

*Valuing prior Learning, Building Qualifications*



**Final report of the scouting phase**  
Comparison between qualification paths in the cleaning sector  
(Switzerland - EU countries)

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## 2. Delimitation of the sector

### a. NACE classification of cleaning activities

Jobs related to “cleaning” are widely diffused in many branches and economic sectors, nonetheless the recent evolution of organizational settings in most of the companies – producing a strong trend towards the outsourcing of non-strategic tasks from the core business of the firms – determined the emergency of a wide and articulated industrial sector, whose mission is related to the provision of cleaning, maintenance and complex recovery services. Identified as “cleaning industry”, this sector covers services provided by specialized contractors, including for instance:

- building maintenance and associated cleaning,
- cleaning of public transport vehicles,
- waste management services
- and disinfecting and extermination activities.

Cleaning activities are identified by the Statistical Classification of Economic Activities in the European Community (NACE - Rev. 2), through the aggregation of 3 sub-sectors (Table 1)

**Table 1 – NACE classification of cleaning activities**

NACE Rev. 2	Description
81.2	Cleaning activities
81.21	General cleaning of buildings
81.22	Other building and industrial cleaning activities
81.29	Other cleaning activities

NACE 81.2 class, replacing and enlarging the older NACE 7.4 (Industrial cleaning), includes activities such as:

- interior cleaning of buildings of all types, including offices, factories, shops, institutions and other business and professional premises and multiunit residential buildings
- window cleaning
- chimney cleaning and cleaning of fireplaces, stoves, furnaces, incinerators, boilers, ventilation ducts and exhaust units
- disinfecting and exterminating activities for buildings, ships, trains, etc.
- cleaning of trains, buses, planes, etc.

Besides this general delimitation, it is worth noting that the sector is delimited in different ways in each country and different systems of classification of activities exist in all countries. In addition the statistical delimitation may be different from the collective bargaining structuring of the sector, because professional tasks of cleaning are normally taken in charge by workers depending from other business sectors, due to the interlinks existing between the cleaning service and other economic activities, largely depending from organizational arrangements of the companies, deciding to in-source or out-source a certain number of tasks normally belonging to the core business of cleaning service providers.

## b. Interlinks between the cleaning domain and other activities

A second feature to be considered, in order to delimitate the field, is the existence of structural interlinks between the cleaning professional domain, and a number of business activities. Originally, NACE classes excluded different professional domains clearly referable to the cleaning professional area, such as, for instance, jobs related to steam-cleaning, sand blasting and similar activities for building exteriors, cleaning of new buildings after construction, carpet and rug shampooing, drapery and curtain cleaning, and above all activities of domestics, services for the Households. In the meanwhile, cleaning contractors - reflecting a general trend towards multi-service contracting registered in the industry - normally provide specialized services requiring specific profiles not comparable to the “basic ones”, we are considering in our project, such in the case of waste management services, chimney sweeping, façade cleaning or maintenance of areas around buildings. On the other hand, cleaning jobs still represent a professional domain inside organizations active in different sectors (from Industry to Services), even if the trend towards outsourcing is rapidly growing. Cleaning is a structured performance, assigned to internal staff, in any touristic activity (mainly in Hotels and Incoming structures). As a service to households, cleaning is partially interlinking also caregiving provisions assured by public and private providers, through “social workers”.

Last but not least, beyond the border of the cleaning industry, cleaning and ordinary maintenance works are also performed in households, in varied configurations of unpaid housework, informal work and formal employment. Indeed, the largest part of cleaning across Europe is done informally. Domestic cleaning provides a precarious labor market alternative to cleaning workers and also impacts recruitment and turnover in the commercial sector. Various initiatives in Europe have tried to draw workers from the informal sector to the formal economy, using different types of service vouchers and being more or less successful. In any case informal working spaces play a fundamental role in offering opportunities to many workers, creating by experience in this context a first qualification, often transferred then in the official regular cleaning sector.

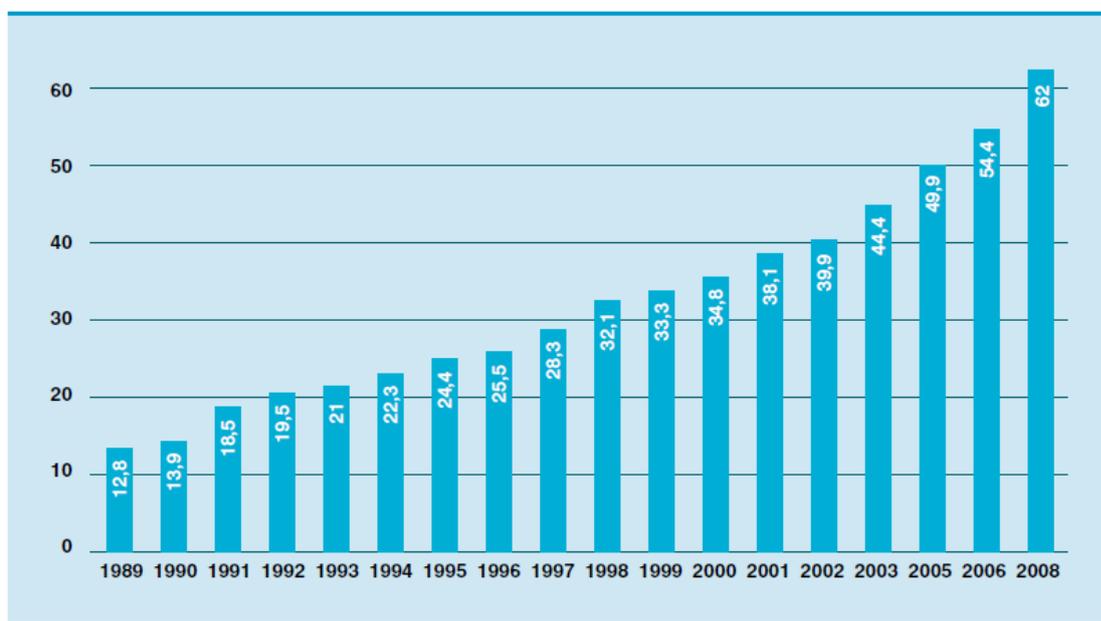
Summing up, and considering different obstacles hampering a strict delimitation of our professional domain, we decided to take in account the NACE classification of the cleaning sector – as “Cleaning Activities” - to detect quantitative trends of the sector and challenges of this professional domain, imagining however to extend qualitative findings – about characteristics of the workforce and qualification needs - to a larger set of activities in which cleaning operators normally work.

### 3. Trends of the sector: a growing industry

#### a. Economic trends

Some key data, provided by recent studies (see above, sources), identify the dimensions and characteristics of the sector. Just before the crisis (2008), the sector reached a turnover of over 62 billion €, with a market penetration (cleaning services bought by contractors on the market) of 62% (20% more than 20 years before). Cleaning contractors were over 131.000 (according to the EFCI), and work organizations, including micro-companies or independent workers approx. 190.000 according to the Eurostat. Employment, constantly growing for decades, overcomes 3,7 million people, mostly part-time workers (70%, with an average duration of work per week of 23 h), and women (77%).

**Table 2 – Turnover of the cleaning Industry (Europe) – billion of €**



Source: EFCI (2010): The Cleaning Industry in Europe: An EFCI Survey. Edition 2010 (data 2008).  
 Note: No updated data available for Denmark, Hungary, Poland, Portugal and Slovakia.

