to European organisations other than UNI Europa’s Hair and Beauty Section are simultaneously affiliated to the latter organisation.

For practical reasons, only those European organisations that cover at least three trade unions are mentioned. This involves four organisations:

- European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT) and IndustriALL Europe, both with five affiliations covering four countries;
- European Transport Workers’ Federation (ETF), with four affiliations from four countries;
- European Federation of Public Service Unions (EPSU), with four affiliations from three countries.

Although the affiliations listed in Table 11 are likely not to be exhaustive, this overview emphasises the principal status of UNI Europa’s Hair and Beauty Section as the sector’s labour representative at European level. This is not only due to the relatively low numbers of affiliations per organisation other than UNI Europa, but also because the presence of these organisations usually results from the multi-sector domains of the respective trade unions.

Those few major sector-related trade unions, such as GPA-djp in Austria and SIPTU in Ireland, that are not affiliated to the Hair and Beauty Section of UNI Europa, partially record affiliations to other European interest organisations. However, there is no indication that these other affiliations (where they exist) reflect a real reference of the affiliations as such to the personal services–hair and beauty sector.

A similar review of the membership of the national employer/business associations can be derived from Table 13 in Annex 1. Most have no or relatively few affiliations to European associations other than Coiffure EU. Overall, only one alternative European association with three direct and two indirect (via a higher order unit) affiliations can be identified, namely the European Confederation of Professional Beauticians and Cosmeticians (CEPEC). Its membership domain covers the beauty treatment subsector and thus that part of the sector which is not covered by the domain of the sector’s principal social partner organisation at European level, Coiffure EU. Although it appears from its website that CEPEC considers itself primarily as a trade association, it nevertheless claims to ‘promote the European sector [sic] Social Dialogue in order to deal with the most important issues of the profession in Europe’. A review of its membership list as provided on its website reveals that CEPEC represents one member organisation in 11 EU Member States. Additional information drawn from the national contributions indicates that 4 of these 11 member organisations are involved in sector-related collective bargaining; this is the case countries such as France, Italy, Slovenia and Spain. Moreover, at least some of them (as is the case of member organisations in Finland, France, Greece and Italy) can rely on a relatively strong membership base. Yet CEPEC appears to be a trade association rather than a genuine social partner organisation. In terms of both the number of affiliations and territorial coverage and, in particular, the membership ratio of genuine social partner organisations, CEPEC does not challenge the position of Coiffure EU.



## 4 Conclusions

As identified in the 2009 representativeness study on the European social partners in the personal services industry, this sector has a number of distinct characteristics. In economic terms, the personal services–hair and beauty sector is characterised by high labour intensity and a particular business structure (that is, the predominance of SMEs and self-employed without employees). The still increasing proportion of franchise companies (often located in large shopping malls), together with informal or illegal work, is placing growing pressure on the ‘professional’ service providers.

In most countries the sector’s growth in terms of companies is likely to be at least partially attributable to the growing numbers of self-employed without employees. Apart from the high incidence of self-employment (also including bogus self-employment in several countries), the sector’s labour market features:

- an extraordinarily high prevalence of female and young workers;
- a high incidence of atypical work (including, in particular, part-time employment and fixed-term work contracts);
- often inconvenient working hours (including evening and weekend work);
- relatively poor pay levels and working conditions.

This reality, together with some health issues related to the occupation of hairdressing, results in particularly high fluctuation rates in the sector.

All these economic and labour market characteristics have an impact on industrial relations in the sector. The high proportion of self-employment and ‘one-person companies’ as well as the small size of most establishments (which consequently often do not meet the criteria for setting up workplace representation) in conjunction with high staff turnover are regularly reported to account for low unionisation rates in the sector. Likewise, the predominance of SMEs and micro-enterprises that are traditionally less inclined than larger ones to gather in associations is considered to be the main reason for modest densities in terms of employer representation in some countries. As far as data are available, however, density rates among employer organisations tend to be relatively high.

In about half of the Member States, the sector’s industrial relations are poorly organised, as (virtually) no sector-related collective bargaining activities can be found in these countries. This group of countries consists of the 2004, 2007 and 2013 accession countries except for Slovenia. In these countries, representative social partner organisations are lacking on at least one side of industry. However, there is a group of countries with high or even full coverage rates, consisting of the EU15 Member States, except for Luxembourg and the UK, plus Slovenia.

Comparatively high levels of collective bargaining coverage in the sector occur in those countries where multi-employer bargaining prevails and where extension practices are applied. Exclusive single-employer bargaining, in turn, only leads to low coverage rates (for example, in Malta) due to the absence of large companies and the limited extent of economic concentration and unionisation in the sector.

With regard to the European-level social partner organisations, the Hair and Beauty Section of UNI Europa and Coiffure EU organise the most important national players in the sector. Through their affiliations, they cover 16 and 18 of the Member States, respectively, and they represent two-thirds of the sector-related trade unions and almost half of the sector-related



employer/business organisations. Whereas UNI Europa’s Hair and Beauty Section claims to represent employees of the entire personal services–hair and beauty sector, the focus of Coiffure EU is on the hairdressing subsector.

Of the 35 sector-related trade union organisations in 18 different EU Member States, 23 (66%) are affiliated to the Hair and Beauty Section of UNI Europa, covering 16 different countries. This means that, of the 18 EU Member States where sector-related trade union organisations can be identified, 16 (89%) record affiliations to UNI Europa’s Hair and Beauty Section.

For the hairdressing subsector alone, this study identified at least 29 sector-related employer organisations, with a further 3 associations in Spain for which it is not clear whether their domain covers the hairdressing subsector. Of these at least 29 (but at most 32) employer organisations, 19 are affiliated to Coiffure EU, which corresponds to at least 59%. With regard to the hairdressing subsector, sector-related employer organisations can be found in 21 (or at least 20) EU Member States of which 18 (at least 86%) record affiliations to Coiffure EU.

With regard to the entire personal services–hair and beauty sector (including beauty treatment activities), 41 sector-related employer organisations were identified, of which 19 (46%) are affiliated to Coiffure EU. A total of 22 Member States have sector-related employer organisations, while Coiffure EU has an affiliate in 18 EU Member States (82%). In line with the fact that Coiffure EU’s membership domain is confined to the hairdressing subsector, this means that this organisation’s representativeness is significantly higher in the hairdressing subsector than in the overall personal services–hair and beauty sector.

Another European organisation on the employer side (CEPEC) organises enterprises in the beauty treatment subsector, which Coiffure EU does not represent. It appears that this organisation considers itself mainly as a trade association rather than an industrial relations player and it clearly falls short of Coiffure EU in terms of both the number of affiliations and territorial coverage.

Thus, the Hair and Beauty Section of UNI Europa and Coiffure EU can be regarded as the main and hitherto unchallenged EU-wide representatives of the sector’s workforce and businesses. No other European organisations exist that can compare with them in terms of organising relevant sector-related trade unions and employer/business organisations across the EU Member States. In this respect, the situation has remained unchanged since 2009.

