

Industrial relations and social dialogue

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



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Country codes

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

Executive summary

Introduction

This report examines the representativeness of social partner organisations in the personal services sector, more precisely the hairdressing and beauty sector. The personal services (hair and beauty) sector includes establishments such as hair salons, barbers' shops and beauty parlours, covering activities including hair cutting, styling and shaving, and cosmetic treatments like facials, manicures and pedicures. The study provides an overview of the sector's economic profile and identifies the key trade unions and employer organisations active in hairdressing and beauty services. It also analyses how these national organisations relate to their European-level counterparts in the sector.

The purpose of the study is to assess the representativeness of national and European social partner organisations in the hairdressing and beauty sector across all 27 EU Member States. In practice, this involves identifying all relevant trade unions and employer organisations / business associations whose membership domain is the hairdressing and beauty sector and evaluating their social dialogue and collective bargaining role and affiliations. By mapping the sector's interest representation at the national level and linking it to European-level organisations, the study assesses which organisations meet the requirements for representativeness set out in Commission Decision 98/500/EC and can therefore participate in the European sectoral social dialogue committee (ESSDC) for personal services (hair and beauty). The analysis covers the 27 Member States, using a combination of a top-down approach (looking at membership of recognised European social partners in the sector) and a bottom-up approach (a full mapping of the actors involved in national industrial relations structures in the sector) to ensure comprehensive coverage of the sector.

Policy context

This representativeness study contributes to the effective functioning of the ESSDC for personal services (hair and beauty). It aligns with the European Commission's aim, as set out in Commission Decision 98/500/EC, to support social dialogue by identifying representative social partner associations eligible for consultation at the European level. Ensuring that the European social dialogue in this sector builds on truly representative national organisations is crucial for meaningful negotiations and outcomes. By providing up-to-date information on the major labour and employer organisations in hairdressing and beauty services, the study underpins the legitimacy and inclusiveness of the ESSDC's activities, in accordance with EU social dialogue frameworks.

Key findings

The hairdressing and beauty sector in Europe consists of a very large number of micro and small businesses, collectively employing a substantial workforce. According to Eurostat structural business statistics for 2023, the EU's hairdressing and beauty industry encompasses around 1.1 million enterprises, which together employ around 1.7 million people. These businesses are typically small owner-operated salons – indeed, in many Member States over half of all hair/beauty establishments are one-person enterprises. In terms of the wider economy, the sector represents a small share of total employment and gross domestic product (generally well under 1 % of the latter at the national level, with an EU average of around 0.6 %). Nonetheless, despite its modest economic weight, the sector can form an important part of local service economies and provides job opportunities,

especially for women, who form the majority of the workforce, and for young labour market entrants.

The relative size of the hairdressing and beauty sector varies among Member States. In a few – particularly in parts of southern Europe and smaller island states – the sector’s workforce forms a higher-than-average share of national employment. In Cyprus, Greece, Italy and Malta, for example, hairdressing and beauty services are estimated to make up over 1 % of total employment, reflecting the cultural prominence of personal care services in these economies. By contrast, in some Nordic and central and eastern Member States, the sector is comparatively small, accounting for roughly 1 % or less of national employment. These differences are mirrored in the number of businesses: populous states like France, Germany, Italy and Spain each count between 84 000 and 150 000 hair/beauty enterprises and between 210 000 and 280 000 workers in the sector. Meanwhile, smaller Member States like Luxembourg and Malta have only around 3 500 people working in hairdressing and beauty. The sector is present in every Member State, but its density and economic role tend to be greater in southern Europe and lower in the north. Geographical patterns are also reflected in varying traditions of service provision (for example, more informal or freelance work in some Member States, like Czechia, Finland, Latvia and Lithuania, versus more consolidated salon chains in others, including Germany). The prevalence of undeclared or informal work in the sector means that official statistics may understate the true number of active workers.

Employment in hairdressing and beauty has generally shown stable or modest growth in recent years, as the sector has recovered from a temporary downturn during the COVID-19 lockdowns. Over 75 % of hairdressing and beauty businesses are microenterprises, and many professionals are self-employed or owners of single-person salons. Across the EU, the solo self-employed constitute more than half of all active hairdressers and beauticians. This share cannot be compared directly with the data on self-employment presented in the previous study (Eurofound, 2016), which covered only the hairdressing sector and indicated that a quarter of hairdressers worked on their own account.

The practice of ‘chair renting’, where freelance hairdressers or beauticians rent space in a salon to serve their own clients, has expanded since 2016 and is now a feature of the sector in several Member States. In statistical terms, these workers are typically recorded as self-employed and therefore contribute to the high share of solo self-employment observed in the sector, although the phenomenon itself is not captured as a separate category in official statistics. National correspondents reported it as particularly widespread in Finland, Hungary, Latvia, Lithuania, Poland and Spain. This has contributed to a more fragmented workforce and a reduction in traditional employment relationships. In March 2026, Coiffure EU and UNI Europa Hair & Beauty adopted a joint statement expressing their deep concern about the spread of bogus chair renting as a business model in the hairdressing industry (Coiffure EU and UNI Europa, 2026). While the statement acknowledges the place of chair renting as a way of enabling independent professionals to operate their business within a salon, bogus chair renting is considered to occur when salon owners control key aspects of the work, such as pricing, schedules or products. The practice is considered to distort competition, erode workers’ social protections and deprive public finances of tax and social security contributions.

Part-time work is also common, while undeclared work remains a concern in some areas of the industry. In summary, the sector’s employment is characterised by high self-employment, flexible

work patterns and a predominance of very small firms, which poses particular challenges for collective representation and social dialogue.

Under the general industrial classification of economic activities within the European Union (NACE), both hairdressing and beauty activities fall under NACE Rev. 2 code 96.02. However, the structure and employment patterns of these sectors differ slightly. The hairdressing sector is generally larger, employing the majority of the workforce in NACE Rev. 2 code 96.02, and has a stronger tradition of apprenticeship and collective bargaining. The beauty sector is more fragmented and has grown in recent years, encompassing aesthetic, nail and skincare services provided by self-employed professionals. A growing number of aesthetic treatments, such as Botox, dermal fillers and similar procedures, have been offered within the broader beauty and wellness market. However, the regulatory framework governing these treatments varies between Member States. In the majority, performing these services is legally restricted to licensed medical professionals and is therefore classified under human health activities (NACE code 86) rather than hairdressing and other beauty treatment (NACE code 96.02).

In addition to the traditional service activities covered by code 96.02, a new category – NACE code 96.4 ‘Intermediation service activities for personal services’ – has been introduced in the new NACE Rev. 2.1. This category refers mainly to digital or agency-based platforms that connect clients with independent service providers, including hairdressers, beauticians or wellness professionals. Such intermediaries are a small but expanding part of the sector’s ecosystem; the size of this part of the sector has not yet been quantified in official statistics, and no data were yet available at the time of writing in early 2026 on the NACE Rev. 2.1 classification.

The EU workforce in the personal services sector is organised by 41 national trade unions. There is at least one trade union organisation in 19 Member States. Personal services sector workers are not represented in eight Member States: Bulgaria, Cyprus, Czechia, Estonia, Hungary, Lithuania, Poland and Slovakia. The extent of collective bargaining in the hairdressing and beauty sector differs markedly across the EU, leading to a highly polarised picture. In a minority of Member States, mainly in western and northern Europe, multi-employer collective agreements ensure a very high level of coverage of the workforce. According to the data gathered for this study, six Member States (Austria, Belgium, France, the Netherlands, Portugal and Spain) have collective agreement coverage rates of 75 % or more in the hairdressing and beauty sector. In most of these Member States, sector-wide agreements are in place, resulting in near-universal coverage of employees. By contrast, 13 Member States have no collective bargaining at all in this sector. The prevailing type of bargaining is at the sector level (Madlen et al., 2026), but in many Member States where agreements are lacking, statutory minimum wages play a decisive role in setting pay levels for hairdressers and beauticians.

The most representative European organisation representing the workforce in the personal services sector is UNI Europa, which has 26 affiliated national trade unions in 16 Member States. These national trade unions organise 1.8 % of the total EU workforce in the sector. This figure rises to 3.4 % when taking into account only Member States in which UNI Europa has members. This relatively low share reflects the structural characteristics of the sector, which is dominated by microenterprises and has a high proportion of self-employed workers, many of whom are not typically covered by trade union membership or collective bargaining. Nevertheless, collective bargaining coverage is considerably higher in some of the Member States where UNI Europa affiliates are present. For

example, coverage reaches around 85 % in Austria, around 70 % in Germany, and it is close to universal in Belgium, France and Spain.

The personal services sector companies in the EU are represented by 62 national-level employer organisations across 25 Member States. Personal services sector companies are not represented at all in two Member States: Estonia and Latvia. The most representative European organisation representing companies active in the personal services sector is Coiffure EU, which has 16 affiliated national employer organisations in 13 Member States. These national employer organisations represent 5 % of all EU companies in the sector and at least 5 % of the total sectoral workforce in the EU (based on available data; actual coverage is likely to be higher, given missing figures for some organisations).

National information indicates that some trade unions organising workers in the sector are also affiliated to other trade union federations, such as ETUC, EFFAT, industriAll Europe and UITA ⁽¹⁾, totalling four members in one Member State, although it is not always clear whether these affiliations relate specifically to their members in the hairdressing and beauty sector. Affiliations to other European-level organisations among national employer organisations and business and trade associations were also indicated, such as to EuropeActive ⁽²⁾, SMEunited, EuroCommerce and Cosmetics Europe ⁽³⁾, totalling 18 members in nine Member States. Another organisation mentioned is European Estheticians United; however, no evidence of any activity on the part of this organisation could be found for this study.

(¹) A global trade union federation of food, agricultural, restaurant, catering, tobacco and allied workers, also known by its English abbreviation, IUF (<https://www.iuf.org>).

(²) A not-for-profit organisation representing the fitness and physical activity sector, with the goal of making people more active through political representation, unifying events, research and public relations (<https://www.europeactive.eu/>).

(³) A trade association for the cosmetics and personal care industry (<https://cosmeticseurope.eu/about-us/who-we-are/>).

Introduction

The purpose of this study is to assess the representativeness of the European social partners in the personal services (hair and beauty) sector based on the membership of their affiliated national organisations in the EU Member States. Based on this assessment of their representativeness, it can be decided which organisations should be on the list of those entitled to consultation under Article 154 of the Treaty on the Functioning of the European Union (TFEU). In the case of European social partner agreements that are to be implemented by means of a Council directive, as provided for in Article 155 of the TFEU, the regulatory powers granted to European social partners are based on their representativeness.

Representativeness is defined by the European Commission decision of 20 May 1998 on the establishment of sectoral social dialogue committees promoting the dialogue between the social partners at European level (Commission Decision 98/500/EC). For an organisation to be recognised as a representative EU social partner organisation, it must meet several criteria, such as:

- being related to specific sectors or categories and being organised at the European level;
- being representative of organisations that are themselves an integral and recognised part of the Member States' social partner structures, that have the capacity to negotiate labour agreements and that are representative of several Member States;
- having adequate structures to ensure the organisation's effective participation in the work of a European sectoral social dialogue committee (ESSDC).