Determinant features of this growth are clearly described by an ETUI research of 2010:

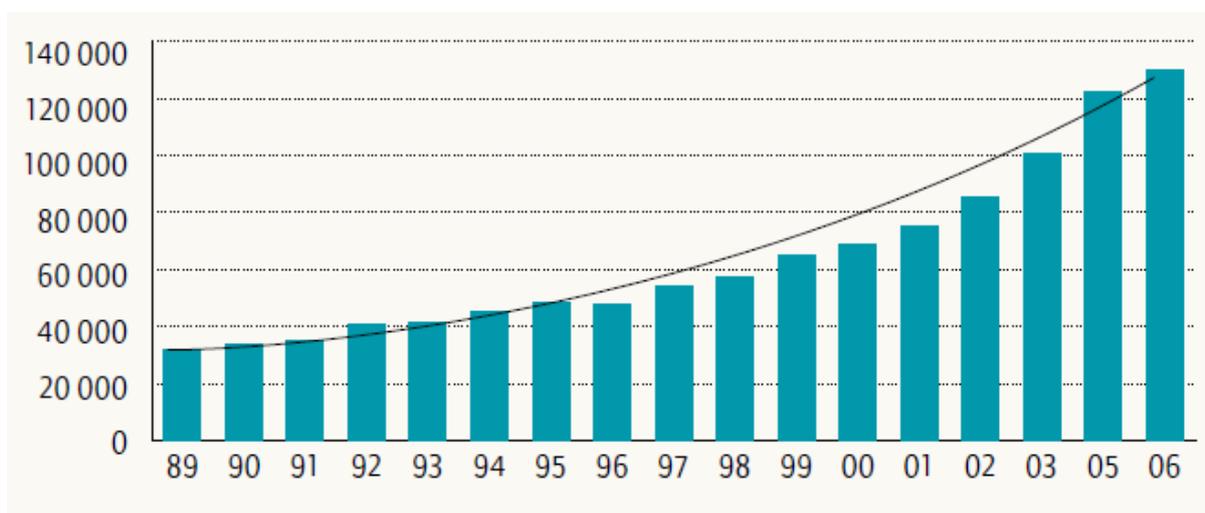
The demand for cleaning services took off from the latter half of the 1970s. Faced with harsher economic times than in the boom decades, firms looked to flexibility based strategies to stay competitive. One favored means was outsourcing, which as the name suggests, means contracting out activities previously done in-house. Unskilled operative jobs, which included cleaning activities, were the first to be outsourced on a large scale thereby creating a demand to match the supply that had been developed and organized over the previous decade. The sector has experienced steady sharp growth ever since, as evidenced by the available sectoral indicator trends. The European Federation of Cleaning Industries (EFCI) reports the European cleaning sector’s average market penetration rising from 43 to 61% between 1989 and 2005. In the space of sixteen years, therefore, the sector captured an additional 18% market share while the use of bought-in cleaning services overtook in-house cleaning from the mid-1990s on. Unsurprisingly, this remarkable expansion in market coverage has had a knock-on effect on the other industry indicators at European level. Between 1989 and 2006, its turnover increased fourfold at an average annual growth rate of 9.7%. (Scandella, 2010)

The WALQ-ING study, already quoted, provides us with an updated overview of the sector:

...dominated by a number of large companies, some of them multinational companies. After years of continuing outsourcing of services in Europe, an emerging trend for the diversification of these large companies' activities towards integrated services and facilities management is observed in all EU member states. Office cleaning is still the main subsector, but other segments such as industrial cleaning (including the hygiene of food chains), specialized cleaning services (hospital cleaning, etc.), façade and window cleaning, cleaning of public transport vehicles, cleaning of schools, etc. have grown in importance. Taken together, these services represent almost half the sector's turnover (Forba, 2012).

Nevertheless, apart from the above mentioned big players and competitors, the cleaning sector business structure is highly articulated and composed mainly by small and medium-sized companies (SMEs); only 10% of the sector companies have 50 or more employees.

**Table 3 – Number of active companies in the sector in Europe – 1989 / 2006**



The cleaning industry is a highly labor-intensive sector where about 75% of the costs are related to salaries and social charges. In the meanwhile, dominated by sub-contracting relationship between contractors and final / intermediate clients, it is a sector in which the concurrence between competitors is particularly hard, with pressure and work conditions and salaries.

A trend of constantly increasing rationalization is observed in the sector: since the wage cost is the most important cost in this labor-intensive sector, this is where competition is toughest. With fairly comprehensive or generally binding collective agreements, competition on wages mainly revolves around getting people to do the same type of job in fewer hours, which leads to a spiral of lower incomes and increasing work intensity. The provision of outsourced cleaning services is regulated through contract awarding (public procurement in the case of public clients). (Forba, 2012)

Finally the cleaning sector showed a great resistance against the crisis, scoring enviable results also after 2008. The impact of the financial crisis on the cleaning sector varies from one country to the other. However, at least in terms of employment, the sector appears to have suffered less from the crisis compared with most other industries

Consequences are to be found, however, considering the competition. In most countries the financial crisis did not affect, or only marginally affected, the sector in terms of employment.

It worsened – however - the business environment and the competition: falling profit margins within the sector and increased pressure on costs.

This, in turn, has resulted in reduced working hours and/or cuts in pay and premiums rather than direct job losses (for example in Bulgaria, Ireland, Luxembourg, the Netherlands and the UK). Moreover, the crisis may also have led to an increase in irregular and undeclared work in the cleaning industry (for example, Italy). Apart from that, according to several country reports, the crisis may have had negative effects on the public procurement policies of many administrations. Accordingly, against the background of increasingly restrictive austerity programmes imposed by national governments, the administrations have increasingly tended to award contractors offering the lowest price rather than the best value. As a consequence, the quality of work in the sector may have decreased in many instances. (European Foundation..., 2012)

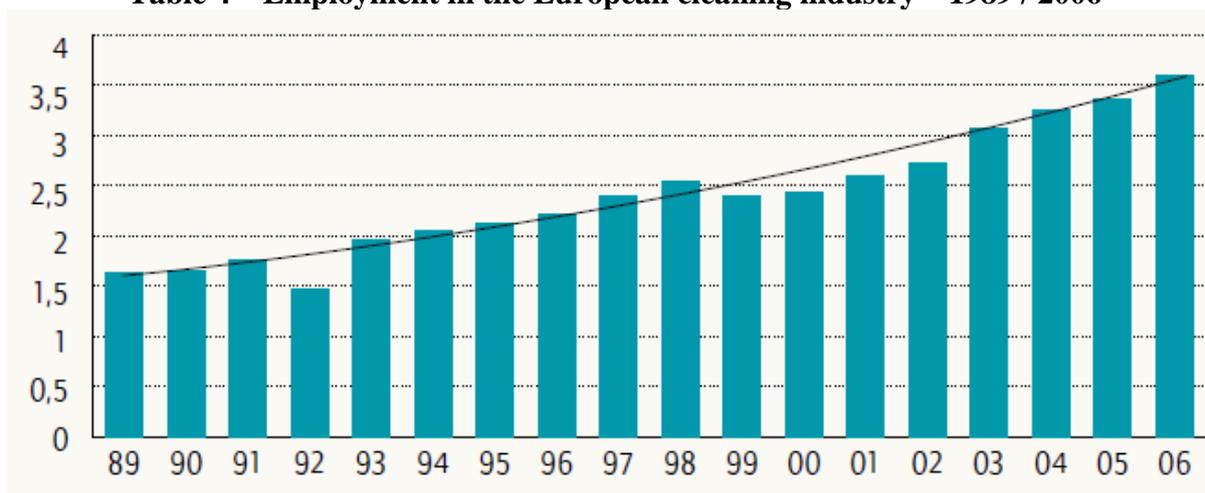
## b. Occupation

In a labor-intensive sector like cleaning, market expansion has naturally been accompanied by employment growth. The European cleaning industry workforce it's actually approaching 4 million workers.

This growth, however, should be interpreted with caution, partly because it cannot be equated to net job creation since much of the increase in the industry workforce is a virtual knock-on effect from the transfer of jobs resulting from outsourcing, and partly because the industry's employment figures are expressed in terms of straight headcount rather than full time equivalents. The problem is that part-time working is the norm rather than the exception in an industry whose expansion is driven by outsourcing and is subject to unbridled intra-industry competition. (Forba, 2012)

In 2008, more than 3.75 million people were employed in the cleaning industry in the EU countries, as opposed to 3.57 million in 2006 and 1.65 million in 1989. This represents an increase of 5% over two years (2006 – 2008), thus an average growth of 2.5% per year. For comparison, general EU-27 employment growth in these two years (2006 – 2008) was limited to a growth of 1.8% and 1.0% respectively.

**Table 4 – Employment in the European cleaning industry – 1989 / 2006**



Characterized by an impressive and positive occupational performance, both before and during the crisis, the cleaning sector is actually facing a crucial challenge: how to make human resources of the sector not only “marginalized workers to be exploited more and more in order to reduce costs and gain the market competition”, but a real asset for the development of an innovative and sustainable cleaning industry. It's not only a problem of “image”, but

really a challenge acknowledged also by the companies, coping with growing difficulties in recruiting and qualifying their staff.

The workforce in industrial cleaning across Europe comprises high shares of women, low-skilled workers, immigrants and ethnic minorities. Cleaning offers an opportunity for this segment of workers, who have limited opportunities in the European labor market. However, although conditions in cleaning vary between countries, many jobs are part time, include atypical working hours and are highly fragmented. Finally, there is an increasing intensification of work and a rising use of less secure employment contracts, all of which have implications for the most vulnerable groups. Vulnerability refers to a potentially problematic social situation in the zone between 'normal' and 'excluded'. It concerns work processes characterized by uncertainty/weakness that expose a person or family to suffering particularly negative or damaging consequences if a problematic situation arises. (Forba, 2012)

Three groups of workers appear particularly vulnerable according to the recent studies: women, immigrants/ethnic minorities, and older workers.