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## Annex 1: Additional tables

Table 8: Total companies and employment in personal services–hair and beauty, 2008 and 2014 (approximately)

	Year	Number of companies	Year	Total employment	Female employment	Female employment as % of total employment	Total sectoral employment as % of total employment in economy
AT	2010	7,084 (a)	2008	n.a.	n.a.	n.a.	n.a.
	2015	7,996 (a)	2014	n.a.	n.a.	n.a.	n.a.
BE	2008	6,188 (b)	2008	n.a.	n.a.	n.a.	n.a.
	2014	6,048 (b)	2014	n.a.	n.a.	n.a.	n.a.
BG	2008	5,054	2008	8,952	4,967	55%	0.3%
	2014	8,540	2014	13,850	11,512	83%	0.6%
CY	2008	2,545	2008	4,048	n.a.	n.a.	1.2%
	2014	3,264	2014	4,262	n.a.	n.a.	1.3%
CZ	2008	n.a.	2008	n.a.	n.a.	n.a.	n.a.
	2014	n.a.	2015	46,800	n.a.	n.a.	n.a.
DE	2008	77,210	2008	n.a.	n.a.	n.a.	n.a.
	2013	79,703	2014	n.a.	n.a.	n.a.	n.a.
DK	2008	6,365	2008	14,720	13,203	90%	0.5%
	2013	7,093	2014	14,026	12,280	88%	0.5%
EE	2008	n.a.	2008	n.a.	n.a.	n.a.	n.a.
	2014	n.a.	2014	n.a.	n.a.	n.a.	n.a.
EL	2008	30,480	2008	65,325	49,452	76%	1.4%
	2014	22,164	2014	46,379	35,389	76%	1.3%
ES	2008	n.a.	2008	n.a.	n.a.	n.a.	n.a.
	2014	n.a.	2014	n.a.	n.a.	n.a.	n.a.
FI	2008	12,005	2008	12,427	n.a.	n.a.	0.5%
	2014	13,284	2014	11,362	n.a.	n.a.	0.5%
FR	2009	87,357	2008	n.a.	n.a.	n.a.	n.a.
	2013	122,755	2013	246,144	n.a.	n.a.	0.9%
HR	2008	5,188	2008	10,896	9,120	84%	0.8%
	2014	3,307	2014	7,007	5,520	79%	0.5%
HU	2008	n.a.	2008	28,642	n.a.	n.a.	0.8%

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	Year	Number of companies	Year	Total employment	Female employment	Female employment as % of total employment	Total sectoral employment as % of total employment in economy
	2014	25,381	2014	25,156	n.a.	n.a.	0.6%
IE	2008	3,100 (c)	2008	18,500	n.a.	n.a.	n.a.
	2012	n.a.	2012	n.a.	n.a.	n.a.	n.a.
IT	2008	119,291	2008	235,367	169,695	72%	1.0%
	2013	123,930	2013	243,422	167,420	69%	1.1%
LT	2008	n.a.	2008	n.a.		n.a.	n.a.
	2014	n.a.	2014	n.a.		n.a.	n.a.
LU	2008	670	2009	2,629	2,334	89%	0.8%
	2014	816	2014	2,832	2,499	88%	0.7%
LV	2008	3,128	2008	7,951	7,187	90%	0.8%
	2014	4,668	2014	8,437	7,601	90%	0.9%
MT	2008	1,045	2008	1,312	1,181 (d)	90% (d)	0.9%
	2014	1,232	2014	1,582	1,424 (d)	90% (d)	1.0%
NL*	2008	39,065	2008	78,000	71,000	91%	0.9%
	2014	51,015	2014	71,000	64,000	90%	0.9%
PL	2009	58,926	2008	200,000	n.a.	n.a.	n.a.
	2014	64,135	2014	220,000	n.a.	n.a.	n.a.
PT	2008	26,664	2008	n.a.	n.a.	n.a.	n.a.
	2014	29,414	2014	n.a.	n.a.	n.a.	n.a.
RO	2008	4,309	2008	21,458	n.a.	n.a.	0.2%
	2013	4,426	2013	22,893	n.a.	n.a.	0.3%
SE	2008	21,431	2008	n.a.	n.a.	n.a.	n.a.
	2014	23,447	2014	n.a.	n.a.	n.a.	n.a.
SI	2008	2,940	2008	5,158	4,689	91%	0.6%
	2014	3,687	2014	5,466	4,964	91%	0.7%
SK	2008	8,009	2008	14,200	14,100	99%	0.6%
	2014	8,936	2014	13,700	13,200	96%	0.7%
UK	2008	24,740	2008	264,100	235,500	89%	0.9%
	2014	29,410	2014	305,400	262,200	86%	1.0%

Source: Eurofound's Network of European correspondents (2016), national statistics.  
For detailed description of sources please refer to the national contributions.

**Table 9: Total employees in personal services – hair and beauty, 2008 and 2014 (approximately)**

	Year	Total number of employees	Number of female employees	Female employees as % of total employees	Total sectoral employees as % of total employees in economy
AT	2010	20,755 (a)	19,423 (a)	94% (a)	0.6% (a)
	2015	19,952 (a)	18,285 (a)	92% (a)	0.6% (a)
BE	2008	16,453 (b)	14,166 (b)	86% (b)	0.4% (b)
	2014	16,595 (b)	13,958 (b)	84% (b)	0.4% (b)
BG	2008	4,771	4,247	89%	0.2%
	2014	6,923	6,287	91%	0.3%
CY	2008	n.a.	n.a.	n.a.	n.a.
	2014	n.a.	n.a.	n.a.	n.a.
CZ	2008	n.a.	n.a.	n.a.	n.a.
	2015	9,600	n.a.	n.a.	n.a.
DE	2008	166,865	154,445	93%	0.4%
	2014	165,721	152,003	92%	0.4%
DK	2008	7,646	7,139	93%	0.3%
	2014	6,541	5,858	90%	0.3%
EE	2008	n.a.	n.a.	n.a.	n.a.
	2014	n.a.	n.a.	n.a.	n.a.
EL	2008	33,524	27,935	83%	0.7%
	2014	23,150	20,220	87%	0.65%
ES	2008	n.a.	n.a.	n.a.	n.a.
	2014	n.a.	n.a.	n.a.	n.a.
FI	2008	n.a.	n.a.	n.a.	n.a.
	2014	n.a.	n.a.	n.a.	n.a.
FR	2010	119,912	107,921	90%	0.5%
	2013	114,476	103,864	91%	0.5%
HR	2008	6,557	5,188	79%	0.5%
	2014	5,159	4,127	80%	0.4%
HU	2008	6,925	n.a.	n.a.	0.3%
	2014	7,765	n.a.	n.a.	0.3%
IE	2008	18,500	n.a.	n.a.	n.a.
	2012	n.a.	n.a.	n.a.	n.a.