Sector factsheet

Personal services (hair and beauty)	
Relevant NACE Rev. 2 code	96.02 'Hairdressing and other beauty treatment'
Sector share of EU gross domestic product (GDP)	0.6 % of the EU's GDP (2023)
Number of companies in the sector and breakdown by size class	1.1 million companies (2023) 73 % with 0–1 employees 26 % with 2–9 employees 1 % with 10–49 employees < 0.1 % with more than 49 employees
Employment in the sector	1.7 million workers (2023), around 53 % of whom are self-employed
Organisations involved in social dialogue at the EU level	
Trade union	
Name of representative EU-level trade union organisation	UNI Europa Hair & Beauty

Number of Member States covered by affiliated members	26 national sectoral trade unions are affiliated to UNI Europa in 16 Member States. The only Member States with trade unions organising workers in this sector but without UNI Europa members are Latvia, Romania and Slovenia. There are no trade unions organising workers in the sector in Bulgaria, Cyprus, Czechia, Estonia, Hungary, Lithuania, Poland or Slovakia.
Number of persons employed in the sector and share of EU sectoral workforce represented by all affiliates	UNI Europa's members represent 74 % of the trade union members in the personal services sector, close to 31 000 workers, which represents 3.4 % of the total workforce in the sector (taking into account only Member States for which data are available – otherwise 1.8 % of the workforce).
Share of EU workforce covered by collective agreements negotiated by affiliates in the sector	Data are not available for all Member States on the coverage of collective agreements in which UNI Europa members are involved. The collective bargaining coverage of UNI Europa-affiliated trade unions ranges from 2 % to 100 % in 12 Member States. 85 % of UNI Europa members are involved in collective bargaining, in the 12 Member States where they undertake collective bargaining for the sector. No collective bargaining takes place involving UNI Europa members in Croatia, Greece or Malta. There is no collective bargaining in Latvia involving the existing trade union which is not a member of UNI Europa. Collective bargaining takes place in Slovenia involving a union not in membership of UNI Europa. Additionally, since there are no trade unions organising workers in the personal services sector in Bulgaria, Cyprus, Czechia, Estonia, Hungary, Lithuania, Poland or Slovakia, no collective bargaining is recorded there.
Employer organisation	
Name of representative EU-level employer organisation	Coiffure EU
Number of Member States covered by affiliated members	16 of the 62 employer organisations / business associations in the personal services sector (or 26 % of national sectoral employer organisations), in 13 Member States (Austria, Belgium, Croatia, Cyprus, Denmark, Finland, France, Germany, Ireland, Italy, Lithuania, Malta and the Netherlands), are affiliated to Coiffure EU. The Member States in which there are hairdressing and beauty employer organisations but none affiliated to Coiffure EU are

	Bulgaria, Czechia, Greece, Hungary, Luxembourg, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and Sweden.
Share of companies covered by affiliates	Coiffure EU members represent 55 000 companies employing over 90 000 workers (5 % of companies in the sector).
Number of persons employed in the sector and share of EU sectoral workforce represented by affiliates	The affiliated employer organisations represent companies employing around 90 000 workers (13 % of the workforce in Member States with data).
Share of EU workforce covered by collective agreements negotiated by affiliates in the sector	Data are not available for all Member States on the coverage of collective agreements in which Coiffure EU members are involved. The collective bargaining coverage of Coiffure EU-affiliated employer organisations ranges from 49 % to 100 % in five Member States with data. 56 % of Coiffure EU members are involved in collective bargaining, in seven Member States. Member States in which Coiffure EU affiliates are not involved in collective bargaining are Croatia, Ireland, Lithuania and Malta. Additionally, since there are no trade unions organising workers in the personal services sector in Bulgaria, Cyprus, Czechia, Estonia, Hungary, Lithuania, Poland or Slovakia, no collective bargaining is recorded there. Collective bargaining takes place in Finland, Greece, Portugal, Sweden and Slovakia, but the employer organisations involved are not members of Coiffure EU.
Key challenges for the sector	
Main challenges in the sector	• Occupational health and safety risks • Bogus chair renting • Lack of attractiveness of the sector
Key themes of social dialogue	
Key themes covered by social dialogue in the sector in the past 10 years	• Occupational health and safety • Working conditions and sector attractiveness • Social partner capacity building • Training in the sector • Product safety for workers

1. Sector overview

1.1. Scope of the personal services sector

Across the EU, the hairdressing and beauty sector accounts for a modest share of total economic output, typically between 0.2 % and 0.7 % of national GDP, confirming its classification as a small-scale service industry. This share has remained broadly stable since 2016. Member State-level data illustrate this pattern: the share of GDP is 0.6 % in Spain, around 0.5 % in Lithuania, 0.4 % in Italy, 0.3 % in Portugal and 0.14 % in Latvia. Despite the sector's limited macroeconomic weight, it is highly visible in local economies due to its dense network of small establishments and self-employed professionals.

In terms of the general industrial classification of economic activities within the European Union (NACE), the personal services sector covered by this study are hairdressing and beauty sector activities as defined by NACE Rev. 2 code 96.02 (Table 1). This class comprises two main subsectors: hairdressing and barber services; and other beauty treatments, such as facial care, manicures and pedicures, and make-up application. It excludes the manufacture of wigs and other cosmetic products. The same delineation was applied in the previous representativeness study on the sector in 2016.

In qualitative terms, the structure and activities of the sector have evolved only gradually since the previous 2016 representativeness study. Traditional hairdressing and beauty services remain dominant, yet several changes can be observed. The diversification of services has blurred the boundary between beauty and wellness, integrating day spa and aesthetic care activities.

With the growth of the pharmaceutical beauty sector in recent years, the representativeness study explored the extent to which the sector providing treatments such as injections of Botox, dermal fillers, mesotherapy or similar procedures is considered to be part of the beauty sector at the national level. It was found that, in the majority of cases, the provision of such treatments is not considered to be part of the hairdressing and beauty sector as defined under NACE Rev. 2 code 96.02. In nearly all Member States, the provision of these services is legally restricted to licensed medical professionals and therefore classified under the health or medical services sector (NACE code 86) rather than personal services. Only a few Member States, notably Ireland, Italy, Luxembourg, Latvia and Romania, indicated some overlap, in that non-invasive aesthetic procedures (for example hyaluronic acid fillers) may be offered in beauty salons or specialised medi-spa establishments. Therefore, the extent to which the growth in pharmaceutical beauty treatments provides growth opportunities for NACE Rev. 2 code 96.02 or NACE code 86 activities depends on how these procedures are regulated at the national level. In the majority of Member States, this growth is occurring in NACE code 86 activities without any negative impact on the hairdressing and beauty sector.

Generally, the trend shows a clear medicalisation of advanced aesthetic treatments, with many Member States tightening regulation since 2016 (for example, Finland's Radiation Act reform, Sweden's 2021 Law on Aesthetic Procedures and new rules planned in Bulgaria and Ireland). Some Member States (such as Estonia, Finland, France and Sweden) have seen a clearer distinction emerge

between non-medical beauty care and medical-grade aesthetic treatments; the latter being regulated as healthcare.

As a result, pharmaceutical beauty has largely moved outside the traditional beauty salon domain and workers and companies in these activities are seldom represented by the social partners covered in this study. Where such activities exist, they are performed in separate clinics, often by nurses or doctors, and are not covered by collective agreements in the personal services sector.

For clarity, NACE Rev. 2 code 96.02 includes only non-medical beauty care and aesthetic services, while medical or invasive treatments are classified elsewhere. The new NACE Rev. 2.1 maintains this distinction but introduces additional breakdowns (96.21 'Hairdressing and barber activities', 96.22 'Beauty care and other beauty treatment activities' and 96.23 'Day spa, sauna and steam bath activities'), further clarifying the boundary between beauty and health-related activities.

Digitalisation and intermediation platforms are beginning to influence booking and client management, although they remain marginal in quantitative terms. Gender diversification continues, with men's grooming and barber services forming a growing share of turnover, particularly in the Baltic and Nordic Member States. Regulatory differentiation has widened between hairdressing and beauty professions. Some Member States (such as Estonia, Finland and France) have introduced or updated safety or qualification rules for beauty treatments involving lasers, intense pulsed light or other invasive techniques. Others (such as Portugal and Slovakia) report no substantive legal change since 2016.

Overall, the core activities of NACE Rev. 2 code 96.02 remain the analytical focus of this representativeness study, while related or emerging categories – such as spas, wellness and intermediation services – are noted insofar as they may later fall under the social partner remit or affect coverage under the organisation of NACE code 96.2 (and its subsectors) in NACE Rev. 2.1.

In addition to the traditional service activities covered by NACE Rev. 2 code 96.02, a new category – NACE code 96.4 'Intermediation service activities for personal services' – has been introduced in NACE Rev. 2.1. This category refers mainly to digital or agency-based platforms that connect clients with independent service providers, including hairdressers, beauticians and wellness professionals. The representativeness study explored the extent to which such intermediation activities are considered to be part of the hairdressing and beauty sector in different Member States and the scale of such activities in terms of employment. In Member States where these intermediation services are considered to be part of the hairdressing and beauty sector, the study sought to understand the extent to which workers in this subsector are organised by the same employer and trade union organisations.

It was found that, at this point, such intermediaries remain a small but expanding part of the sector's ecosystem. Since 2016, several Member States (notably France, Italy and Spain) have reported growth in online booking platforms and mobile beauty-on-demand services, although these are still not systematically captured in official statistics. Intermediaries' presence varies widely and is concentrated in urban areas of western and southern Europe. In most Member States, these intermediation platforms are not clearly considered part of the core hairdressing and beauty sector and typically operate as separate service providers. As a result, they generally fall outside the scope of the sector's existing industrial relations structures.

Table 1: Classification of activities in the personal services sector based on NACE codes

NACE code (Rev. 2)	Activity description
96.02	Hairdressing and other beauty treatment This includes, in particular, the following activities: - in the hairdressing sector: 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 sector: facial massage, manicure and pedicure, make-up application, etc.
NACE code (Rev. 2.1)	Activity description
96.21	Hairdressing and barber activities
96.22	Beauty care and other beauty treatment activities
96.23	Day spa, sauna and steam bath activities
96.4	Intermediation service activities for personal services

Note: In future (from 2026 onwards), data for the sector will be disaggregated by NACE Rev. 2.1 code.

Sources: NACE Rev. 2 and NACE Rev. 2.1.

1.2. Personal services workforce in the EU

According to Eurostat structural business statistics (SBS) for 2023, around 1.7 million persons were employed in the EU in activities classified under NACE Rev. 2 code 96.02 (Figure 1 and Table 2). This corresponds to about 1.1 % of total EU employment (162 million persons in 2023). The sector's relative weight has therefore remained broadly stable since 2016, confirming its role as a small but enduring part of the European service economy ⁽⁴⁾.

Employment in the sector is overwhelmingly female. European Union Labour Force Survey (EU-LFS) data are not available to provide a demographic breakdown for the hairdressing and beauty sector (NACE four-digit-level classification). The broader classification of 'other personal services', which includes the hairdressing and beauty sector, shows a male share of employment of 25.3 % across the EU in 2024. National data also consistently show that women make up the majority of the workforce, often above 80 % or even 90 %. In the Baltic states and in Finland, Italy and Spain, between 80 % and 85 % of workers are women. Even in Member States with more balanced participation, such as Cyprus and Ireland, women still account for roughly two thirds of those employed.