Cleaning is characterized by a high degree of **gender segregation** in terms of work tasks as well as wages, working conditions and working times. The few men in the sector usually work in specific niches, e.g. window cleaning, and frequently work full time while **women** tend to work part time, have lower wages, have less discretion and are more closely monitored than men. The atypical working hours and part-time work on offer collide with care obligations, creating everyday problems for the groups of single mothers and immigrants without social networks.

The group of **immigrants and ethnic minorities** occupies a special position because of their immigration status and lack of language skills. Furthermore, because of their lack of seniority in the sector combined with a gradual deterioration of employment contracts, they are offered the least attractive working conditions without having the bargaining power to complain.

Finally, the group of **older workers aged 50+**. (...) Many older workers have health problems from wear and tear and worry about being able to stay in the sector until retirement age. Cleaning offers very limited alternative job options for this group of older employees. (Forba, 2012)

It's therefore evident, and confirmed by these studies, that a project like Valbuk is particularly relevant in order to set up an innovative approach to the management of Human resources in the cleaning sector. It addresses the condition of immigrant women, aiming at the same time at developing qualification levels of the workforce; it tries to gain the joint commitment of the social partners in making companies sensitive toward the professionalization of their workforce.

Many structural obstacles hamper in the sector an adequate qualification, based on the valuation of experiential learning (the majority of the workers simply learn to make their job working and flanking their experienced companions), and drawing both on practice and on training. Peculiar working time arrangements characterizing the sector play a role of utmost importance.

It refers both to the prevalence of part-time work and common working times in the early mornings and in the evenings, often organized as split shifts. (...) With some exceptions, cleaning services in Europe are predominantly performed outside the usual periods of occupation of the premises that are cleaned. This is particularly true for office cleaning, but it also applies to commercial premises or buildings with public access. There are significant differences between countries. Part-time work remains the most frequent form of employment in this sector: 70 percent of the workforce in Europe hold part-time contracts. At the European level, about 75% of the employees in the sector are women, with men concentrating in the better-paid segments of outside cleaning. In general, part-time work combined with atypical working hours may have negative effects on the quality of work. Often it means that employees receive very small incomes because they work short hours. This suits some workers' work-life balance but others would prefer to work more hours. Part-time work is one way of adapting to the dominant working hours in office cleaning, which make it difficult for companies in some countries to offer full-time jobs or additional hours.

Furthermore, office cleaning is often organized by using split shifts. This means that cleaners work e.g. in the early morning, have a break during the day and start working again in the later afternoon. According to UNI Europa, the average working day distribution consists of 26% of work in the early morning and 43% of work in the late afternoon. It should be noted, however, that particularly women often use these ‘breaks’ for doing domestic work. If paid and unpaid work are taken together, split shifts can thus mean very long working days in practice, leaving little time for recreation, friends and family (*and we would also add for training and further training*). (Forba, 2012)

Therefore, despite the presence of formal qualifications in the great majority of the EU countries, a large quota of cleaning workers are low, or unskilled workers, trying to find out a way to escape from the sector, instead of investing in their professionalization.

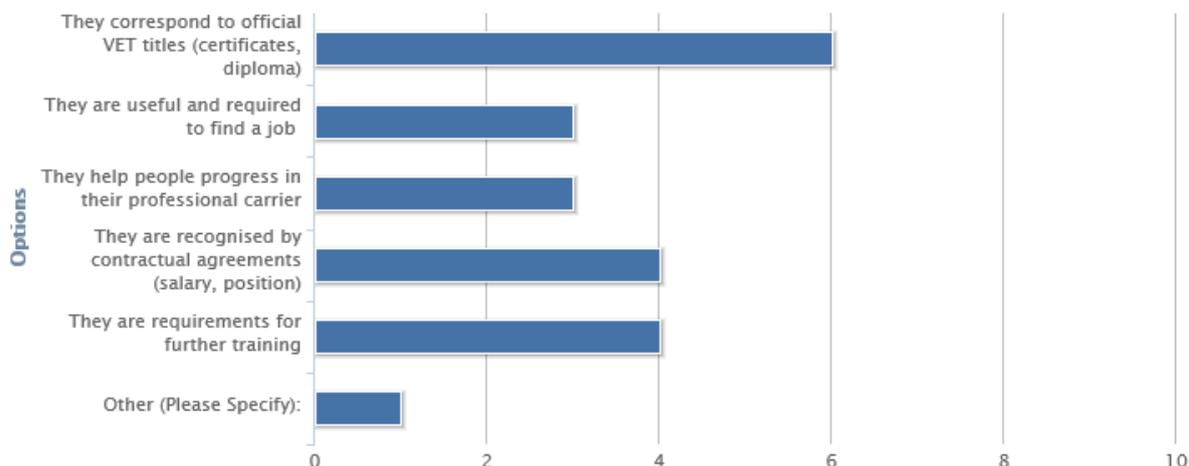
In several countries there is formal vocational training, mostly for outdoors cleaning, but increasingly also for indoors and office cleaning. It appears that clients are beginning to require certain skill levels, especially for frontline managers. Nevertheless, with its flat hierarchies and high labor turnover, in most countries the sector still relies on operatives with limited opportunities and aspirations, and training tends to be limited to workers qualifying for management positions. The issue of improving skills is closely connected to the issue of image improvement of the cleaning profession. (Forba, 2012)

#### 4. Qualification systems: overview

We focused on characteristics and added value of qualification systems active in the cleaning sector in each partner country, developing in the initial phase of the project a detailed “on-line” survey of partner organizations, whose results have been discussed and refined in Vienna, during the Kick off Meeting of the project.

The research confirmed first of all some general evidences provided by the literature about characteristics and trends of the sector. A general overview underscores the relevance of phenomena such as outsourcing and development of a demand related to specialized cleaning and maintenance services in determining a trend of growth of business indicators and employment in the majority of partner countries. The Netherlands seems to be characterized by a limited growth, if compared to the other countries, but it’s more an evidence of how the same trends as at the EU level has been anticipated in this country during the 70’ and the 80’, with the development of a solid and structured cleaning industry, providing services on the market.

**Table 5 – Formal value and usefulness of qualifications in the cleaning domain – Valbuk countries**



National qualifications and related training offers exist in almost all the countries, with the exception of Italy, where VET regulations are in charge of the regional Authorities, and only some regions (such as Emilia Romagna) are actually working to develop professional profiles in the sector. As shown by Table 5, however, qualifications, although corresponding to officially recognized titles and diploma, play a rather limited role in order to find a job or to develop a professional career. The cleaning sector still represents a good opportunity for “lateral entries”, for people not having a specific experience or qualification, but available to learn on the job, just beginning from the first steps of the ladder, in ordinary cleaning activities. Competences referred to roles and functions at the workplace - achieved through experience and training, corresponding or not to official qualifications - are considered by contractual agreements, and by the companies, much more relevant than formal entitlements in order to classify the workers.

Table 6 define the structure and some key characteristics of existing qualification systems, with respect to some mainstream trends towards a learning outcomes and competence based approach, emerging at the European level.