	Year	Total number of employees	Number of female employees	Female employees as % of total employees	Total sectoral employees as % of total employees in economy
IT	2008	91,561	75,959	83%	0.5%
	2013	97,342	85,195	88%	0.6%
LT	2008	n.a.	n.a.	n.a.	n.a.
	2014	n.a.	n.a.	n.a.	n.a.
LU	2009	2,208	1,978	90%	0.7%
	2014	2,367	2,093	88%	0.6%
LV	2008	5,765	5,211	90%	0.6%
	2014	4,984	4,490	90%	0.5%
MT	2008	458	412(c)	90%(c)	0.4%
	2014	471	424(c)	90%(c)	0.4%
NL*	2008	33,000	32,000	97%	0.4%
	2014	29,000	26,000	90%	0.4%
PL	2008	n.a.	n.a.	n.a.	n.a.
	2014	n.a.	n.a.	n.a.	n.a.
PT	2008	n.a.	n.a.	n.a.	n.a.
	2014	n.a.	n.a.	n.a.	n.a.
RO	2008	20,914	n.a.	n.a.	0.4%
	2013	22,454	n.a.	n.a.	0.4%
SE	2008	6,790	n.a.	n.a.	0.2%
	2013	9,485	n.a.	n.a.	0.2%
SI	2008	2,888	2,610	90%	0.4%
	2014	2,437	2,194	90%	0.3%
SK	2008	3,400	3,400	0%	0.2%
	2014	4,500	4,500	0%	0.2%
UK	2008	149,700	137,700	92%	0.6%
	2014	156,000	137,800	88%	0.6%

Notes: (a) Figure refers to hairdressing subsector only; (b) Figure includes also the fitness industry; (c) Estimate. \* Employee figures rounded therefore they do not add up exactly. n.a. = not available.

Source: Eurofound's Network of European correspondents (2016), national statistics. For detailed description of sources please refer to the national contributions.



**Table 10: Domain coverage, membership and density of trade unions in personal services – hair and beauty, 2014, 2015, 2016**

	Trade union	Type of membership	Domain coverage*	Membership		Density	Members in largest companies
				Members active	Members sector active	Sector density	
AT	vida	voluntary	SO	137,553 (a)	1,200	6%	yes
	GPA-djp	voluntary	SO	277,792 (a)	n.a.	n.a.	yes
BE	BBTK/SETCa	voluntary	SO	350,000 (a)	1,200	7%	yes
	ACLVB/CGSLB	voluntary	O	290,000	1,000	6%	yes
	CSC-Bie/ACV-Bie	voluntary	O	167,966	<5,020	<30%	yes
	ACCG	voluntary	SO	430,000	3,658	22%	yes
DE	ver.di	voluntary	O	2,038,638 (a)	n.a.	n.a.	yes
DK	DFKF	voluntary	C	3,100	3,100	47%	yes
EL	UECC	voluntary	S	1,300	1,300	6%	yes
	OIYE	voluntary	O	47,201	350	2%	yes
ES	CCOO-CYS	voluntary	O	119,000	250	n.a.	yes
	FES-UGT	voluntary	O	225,000	250	n.a.	n.a.
FI	PAM	voluntary	O	230,000 (a)	2,300	n.a.	yes
FR	FCS-CGT	voluntary	O	43,018	350	0%	yes
	SGFOSCE	voluntary	C	n.a.	170	0%	yes
	FS-CFDT	voluntary	O	80,000	200	0%	no
	FNECS CFE-CGC	voluntary	SO	n.a.	40	0%	n.a.
	FCS-UNSA	voluntary	O	6,000	100	0%	yes
	CFTC-CSFV	voluntary	O	32,000	160	0%	n.a.
HR	HSMP	voluntary	O	794	50–60	1%	yes
IE	SIPTU	voluntary	SO	155,000	n.a.	n.a.	yes
	Unite	voluntary	SO	23,851	72	n.a.	yes
IT	FILCAMS-CGIL	voluntary	O	458,139	1,603	2%	yes
	FISASCAT-CISL	voluntary	O	320,000	n.a.	n.a.	yes
	UILTUCS-UIL	voluntary	O	124,824	n.a.	n.a.	yes
LU	SC-OGBL	voluntary	O	n.a.	200	8%	yes
MT	GWU	voluntary	O	39,201	<10	2%	no
	UHM	voluntary	SO	22,502	20	4%	n.a.
NL	CNV Vakmensen	voluntary	O	160,000	2,250	8%	yes

	Trade union	Type of membership	Domain coverage*	Membership		Density	Members in largest companies
				Members active	Members sector active	Sector density	
	FNV Mooi	voluntary	C	8,000	8,000	28%	yes
PT	CESP	voluntary	O	n.a.	n.a.	n.a.	n.a.
	SITese	voluntary	O	<10,000	n.a.	n.a.	n.a.
SE	Handels	voluntary	O	127,400	3,200	34%	yes
SI	SOPS	voluntary	O	8,100	60	2%	yes
UK	USDAW	voluntary	O	424,543	100	0%	no

Notes: (a) Including non-active members. \*\* Domain coverage: C = Congruence; O = Overlap; SO = Sectional Overlap; S = Sectionalism (for details see Table 2). n.a. = not available. Source: Eurofound's Network of European correspondents (2016), administrative data and estimates

**Table 11: Collective bargaining, consultation and affiliations of trade unions in the personal services–hair and beauty sector, 2014, 2015, 2016**

	Trade union	Collective bargaining*	Collective bargaining coverage (total)**	Consultation / frequency	National and European affiliations***
AT	vida	M	19,000	regularly	ÖGB; UNI Europa Hair and Beauty, ETF, EFFAT, EPSU
	GPA-djp	M	1,000	n.a.	ÖGB; UNI Europa, IndustriALL Europe, EFFAT, EPSU, EFJ
BE	BBTK/SETCa	M	1,200	regularly	ABVV/FGTB; UNI Europa Hair and Beauty
	ACLVB/CGSLB	M+S	16,000	ad hoc	UNI Europa Hair and Beauty, IndustriALL Europe, EMB, Eurocadres
	CSC-Bie/ACV-Bie	M+S	12,534	regularly	CSC/ACV; UNI Europa Hair and Beauty
	ACCG	M	n.a.	regularly	ABVV/FGTB; UNI Europa Hair and Beauty, IndustriALL Europe
DE	ver.di	M+S	165,721	yes	DGB; UNI Europa Hair and Beauty
DK	DFKF	M	3,350	ad hoc	LO; UNI Europa Hair and Beauty
EL	UECC	M	n.a.	no	EKA