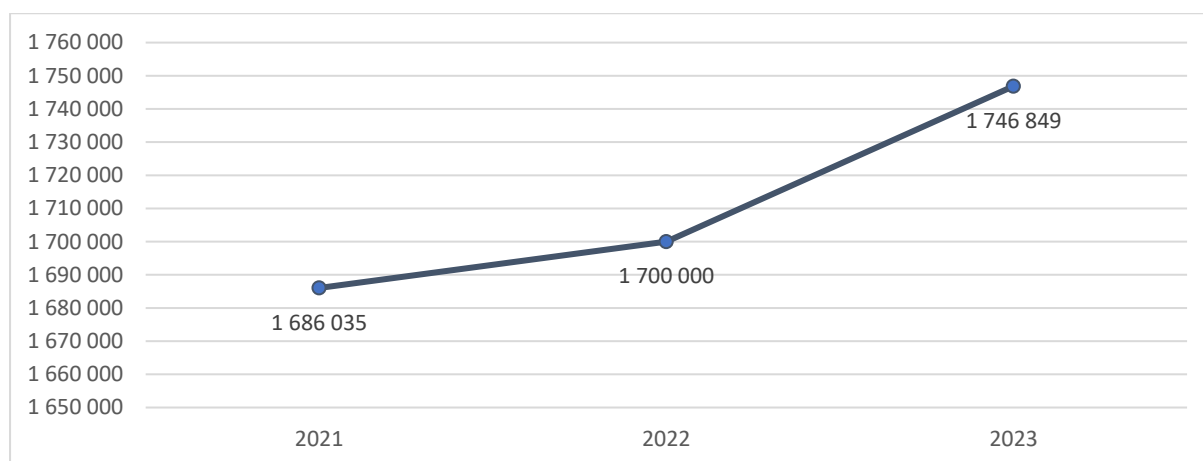
⁽⁴⁾ No historical employment data for NACE Rev. 2 code 96.02 are publicly available from either the SBS or the EU-LFS for 2016. The previous representativeness study provided national data for 17 Member States, adding up to a total of 957 518 sectoral workers. Given that data were missing for Austria, Belgium, Czechia, Estonia, Germany, Ireland, Lithuania, Portugal, Spain and Sweden, it is fair to assume that a similar number of persons were employed in the sector in 2016.

Information on the age profile is more limited but points to a workforce concentrated in mid-career and older age groups. EU-LFS data on ‘other personal services’ indicate that 71 % of the workforce in this sector is aged between 25 and 54 years, with 16 % aged 55–64 and 9 % between the ages of 15 and 24. Similar indicators are available from national data on several Member States. Information from Austria, Croatia, France and Portugal describes a declining inflow of young apprentices and a rising average age of workers, particularly among salon owners. In Estonia and Finland, training reforms have shortened vocational pathways, yet retention rates among younger workers remain low. The pattern across Europe therefore suggests a sector sustained largely by experienced professionals, with comparatively fewer entrants under 25.

Data indicate that self-employment remains the dominant work status. According to SBS data for 2023, 53 % of persons employed in the sector were self-employed. According to these data, the share of employees among persons employed was lowest in Czechia (10 %), Hungary and Lithuania (11 %). On the other hand, the share of employees was highest in Luxembourg (88 %), Estonia (73 %) and Germany (71 %). EU-LFS data for 2024 on NACE code 96 show a similar share of employees in the broader sector of personal services (which includes hairdressing and beauty services alongside activities such as dry cleaning, funeral services and wellness facilities) and indicate that 35 % of the self-employed workers were self-employed without employees, whereas 11 % were self-employed with employees. The practice of ‘chair renting’, where freelance hairdressers or beauticians rent space in a salon to serve their own clients, has expanded since 2016 and is now a recognised feature of the sector in several Member States. National correspondents reported it as particularly widespread in Finland, Hungary, Latvia, Lithuania, Poland and Spain. Quantitative data remain limited, but available estimates (for instance, there are around 5 500 chair-renting hairdressers in Sweden and about 80 % of the workforce rents space in Lithuania) suggest that this has become a major business model for self-employed professionals in parts of Europe.

The sector’s overall employment levels have increased since the previous representativeness study in 2016, although short-term fluctuations occurred during the COVID-19 pandemic. Most Member States report full recovery of employment volumes by 2023, supported by growing demand for beauty and grooming services and the return of in-person consumer activity. A clear assessment of employment trends in the sector is hampered by the fact that historical data are not available for the sector prior to 2021 and EU-LFS data only provide information on the personal services sector as a whole, where employment increased by 24 %, from 2.5 million in 2016 to 3.2 million in 2024.

Figure 1: Number of persons employed in the personal services sector, EU-27, 2021–2023



Source: Eurostat (sbs_oww_act).

Table 2: Personal services workforce, in the EU-27 and by Member State, 2023

Member State	Number of persons employed in NACE Rev. 2 code 96.02	Number of self-employed workers in the sector	Share of EU sectoral workforce (%)	Share of total national employment (%)	Relative change in employment since 2016 (%)
EU-27	1 746 849	926 320	100	1.08	+ 64.5
AT	39 081	18 102	2.24	1.03	n.d.
BE	32 085	20 699	1.84	0.81	n.d.
BG	23 433	13 456	1.34	1.07	+ 69.2
CY	7 444	3 804	0.43	1.86	+ 74.7
CZ	33 639	30 202	1.93	0.79	– 28.1
DE	264 363	76 226	15.13	0.69	n.d.
DK	15 191	7 491	0.87	0.68	+ 8.3
EE	5 734	1 532	0.33	1.04	n.d.
EL	46 426	20 247	2.66	1.33	+ 0.1
ES	210 384	113 522	12.04	1.33	n.d.
FI	15 917	13 306	0.91	0.90	+ 40.1
FR	239 396	109 040	13.70	1.15	– 2.7
HR	15 655	7 031	0.90	1.20	+ 123.4
HU	48 394	43 266	2.77	1.45	+ 92.4
IE	30 357	10 266	1.74	1.29	+ 18.1 (*)
IT	282 182	151 237	16.15	1.51	+ 15.9
LT	18 887	16 766	1.08	1.47	+ 33.6 (*)
LU	3 459	410	0.20	0.87	+ 22.1

Member State	Number of persons employed in NACE Rev. 2 code 96.02	Number of self-employed workers in the sector	Share of EU sectoral workforce (%)	Share of total national employment (%)	Relative change in employment since 2016 (%)
LV	9 503	7 223	0.54	1.41	+ 12.6
MT	3 579	2 339	0.20	1.38	+ 126.2
NL	86 452	57 397	4.95	1.00	+ 21.8
PL	146 102	93 653	8.36	1.27	– 33.6
PT	59 292	44 489	3.39	1.28	n.d.
RO	54 194	29 421	3.10	1.12	+ 136.7
SE	33 925	18 431	1.94	0.83	n.d.
SI	6 976	4 695	0.40	0.88	+ 27.6
SK	14 799	12 069	0.85	0.80	+ 8.0

(*) Data sourced from the Network of Eurofound Correspondents, 2024.

Notes: n.d., data not available. Relative change in employment since 2016 was calculated using data from the 2016 representativeness study on the sector (Eurofound, 2016). These data were based on national figures, whereas the data reported for 2023 are based on SBS data.

Source: Eurostat (sbs_ovw_act).

The practice of chair renting has expanded since 2016 and is now a recognised feature of the sector in several Member States. Quantitative data remain limited, but available estimates (for instance, there are around 5 500 chair-renting hairdressers in Sweden and about 80 % of the workforce rents space in Lithuania) suggest that this has become a major business model for self-employed professionals in parts of Europe. This has contributed to a more fragmented workforce and a reduction in traditional employment relationships. Part-time work is also common, while undeclared work remains a concern in some areas of the industry. In summary, the sector's employment is characterised by high self-employment, flexible work patterns and a predominance of very small firms, which poses challenges for collective representation and social dialogue.

1.3. Personal services sector companies in the EU

Detailed data at the four-digit level (NACE Rev. 2 code 96.02 'Hairdressing and other beauty treatment') are only available in SBS for 2021 to 2023. During this period, the number of enterprises in the sector increased from 982 353 to 1 063 320 ⁽⁵⁾ (see Table 31 in the Annex). However, no data are available on the shares of enterprises in hairdressing and other beauty treatment alone by size class. Therefore, the following description draws on the broader NACE division 96 (other personal service activities), which includes hairdressing and beauty services alongside a few other activities such as dry cleaning, funeral services and wellness facilities. Hairdressing and beauty enterprises

⁽⁵⁾ The 2016 representativeness study reported 585 827 enterprises in the sector, but did not have data for Czechia, Estonia, Ireland, Lithuania, Portugal or Spain. Some Member States were only able to provide data for the hairdressing sector.

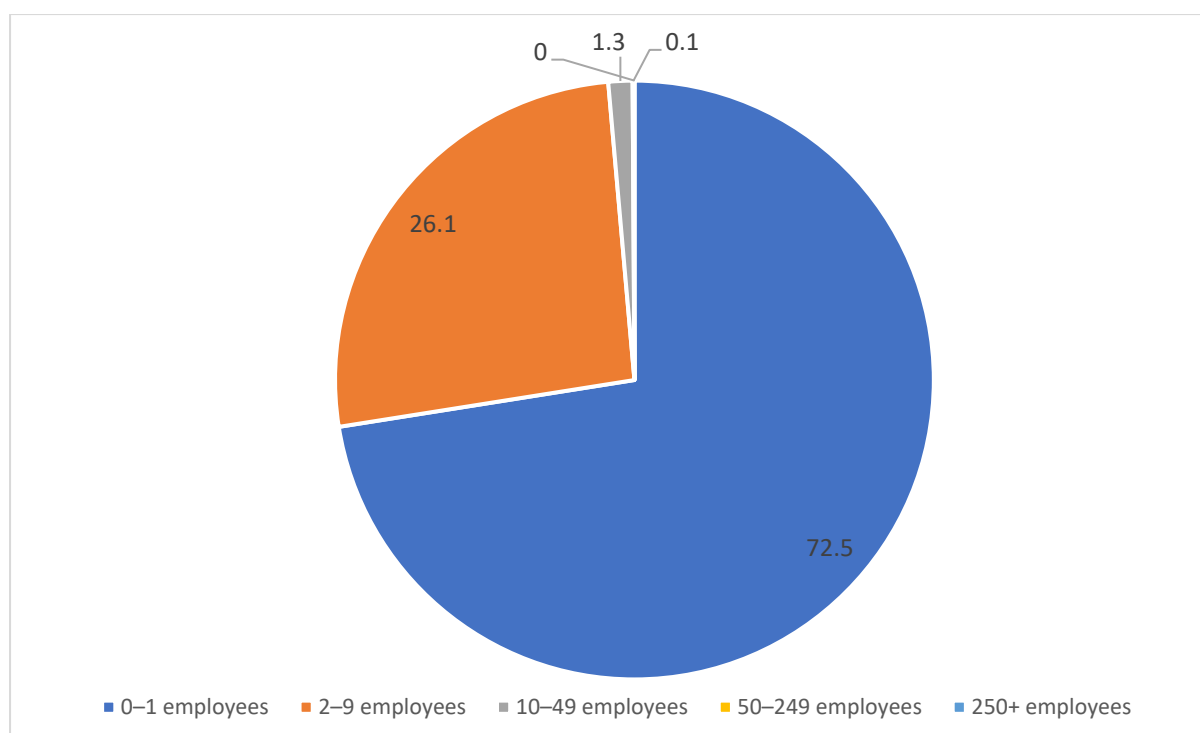
account for the great majority of firms and employment in this division (approximately 67 % and 62 %, respectively).

In 2023 division 96 comprised around 1.52 million enterprises in the EU, employing roughly 1.54 million persons. The business structure was overwhelmingly dominated by microenterprises: about 99 % of all firms employed fewer than 10 persons, and over 70 % were enterprises with no employees or only one employee. Only around 14 000 enterprises (approximately 1 %) had 10 or more employees, and fewer than 2 000 employed 50 or more (Figure 2).