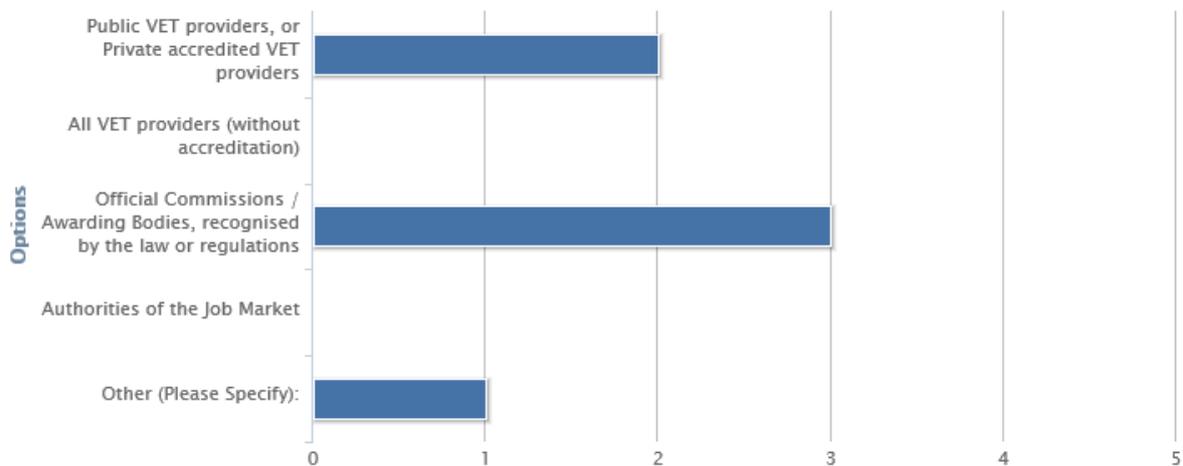
**Table 6 – Structure and characteristics of qualifications in the cleaning domain – Valbuk countries**

	<i>Not at all</i>	<i>I don't know</i>	<i>It's foreseen</i>	<i>Yes partially</i>	<i>Yes, absolutely</i>
Qualifications are structured in competences, referring to job processes	0 (0.00%)	0 (0.00%)	0 (0.00%)	3 (50.00%)	3 (50.00%)
Qualifications are described in learning outcomes (knowledge, skills, competences)	0 (0.00%)	1 (16.67%)	0 (0.00%)	3 (50.00%)	2 (33.33%)
Qualifications are articulated in units of learning outcomes	3 (50.00%)	0 (0.00%)	0 (0.00%)	1 (16.67%)	2 (33.33%)
Regulations clearly define standards for assessing learning	0 (0.00%)	1 (16.67%)	0 (0.00%)	2 (33.33%)	3 (50.00%)
Single learning outcomes, corresponding to units of competences, can be assessed and certified	0 (0.00%)	3 (50.00%)	1 (16.67%)	2 (33.33%)	0 (0.00%)
There is the possibility of validating informal learning outcomes	1 (16.67%)	1 (16.67%)	1 (16.67%)	2 (33.33%)	1 (16.67%)
A system of credits enable learners achieve a qualification cumulating learning outcomes	1 (16.67%)	3 (50.00%)	1 (16.67%)	1 (16.67%)	0 (0.00%)

Qualifications are generally structured and described according to EU approaches defined by the EQF, in a coherent way with the shifting towards learning outcomes. They are, at least partially, defined in competences, referring to job processes, and they are described in learning outcomes (knowledge, skills, competences). Professional regulations clearly define, in general, assessment criteria and indicators for evaluating the achievement of learning outcomes, but the presence of systems for validating informal learning is still an exception, practically implemented in France, and in a certain way in the Netherlands, or in other words in countries where legal basis and an open learning culture facilitate the development of recognition and validation of prior informal and non formal learning.

Qualification systems in the cleaning sector, despite the reality of the workplace, and the role actually played by informal learning, show – on the other hand - an impressive resistance against modularization and acceptance of flexible learning arrangements, including the accumulation of credits, corresponding to units of learning outcomes, in order to achieve a part or a whole qualification. In half of the countries profiles are not at all articulated in units of learning outcomes, in less than one third of the countries single learning outcomes can be assessed, recognized and accumulated (in terms of credits) to achieve a qualification.

**Table 7 – Who is in charge to issue official certifications in the cleaning sector – Valbuk countries**



Despite their relatively low value in the job market, and as an educational attainment, qualifications in the cleaning sector are officially issued by public commissions, or entitled bodies – including accredited training providers - acting according to precise legal basis and regulatory frameworks. The reality, as we will see focusing on the single countries, shows how in many different situations a sort of “double track” system has been established, considering the validity and “marketability” of certifications and diploma and the social recognition of them by collective bargaining. Diploma seems to be taken in account by companies (when classifying their collaborators) normally cross-cutting the 2 dimensions defined by roles and functions of the workers at the workplace and possession of officially recognized qualifications.

We will focus in the next chapters on the structure and main features of jobs and qualifications in the cleaning sector in the partner countries of Valbuk, in order to better define communalities and peculiarities related to the different frames in which occurred the development of market services in the cleaning sector.

### a. Switzerland

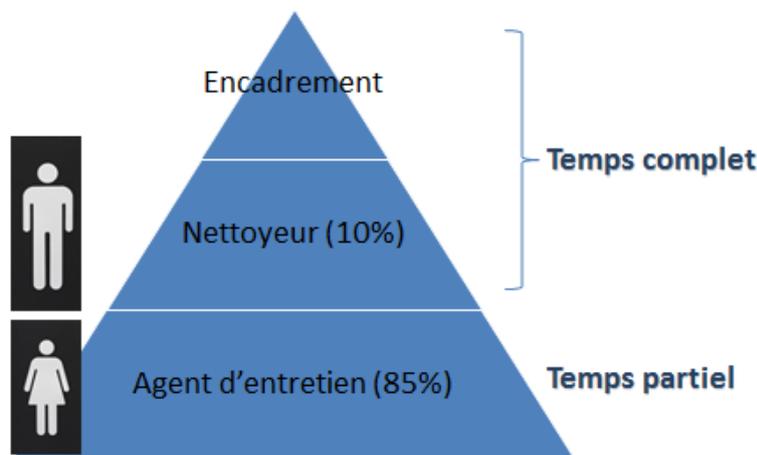
According to some recent data (Federal Office of Statistics), about 65.000 workers are active in Switzerland in the different branches of the cleaning sector; 2/3 of them are women, mostly working part time. 1.900 companies are active in the sector. As in the other European countries, the sector knew a good trend of growth during the last decades, due to the outsourcing of cleaning activities and the consolidation of sub-contracting of cleaning tasks by large public and private organizations both to micro-companies and medium/large size ones.

Different qualifications characterize the sector: “cleaner of buildings” (*Gebäudereiniger/In*) could be considered the principal one; as all I-VET qualifications, it’s a comprehensive and holistic profile, refined in 2010, positioned at level 3 EQF, defining knowledge, skills and competences related to the complete set of tasks of a cleaner, including:

- Deep cleaning at the end of construction or maintenance works
- Cleaning of windows and glass facades
- Extra-ordinary and periodic cleaning activities, including washing of textiles, carpets, etc.
- Maintenance cleaning and restoring activities

These operators must have a profound knowledge of work processes and products; they are expected to be capable of relating with clients, working in autonomy and taking full responsibility for their work. A lower level of qualification is in addition defined – as in any other professional field, by an initial training of 2 years, leading to a Federal Certification of skills and competences. These profiles reasonably includes some learning units overlapping qualifications of the same EQF level, related to other similar professional profiles (more or less specialized, defined by different regulations) including the provision of cleaning activities, such in the case of operators active in building service maintenance, specialized operators working in healthcare units and hospitals, employees active in domestic services and services for the households, room cleaners in Hotel, etc.

**Table 8 – structure of categories of cleaning workers according to CCT in Switzerland**



Apart from qualifications, the reality of the cleaning sector in Switzerland is defined by the way in which collective bargaining – actually managed by the social partner at a regional level, on the basis of different agreements in the 3 linguistic areas of the country – identify and classify functions and roles of the operators. Collective contractual agreements define a typology based on 3 main levels, crosscutting qualifications (see table 8).

Despite the presence of a unique comprehensive qualification, cleaning workers are classified by Contractual Agreements in 3 levels, on the basis of criteria and indicators related to their positioning in the hierarchy of functions, as:

- generic cleaners (*Agent d'Entretien*) estimated to be 85% of the whole workforce, mainly women, immigrants, working part time, with lower levels of incomes, often belonging to the working poor areas – see Rieger, Pfister, Alleva - 2012);
- specialized cleaners, (*Nettoyeur*), not more than 10% of the workforce, active in specific and specialized tasks, normally men, working as full time employees, gaining a middle-low level salary, having sometime the perspective of a career in the sector (i.e. creating his/her own company)
- Technicians and team responsables (*Encadrement*), a very limited area of workers, leading a small team, and /or working in complex technical positions, with tasks of a certain responsibility.

Specialized and generic cleaning works are defined on the basis of technical contents and mastery in using tools and products, as well as level of responsibility and autonomy of the workers. These criteria crosscut the presence of formal qualifications: the workers are classified by contractual agreements on the basis of roles / functions, and in their respective categories at different qualification levels. Fundamental categories are:

N: *Nettoyage*, in addition split in :

- *Nx* : having a full IVET qualification
- *Ny* : having only the initial partial qualification (corresponding to a 2 years training)
- *Nz* : workers without any recognized qualification.