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	OIYE	no	0	no	<i>GSEE</i> ; UNI Europa Hair and Beauty
<b>ES</b>	CCOO-CYS	M	n.a.	no	<i>CCOO</i> ; UNI Europa Hair and Beauty
	FES-UGT	M	n.a.	no	<i>UGT</i> ; UNI Europa Hair and Beauty
<b>FI</b>	PAM	M	2,700	regularly	<i>SAK</i> ; UNI Europa Hair and Beauty
<b>FR</b>	FCS-CGT	M+S	114,476	ad hoc	<i>CGT</i> ; UNI Europa Hair and Beauty
	SGFOSCE	M+S	114,476	regularly	<i>CGT-FO</i> ; UNI Europa Hair and Beauty
	FS-CFDT	M+S	114,476	n.a.	<i>CFDT</i> ; UNI Europa Commerce
	FNECS CFE-CGC	M+S	114,476	n.a.	<i>CGC</i>
	FCS-UNSA	M+S	114,476	no	<i>UNSA</i> ; (UNI Europa)
	CFTC-CSFV	M+S	114,476	n.a.	<i>CFTC</i>
<b>HR</b>	HSMP	M(a)	0	ad hoc	
<b>IE</b>	SIPTU	M	n.a.	ad hoc	<i>ICTU</i>
	Unite	M	n.a.	ad hoc	<i>ICTU</i> ; UNI Europa Hair and Beauty, IndustriALL Europe, ETF, EFBWW, EPSU, EFFAT
<b>IT</b>	FILCAMS-CGIL	M+S	60,000	no	<i>CGIL</i> ; UNI Europa Hair and Beauty
	FISASCAT-CISL	M+S	60,000	n.a.	<i>CISL</i> ; UNI Europa Hair and Beauty
	UILTUCS-UIL	M+S	60,000	n.a.	<i>UIL</i> ; UNI Europa Hair and Beauty
<b>LU</b>	SC-OGBL	no	0	no	<i>OGB-L</i> ; Europa Hair and Beauty
<b>MT</b>	GWU	S	20	ad hoc	UNI Europa Hair and Beauty, EPSU, Eurocadres, ETF, EFBWW, EMF, EFFAT
	UHM	S	20	ad hoc	<i>CMTU</i>
<b>NL</b>	CNV Vakmensen	M	26,000	ad hoc	
	FNV Mooi	M	26,000	ad hoc	<i>FNV</i> ; UNI Europa Hair and Beauty
<b>PT</b>	CESP	M	n.a.	n.a.	<i>CGTP-IN</i>
	SITSESE	no	0	n.a.	<i>UGT</i> ; UNI Europa Hair and Beauty
<b>SE</b>	Handels	M	n.a.	yes	<i>LO</i> ; UNI Europa Hair and

					Beauty
<b>SI</b>	SOPS	M	2,500	no	ZSSS
<b>UK</b>	USDAW	no	0	no	TUC; UNI Europa Hair and Beauty, EFFAT, ETF, IndustriALL Europe

Notes: (a) Will begin collective bargaining engagement during 2016. \* Collective bargaining involvement: S = single-employer bargaining; M = multi-employer bargaining. \*\* Number of employees covered by collective agreements concluded by the union within the personal services–hair and beauty sector. \*\*\* National affiliations put in italics; for the national level, only cross-sectoral (i.e. peak-level) associations are listed; for the European-level sectoral associations only; affiliation put in parenthesis means indirect affiliation via a higher order unit. n.a. = not available  
Source: Eurofound's Network of European correspondents (2016), administrative data and estimates

**Table 12: Domain coverage and membership of employer/business organisations in personal services–hair and beauty sector, 2014, 2015, 2016**

	Employer organisation	Domain coverage*	Membership				
			Type	Companies	Companies in sector	Employees	Employees in sector
<b>AT</b>	BIF	SO	obligatory	7,996	almost 7,996	19,952	almost 19,952
	BIFKM	SO	obligatory	15,648	n.a.	5,728	n.a.
<b>BE</b>	UBK/UCB	S	voluntary	1,312	1,312	1,500	1,500
	BESKO	S	voluntary	750	750	n.a.	n.a.
	UNEB	S	voluntary	n.a.	n.a.	n.a.	n.a.
<b>CY</b>	CHF	S	obligatory	3,200	3,200	n.a.	n.a.
<b>DE</b>	ZV	C	voluntary	n.a.	n.a.	n.a.	n.a.
<b>DK</b>	DOFK	C	voluntary	2,700	2,700	3,350	3,350
<b>EL</b>	PSVAK	SO	voluntary	57	n.a.	10,000	n.a.
<b>ES</b>	FEIP	S	voluntary	n.a.	n.a.	n.a.	n.a.
	ANEIP	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	FNAE	S	voluntary	n.a.	n.a.	n.a.	n.a.
	CEPE	n.a.	voluntary	n.a.	n.a.	n.a.	n.a.
<b>FI</b>	FHA	C	voluntary	713	713	2,300	2,300
<b>FR</b>	UNEC	S	voluntary	6,000	6,000	n.a.	n.a.
	CNEC	S	voluntary	2,600	2,600	>25,000	>25,000
	CNAIB	S	voluntary	1,647	1,647	n.a.	n.a.
	FIEPPEC	S	voluntary	70	70	1,400	1,400

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	Employer organisation	Domain coverage*	Membership				
			Type	Companies	Companies in sector	Employees	Employees in sector
	UNIB	S	voluntary	224	n.a.	n.a.	n.a.
<b>HR</b>	EACCHC	C	voluntary	10	10	50	50
<b>HU</b>	MOSZI	O	voluntary	10,000	580	n.a.	n.a.
<b>IE</b>	Ibec	O	voluntary	7,500	n.a.	>100,000	n.a.
	IHF	C	voluntary	256	256	>1,000	>1,000
<b>IT</b>	CB	SO	voluntary	22,000	18,000	40,000	30,000
	CNA-UBS	SO	voluntary	22,000	18,000	40,000	30,000
	Casartigiani	SO	voluntary	200,000	n.a.	n.a.	n.a.
	CLAAI	SO	voluntary	18,000	n.a.	n.a.	n.a.
<b>LT</b>	KIGSA	C	voluntary	250	250	n.a.	n.a.
<b>LU</b>	FPC	S	voluntary	176	176	n.a.	n.a.
<b>MT</b>	HBF	C	voluntary	85	85	40	40
<b>NL</b>	ANKO	S	voluntary	5,511	5,511	25,327	25,327
<b>PL</b>	ZRP	SO	voluntary	300,000	10,000	n.a.	35,000
<b>PT</b>	APBCIB	S	voluntary	n.a.	n.a.	n.a.	n.a.
	ACP	S	voluntary	n.a.	n.a.	n.a.	n.a.
	APCEB	S	voluntary	n.a.	n.a.	n.a.	n.a.
	ACISTDS	SO	voluntary	5,000	251	6,250	327
<b>SE</b>	SFSAB	S	voluntary	4,000	4,000	3,500	3,500
<b>SI</b>	SF OZS	S	voluntary	1,250	1,250	1,800	1,800
	SK OZS	S	voluntary	460	460	550	550
	ZDOPS	O	voluntary	3,000	1,710	30,000	2,350
<b>UK</b>	NHF	C	voluntary	5,130	5,130	40,000	40,000