This pattern corresponds closely to the national evidence reported for the hairdressing and beauty sector by the Network of Eurofound Correspondents, which consistently describes very small, locally based businesses and a high degree of self-employment. In Member States such as Austria, Italy and Portugal, most salons are owner-operated, often with only one or two employees. Larger establishments and chains exist in France, Germany and the Nordic Member States, but they represent only a small share of the market.

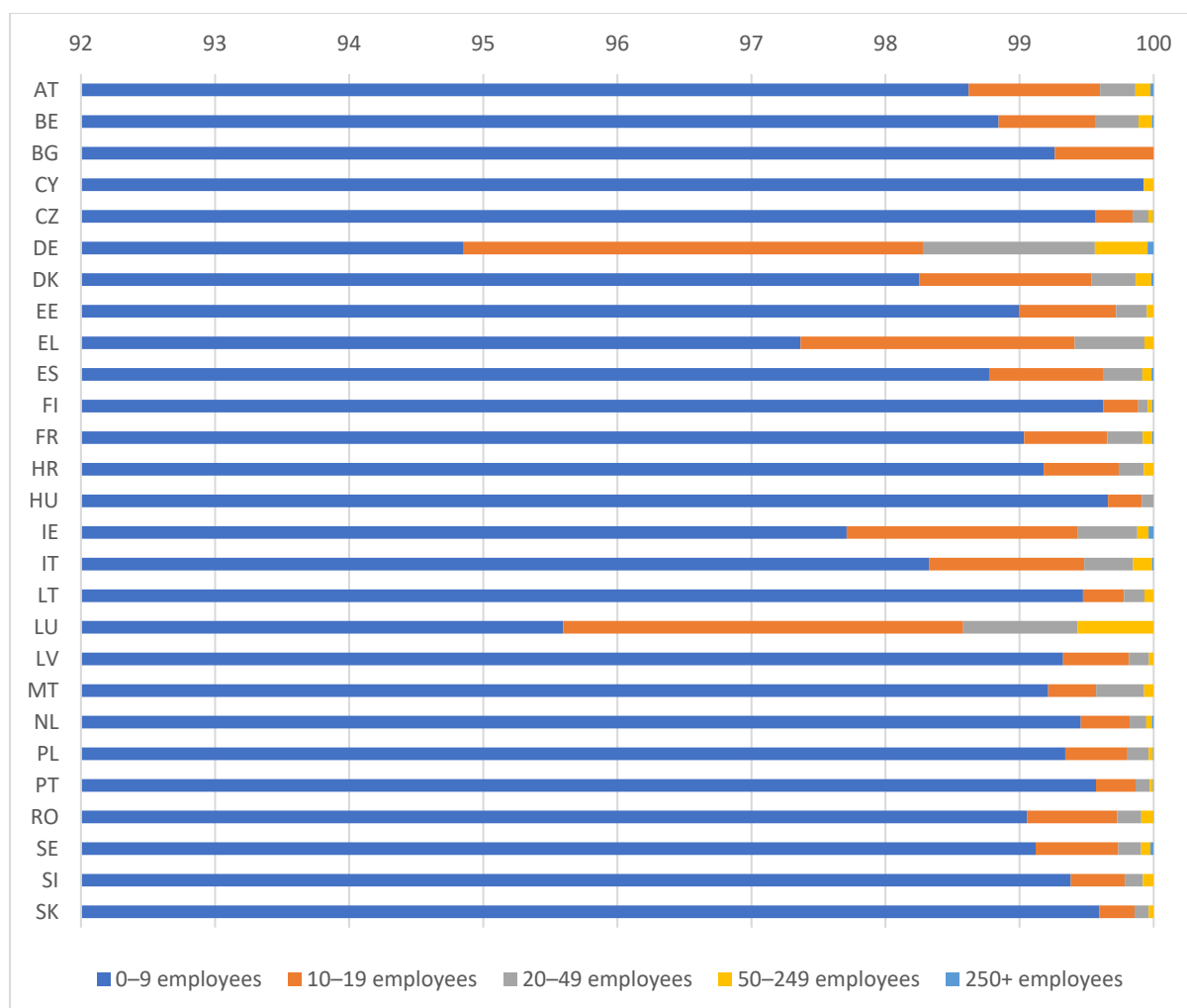
Compared with 2016, the overall enterprise structure has remained stable, with a modest increase in enterprise numbers since 2020 mainly reflecting the recovery of small firms and the entry of new self-employed professionals after the COVID-19 pandemic (largely self-employed without employees). The dominance of microenterprises and individual operators continues to define the sector's economic organisation and has implications for social partner representation and collective bargaining coverage, as discussed in later sections.

Figure 2: Proportions of enterprises in the personal services sector by size class, EU-27, 2023 (percentage of all enterprises in the sector)



Source: Eurostat (sbs_sc_ovw).

Figure 3: Proportions of enterprises in personal services by size class, by Member State, 2021 (percentage of all enterprises in the sector)



Notes: The x-axis has been truncated to display only the range 92–100 %. This allows small but relevant differences between enterprise size classes to be visualised clearly. The vast majority of enterprises (over 90 %) have 0–9 employees.

Source: Eurostat (sbs_sc_oww).

The broader ‘other personal services’ activities sector is characterised by a predominance of microenterprises. In nearly all Member States, firms with fewer than 10 employees make up over 95 % of all companies in the sector (Figure 3). Small and medium-sized enterprises (SMEs) account for a notable share of total jobs compared with large firms. Overall, the structure of the sector reflects its local and service-based nature, with most enterprises operating at a small scale.

1.4. National sectoral trade unions and employer organisations and their collective bargaining coverage

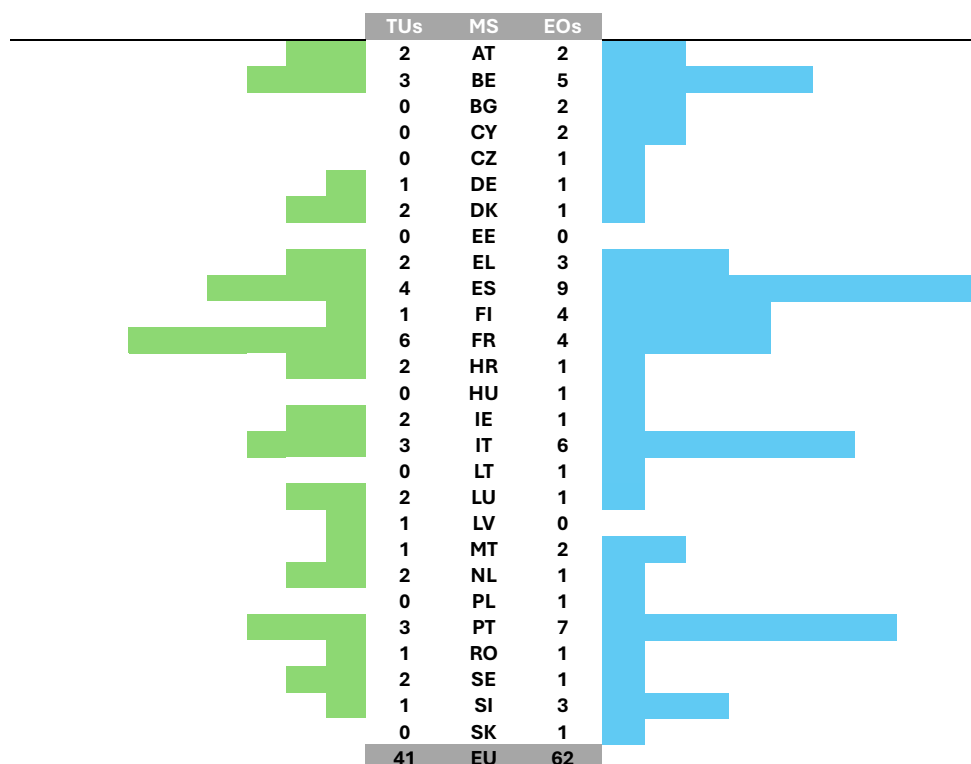
According to information provided by the Network of Eurofound Correspondents, the personal services (hair and beauty) sector in the EU is represented by 41 national-level trade unions and 62 employer organisations (Figure 4). Both sides of industry are present in nearly all Member States,

although the size and scope of these organisations vary widely. No trade unions representing workers in the sector are present in Bulgaria, Cyprus, Czechia, Estonia, Hungary, Lithuania, Poland or Slovakia, and no employer organisations are active in Estonia or Latvia.

The number of trade unions per Member State ranges from one (Finland, Germany, Latvia, Malta, Romania and Slovenia) to as many as six (France). Larger Member States (except Germany) typically have several trade unions representing different occupational groups or subsectors within the personal services field. In Member States such as Italy and Spain, both general service sector and smaller occupational or regional organisations are active. In central and eastern European Member States, representation is often limited to one small trade union. Overall, trade union density in the sector is low, reflecting the predominance of self-employment and the limited presence of standard employment relationships.

Employer representation is more extensive in numerical terms, with 62 national organisations identified across the EU. Most are professional or craft associations representing microenterprises and self-employed salon owners. In several Member States, including Austria, Belgium, Denmark, Finland and Germany, these organisations operate within statutory chambers or guild systems, which provide a relatively stable institutional base. In other Member States, notably in southern and eastern Europe, associations rely on voluntary membership and typically represent only a small share of establishments.

Figure 4: Numbers of national sectoral trade unions and employer organisations, by Member State, 2024



Notes: EO, employer organisation; MS, Member State; TU, trade union. Green cells indicate the number of national-level trade unions identified in the current study as having members in the personal services (hair and beauty) sector; blue cells indicate the number of national employer organisations identified in the current study as having members in the personal services (hair and beauty) sector.

Source: Network of Eurofound Correspondents (see Table 36 and Table 37 in the Annex), 2024.

Out of the 41 trade unions and 62 employer organisations identified in the sector, 31 trade unions and 37 employer organisations are involved in collective bargaining at either the company or the sector level (Figure 5). Collective bargaining therefore exists in around two thirds of the Member States but remains highly uneven in coverage and scope.

Sectoral or multi-employer agreements are in place in a limited number of Member States, most notably Austria, Belgium, Denmark, Finland, France, Italy, Portugal and Spain, where they regulate core employment conditions, such as pay, working time, training and health and safety standards. In these Member States, both sides of industry are institutionally organised and maintain long-standing collective bargaining arrangements through chambers, professional bodies or social partner federations.

In contrast, in many central and eastern European Member States (including Bulgaria, Croatia, Hungary, Latvia, Lithuania, Poland, Romania and Slovakia), collective bargaining is either absent or limited to the company level. This reflects the sector's structure, dominated by self-employed professionals and very small businesses, which limits the practical applicability of collective agreements. Even where bargaining exists, it generally covers a narrow segment of the workforce, primarily employees in larger salons or chains.

Figure 5: Numbers of sectoral trade unions and employer organisations involved in collective bargaining, by Member State, 2024

	TUs	MS	EOs	
	2	AT	2	
	3	BE	5	
	0	BG	0	
	0	CY	0	
	0	CZ	0	
	1	DE	1	
	1	DK	1	
	0	EE	0	
	1	EL	1	
	4	ES	7	
	1	FI	1	
	6	FR	4	
	0	HR	0	
	0	HU	0	
	0	IE	0	
	3	IT	5	
	0	LT	0	
	2	LU	0	
	0	LV	0	
	0	MT	0	
	2	NL	1	
	0	PL	0	
	3	PT	7	
	0	RO	0	
	1	SE	1	
	1	SI	1	
	0	SK	0	
	31	EU	37	

Notes: EO, employer organisation; MS, Member State; TU, trade union. Green cells indicate the number of national-level trade unions involved in collective bargaining for the personal services (hair and beauty) sector; blue cells indicate the number of national employer organisations involved in collective bargaining for the personal services (hair and beauty) sector.