These workers are assigned to specialized tasks, including the mastery of complex machines and extraordinary cleaning and maintenance works. They work in an autonomous way, independently from their formal qualification.

E : *Entretien*, related to simple and repetitive tasks, in addition split in :

- *E1* : including workers using in a constant way specific machines and tools, for accomplishing in a repetitive way relatively complex tasks
- *E2* : having at least a non-formal training, provided by training centers of the sector
- *E3* : generic workers, without any qualification, basically trained on the job

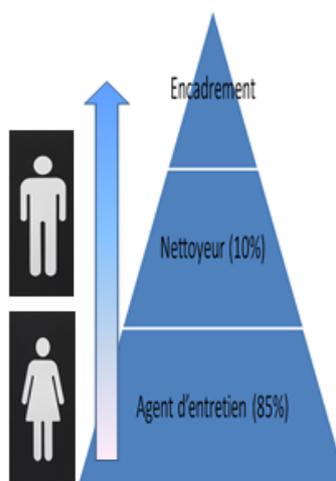
Table 9 provides a synthesis of the overall characteristics of the cleaning sector in Switzerland on the basis of categories and qualifications. According to the scheme, existing formal qualifications play a role in determining the positioning of specialized workers in the 2 upper categories Nx and Ny, when the upgrade from these categories to CE is clearly determined by other factors, related to human resources policies of the companies, even if higher vocational qualifications can be formally achieved via training and exams. Non formal training, leading to certifications of single competences, enable workers to progress in lower level categories.

Qualifications play therefore a role in the sector, but strictly interlinked with human resources policies of the companies, and with collective bargaining. The sector suffers of a strong problem of “image” and appeal. It’s an entry door in the job market for not qualified women and above all for migrants.

Generally speaking – however – it’s more conceived as a trampoline for shifting towards other working areas, than as the place for setting up a career path, despite efforts made in this sense bi bilateral bodies and entrepreneurial organizations of the sector. Salaries are very low, work conditions hard, and incomes pushed back by the great presence of part-time work, and atypical working hours (facilitating the development of parallel activities, switching from regular to black economy). These problems have been clearly highlighted by the recent study promoted by the trade unions, see Rieger A., Pfister P., Alleva V., 2012), which gave also an impressive idea of the concentration – in the cleaning sector – of workers gaining lower salaries (more than 40% of the 1,7 million workers receiving a salary under 3.500 CHF per month belong to the aggregate including cleaning services to companies and households).

**Table 9 – Categories and qualifications in the cleaning sector in Switzerland**

	RECONNAISSANCE : DIPLOMES ou ATTESTATIONS		
CE			∅
Nx		CFC	
Ny		AFP	
Nz			∅
E1			∅
E2	Attestation formation		
E3			∅



The research developed in Switzerland clarifies which kind of actions should be undertaken in order to improve human resources management and qualification paths, during the next years, according to the Valbuk Model. Different criteria, less related to the mere technical sphere (tasks and machines), should be considered when classifying the workers, including the valuation of personal and social competences, in terms of:

- autonomy and initiative
- relational and communicative competences (the workforce – active on field, in the front stage towards clients and final “beneficiaries” of cleaning activities – represents the ideal “commercial interface” of the cleaning company)
- responsibility, achieved through qualification and practice.

A new way of conceiving training comes to the fore, interlinking the recognition and valuation of skills and competences deriving from practice, their consolidation via flexible training offers and the setting-up of a training aiming at reinforcing and recovering basic skills:

- Alphabetization, literacy and recovery of basic language, math and ICT skills, needed to develop any professional career
- Definition of modular training pathways, addressing specific needs
- Validation of prior learning.

On the basis of a solid interlink between training and practice, the structure of Collective Agreement could be improved, in order to enable the kick-off of career paths actually blocked by obstacles related to qualifications and above all to the atypical structure of working conditions and times in the sector, hampering lower level workers (women, not having time or money to invest in their training) progress in the hierarchy scale (good practices emerged at this level in Austria, Belgium, Norway by the already quoted WALQ-ING study).

## b. Austria

About 53.000 workers were active in Austria in the cleaning sector in 2008; 65% of them women. Part time work were fundamental between the women belonging to lower levels of qualification (66%, against 16% of males). 2.700 companies were active, with a large presence of small size units. From a general point of view, the cleaning sector in Austria shows the same characteristics of the branch all over Europe: large presence of women, above all at the lower levels of qualification, majority of part-time and low-skilled workers, high labor turnover, high share of employees with migration background (app.. 60%). There is – however - an increasing demand for skills and expertise, in a sector that is steadily expanding since 2000, on the wake of outsourcing and specialization phenomena. The sector is in addition characterized by the polarization between “regular” services sold on the market – where formal qualifications and collective agreements are largely present – and unregulated cleaning activities (i.e. in private households), dominated by informal labor arrangements, where no data are available (“grey area”), and activities are more and more overlapping with care-taking services.

Different IVET qualifications are present in the sector, in form of Certificates of apprenticeship (ISCED 3B) such as:

- ‘Cleaner of monuments, facades and buildings’
- ‘Textile cleaner’
- ‘Chimney sweep’

The Federal Ministry of Economy, Family and Youth is responsible for the issue of official certifications. The above mentioned formal qualifications:

- correspond to official VET titles (certificates, diploma)
- are recognized as a classification means by contractual agreements (salary, position)
- are requirements for further training.

At the same time they are:

- structured in ‘knowledge’ related to work processes
- described, at least partially, in learning outcomes
- But they still maintain a certain comprehensiveness and rigidity, not being articulated in units of learning outcomes

Regulations clearly define standards for assessing learning, according to a very large number of different areas of qualification: from workplace cleaning (office cleaning, kitchen cleaning, lab cleaning), to cleaning after the end of a construction work, cleaning of windows, glass polishing to a wide number of specialized cleaning works (Flame cleaning, Sandblasting, Cleaning of hospitals, etc.)

Apprenticeship in the cleaning sector is not that attractive. Training normally takes place in second-chance education, addressed to drop out and disadvantaged youngsters and young adults, or in the framework of qualification initiatives for unemployed promoted by the Austrian Public Employment Services. Beyond these qualifications, training takes in place on the job and in companies: it has an informal character (rarely recognised certificates are issued), and it’s hard to define if curricula are specified in learning outcomes and to which extent a recognition of learning outcomes could be possible. Higher level qualifications are nonetheless present in the sector. The Master Craftsperson Qualification ISCED 5B - ‘Cleaner of monuments, facades and buildings’ can be achieved passing the Master Craft Examination, with a minimum age of 18 years, also without formal preparatory training, through an examination structured in modules, assessed separately.

Summing up, qualification structures in Austria are to a certain extent similar to Swiss ones, but they seem to overlap more strictly the structure of collective agreements, informing classification criteria of the workers. They define affordable, but probably very rigid, criteria for designing and planning professionalization paths. As in Switzerland, workers active in the sector – most of them immigrant women - are classified at lower levels of contractual position. The image of the sector still remains poor and bad, despite efforts made by the Chambers of Commerce for improving it (see WALQ-ING study, 2012).

### c. France

According to the data provided by Opicalia propreté (the Bilateral Body of the sector), 9.600 companies are active in France in the cleaning sector, with a paid staff of 428.400 workers (68% women). As in the other countries, the sector is characterized by:

- Lower level of formal qualifications (61% of the employees without any diploma or qualification)
- Good growth rate, high level of part-time workers and increasing demand (workers and qualifications)
- A certain development of training in the lifelong learning sector (non formal training): in 2010 74.355 employees followed a training (66.285 in 2009) promoted by the companies and supported by training allocations, around 60 hours per employee.

Despite its characteristics, the cleaning sector is relatively well regulated in France. The general framework is defined by collective contractual agreements, absolutely crucial in France in any branch. Three « referential matrixes » (*référentiels*) are already defined, endorsing different forms of qualifications. The certification of learning outcomes – independently from the mode and space of learning - is also possible thanks to existing “*certificats de qualification professionnelle*” (CQP). So far 6 CQP exist:

- People cleaning the windows with specific means
- Agent using classical methods of cleaning
- Agent of cleaning and rehabilitation in cleaning
- Agent using multi-tasks (plumbing, electricity...) in real-estate field
- Chief of team in cleaning coordinating a team of agents (able to replace anyone of them)
- Chief of team multi-tasks coordinating a team with different profiles of agents (cleaning and multi-tasks in real-estate sector).