Notes: \* Domain coverage: C = Congruence; O = Overlap; SO = Sectional Overlap; S = Sectionalism (for details see Table 2). n.a. = not available

Source: Eurofound's Network of European correspondents (2016), administrative data and estimates

**Table 13: Density, collective bargaining, consultation and affiliations of employer/business organisations in personal services–hair and beauty sector, 2014, 2015, 2016**

**(a) Density in sector and member in largest companies**

	Employer organisation	Density in sector (%)		Members in largest companies
		Companies	Employees	
<b>AT</b>	BIF	n.a.	n.a.	yes
	BIFKM	n.a.	n.a.	yes
<b>BE</b>	UBK/UCB	7%	9%	yes
	BESKO	4%	n.a.	yes
	UNEB	n.a.	n.a.	yes
<b>CY</b>	CHF	100%	100%	yes
<b>DE</b>	ZV	n.a.	n.a.	n.a.
<b>DK</b>	DOFK	38%	51%	yes
<b>EL</b>	PSVAK	n.a.	n.a.	yes
<b>ES</b>	FEIP	n.a.	n.a.	n.a.
	ANEIP	n.a.	n.a.	n.a.
	FNAE	n.a.	n.a.	no
	CEPE	n.a.	n.a.	n.a.
<b>FI</b>	FHA	5%	n.a.	no
<b>FR</b>	UNEC	5%	n.a.	n.a.
	CNEC	2%	>22%	yes
	CNAIB	1%	n.a.	n.a.
	FIEPPEC	0%	1%	yes
	UNIB	n.a.	n.a.	n.a.
<b>HR</b>	EACCHC	0%	1%	no
<b>HU</b>	MOSZI	2%	n.a.	no
<b>IE</b>	lbec	n.a.	n.a.	yes
	IHF	n.a.	n.a.	yes
<b>IT</b>	CB	15%	31%	no
	CNA-UBS	15%	31%	no
	Casartigiani	n.a.	n.a.	no
	CLAAI	n.a.	n.a.	no
<b>LT</b>	KIGSA	n.a.	n.a.	n.a.
<b>LU</b>	FPC	22%	n.a.	yes
<b>MT</b>	HBF	7%	8%	n.a.

	Employer organisation	Density in sector (%)		Members in largest companies
		Companies	Employees	
NL	ANKO	11%	87%	yes
PL	ZRP	16%	n.a.	no
PT	APBCIB	n.a.	n.a.	n.a.
	ACP	n.a.	n.a.	n.a.
	APCEB	n.a.	n.a.	n.a.
	ACISTDS	n.a.	n.a.	no
SE	SFSAB	17%	37%	yes
SI	SF OZS	34%	74%	yes
	SK OZS	12%	23%	yes
	ZDOPS	46%	96%	n.a.
UK	NHF	17%	26%	no

**(b) Collective bargaining, consultation and affiliations**

	Employer organisation	Collective bargaining*	Collective bargaining coverage**		Consultation/ frequency	National and European affiliations***
			Companies	Employees		
AT	BIF	M	~8,000	~20,000	regularly	WKÖ; Coiffure EU
	BIFKM	M	n.a.	1,000	regularly	WKÖ
BE	UBK/UCB	M	5,000	13,000	regularly	UNIZO/UCM; Coiffure EU
	BESKO	M	n.a.	n.a.	regularly	
	UNEB	M	n.a.	n.a.	regularly	
CY	CHF	no	0	0	regularly	Coiffure EU
DE	ZV	M	n.a.	n.a.	n.a.	ZDH, UDH; Coiffure EU
DK	DOFK	M	1,325	3,350	ad hoc	SAMA, DA, HVR; Coiffure EU
EL	PSVAK	M	n.a.	n.a.	no	SEV; Cosmetics Europe
ES	FEIP	M	n.a.	n.a.	n.a.	
	ANEIP	M	n.a.	n.a.	n.a.	
	FNAE	M	n.a.	n.a.	regularly	CEPEC
	CEPE	M	n.a.	n.a.	n.a.	
FI	FHA	M	>800	2,700	ad hoc	Coiffure EU



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

	Employer organisation	Collective bargaining*	Collective bargaining coverage**		Consultation/ frequency	National and European affiliations***
			Companies	Employees		
FR	UNEC	M	82,743	96,891	yes	UPA; Coiffure EU
	CNEC	M	82,743	96,891	regularly	CGPME
	CNAIB	M	40,012	17,585	ad hoc	UPA, CNAMS; CEPEC
	FIEPEEC	M	40,012	17,585	ad hoc	
	UNIB	M	40,012	17,585	n.a.	UPA
HR	EACCHC	M(a)	0	0	no	
HU	MOSZI	no	0	0	ad hoc	IPOSZ; Coiffure EU
IE	Ibec	M	n.a.	n.a.	ad hoc	
	IHF	M	n.a.	n.a.	n.a.	Coiffure EU
IT	CB	M+S	100,000	n.a.	regularly	(Coiffure EU)
	CNA-UBS	M+S	100,000	n.a.	regularly	(Coiffure EU), CEPEC
	Casartigiani	M+S	n.a.	n.a.	n.a.	
	CLAAI	M+S	n.a.	n.a.	n.a.	
LT	KIGSA	no	0	0	ad hoc	Coiffure EU
LU	FPC	no	0	0	ad hoc	FDA; Coiffure EU
MT	HBF	no	0	0	ad hoc	MEA; Coiffure EU
NL	ANKO	M	6,000	26,000	ad hoc	MKB-Nederland; Coiffure EU
PL	ZRP	no	0	0	ad hoc	Coiffure EU
PT	APBCIB	M	n.a.	9,608	n.a.	CCP
	ACP	M	n.a.	1,510	n.a.	CCP
	APCEB	M	n.a.	795	n.a.	
	ACISTDS	M	n.a.	n.a.	ad hoc	CCP
SE	SFSAB	M	4,700	5,000	regularly	Företagarna; Coiffure EU
SI	SF OZS	(M)	2,900	2,000	ad hoc	OZS; Coiffure EU, (CEPEC)
	SK OZS	(M)	600	350	ad hoc	OZS; CIDESCO, (CEPEC)

	Employer organisation	Collective bargaining*	Collective bargaining coverage**		Consultation/ frequency	National and European affiliations***
			Companies	Employees		
	ZDOPS	M	3,500	2,500	n.a.	
<b>UK</b>	NHF	no	0	0	regularly	Coiffure EU

Notes: (a) Will start collective bargaining engagement during 2016. \* Collective bargaining involvement: S = single-employer bargaining; M = multi-employer bargaining; (M) = indirect involvement in multi-employer bargaining via a higher order unit. \*\* Number of companies/employees covered by collective agreements concluded by the employer organisation within the personal services–hair and beauty sector. \*\*\* National affiliations are in italics. For the national level, only cross-sectoral (that is, peak-level) associations are listed. For the European-level sectoral associations only, an affiliation in parenthesis means indirect affiliation via a higher order unit. n.a. = not available.