Source: Network of Eurofound Correspondents (see Table 38 and Table 39 in the Annex).

1.5. Changes in the industrial relations landscape at the national level

This section compares the findings of the previous representativeness study (Eurofound, 2016), which used data from 2016, with the findings of the current report, which captures the situation in terms of national trade unions identified as representing the personal services (hair and beauty) workforce. Compared to the previous study, the structure of trade union representation in the sector has remained relatively stable, with six additional trade unions identified. Most organisations identified in 2016 continue to operate, while a small number have merged or become inactive (Table 3).

The most frequent development has been the integration into broader service sector federations. In Denmark, the Danish Hairdresser & Cosmetician Union (DFKF) merged into Serviceforbundet, where it now functions as a dedicated section. It is nonetheless mentioned separately here, as it is involved in collective bargaining for the sector. In France, the former Syndicat général des coiffeurs (FO) and the Syndicat national de la coiffure (CFTC) were incorporated into the larger confederations' service federations (FGTA-FO and CFTC-CSFV, respectively). In Sweden, the small Frisörernas Fackorganisation was integrated into the Swedish Commercial Employees' Union (Handels), which continues to cover the sector.

A limited number of new or newly active unions have emerged, primarily in central and eastern Europe. In Croatia, Novi Sindikat became newly active alongside the pre-existing Croatian Union of Small and Medium Businesses (HSMP), expanding representation for salon workers. In Spain, two regional unions – the Galician Inter-Union Confederation (CIG) and Basque Employees Solidarity (ELA-STV) – were newly recorded as representing the sector; both existed in 2016 but were omitted from the earlier study despite their established involvement in regional collective bargaining. In Latvia, the Latvian United Hairdressers' Union (LAFA) was identified for the first time; it has existed since 2010 but was previously unreported due to its very limited size and activity. In Luxembourg, the Luxembourg Federation of Christian Trade Unions – Services and Commerce (LCGB) was also newly included, having been overlooked in 2016 although it covers workers in service and craft sectors, including hairdressing. Finally, in Sweden, Unionen was newly listed as representing white-collar staff in the broader beauty and wellness segment, although it has long existed and plays only a marginal role in the sector.

In Malta, the United Workers' Union (UHM) is no longer reported as having members in the sector.

In total, the number of national trade unions representing the sector increased slightly, from 34 in 2016 to 41 in 2024, and representation remains present in nearly all Member States. The main trend since 2016 has been consolidation into larger multisector federations in western and northern Europe, alongside the emergence or formal recognition of small occupational unions in central and eastern Europe, reflecting the sector's continued fragmentation and expansion of self-employment.

Table 3: Comparative overview of national personal services trade unions identified in 2016 and 2024

Member State	Change in number of all sectoral trade unions compared with the previous representativeness study	Change factors ⁽⁶⁾
AT	0	
BE	– 1	Organisational factors
BG	0	
CY	0	
CZ	0	
DE	0	
DK	0	
EE	0	
EL	0	
ES	+ 2	Structural factors
FI	0	
FR	- 1	
HR	+ 1	Structural factors

⁽⁶⁾ A detailed explanation of the factors explaining the changes in the number of organisations at the national level is available in Table 34 in the Annex.

HU	0	
IE	0	
IT	0	Organisational factors
LT	0	
LU	+ 1	Organisational factors
LV	+ 1	Structural factors
MT	– 1	Organisational factors
NL	0	
PL	0	
PT	+ 1	Organisational factors
RO	+ 1	Organisational factors
SE	+ 1	Organisational factors
SI	0	Organisational factors
SK	0	

Source: Network of Eurofound Correspondents, 2016 and 2024.

Compared with the previous representativeness study, an additional 21 employer and business associations were identified, which is largely due to changes in the methodology for information collection (Table 4).

The most frequent development has been consolidation and reorganisation within existing employer organisation structures. In Luxembourg, three small craft federations (including FPC) merged in 2018 to create the Hair Beauty Tattoo Guild (CHBTG), now the single representative body. In France, the Union of Beauty and Wellness Professionals (UPB) replaced the older UNIB, broadening coverage to spa and wellness employers and another organisation ceased to function. In Hungary, the long-standing MOSZI ceased activity, with the Hungarian Association of Hairdressers, Cosmetologists and Nail Technicians (MFKKE) taking over its role. In Croatia, the provisional employers' committee (the EACCHC) noted in 2016 evolved into the formal Employers' Association in Craft, Cooperatives and Small-scale Business (UPOZ).

A limited number of new or newly active organisations have emerged, mainly in southern and eastern Europe. In Romania, the Employers' Association of Entrepreneurs in the Beauty Industry of Romania (PADIR) was founded in 2020 as the first national employer association for the beauty industry. In Bulgaria, the Bulgarian Association of Cosmetologists (AKB) was created after 2016, while the National Chamber of Crafts (H3K) has become newly relevant for hairdressing and beauty businesses. In Greece, two national federations, the Greek Federation of Barbers, Hairdressers and Salon Owners (Kokkke) and the Federation of Professional and Qualified Beauticians of Greece (Osedae), were established to unify previously local associations. In Cyprus, the statutory Cyprus Association of Beauticians (ΣAK) is newly listed, filling a gap in representation for beauticians. In Belgium, the Belgian Massage Federation (BMF) and Belgian Professional Association for the Fitness and Wellness Industry (BBF&W) are now recognised for their role in collective bargaining and expanding coverage to massage, spa and wellness activities. In Lithuania, the Association of

Hairdressers and Beauty Professionals (KIGSA) established a trade union section representing salon employees and freelance beauticians.

Other Member States have seen broader reconfiguration. In Spain, the former FEIP and CEPE were replaced by a coalition of three national organisations, ANEIP, FANAE and ANEPE-IMPE, alongside regional federations such as Fedcat, Fepega and Asociación profesional de peluquerías de Gipuzkoa. In Finland, the dedicated Finnish Hairdressers Association (FHA) withdrew from bargaining in 2018, and representation has passed to the multisector bodies Kaupan liitto, Palta and Suomen Yrittäjät (SY). In Italy, the Camera Italiana dell' Acconciatura and Cosmetica Italia are newly recorded, reflecting stronger coordination between associations in the craft and product industries. In Portugal, the once-active APBCIB and APCEB have become inactive following the dissolution of their partner union; their role is now filled by regional commerce associations such as Acilis, ACIFF, AEDVC and Acecoa. In Malta, the Malta Chamber of SMEs has been newly reported as hosting a hairdressing and beauty section, while in Ireland the general body IBEC is no longer active in the sector. A further two new employer organisations are recorded for Czechia and Slovakia.

Table 4: Comparative overview of national personal services employer organisations / business associations in 2016 and 2024

Member State	Change in number of all sectoral employer organisations compared with the previous representativeness study	Change factors ⁽⁷⁾
AT	0	
BE	+ 2	Organisational factors
BG	+ 2	Structural factors
CY	+ 1	Structural factors
CZ	+ 1	Organisational factors
DE	0	
DK	0	
EE	0	
EL	+ 2	Structural factors
ES	+ 4	Structural factors
FI	+ 3	Structural and organisational factors
FR	– 1	Organisational factors
HR	0	
HU	0	
IE	– 1	Organisational factors
IT	+ 2	Structural factors
LT	+ 1done	

⁽⁷⁾ A detailed explanation of the factors explaining the changes in the number of organisations at the national level is available in Table 34 in the Annex.

LU	0	
LV	0	
MT	+ 1	Structural factors
NL	0	
PL	0	
PT	+ 2	Structural factors
RO	+ 1	Structural factors
SE	0	
SL	0	
SK	+ 1	Structural factors

Source: Network of Eurofound Correspondents, 2016 and 2024.

2. European sectoral social dialogue in the personal services (hair and beauty) sector

The personal services ESSDC was formally established by the European Commission in 1999 as the forum for social dialogue in the hairdressing and beauty industry. In practice, the dialogue initially centred on hairdressing, as no European-level employer body for beauty salons existed at first, but the ESSDC has always aimed to include both hairdressers and beauticians under the broad personal services umbrella. Since its inception, the European-level social partners have been Coiffure EU on the employers' side and UNI Europa Hair & Beauty on the workers' side. Coiffure EU – founded in 2005 as successor to the earlier CIC-Europe (established 1998) – represents salon owners across Europe. UNI Europa Hair & Beauty, the sectoral section of UNI Europa (formed in 2000), brings together trade unions of hairdressers and beauticians. The scope of the committee covers NACE Rev. 2 code 96.02 'Hairdressing and other beauty treatment', encompassing activities from haircutting and barber services to cosmetic beauty treatments.

Informal cooperation between the social partners began in the late 1990s, leading to early joint initiatives to raise professional standards in the sector. In 2001, the ESSDC's first outcome – the 'How to get along' code of conduct – set out European guidelines for good practices in salons, with the aim of ensuring excellent service standards and harmonious employer–employee–client relations. During the 2000s, the committee prioritised improving training and qualifications. Notably, in 2009, the social partners agreed on a European Hairdressing Certificate to promote the mutual recognition of skills and mobility for hairdressers across Member States.

A major milestone for the personal services ESSDC was the conclusion of a European framework agreement on occupational health and safety in the hairdressing sector, signed on 26 April 2012 by Coiffure EU and UNI Europa. This agreement responded to work-related health risks in the industry – for example, hairdressers face a far higher incidence of skin and respiratory diseases and musculoskeletal disorders than the average worker. The framework agreement set out measures to improve workplace safety (protective gloves, better ventilation, ergonomic equipment, etc.) and was intended to be given legal force via an EU directive. Following several years of discussion on the implementation of this agreement and the redrafting of some of its elements, in December 2019 – marking the 20th anniversary of the ESSDC – the hairdressing social partners and the European Commission agreed on an action plan for autonomous implementation of the 2012 agreement. A joint statement adopted that month reiterated the partners' engagement to implement a package of measures, targeting improved protection of hairdressers' skin and respiratory health, ergonomics and accident prevention in salons. This action plan has since been rolled out in cooperation with the European Agency for Safety and Health at Work, the European Committee for Standardization and other stakeholders – for instance, developing a European standard for hairdressers' protective gloves as well as interactive risk assessment tools for salons – showcasing the long-term commitment to safer working conditions in the sector (European Agency for Safety and Health at Work, 2025).

While the ESSDC's most advanced occupational health and safety work has centred on hairdressing, the beauty sector has also seen important developments, albeit more decentralised and regulation driven than dialogue driven at the EU level. Several Member States tightened rules on invasive or

higher-risk aesthetic procedures and equipment since 2016, shifting many activities into the health domain and thereby outside the scope of sectoral social dialogue. Examples include Finland's Radiation Act reform, which moved intense pulsed light / high-intensity focused ultrasound equipment into healthcare use and out of beauty services; Sweden's 2021 law on aesthetic surgical procedures and injection treatments, which restricted administering injections to licensed medical professionals; and France's updated rules on laser and intense pulsed light hair removal, clarifying who may perform such treatments and under what safeguards. These reforms, together with national hygiene and training requirements, have raised safety standards in beauty services but have also fragmented representation, as some activities now fall under healthcare bargaining structures rather than the personal services sector. Overall, compared with hairdressing, formal social partner occupational health and safety initiatives in beauty are less consolidated and rely more on national regulation, guidance and professional standards than on sector-wide European agreements.