Certifications can be achieved by different means:

1. Valuing Prior learning (VAE in French) with the condition of 3 years of experience - Since the law of 2002, the access to CQP is possible thanks to a VPL process
2. Through a training adapted to specific needs if professionals are working in companies
3. A training in the framework of a contract of apprenticeship addressed to unemployed people

Summing up, in France lifelong learning is becoming a main issue for the cleaning sector. People normally build up their basic skills on the job, but qualification requirements are rapidly growing. The sector is trying to gain a better reputation, as companies pay hard difficulties to find workers available to be recruited and to develop their competences in the branch. Companies invest in continuous vocational training, addressing some urgent needs: improve health and safety (courses in this field are very popular and normally lead to the delivery of compulsory certificates), develop social and personal competences of the workforce (a special certificate is offered focusing on key competences).

#### d. Italy

Recent data (Source: Italian National Institute of Statistics - ISTAT - Average data for years 2008-2010) show to which extent the sector is articulated and fragmented in Italy. With a total workforce of about 435.000 operators (about 60% women, 55% over 40, a global amount very close to the French one), cleaning services are offered by 28.700 companies (more or less 3 times more than in France). The large presence of micro-companies, and independent workers (25% of the workforce) defines the characteristics of the sector in Italy, crosscutting the border between regular services and the large area of informal services (mainly to households) belonging to the black market or informal economy.

This polarization clearly affects also the nature of jobs and job related arrangements. A certain number of not qualified / unskilled workers are involved:

- in the services of Hygiene and Cleanliness, offered on the market such in the case of large-scale disinfection of the interior and exterior of buildings and other building components, often implying the use of equipment, machinery, specific techniques and materials,
- or in exceptional cleaning, disinfection and pest control.

The majority of them work in cleaning services bought by enterprises and public agencies (174.000, 70% women, 62% over 40, only 3% independent, 43% without a school degree)

A parallel wide market – employing a large number of people, difficult to be quantified - is represented by cleaning services bought by private households. These cleaning operators are normally not qualified, they accomplish simple maintenance and ordinary cleaning of the house, washing of clothes, and in some cases they also perform activities overlapping caregiving (daily shopping, cook and serve meals, etc.). 159.000 workers are officially active in this area (92% women, 6% independent), but this figure should be increased taking into account irregular workers.

Qualified workers are a strict minority, according to official data, also because specialized activities are very rarely identified in Italy, at least in the cleaning sector, by formal qualifications or certifications. Qualified workers are therefore essentially classified considering managerial and entrepreneurial roles, considering persons who:

- define, plan, implement, and maintain policies and production strategies and assess their outcome;
- negotiate with suppliers and customers, schedule and control the efficient use of resources,
- recruit staff and define the processes of organizational innovation and production

Managers and directors of small businesses as personal services, cleaning and similar services are not directly engaged in the process of material production; they represent a very low quota of the workforce in the sector (about 16.000 persons, 52% women, 64% over 40) mainly corresponding to the entrepreneurs and company owners (92% of them are independent).

Qualifications are practically unknown and not required by the companies. We should bear in mind – however – that VET qualifications are in general poorly recognized in Italy in many branches, and above all where competences are normally achieved by experience and working in companies. Waiting for the development of a National Qualifications Framework, the landscape is still dominated by Regional Qualification systems. Until the last decade, cleaning activities have been not at all regulated by any region on the basis of initial training and qualifications. Only a minority of the Regions, as Emilia Romagna and Toscana made in recent years, are now trying to define qualifications, considering middle and higher levels of professional engagement. These qualifications should be defined in learning outcomes and should be opened to the recognition of non formal and informal learning.

## e. Germany

According to recent data, 35.900 companies and 565.000 operators (397.000 women) should be actually active in cleaning activities in Germany; only 57 per cent of them – however - are paying full national insurance contributions. The reality of the sector is therefore two-faced: from one side a large number of marginal workers, normally hired part-time with a very limited number of working hours and lower salaries (sometimes also working in the informal economy), from the other side a robust component of stable workers, active in specialized cleaning services. Taking in account the cleaning industry in a strict sense (and excluding the large number of independent workers and micro-companies providing services to the households), employed by companies active in cleaning and maintenance grew from 52.000 to 67.000 between 2005 and 2010, with one of the highest rates all over Europe. The cleaning industry is in Germany the craft with the strongest employment rate – the number of employees quintupled in the last 30 years! With regard to its total revenue, the German cleaning sector is on the top in Europe, before France, Italy or the UK.

The German cleaning sector is characterized by common features if compared to the other countries; it is:

- a female sector: mostly women work in it, in some not specialized branches four out of five employees are women;
- dominated by part-time work: the average weekly hours of work are around 20 – most people work only part-time
- highly depending from additional workforce with a migration background (immigrants are still growing, from 20 to 24% between 2005 and 2010)
- not attractive, and therefore characterized by an older workforce (over 50 grew from 26% to 33%), by the reduction of people having a formal qualification (apprenticeship) – from 23 to less than 18%, by a quick turn-over amongst the youngsters and by the reduction of unemployed interested to work in the sector

At the same time the sector in Germany is characterized by some peculiarities:

- A relatively well established contractual system, ensuring some rights (it is one out of ten branches that have a minimum wage (wage rate per hour in east Germany: 7,33€ - 8,88€, in west Germany 8,82€ - 11,33€)
- A good set of formal qualifications, corresponding to main job tasks, enabling the development of professional careers.

Considering the wide range of qualifications which contain cleaning tasks, we can mention:

- Domestic economy (e. g. housekeeper)
- Disposal (e.g. recycling and waste management technician)
- Roomcare and cleaning buildings (e.g. industrial cleaner)

All these I-VET qualifications open the door to the acquisition of the mastership (“Meister”) and of Higher Vocational Qualifications.

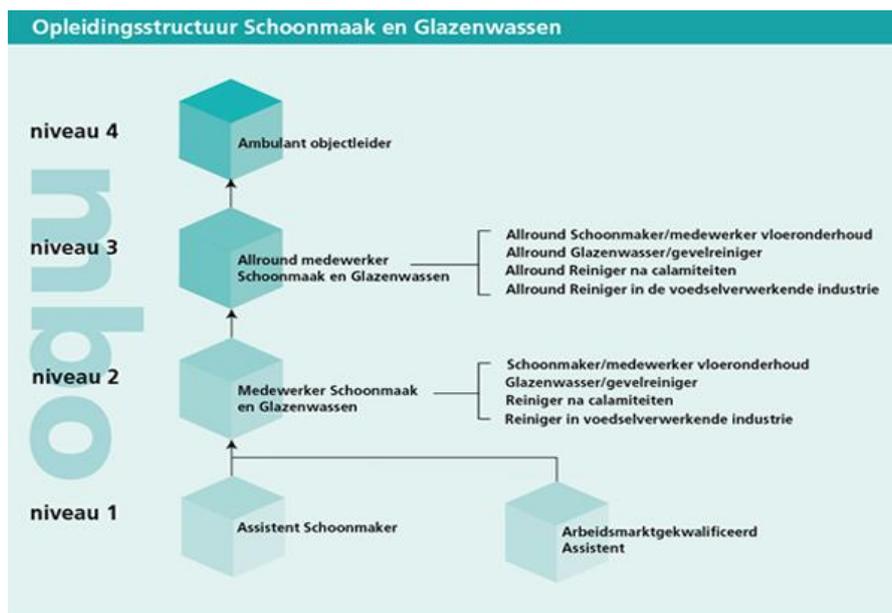
Summing up, the challenge for the cleaning sector in Germany seems to be related to the need of valuing some traditional strengths of the system (in terms of negotiation arrangements and qualification processes) to cope with emerging difficulties in making supply match with the growing demand of workforce. The sector needs to improve qualifications and its image, in order to be more attractive; at the same time it should be inclusive, offering new opportunities to low qualified and marginal workers interested to be recruited, without having achieved a formal IVET qualification by traditional means (apprenticeship). As in Switzerland, these workers should be integrated in flexible learning paths in order to let them build and certify their competences.

## f. The Netherlands

The cleaning sector is one of the biggest employers in the Netherlands, providing low-skilled people with opportunities for recruitment and (to a certain extent) a professional career. The annual turnover of the branch as a whole reached 4.3 billion euro before the crisis started (2007). In 2009, 8.765 companies were active, most of them (6.800) in generic and extraordinary cleaning of buildings and in window cleaning (2.400). A minority of companies were active in cleaning of transport means (775) and in ‘other’ services (1.200). As in other countries, the cleaning sector is a job intensive one: 2/3 of employer’s costs are represented by salaries paid to staff members. Jobs created by the sector – in full time equivalent - are about 150.000. Women and migrants play a relevant role: 68% of staff members are female, 46% immigrants.