Source: Eurofound's Network of European correspondents (2016), administrative data and estimates

**Table 14: System of sectoral collective bargaining, 2016**

Country	Collective bargaining coverage (CBC) (estimates)	Share of multi-employer bargaining in total CBC (estimates)	Extension practices <sup>a</sup>
AT	80%–90%	100%	(2)
BE	100%	100%	2
BG	0%	n/a	n/a
CY	0%	n/a	n/a
CZ	0%	n/a	n/a
DE	100%	almost 100%	2
DK	60%	MEB prevailing	0
EE	0%	n/a	n/a
EL	n.a.	MEB prevailing	0
ES	almost 100%	MEB prevailing	2
FI	99%	100%	2
FR	100%	MEB prevailing	2
HR	0% (a)	n/a	n/a
HU	0%	n/a	n/a
IE	n.a.	MEB prevailing	1
IT	100%	almost 100%	(2)
LT	0%	n/a	n/a

Country	Collective bargaining coverage (CBC) (estimates)	Share of multi-employer bargaining in total CBC (estimates)	Extension practices <sup>a</sup>
LV	0%	n/a	n/a
LU	0%	n/a	n/a
MT	4%	0%	0
NL	97%	100%	2
PL	0%	n/a	n/a
PT	>66%	100%	2
RO	0%	n/a	n/a
SE	50%–60%	almost 100%	2
SI	100%	100%	2
SK	0%	n/a	n/a
UK	0%	n/a	n/a

Notes: CBC = collective bargaining coverage: employees covered as a percentage of the total number of employees in the sector. MEB = multi-employer bargaining. Extension practices (including functional equivalents to extension provisions, that is, obligatory membership and labour court rulings): <sup>a</sup> 0 = no practice, 1 = limited/exceptional, 2 = pervasive. Cases of functional equivalents are put in parentheses. (a) Collective bargaining announced to start during 2016. n/a = not applicable

Source: Eurofound's Network of European correspondents (2016), administrative data and estimates.

**Table 15: Tripartite sector-specific boards of public policy, 2016**

Country	Name of body and scope of activity	Origin	Trade unions participating	Business associations participating
FI	National Education and Training Committee for the Beauty Sector	Statutory	PAM, SAK, Trade Union of Education (OAJ)	FHA, Confederation of Finnish Industries (EK), Association of Finnish Beauty Therapists (SKY)

Source: Eurofound's Network of European correspondents (2016)

**Table 16A: Membership of the Hair and Beauty Section of UNI Europa, 2016**

Country	Trade unions
AT	vida*
BE	BBTK/SETCa,* ACLVB/CGSLB,* CSC-Bie/ACV-Bie,* ACCG*
BG	–
CY	–
CZ	–
DE	ver.di*
DK	DFKF*
EE	–
EL	OIYE
ES	CCOO-CYS,* FES-UGT*
FI	PAM*
FR	FCS-CGT,* SGFOSCE*
HR	–
HU	–
IE	Unite*
IT	FILCAMS-CGIL,* FISASCAT-CISL,* UILTUCS-UIL*
LT	– (a)
LU	SC-OGBL
LV	–
MT	GWU*
NL	FNV Mooi*
PL	–
PT	SITese
RO	–
SE	Handels*
SI	–
SK	–
UK	USDAW

*Notes: Membership list is confined to the sector-related associations of the countries under consideration. (a) Lithuania's LKKDPS is not included in this list even though it is still a member of UNI Europa Hair and Beauty. This is because, according to the national correspondent of Lithuania, it no longer organises any members in the sector. \* Involved in sector-related collective bargaining.*

Source: Eurofound's Network of European correspondents (2016)

**Table 16B: Sector-related trade unions not affiliated to UNI Europa Hair and Beauty, 2016**

Country	Hairdressing subsector (a)	Beauty subsector (b)	Sector-related trade unions not affiliated to UNI Europa Hair and Beauty
AT	yes	yes	GPA-djp
BE			–
BG			–
CY			–
CZ			–
DE			–
DK			–
EE			–
EL	no	yes	UECC
ES			–
FI			–
FR	yes	yes	FS-CFDT
	yes	yes	FNECS CFE-CGC
	yes	yes	FCS-UNSA
	yes	yes	CFTC-CSFV
HR	yes	yes	HSMP
HU			–
IE	yes	yes	SIPTU
IT			–
LT			–
LU			–
LV			–
MT	yes	yes	UHM
NL	yes	yes	CNV Vakmensen
PL			–
PT	yes	yes	CESP
RO			–
SE			–
SI	yes	yes	SOPS
SK			–

Country	Hairdressing subsector (a)	Beauty subsector (b)	Sector-related trade unions not affiliated to UNI Europa Hair and Beauty
UK			–

Notes: (a) Coverage of hairdressing subsector according to membership domain.

(b) Coverage of beauty treatment subsector according to membership domain.

Source: Eurofound's Network of European correspondents (2016)

**Table 17A: Membership of Coiffure EU, 2016**

Country	EU Coiffure
AT	BIF*
BE	UBK/UCB*
BG	–
CY	CHF
CZ	–
DE	ZV*
DK	DOFK*
EE	–
EL	–
ES	–
FI	FHA*
FR	UNEC*
HR	–
HU	MOSZI
IE	IHF*
IT	(CB*), (CNA-UBS*)
LT	KIGSA
LU	FPC
LV	–
MT	HBF
NL	ANKO*
PL	ZRP
PT	–
RO	–
SE	SFSAB*

Country	EU Coiffure
SI	SF OZS**
SK	–
UK	NHF

Notes: Membership list is confined to the sector-related associations of the countries under consideration. Affiliation in parenthesis means indirect affiliation via a higher order unit. \* Involved in sector-related collective bargaining. \*\* Indirect collective bargaining involvement via a higher order unit.

Source: Eurofound's Network of European correspondents (2016)

**Table 17B: Sector-related employer organisations not affiliated to Coiffure EU, 2016**

Country	Hairdressing subsector (a)	Beauty subsector (b)	Sector-related employer organisations not affiliated to Coiffure EU
AT	no	yes	BIFKM
BE	no	yes	BESKO
	no	yes	UNEB
BG			–
CY			–
CZ			–
DE			–
DK			–
EE			–
EL	no	yes	PSVAK
ES	n.a.	n.a.	FEIP
	n.a.	n.a.	ANEIP
	no	yes	FNAE
	n.a.	n.a.	CEPE
FI			–
FR	yes	no	CNEC
	no	yes	CNAIB
	no	yes	FIEPPEC
	no	yes	UNIB
HR	yes	yes	EACCHC
HU			–
IE	yes	yes	Ibec
IT	yes	yes	Casartigiani



Country	Hairdressing subsector (a)	Beauty subsector (b)	Sector-related employer organisations not affiliated to Coiffure EU
	yes	yes	CLAAI
LT			–
LU			–
LV			–
MT			–
NL			–
PL			–
PT	yes	yes	APBCIB
	yes	yes	ACP
	yes	yes	APCEB
	yes	yes	ACISTDS
RO			–
SE			–
SI	no	yes	SK OZS
	yes	yes	ZDOPS
SK			–
UK			–

Notes: (a) Coverage of hairdressing subsector according to membership domain.