Aside from health and safety, the personal services ESSDC has addressed a range of social and economic challenges facing the hairdressing and beauty sector. Working conditions and sector attractiveness have been recurrent themes, given the prevalence of low pay, informal/undeclared work and high staff turnover in this industry (Bergfeld et al., 2024). The social partners have exchanged good practices on how to make careers in hairdressing more sustainable – for example, improving working hours arrangements, facilitating work–life balance in a sector known for unconventional hours and upgrading skills to offer new services. They have also jointly lobbied for public policies to support the many SMEs and microenterprises in personal services, which often struggle with compliance costs and labour shortages. The issue of undeclared work is a notable concern: the ESSDC is engaging with the European Labour Authority's undeclared work platform to explore ways of tackling the shadow economy in hairdressing and beauty. Meanwhile, gender equality and youth employment underlie many discussions, as about 80 % of the workforce are young women.

In 2020–2022, the committee's work was profoundly impacted by the COVID-19 pandemic. Hairdressing and beauty services were among the sectors hardest hit by lockdowns and social distancing measures. In response, the ESSDC shifted focus to immediate health and safety and business continuity issues. The social partners developed joint COVID-19 safety guidelines for hairdressers, detailing concrete measures for salons to operate safely and prevent virus spread. They also pressed for support for workers and salon owners during the crisis and facilitated exchanges on safe reopening protocols between Member States. Despite the pandemic disruption, work continued on long-term priorities like skills development and the roll-out of the occupational health and safety action plan – for example, 2020 saw the launch of an EU-wide online risk assessment tool (OIRA) ⁽⁸⁾ tailored to hairdressing salons as part of the agreed safety measures.

The personal services ESSDC has recently renewed its work programme (Coiffure EU and UNI Europa, 2024) with a forward-looking agenda for the post-pandemic period. In November 2024, UNI Europa Hair & Beauty and Coiffure EU signed a joint work programme for 2025–2026, setting out three strategic priorities.

⁽⁸⁾ For more information, see the OSHWiki entry on the hairdressing sector: <https://oshwiki.osha.europa.eu/en/themes/osh-hairdressing-sector>.

- Make the sector more attractive through initiatives to improve working conditions, strengthen training and apprenticeships, and highlight viable career pathways in hairdressing (aimed at tackling recruitment difficulties and high turnover).
- Build social partner capacity by reinforcing cooperation between employer and worker organisations at both the European and the national levels and bolstering collective bargaining structures in this fragmented sector. This includes a planned joint study on effective bargaining practices and support for a new Eurofound representativeness study on the sector.
- Promote health and safety by continuing to implement the 2012 autonomous agreement, with a focus on celebrating its achievements and finalising practical tools like the EU standard for protective gloves).

In March 2026, UNI Europa Hair & Beauty and Coiffure EU adopted a joint statement expressing their deep concern about the spread of bogus chair renting as a business model in the hairdressing industry (Coiffure EU and UNI Europa, 2026). While the statement acknowledges the place of chair renting as a way of enabling independent professionals to operate their business within a salon, bogus chair renting is considered to occur when salon owners control key aspects of the work such as pricing, schedules or products. The practice is considered to distort competition, erode workers' social protections and deprive public finances of tax and social security contributions. In the joint statement, the social partners commit to cooperating with national authorities, labour inspectorates and social security institutions to strengthen compliance, continue the autonomous implementation of the agreement on occupational health and safety, engage in joint capacity building and write a joint letter to the European Commission, European Parliament and Member States on policies to safeguard fair competition and promote decent work in the sector.

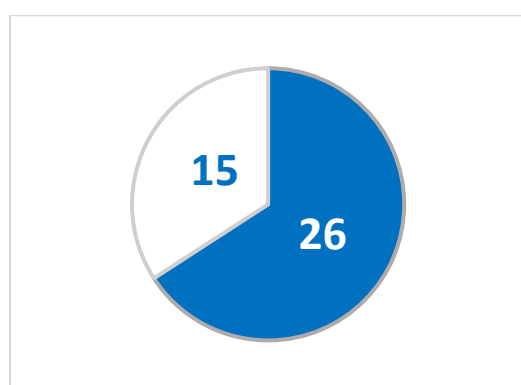
A complete overview of all joint opinions concluded in the ESSDC for the personal services sector can be found in the Table 40 in the Annex.

3. UNI Europa

The membership-based representativeness of UNI Europa is summarised in the scoreboard (Figure 6). This illustrates that 26 of the 41 sector-related trade unions (63 %), in 16 Member States, are affiliated to UNI Europa.

Figure 6: Scoreboard of the representativeness of UNI Europa in the personal services (hair and beauty) sector, EU-27, 2024

26 of the 41 personal services (hair and beauty) sector trade unions are affiliated to UNI Europa.



UNI Europa has at least one member union in 16 Member States .		
AT	ES	LV
BE	FI	MT
BG	FR	NL
CY	HR	PL
CZ	HU	PT
DE	IE	RO
DK	IT	SE
EE	LT	SI
EL	LU	SK

Notes: The blue part of the chart corresponds to the number of sectoral trade unions affiliated to UNI Europa out of the total number of unions in the sector. Blue-shaded cells indicate Member States in which UNI Europa has at least one affiliated sectoral trade union. Bold font indicates Member States in which all sectoral trade unions are affiliated to UNI Europa. Grey-shaded cells indicate Member States in which there are no trade unions organising workers in the sector. Cells with no shading indicate Member States in which none of the sectoral trade unions is affiliated to UNI Europa.

Source: Table 5.

Of the 1 746 849 workers in the personal services (hair and beauty) sector in the EU, around 41 515 are affiliated to a sectoral trade union (2.4 %). This is based on SBS data on persons employed in the sector and information provided by the Network of Eurofound Correspondents on trade union membership. The trade unions affiliated to UNI Europa report 30 708 affiliated sectoral employees. This corresponds to 1.8 % of all 1 746 849 workers (74 % of all workers affiliated to a trade union). However, due to a lack of membership data on nine UNI Europa-affiliated trade unions in Austria, Belgium, Denmark, France, Italy and Spain (Synova, Uiltucs, Serviceforbundet, Vida, CCOO del Hábitat, FeSMC-UGT, CGT Commerce et Services, UNSA Commerces et Services and CFTC-CSFV), this share is likely to be an underestimate. When counting only the share of employees represented by trade unions affiliated to UNI Europa in the Member States for which data are available (13 Member States have such data), this density figure rises to 3.4 %.

A comparison with the previous representativeness study is challenging due to a significant amount of missing data in the 2016 report. As shown in Table 5, density rates vary significantly between Member States. Overall, density rates in the hairdressing and beauty sector could be seen as relatively comparable but still somewhat below that of other female-dominated services sectors, such as industrial cleaning. This is most likely to be related to the structural characteristics of the

sector, particularly the very high share of self-employment and the predominance of microenterprises.

In seven Member States (Belgium, Croatia, Denmark, Finland, Germany, Italy and Malta), all sectoral trade unions are affiliated to UNI Europa (marked in bold in Figure 6). In those seven Member States, there are 628 972 workers in the sector, which is 36 % of the EU sectoral workforce. All these trade unions together cover at least 25 602 employees in the sector, corresponding to a density of 4 % of the sectoral workforce in those seven Member States; however, due to a lack of membership data on multiple trade unions (Synova, Uiltucs and Serviceforbundet), this percentage is most likely higher.

There are three Member States where UNI Europa has no affiliated trade unions: Latvia, Romania and Slovenia. In those three Member States, there are 70 673 workers in the sector, which corresponds to 4 % of the EU sectoral workforce. Trade unions in these three Member States have a density rate of at least 2 %.

In eight Member States, there are no trade unions organising workers in the sector. This is the case for Bulgaria, Cyprus, Czechia, Estonia, Hungary, Lithuania, Poland and Slovakia. In those eight Member States, there are 298 432 workers in the sector, totalling 17 % of the total EU workforce.

In the nine remaining Member States, there are some trade unions affiliated to UNI Europa but not all. This is the case for Austria, France, Greece, Ireland, Luxembourg, the Netherlands, Portugal, Spain and Sweden. In those nine Member States, the total number of workers in the sector is 748 772, 43 % of the EU sectoral workforce. A total of seven trade unions affiliated to UNI Europa from those nine Member States reported altogether 5 106 affiliated sectoral employees, accounting for under 1 % of the total EU sectoral workforce. Another six trade unions affiliated to UNI Europa in those nine Member States were unable to provide membership data (Vida, CCOO del Hábitat, FeSMC-UGT, CGT Commerce et Services, UNSA Commerces et Services and CFTC-CSFV).

In 13 Member States, the largest sectoral trade union is directly affiliated. There are three Member States where the largest sectoral trade union is not affiliated to UNI Europa, but there is a smaller affiliated trade union (Greece, Netherlands and Portugal). The second largest trade union is affiliated in 5 out of the 13 Member States where there is more than one sectoral trade union.

Since the previous representativeness study (Eurofound, 2016), the composition and membership of UNI Europa's affiliates in the personal services (hair and beauty) sector have remained broadly stable, although with some notable changes in national representation and internal restructuring. The total number of UNI Europa-affiliated unions increased from 22 in 2016 to 26 in 2024, while the overall share of organised workers they represent decreased slightly from 31 833 to 30 708; however, as noted elsewhere in this report, the latter number does not include membership data on nine trade unions, as they are unavailable.

Continuity and stable representation characterise several Member States. In Croatia, HSMP continues to represent workers in the sector with a small but steady membership of around 50 to 60, while Novi Sindikat has been affiliated since 2016, modestly broadening UNI Europa's coverage. In Luxembourg, representation has continued under the same confederation but through internal restructuring: SC-OGBL's hairdressing section was integrated into OGB-L, resulting in a slight increase in membership from 200 to about 300 and a rise in density from 8 % to 10 %. Similarly, in Malta,

GWU remains active as UNI Europa's affiliate and has expanded its membership from fewer than 10 members in 2016 to roughly 50 in 2024, with density improving from 2 % to 4 %.

Mergers and integration into broader federations are among the most common developments. In Denmark, the DFKF, previously an independent affiliate with around 3 100 members, has been fully incorporated into Serviceforbundet, which now covers the sector within a larger service federation. Membership and density have declined slightly (< 3 100 members; < 40 %). The same trend can be observed in Sweden, where the small occupational union Frisörernas Fackorganisation has been integrated into Handels. Handels remains UNI Europa's sole Swedish affiliate, representing around 3 000 members (down from 3 200 in 2016), but the overall density fell from 34 % to 19 % as the workforce expanded.

Declining membership is reported in several other affiliates. In Greece, the UNI Europa member OIYE continues to represent the sector, but its membership has halved from 350 to 150, and density decreased from 2 % to 1 %. In Finland, PAM remains the national affiliate but with a reduced reported membership of around 900 workers compared with 2 300 in 2016.

Changes in affiliation occurred in a few Member States. In Belgium, the overall strength of UNI Europa's representation remains high, but the composition of affiliated unions has shifted. BBTK/SETCa and ACCG have been replaced by ABVV-FGTB AC, while ACV-CSC BIE continues as a member, maintaining sectoral density at around 8–9 %. In the Netherlands, CNV Vakmensen, now representing roughly 1 200 members (4 % density), joined UNI Europa after 2016, while FNV MOOI, formerly the largest affiliate, is no longer associated. Conversely, in Slovenia, SOPS continues to operate nationally but has ceased its affiliation with UNI Europa.