Qualifications in the cleaning sector clearly reflect the nature of the demand. Companies normally hire people without any formal qualification, letting them train themselves on the job. Educational levels of the workforce are very low: 66% of the jobs require only a basic level of education and training (corresponding to NLQF / EQF 1). Recent trends – however – show the need of upgrading qualifications. 2/3 of staff members and jobs (a quota largely exceeding Swiss or German ones) are positioned at an educational level going beyond compulsory schooling, reaching upper I-VET or upper secondary education (28%- NLQF2-4) or higher education (NLQF5-8 – 3%).

**Table 10 – Professional career and qualifications in window cleaning (NL)**



This positive trend is accompanied by a good articulation of qualifications, achievable in the framework of career paths and lifelong learning. Table 10 provide an example related to window cleaning, where steps of development of skills and competences, and career paths are strictly interlinked, moving from level 1 (not qualified assistent) to level 4 (responsible and team leader). Intermediate levels are defined by crosscutting responsibility and autonomy at the workplace and sectorial specializations. Learning and qualification processes are developed by a partnership including entrepreneurial organisations (OSB: employers union), training centres and companies (Savantis: knowledge centre learning & working, SVS and others: training centers and lifelong learning), public institutions (such as MBO, responsible for initial qualification programs)

## g. Slovenia

According to recent statistics, about 1.200 companies and 6.700 operators (5.100 women) are active in Slovenia in the cleaning sector. As far as qualifications are concerned, the branch is characterized by many similarities with the other countries:

- Low level of entry requirements, no need of having a formal qualification (no education and no official certificate of qualification for cleaning required by state, also in hospitals and food industry; employers usually look for people just completing a primary school or some sort of vocational training mainly based on job experience)
- Prevalence of informal learning processes: newcomers are educated by colleagues, even if bigger cleaning service providers have internal introductory and further training departments, and despite the fact that certificates are needed in special circumstances – e.g. work on heights, work with dangerous substances, etc.
- Existence of a certain number of qualifications embedding cleaning tasks and competences.

Slovenian qualification landscape has been recently reformed, according to the NVQ logic. In the past 2 qualifications were addressed to cleaning tasks: cleaner of facilities (lower vocational education, officially ended in 2012), and housekeeper assistant (lower vocational education, ended in 2010). Three qualifications are now directly related to cleaning:

- hotel valet / room maid (never actually activated so far)
- room cleaner (not popular, 1 certificate awarded)
- assistant room cleaner (very popular, 76 certificates awarded)

The added value of these qualifications is still low, because they are practically ignored, not recognised, by employers, valuing prior experience in recruiting their staff.

Room cleaner corresponds to a typical I-VET qualification, intended in a comprehensive way. The completion of compulsory school is required. Tasks are related to manual and machine room cleaning, disinfection, maintenance and reporting on condition of equipment. Workers are expected to organize in autonomy their work, evaluating it according to standards and filling in inspection documentation. The qualification can be acquired through the Biotechnology and care assistant official VET programme. The training is offered by 5 institutions, but only 1 certificate has been awarded until now.

Assistant Room cleaner is a lower level, less exigent, qualification, intended mostly for people with disabilities and people without any primary education (no prior education required). It includes only simple tasks: manual room cleaning, simple maintenance, simple organization. It is offered by 3 institutions, and 76 certificates has been already awarded (by Želva and Institute for Business education CPU).

Beyond these official qualifications, also the Chamber of craft and small businesses provides training paths aiming at offering basic and higher vocational training in the sector:

- it already organized (twice) a 60-hour course for managers of cleaning service providers
- it organized (once) a “week of introductory training“
- published translation of a reference book for cleaners (not well received).

The Chamber is actually attempting to introduce a certificate of qualification that would be required for all cleaners, discussing with its members the introduction of a standardized education (course) for cleaners.

## 5. Social partners

Social partners play in any sector and professional branch a role of the utmost importance in order to establish rules and practices leading to recognition, valuation and effective implementation of qualification systems. Independently from their existence - and by their formalization in regulations and legal entitlements - qualifications are taken in account by the job market and by the companies (and consequently provide the workers with an added value) if they are embedded in contractual agreements, whose contents – including classification and description of professional profiles - are negotiated by the social partners.

The relevance of the social partners and collective bargaining with reference to qualification systems is multifaceted; it includes:

- the definition of profiles and regulatory frameworks
- the contractual recognition of qualifications
- the implementation of strategies for improving work conditions (and attractiveness – image of the sector)
- the definition of common rules enabling professionalization
- the management of tripartite (or bilateral) bodies collecting and using funds for training (their presence is however very limited in the sector, but it is important, above all considering training arrangements, in Switzerland and in France)

The cleaning sector has an established social partnership at European level, but the situation in the individual member states varies considerably, from cases with strong social partners and developed collective bargaining to cases where most of the conditions are decided unilaterally by employers. The national social partner organizations within the sector, where they exist, tend to record relatively low levels of representativeness, in particular on the employee side. This is because the sector's predominant employment structure (low-skilled, female, often migrant service workers) tends to be quite unfavorable to recruit union members. Therefore, despite the large presence of formal qualifications in the sector, in many situations (as we have already underscored) collective bargaining under estimate the value of existing qualifications, companies simply ignore them in order to reduce salary costs (even if they are threatened by the negative image of the sector and they need a more competent and stable workforce) and workers are not encouraged to reach a qualification.

### a. The entrepreneurial dimension

The EFCI is the entrepreneurial organization representing the cleaning industry at EU level. Created in 1987 (operational since 1989), it associates 18 Members from EU-15 States, new member states (Czech Rep., Poland, Slovenia), Norway and Switzerland. Recognised as representative of the cleaning industry it is formally consulted by the EU Commission, pursuing 3 strategic missions:

- Definition of a professional policy and defense of cleaning contractors' interests
- Promotion of professionalism in the industry (training, standards, etc.)
- Better knowledge of the industry and promotion of its image

EU level plays a relevant role for representing the interests of the contract cleaning companies. **75 %** of national legislation is defined at EU level, both in the case of social aspects (working time directive, posting of workers directive, TUPE directive, health and safety at the workplace, etc.) and economic ones (public procurements, services directive,

company law...). The EFCI aims at ensuring better conditions for the companies, engaged in a hard competition on the market: best value (against price based competition), market developments (facilities management / multi-services), professional training as a basis for a more clever and attractive Human Resources Management, active lobbying. The EFCI fights against the big influence of the traditional „industrial“ culture in orienting policies, and at the same time against the attention focused on the „New Economy“ as economic and occupational engine, in order to make visible, and listened, a sector belonging for many aspects to High Tech Services and for sure Labor Intensive and capable of creating a growing number of workplaces (and neglected career opportunities).

For this reason the EFCI participates in consultations promoted by the European Commission, and is active in the Social Dialogue at European level, collaborating with other European employers' organizations (Lill, 2010).

Considering national levels, the structure of employers' associations in the cleaning sector seems to be relatively weaker. Companies belonging to the sector are often organized inside larger multi-sectorial associations. Membership domains normally overlap more than one sector, including cleaning and other industrial services. There are also several employer/business organizations whose domain is focused on a very particular segment of the economy transversally crossing the cleaning sector (such in Italy the ANCST-Legacoop, PSL-AGCI and UNCI and KFO of Sweden), the public sector (such as Germany's VKA, Italy's USC, Spain's ASELIP and Sweden's SALAR) and the SMEs and a craft segment of the economy (as is the case of Italy's CLAAI, FENAPI and CAPIMED and Slovenia's PTZ and ZDOPS). In Switzerland a well-established organization – *Alpura* – takes care of the interests of the sector, being very active also in managing IVET and further training.

In a growing number of countries, however, employers of the cleaning industry are trying to establish specific employer organizations as a particular voice of the sector's companies, distinct from other service businesses. This enables these associations to perform a focused interest representation on behalf of their members, even though their membership strength may widely vary from one organization to the other (European Foundation for the Improvement of Living and Working Conditions, 2012),.

#### a. The trade unions

The above mentioned trend, towards a more focused specialization of the entrepreneurial organizations, contrasts with the sectorial 'landscape' on the trade union side, where associational representation of labor interests tends to be more dispersed and less focused. Such an unbalanced associational configuration reinforces for sure the (bargaining) power of organized business, weakening the labor side.