(b) Coverage of beauty treatment subsector according to membership domain.

Source: Eurofound's Network of European correspondents (2016)

**Table 18: Trade unions listed in the national contributions but not included in this study**

Country	Trade union	Reason for non-inclusion
BG	Independent Trade Union Federation of Trade, Cooperatives and Services (ITUFTCTS)	No members in the sector
	National Federation 'Commerce, Services, Customs and Tourism' KT Podkrepa (NF 'CSCT' KT Podkrepa)	No members in the sector
CZ	Union of Czech and Moravian Production Cooperatives (SCMVD)	Neither affiliated to UNI Europa Hair and Beauty nor involved in sector-related collective bargaining
HU	Local Industry and Municipal Workers' Union 2000 (HVDSZ 2000)	No members in the sector any more
LT	Lithuanian Trade Union of Commercial	No members in the sector

Country	Trade union	Reason for non-inclusion
	and Cooperative Employees (LKKDPS)	
LU	Christian Trade Union Confederation of Luxembourg (LCGB)	Neither affiliated to UNI Europa Hair and Beauty nor involved in sector-related collective bargaining
LV	Latvian United Hairdressers' Trade Union	Neither affiliated to UNI Europa Hair and Beauty nor involved in sector-related collective bargaining
	Latvian Trade Union of Public Service and Transport Workers (LAKRS)	Neither affiliated to UNI Europa Hair and Beauty nor involved in sector-related collective bargaining
	Latvian Union of Manicure and Pedicure Specialists	Neither affiliated to UNI Europa Hair and Beauty nor involved in sector-related collective bargaining
MT	General Retailers and Traders Union	Neither affiliated to UNI Europa Hair and Beauty nor involved in sector-related collective bargaining
PT	Union of Professionals in Hairdressing and Beauty Services (SINDPAB)	No longer exists (since 2013)
RO	National Confederation of Free Trade Unions of Cooperatives of Romania (CNSLCR)	Neither affiliated to UNI Europa Hair and Beauty nor involved in sector-related collective bargaining
UK	GMB	No members in the sector

**Table 19: Employer organisations listed in the national contributions but not included in this study**

Country	Employer organisation	Reason for non-inclusion
BG	National Crafts Chamber (NCC)	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
	Bulgarian National Association of Hairdressers (BNAH)	Neither affiliated to Coiffure EU (membership suspended in 2015) nor involved in sector-related collective bargaining
CY	Cyprus Association of Beauty Therapists (CABTH)	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
CZ	Hairdressers' Association of the Czech Republic (AKCZ)	Neither affiliated to Coiffure EU (membership suspended in 2012) nor involved in sector-related collective bargaining
	Association of Make-up Artists and Stylists of the Czech Republic (AVS)	Neither affiliated to Coiffure EU nor involved in sector-related collective

Country	Employer organisation	Reason for non-inclusion
		bargaining
	Union of Beauticians (UNIEK)	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
EE	ERKU	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
EL	Sectoral Federation of Barbers and Hairdressing Salons of Greece	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
	Federation of Professional and Qualified Beauticians of Greece (OSEDAE)	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
ES	CONEPE	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
FI	Association of Finnish Beauty Therapists (SKY)	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
HR	Zagreb Craft Association	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
LU	Federation of Graduates in Beauty Treatments	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
LV	Baltic SPA Association 'Baltic SPA Professional'	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
	Hairdressers' and Cosmetologists' Association of Latvia	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
	Latvian Association of Cosmetologists	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
MT	Malta Association of Beauty Therapists (MABT)	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
NL	Sectoral Organisation of Beauty Treatment (ANBOS)	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
	Sectoral Organisation of Pedicure (PROVOET)	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
RO	National Association of Craft Cooperatives in Romania (UCECOM)	Neither affiliated to Coiffure EU nor involved in sector-related collective

Country	Employer organisation	Reason for non-inclusion
		bargaining
<b>SE</b>	Swedish National Association of Skin Therapists (SHR)	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
	Swedish Aestheticians Occupation Association (SEYF)	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
<b>SK</b>	Community of Hairdressers and Cosmetics of the Slovak Republic (SKK SR)	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining
<b>UK</b>	Incorporated Guild of Hairdressers, Wigmakers and Perfumers	Neither affiliated to Coiffure EU nor involved in sector-related collective bargaining

## Annex 2: Contributors from Eurofound’s Network of European correspondents

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### Annex 3: List of organisations and abbreviations

Country	Abbreviation	Full name
<b>AT</b>	BIF	Federal Association of Hairdressers
	BIFKM	Federal Association of Beauty Treatment Companies
	GPA-djp	Union of Salaried Employees, Graphical Workers and Journalists
	ÖGB	Austrian Trade Union Federation
	vida	Vida Trade Union
	WKÖ	Austrian Federal Economic Chamber
<b>BE</b>	ABVV/FGTB	Belgian General Federation of Labour
	ACCG	General Union Central
	ACLVB/CGSLB	Federation of Liberal Trade Unions of Belgium
	BBTK/SETCa	Belgian Union of White-collar, Technical and Executive Employees
	BESKO	Employers' Organisation for Bio-aesthetics and Cosmetology
	CSC/ACV	Confederation of Christian Trade Unions
	CSC-Bie/ACV-Bie	Confederation of Christian Trade Unions – Construction, Industry and Energy
	UBK/UCB	Union of Belgian Hairdressers
	UCM	Union of Small Companies and Traders
	UNEB	National Union of Beauticians in Belgium
	UNIZO	Organisation of the Self-Employed
<b>BG</b>	–	
<b>CY</b>	CHF	Cyprus Hairdressers' Federation
<b>CZ</b>	–	
<b>DE</b>	DGB	Confederation of German Trade Unions
	UDH	German Association of Skilled Crafts Confederations
	ver.di	United Services Union
	ZDH	German Confederation of Skilled Crafts
	ZV	Employer Association for the German Hairdressing Sector
<b>DK</b>	DA	Confederation of Danish Employers
	DFKF	Danish Hairdressing and Cosmetics Union
	DOFK	Danish Hairdressing Federation
	HVR	Federation of Small and Medium-sized Enterprises
	LO	Danish Confederation of Trade Unions