Across the EU as a whole, these data suggest that UNI Europa's affiliate network has remained stable but consolidated, with modest overall membership decline in some western and northern Member States offset by the emergence of new affiliates in central and eastern Europe. While density varies greatly between Member States, the overall pattern reflects ongoing integration into broader service sector federations in mature industrial relations systems and gradual formalisation of representation in smaller and newly organised Member States.

Table 5: Membership strength of sectoral trade unions affiliated to UNI Europa, by Member State, 2024

Member State	Trade unions affiliated to UNI Europa / total number of trade unions	Including the largest	Including the second largest	Number of members of all sectoral trade unions in the Member State	Number of members of UNI Europa-affiliated trade unions	National sectoral workforce	Trade union density of the UNI Europa-affiliated trade unions in relation to national workforce (%)
AT	1/2 ⁽⁹⁾	Yes	n/a	n.d.	n.d.	39 081	n.d.
BE	3/3	Yes	Yes	> 9 189 (*)	> 9 189 (*)	32 085	28.6
BG	0/0	n/a	n/a	n/a	n/a	23 433	n/a
CY	0/0	n/a	n/a	n/a	n/a	7 444	n/a
CZ	0/0	n/a	n/a	n/a	n/a	33 639	n/a
DE	1/1	Yes	n/a	10 000	10 000	264 363	3.8
DK	2/2	Yes	n.d.	< 3 100 (*)	< 3 100 (*)	15 191	20.4
EE	0/0	n/a	n/a	n/a	n/a	5 734	n/a
EL	1/2	No	n.d.	1 750	150	46 426	0.3
ES	2/4	Yes	Yes	n.d.	n.d.	210 384	n.d.
FI	1/1	Yes	n/a	~ 900	~ 900	15 917	5.7
FR	4/6	Yes	n.d.	n.d.	> 400 (*)	239 396	0.2
HR	2/2	Yes	Yes	60	60	15 655	0.4
HU	0/0	n/a	n/a	n/a	n/a	48 394	n/a
IE	1/2	Yes	n/a	> 29 (*)	29	30 357	0.1

(⁹) GPA is affiliated to UNI Europa but for other sectors.

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

Member State	Trade unions affiliated to UNI Europa / total number of trade unions	Including the largest	Including the second largest	Number of members of all sectoral trade unions in the Member State	Number of members of UNI Europa-affiliated trade unions	National sectoral workforce	Trade union density of the UNI Europa-affiliated trade unions in relation to national workforce (%)
IT	3/3	Yes	n/a	> 2 303 (*)	> 2 303	282 182	0.8
LT	0/0	n/a	n/a	n/a	n/a	18 887	n/a
LU	1/2	Yes	n/a	420	300	3 459	1.4
LV	0/1	n/a	n/a	50	0	9 503	n/a
MT	1/1	Yes	n/a	< 50	< 50	3 579	1.4
NL	1/2	n/a	Yes	~ 9 200	1 200	86 452	13
PL	0/0	n/a	n/a	n/a	n/a	146 102	n/a
PT	1/3	n/a	Yes	~ 920	20	59 292	0.03
RO	0/1	n/a	n/a	467	0	54 194	0
SE	1/2	Yes	n/a	3 077	3 007	33 925	8.9
SI	0/1	n/a	n/a	n.d.	0	6 976	n/a
SK	0/0	n/a	n/a	n/a	n/a	14 799	n/a
EU-27	26/41	13 Member States	5 Member States	~ 41 515	~ 30 708	1 746 849	1.8

(*) Figures missing for one or more trade unions.

Notes: n/a, not applicable; n.d., data not available.

Sources: Eurostat (sbs_oww_act) and Network of Eurofound Correspondents, 2024.

3.1. Sector-relatedness of UNI Europa member organisations in the personal services sector

Based on the current statistical classification (NACE Rev. 2 code 96.02 'Hairdressing and other beauty treatment'), UNI Europa has affiliated trade unions in 16 of the 19 Member States where unions are active in the sector. In total, 26 of 41 sector-related trade unions across the EU (around 63 %) are affiliated.

Under NACE Rev. 2, hairdressing and beauty activities are aggregated within a single category. However, from 2026 onwards, new data collection under NACE Rev. 2.1 will distinguish between four subcodes: 96.21 'Hairdressing and barber activities', 96.22 'Beauty care and other beauty treatment activities', 96.23 'Day spa, sauna and steam bath activities' and 96.4 'Intermediation service activities for personal services'. Preliminary mapping has enabled an early approximation of UNI Europa's coverage across these future categories (Table 6).

The broadest representational coverage remains in hairdressing and barber activities (96.21), where 24 of 38 trade unions identified (around 63 %) are affiliated to UNI Europa. Representation is similarly high in beauty care and other beauty treatment activities (96.22), with 25 of 39 trade unions (64 %) affiliated. Coverage is even higher in the smaller but growing day spa, sauna and steam bath segment (96.23), where 15 of 21 trade unions (71 %) are UNI Europa-affiliated. In contrast, intermediation and agency-type services (96.4) show a more limited but still substantial affiliation rate, with 11 of 16 trade unions (69 %) linked to UNI Europa, mainly in Member States where such activities are formally organised.

Table 6: Sector-relatedness of UNI Europa members in terms of sector activities, EU-27, 2024

NACE Rev. 2 subcode	Specific activities in the personal services sector	Share of EU sectoral workforce (%)	Total number of trade unions in these activities	Number of unions that are UNI Europa members	Number of Member States with affiliated trade unions organising these activities out of all Member States with unions in the sector
96.02	Hairdressing and other beauty treatment	100	41	26 (63 %)	16/19
NACE Rev. 2.1 subcodes (*)					
96.21	Hairdressing and barber activities	n.d.	38	24 (63 %)	16/18
96.22	Beauty care and other beauty	n.d.	39	25 (64 %)	16/19

	treatment activities				
96.23	Day spa, sauna and steam bath activities	n.d.	21	15 (71 %)	7/8
96.4	Intermediation services for personal services	n.d.	16	11 (69 %)	6/7
Total		100	41	26 (63 %)	19

(*) Serviceforbundet did not disclose data on specific activities under the NACE Rev. 2.1 codes; therefore, this trade union is not included in the data presented in this part of the table. Data on the total workforce engaged in relevant activities under the NACE Rev. 2.1 codes are not available.

Notes: n.d., data not available. Trade unions affiliated to UNI Europa primarily represent employees working in salons and beauty establishments, but their coverage also extends, albeit more unevenly, to self-employed professionals and other categories of staff in the sector.

Source: Network of Eurofound Correspondents, 2024.

Representation of the self-employed is less widespread but remains a significant and distinctive feature of social partner organisation in the personal services sector. Among self-employed workers without employees – typically independent hairdressers or beauty practitioners renting a chair or working from home – 17 unions are active, 11 of which (65 %) are UNI Europa affiliates, located in 6 of the 10 Member States where such unions exist. Coverage is more limited among self-employed workers with employees (for example, salon owners employing apprentices or assistants): 13 unions are active in total, of which 7 (54 %) are UNI Europa affiliates in three of the seven Member States concerned.

Beyond these core occupational groups, 25 trade unions organise other staff employed in the sector, including salon managers, administrative personnel and support staff in multi-salon chains. UNI Europa affiliates account for 16 of these unions (64 %), operating in 10 of the 11 Member States where this category is represented (Table 7).

Table 7: Types of workers organised by trade unions, with reference to UNI Europa affiliation, EU-27, 2024

Types of workers	Total number of trade unions organising the respective category	Number of trade unions (and share) affiliated to UNI Europa organising in their respective category	Number of Member States with an affiliated trade union organising in their respective category
Employees	40	25 (63 %)	16/19
Self-employed (without employees)	17	11 (65 %)	6/10
Self-employed (with employees)	13	7 (54 %)	3/7
Other staff of companies in the sector (managerial staff)	25	16 (64 %)	10/11

in chain salons, admin, human resources, etc.)			
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Note: Data are unavailable for Unite, Serviceforbundet, LCGB and OGB-L.

Source: Network of Eurofound Correspondents, 2024.

Trade unions affiliated to UNI Europa cover all company-size groups in the personal services sector, although representation remains strongest in SMEs (Table 8). In microenterprises (1–9 employees), 23 of 36 trade unions (64 %) are affiliated to UNI Europa. These unions are active in 14 of the 18 Member States where such very small businesses are represented. In small enterprises (10–49 employees), coverage is similarly high: 22 of 33 trade unions (67 %) are UNI Europa-affiliated, with affiliates operating in 13 of the 15 Member States that have trade unions active in this size group. Representation remains substantial among medium-sized companies (50–249 employees), where 20 of 31 trade unions (65 %) are affiliated to UNI Europa and active in 11 of 13 Member States. In the largest firms (250 employees or more), 16 of 24 trade unions (67 %) are affiliated, with coverage in all 10 Member States where such companies are present.

Table 8: Number of trade unions by company size, with reference to UNI Europa affiliation, EU-27, 2024

Company size (number of employees)	Total number of trade unions organising companies in this size group	Number of UNI Europa-affiliated trade unions	Number of Member States with a UNI Europa-affiliated trade union / number of Member States with a sectoral trade union
1–9	36	23 (64 %)	14/18
10–49	33	22 (67 %)	13/15
50–249	31	20 (65 %)	11/13
250+	24	16 (67 %)	10/10

Note: Data are unavailable for Serviceforbundet, LCGB, Unite and OGB-L.

Source: Network of Eurofound Correspondents, 2024.

3.2. UNI Europa’s role in sectoral industrial relations at the national level

Commission Decision 98/500/EC of 1998 ⁽¹⁰⁾, in Article 1(b), refers to three criteria to be assessed to determine whether social partner organisations (in this case, trade unions) are representative. These criteria relate to:

- whether the affiliated sectoral trade unions are an integral and recognised part of the sectoral social dialogue structures in the Member States, being involved in bipartite or tripartite social dialogue or paritarian organisations, or being consulted by government institutions;

⁽¹⁰⁾ Commission Decision 98/500/EC of 20 May 1998 on the establishment of sectoral social dialogue committees promoting the dialogue between the social partners at European level (notified under document number C(1998) 2334) (OJ L 225, 12.8.1998, p. 27, ELI: <http://data.europa.eu/eli/dec/1998/500/oj>).

- the extent to which the affiliated sectoral trade unions have the capacity to negotiate agreements determining the working conditions of the sectoral workforce – in other words, whether they are involved in collective bargaining – and the proportion of the workforce that is covered by collective bargaining;
- the number of affiliated sectoral trade unions that are considered representative in the national industrial relations setting of the Member State in question and the number of Member States in which an affiliated trade union is considered representative.

3.2.1. UNI Europa members' participation in Member States' social dialogue structures

Trade unions in the personal services sector participate in several forms of social dialogue across Europe. According to data from the Network of Eurofound Correspondents, 20 trade unions (49 %) are engaged in bipartite bodies, 12 (29 %) in tripartite structures and 17 (41 %) in paritarian organisations; 16 (39 %) are consulted by government on sector-related issues. These activities are reported in 8, 6, 8 and 7 Member States, respectively. Among the 26 trade unions affiliated to UNI Europa, participation rates are higher in all categories: 16 (62 %) are involved in bipartite dialogue, 10 (38 %) in tripartite forums and 15 (58 %) in paritarian bodies; 11 (42 %) are consulted by national authorities (Table 9).