The European Foundation for the Improvement of Living and Working Conditions developed in 2012 a targeted analysis of the sector, making visible strengths but also weaknesses and paradoxes of the representativeness of sectoral trade unions of the cleaning workers all over Europe, first of all the difficulties in reaching women and low qualified workers, partially due to the fact that the domain of all these unions overlaps with regard to the sector, and it is likely to originate in areas of their domains other than the cleaning activity sector. Trade Union characteristics differ however a lot from country to country, both considering overlapping between sectors, and penetration (capability of recruiting members). The absolute numbers of trade union members differ widely, ranging from about 2.1 million (in the case of Germany's Ver.di) to around 3,000 (in the case of France's FNECS). This considerable

variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the ability to attract members (in the sector), and it doesn't enable to calculate in a correct way the density of the membership in the cleaning sector.

Representativeness of the trade unions is not easy to be analyzed, since the majority of the unions do not deliver precise data about their membership; in any case it is far from being relevant and homogeneous:

domain density is over 50% in the case of around 29% of the trade unions which document figures on density. (...) Only about 8% of the unions gather 70% or more of the active employees covered by their domain. About 38% of the trade unions for which data are available organise fewer than 15% of the active employees within their domain; and one-third of the trade unions record a density of 15%–50% of their potential active members. These results indicate that overall domain density of the sector-related trade unions tends to be rather low. However, it should also be noted that for clearly less than 40% of the 64 sector-related trade unions domain density data are recorded. Therefore these figures should be treated very cautiously, as indicated earlier (European Foundation for the Improvement of Living and Working Conditions, 2012).

A different and more complex view appears when looking at sector specific density of the membership.

When taking the trade unions' *sectoral domain* density into account, the trade unions' density in the cleaning sector tends to be lower compared with the density ratio referring to their domain on aggregate. Sectoral domain density is over 50% in the case of about 13% of the trade unions for which data are available. About 9% of the unions attract 70% or more of the active employees covered by their sectoral domain. More than half of the trade unions (around 57%) record a sectoral domain density lower than 15%, and about 30% record a sectoral domain density of in between 15% and 50%. European Foundation for the Improvement of Living and Working Conditions, 2012

According to these data it seems clear that the trade unions' density in the cleaning sector is lower if compared with their overall representativeness. This evidence is not surprising, given the characteristics of the sector: frequently dispersed nature of employment; low average skill levels and low salaries, large numbers of non-standard, part-time, female and migrant workers, high levels of turnover. All these factors – at least in the context of most European countries, also beyond the sector – are correlated to weak levels of union membership.

Of course this state of the art creates a negative spiral: the weakness of trade union representativeness hamper their bargaining power, reproducing the same obstacles, reducing in the meanwhile the attractiveness of the sector. Social Dialogue tends to be depressed and limited at the surface, or at very general level, and paradoxically it determines difficult conditions for pursuing the same aims of entrepreneurial associations, related to the improvement of qualifications, human capital and image of the sector.

In this landscape, the Valbuk project aims at playing a promotional and pioneer role, in a country (Switzerland) characterized by a low level of organization of the workers (membership rate is estimated lower than 10%), but also by some promising conditions:

- a growing attention of the trade unions for the sector, connected to an increasing penetration and capability of recruiting members (also reaching less qualified workers, migrants and women, for instance offering them language and vocational training)
- a good system of industrial relations, even if managed in a complex way (different collective agreements in any linguistic area of the country)
- the presence of bilateral bodies in charge of funding and managing joint initiatives for the training of continuous training of the workers (both considering basic skills and further professional training)
- the presence of training institutions managed by the social partners, specialized in providing initial and continuous training in the sector (such as the *Maison Romande de la Propréte*, member of the Consortium together with the trade union UNIA).

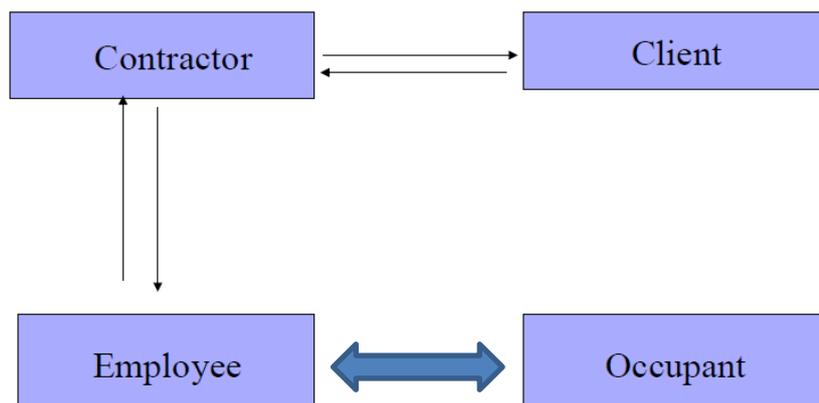
## 6. Challenges of the sector

The cleaning industry has been a dynamic and fast-growing industry for many years. This trend has been produced by several factors, including low barriers to enterprise creation, the continuing outsourcing of cleaning and hygiene services by administrations and companies as well as the specialization and diversification of cleaning activities. These developments have stimulated the emergence of new markets in the field of more global and integrated service delivery, providing highly qualified and encompassing facilities management and support services rather than simple cleaning. However, fierce competition over labor costs within the sector, as well as outsourcing, has frequently increased the number of temporary and vulnerable workers, often without legal contracts of employment. The crisis didn't have an hard impact on the occupation of the sector, still growing, but determined a worsening of sub-contracting and work conditions, engendering the need of restructuring and innovating the way in which cleaning activities are managed.

Entrepreneurial associations and big competitors of the sector share the idea that after this quick growth, it's now time to rationalize the sector, avoiding the effects of a competitive spiral based on the reduction of costs and the worsening of work environments and conditions. This conviction highlights some challenges:

- cope with the globalization of markets also affecting outsourcing, where emerges the presence of multinational companies active in facilities management capable of ensuring multi-services provisions
- need of professionalizing the sector, in order to ensure best value creating a fair competition, instead of accepting a price driven / low margins one
- cope with the lack of supply and difficulties in recruitment and retention of employees (high staff turnover), in a situation of demographic change (making more and more necessary the integration of migrant workers).

**Table 11 – Trilateral contractual relationship in the cleaning sector**



We have therefore an evidence of the relevance of challenges related to the management of Human Resources, in connection of availability, qualification and career opportunities for the workers. The peculiarity of contractors relationship in the sector – linking cleaning companies, building owners (clients) and occupants (see fig. 11) – creates a framework in which not only technical skills come to the fore, but also social and personal competences. Workers are the front-office of the cleaning companies, daily relating with final beneficiaries of their activity.

Challenges faced by the sector, as well as strategies set up by the companies, have been clearly described by the already quoted WALQ-ING study:

It is thus crucial for the quality of work whether other criteria than price are taken into account in public procurement. Furthermore, the quality of work is shaped by the **triangular relationship** between the employer, the employee and the client organization in which the cleaning takes place. Cleaning is typically one of those 'mobile' jobs, comparable to construction and domiciliary care services or consulting, in which a worker is employed at a site which is not the place where the employer resides and the control of work is distributed between the employer and the client. This may imply problems for companies, with regard to an unclear division of control tasks and responsibilities between the companies, but also for workers if they lack contact to their employer or face bad working conditions at the customer company. **Customer requirements** play a significant part in shaping quality of work. They include preferences for cleaning work to be done 'invisibly' and thus in the early morning or in the evening, but they are also influential in that office cleaners spend their workdays not at the employer's but at the customer's company (Forba, 2012).

Summing up, if the companies are trying to restructure the complex triangular relationship linking them to clients and final beneficiaries of their service (occupants of the buildings), giving voice and power to the latter, workers are becoming the most important resource for them, what can make the difference in terms of skills, motivation, proactivity. Qualifications are clearly coming to the fore, both in terms of vocational knowledge and skills (essential to improve autonomy, health and safety at the workplace, reducing costs engendered by the lack of direct responsibility in managing working tasks by low qualified workers) and in terms of social and personal skills. In this sense we are facing a double challenge, related to the possibility of increasing the added value of cleaning activities (creating the basis for a better salary policy) and to the chance of modifying the nature of a work actually done when premises to be cleaned are empty, with all the consequences in terms of structure and allocation of working hours. For being more attractive, overcoming difficulties in recruiting people and consolidating its workforce, the cleaning sector needs at any level qualified workers, ready to operate during the opening hours of offices and buildings, capable of integrating in larger staffs, relating with occupants and clients, as normally occurs in health care premises, where cleaning staff has been traditionally qualified by companies and Hospitals.