Country	Abbreviation	Full name
	SAMA	Danish Federation of Small Employers' Associations
EE	–	
EL	EKA	Labour Centre of Athens
	GSEE	General Confederation of Greek Labour
	OIYE	Federation of Private Employees in Greece
	PSVAK	Hellenic Cosmetic, Toiletry and Perfumery Association
	SEV	Hellenic Federation of Enterprises
	UECC	Union of Employees in Cosmetics Companies
ES	ANEIP	National Association of Personal Image Companies
	CCOO	Trade Union Confederation of Workers' Commissions
	CCOO-CYS	Trade Union Confederation of Workers' Commissions – Construction and Services
	CEPE	Spanish Confederation of Hairdressers and Aestheticians
	FEIP	Spanish Federation of Personal Image
	FES-UGT	Service Federation of the General Workers' Federation
	FNAE	National Federation of Beauticians
	UGT	General Workers' Federation
FI	FHA	Finnish Hairdressers' Association
	PAM	Services Trade Union
	SAK	Central Organisation of Finnish Trade Unions
	SY	Federation of Finnish Enterprises
FR	CFDT	French Democratic Confederation of Labour
	CFTC	French Christian Workers' Confederation
	CFTC-CSFV	French Christian Workers' Confederation – Commerce and Services Federation
	CGC	General Confederation of Professional and Managerial Staff
	CGPME	General Confederation of Small and Medium-sized Enterprises
	CGT	General Confederation of Labour
	CGT-FO	General Confederation of Labour – Force ouvrière
	CNAIB	Craft National Confederation of Beauty Salons
	CNAMS	National Confederation of Craft Industry, Trades and Services
	CNEC	National Union of Hairdressing Companies



Country	Abbreviation	Full name
	FCS-CGT	Retail, Supermarket Retail and Services Workers' Federation of General Confederation of Labour
	FCS-UNSA	Commerce and Services Federation of the Union of Autonomous Trade Unions
	FIEPPEC	Federation of Professional Schools of Perfumery, Beauty Treatment and Cosmetics
	FNECS CFE-CGC	National Federation of Commerce and Services Managers – French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	FS-CFDT	Services Federation of the French Democratic Confederation of Labour
	SGFOSCE	General Union Force Ouvrière of Hairdressing and Beauty Treatment Services
	UNEC	National Organisation of Hairdressing Companies
	UNIB	National Organisation of Beauty Centres
	UNSA	Union of Autonomous Trade Unions
	UPA	Craftwork Employers' Association
HR	EACCHC	Employers' Association in the Craft, Cooperative Sector, Hairdressing and Cosmetology
	HSMP	Croatian Union of Small Business, Handicrafts, Services and Foreign Agencies
HU	IPOSZ	Hungarian Association of Craftmen's Corporations
	MOSZI	Hungarian National Industry Board
IE	Ibec	Irish Business and Employers' Confederation
	ICTU	Irish Congress of Trade Unions
	IHF	Irish Hairdressers Federation
	SIPTU	Services, Industrial, Professional and Technical Union
	Unite	General Union Unite
IT	Casartigiani	Autonomous Confederation of Artisan Unions
	CB	Confartigianato – Wellness
	CGIL	General Confederation of Italian Workers
	CISL	Italian Confederation of Workers' Unions
	CLAAI	Confederation of Free Italian Artisan Associations
	CNA-UBS	Italian National Federation of Craftsmen and SMEs – Health and Beauty
	FILCAMS	Italian Federation of Workers in the Commerce, Tourism and Services Sector

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

Country	Abbreviation	Full name
	FISASCAT	Italian Federation of Commercial Services and Tourism
	UIL	Union of Italian Workers
	UILTUCS	Italian Union of Workers in the Commerce, Tourism and Services Sector
LT	KIGSA	Association of Hairdressers and Beauty Specialists
	LKKDPS	Lithuanian Union of Commercial and Cooperative Employees
LU	FDA	Federation of Artisans
	FPC	Hairdressers' Federation of the Grand Duchy of Luxembourg
	OGBL	Luxembourg Confederation of Independent Trade Unions
	SC-OBGL	Luxembourg Confederation of Independent Trade Unions – Retail Union
LV	–	
MT	CMTU	Confederation of Malta Trade Unions
	GWU	General Workers' Union
	HBF	Hair and Beauty Federation
	MEA	Malta Employers' Association
	UHM	United Workers' Union
NL	ANKO	Royal General Dutch Hairdressers' Organisation
	CNV Vakmensen	Christian Trade Union Federation
	FNV	Federation of Dutch Trade Unions
	FNV Mooi	Federation of Dutch Trade Unions – Beauty
	MKB-Nederland	Dutch Federation of Small and Medium-sized Enterprises
PL	ZRP	Polish Craft Association
PT	ACISTDS	Association of Trade, Industry, Services and Tourism of the District of Setúbal
	ACP	Association of Hairdressers of Portugal
	APBCIB	Portuguese Association of Barbershops, Hairdressers and Beauty Institutes
	APCEB	Portuguese Association of Hairdressers and Beauty
	CCP	Confederation of Trade and Services of Portugal
	CESP	Union of Commerce, Office and Service Workers of Portugal
	CGTP-IN	General Confederation of Portuguese Workers
	SITese	Union of Workers and Qualified Staff in Services

Country	Abbreviation	Full name
	UGT	General Union of Workers
<b>RO</b>	–	
<b>SE</b>	Företagarna	Swedish Federation of Business Owners
	Handels	Commercial Employees' Union
	LO	Swedish Trade Union Confederation
	SFSAB	Swedish Association of Hairdressing Services
<b>SI</b>	OZS	Chamber of Crafts and Small Businesses of Slovenia
	SF OZS	Section of Hairdressers of the Chamber of Craft and Small Businesses of Slovenia
	SK OZS	Section of Cosmeticians of Chamber of Craft and Small Businesses of Slovenia
	SOPS	Trade Union of Crafts and Entrepreneurship of Slovenia
	ZDOPS	Employers' Association of Craft and Entrepreneurs of Slovenia
	ZSSS	Association of Free Trade Unions of Slovenia
<b>SK</b>	–	
<b>UK</b>	NHF	National Hairdressers' Federation
	TUC	Trades Union Congress
	USDAW	Union of Shop, Distributive and Allied Workers
<b>EU</b>	CEPEC	European Confederation of Beauticians and Cosmeticians
	CIDESCO	International Committee for Aesthetics and Cosmetology
	Coiffure EU	Association Coiffure EU
	Cosmetics Europe	Cosmetics Europe – the Personal Care Association
	EFBWW	European Federation of Building and Woodworkers
	EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions
	EFJ	European Federation of Journalists
	EMF	European Metalworkers' Federation
	EPSU	European Federation of Public Service Unions
	ETF	European Transport Workers' Federation
	Eurocadres	Council of European Professional and Managerial Staff
	IndustriALL Europe	IndustriALL European Trade Union
	UNI Europa	Union Network International – Europe