The topics covered by these structures broadly concern collective bargaining, training and qualifications, and employment conditions. Bipartite social dialogue remains the most common form of engagement. It typically addresses wage setting, apprenticeships, and occupational health and safety. Examples include the participation of ver.di and the Zentralverband des Deutschen Friseurhandwerks (ZV) in Germany and that of sectoral unions in Belgium, Denmark, France and Italy, which take part in national or sectoral joint committees on pay and working conditions.

Tripartite structures exist in a smaller number of Member States, where social partners work with public authorities on regulatory or enforcement issues. These include Germany's Alliance against Undeclared Work in the Hairdressing Trade, established in 2016 by the Federal Ministry of Finance together with ver.di and ZV; the national training and skills coordination councils in Finland; and consultative bodies in France and Portugal, which bring together ministries and social partners to discuss training and social protection policies relevant to small craft and service sectors.

Paritarian institutions, jointly managed by employers and unions, are widespread in Member States with established joint-management systems. They play a key role in the administration of professional training, welfare schemes and complementary social protection. Examples include France's AG2R La Mondiale, OPCO EP, Apicil Group and AÉSIO, in which sector unions and employer federations jointly manage health, pension and training funds; and Italy's bilateral bodies (Ente Bilaterale Artigianato and Ente Bilaterale Nazionale Artigianato), where Filcams Cgil, Fisascat Cisl and Uiltucs are active.

Finally, government consultation occurs in several Member States, often linked to the implementation of labour market or training policy. In Belgium, ACV-CSC BIE and ABVV-FGTB AC are consulted by federal authorities on employment regulation for small service businesses. In France, social partners are regularly consulted through national dialogue on vocational education, health

and safety, and social protection. In Finland, PAM contributes to government-led discussions on skills and workforce development for service occupations.

Table 9: Trade unions' involvement in social dialogue, with reference to UNI Europa affiliation, EU-27, 2024

	Involved in a bipartite social dialogue body	Involved in a tripartite social dialogue body	Involved in a paritarian organisation	Consulted by government on sector- related matters
Total number of personal services trade unions (share of the total number of 41 identified unions)	20 (49 %)	12 (29 %)	17 (41 %)	16 (39 %)
Number of Member States	8	6	8	7
Number of trade unions affiliated to UNI Europa (share of the total number of 26 affiliated unions)	16 (62 %)	10 (38 %)	15 (58 %)	11 (42 %)
Number of Member States	8	6	8	6

Source: Network of Eurofound Correspondents, 2024.

3.2.2. UNI Europa members' capacity to negotiate collective agreements

Collective bargaining remains a central function of trade unions in the personal services sector. It may go beyond wage setting to cover issues including training and occupational health and safety (Madlen et al., 2026), although its scope and institutional strength vary significantly between Member States. According to data from the Network of Eurofound Correspondents, 31 of the 41 trade unions identified (76 %) are involved in collective bargaining at either the sectoral or the company level. Among the 26 trade unions affiliated to UNI Europa, 22 (85 %) take part in collective bargaining processes. Bargaining coverage by UNI Europa-affiliated trade unions is reported in 12 Member States – Austria, Belgium, Denmark, Finland, France, Germany, Italy, Luxembourg, the Netherlands, Portugal, Spain and Sweden – while no active collective bargaining was identified in 13 Member States, mainly in central and eastern Europe (Bulgaria, Croatia, Cyprus, Czechia, Estonia, Hungary, Ireland, Lithuania, Latvia, Malta, Poland, Romania and Slovakia, in some cases due to the lack of representative organisations) (Table 10).

A total of 22 UNI Europa affiliates (85 % of all UNI Europa affiliates) are involved in sectoral collective bargaining, active in 12 Member States. In Belgium, ACV-CSC BIE and ABVV-FGTB AC negotiate pay scales, training rights, working hours, occupational health and safety, and other issues under the joint committee system (Commission Paritaire 314) for hairdressing and beauty services. This joint committee also covers the fitness sector (Madlen et al., 2026). In France, FGTA-FO, CFTC-CSFV, CGT Commerce et Services and UNSA Commerces et Services participate in the national joint commission for hairdressing (Commission Paritaire Nationale de la Coiffure), negotiating sector-wide agreements

covering pay, training, and health and safety. In Italy, Filcams Cgil, Fisascas Cisl and Uiltucs jointly negotiate national collective agreements for hairdressers and beauticians with the main employer confederations under the Contratto Collettivo Nazionale di Lavoro system. In Germany, ver.di negotiates regional collective agreements with ZV, primarily on pay scales and apprenticeship conditions.

In Spain, CCOO del Hábitat and FeSMC-UGT sign collective agreements for hairdressing and beauty salons at the provincial and the regional levels, covering wages, health and safety, and working time.

At the company level, 12 UNI Europa-affiliated unions (46 % of all UNI Europa-affiliated unions), active in seven Member States – Austria, Belgium, Denmark, Finland, France, Germany and Luxembourg – conduct negotiations. Company-level bargaining mainly occurs within larger salon chains, spa operators and national beauty franchises. For instance, in Belgium and France, company agreements supplement national frameworks by defining bonuses, scheduling flexibility and specific occupational safety measures. In Nordic Member States, such as Denmark and Finland, local-level bargaining complements national agreements, allowing adaptations to business size and regional labour market conditions.

By type of workers covered, collective bargaining predominantly addresses employees and apprentices working in salons or beauty institutes. These workers are the principal beneficiaries of wage agreements, training entitlements and social protection schemes. Coverage of self-employed workers remains limited and is mostly indirect, addressed through consultation or sectoral codes of practice rather than binding agreements. Managerial and administrative staff in larger companies are covered where unions are recognised at the company level (notably in Belgium, Finland and France).

Comparatively, UNI Europa affiliates make up the majority of unions involved in collective bargaining across the sector. Of all 31 unions engaged in bargaining, 71 % are UNI-affiliated, demonstrating the central role of UNI Europa in maintaining sectoral dialogue and negotiated regulation in the personal services field. In Member States with mature social dialogue traditions (such as Belgium, France, Italy and the Nordic states), UNI-affiliated unions are systematically involved in national or regional bargaining structures. In contrast, in Member States where industrial relations are weak or fragmented, collective bargaining coverage remains absent or confined to isolated company agreements.

Table 10: Trade unions' involvement in collective bargaining, with reference to UNI Europa affiliation, EU-27, 2024

All unions

Affiliated to UNI Europa

	Total number of personal services sector trade unions involved in any collective bargaining	Number of UNI Europa member unions involved in any collective bargaining (share of the total number of 26 affiliated unions)	Number of UNI Europa-affiliated unions involved in collective bargaining at ⁽¹¹⁾ :	
			Sector level	Company level
Number of trade unions (share of the total number of 41 identified unions)	31 (76 %)	22 (85 %)	18 (69 %)	12 (46 %)
Number of Member States	14 AT, BE, DE, DK, EL, ES, FI, FR, IT, LU, NL, PT, SE, SI	12 AT, BE, DE, DK, ES, FI, FR, IT, LU, NL, PT, SE	10 AT, BE, DE, DK, ES, FR, IT, NL, PT, SE	7 AT, BE, DE, DK, FI, FR, LU
Number of trade unions with no data on any level of collective bargaining (share of the total number of 41 identified unions)	1 (IE) (< 3 %)			
Member States in which none of the personal services trade unions is involved in any collective bargaining	HR, LV, MT, RO			

Note: No unions are present in the sector in Bulgaria, Cyprus, Czechia, Estonia, Hungary, Lithuania, Poland or Slovakia.

Source: Network of Eurofound Correspondents, 2024.

Collective bargaining coverage among UNI Europa-affiliated trade unions broadly mirrors the overall coverage levels reported for all trade unions active in the sector, although some national variations persist. In most Member States where bargaining is established at the sector level, UNI Europa

⁽¹¹⁾ The two levels of bargaining are not mutually exclusive as a trade union can be involved in both sector-level and company-level collective bargaining simultaneously.

affiliates are signatories to, or directly participate in, the main collective agreements, ensuring coverage levels equal or close to those achieved by all trade unions in the sector (Table 11).

In Belgium, the three UNI Europa-affiliated unions (ABVV-FGTB AC, ACV-CSC BIE and Synova) jointly participate in sector- and company-level collective bargaining under Joint Committee 314. Their agreements cover between 96 % and 100 % of the workforce, matching the full sectoral coverage reported nationally. A similarly high level of coverage is found in France, where FGTA-FO, CGT Commerce et Services, UNSA Commerces et Services and CFTC-CSFV are all parties to the national collective agreement for hairdressing and beauty services (*Convention collective nationale de la coiffure*), covering virtually the entire workforce (close to 100 %), with binding industry-level agreements even for companies that are not members of employer organisations (although this system has been weakened by the Macron labour reforms, which allowed company-level agreements to derogate downwards for sectoral standards; Madlen et al., 2026). In both Belgium and France, UNI Europa affiliates are central to the bargaining process, and their members' coverage is identical to that of all unions in the sector.

In Spain, CCOO del Hábitat and FeSMC-UGT negotiate provincial and regional agreements for hairdressing and beauty salons, covering close to 100 % of employees in the sector. Here too, UNI Europa affiliates coincide with the main sectoral bargaining parties, and no meaningful coverage gap exists between their members and the total workforce covered by collective agreements. In Germany, ver.di remains the sole trade union signatory to collective agreements with ZV. The overall coverage of the sector is about 70 %, and UNI Europa's affiliate therefore represents the full extent of collective bargaining coverage in the Member State.

In Italy, the UNI Europa-affiliated unions Filcams Cgil, Fisascat Cisl and Uiltucs are the recognised sectoral bargaining partners for the *Contratto Collettivo Nazionale di Lavoro* for hairdressers and beauticians. Their agreements cover an estimated 51 % of the sectoral workforce, corresponding to the national collective bargaining coverage reported for all trade unions in the industry. A similar pattern is observed in the Netherlands, where CNV Vakmensen co-signs the national collective agreement for hairdressing. Its members are covered at the same level as the general workforce (about 75 %). In Austria, Vida's participation in the sectoral agreement results in coverage of around 85 %, equal to that achieved by all unions combined.

The main divergences appear in Member States where collective bargaining is limited to the company or the local level. In Finland, PAM negotiates company-level agreements for salon workers, but sectoral coverage is low (25–35 %), with successive governments encouraging a move away from centralised bargaining and in the absence of an official employer organisation in the sector (UNI Europa, 2026; the representative body considers itself a business association). Similarly, in Portugal, Site-se's participation results in very limited coverage (around 2 %). In Sweden, Handels participates in sector-level bargaining with coverage estimated at around 50 %, in line with the overall national figure.

Table 11: List of UNI Europa-affiliated trade unions involved in collective bargaining, with coverage levels, 2024

Member State	Trade union	Involvement in collective bargaining for the personal services sector		Collective bargaining coverage of the personal services workforce (%)
		Sector level	Company level	
AT	Vida	Yes	No	85
BE	ABVV-FGTB AC	Yes	Yes	96–100
BE	ACV-CSC BIE	Yes	Yes	96
BE	Synova	Yes	Yes	96
DE	Ver.di	Yes	No	70
DK	DFKF	Yes	Yes	n.d.
DK	Serviceforbundet ⁽¹²⁾	No	No	n/a
EL	OIYE	No	No	No collective bargaining
ES	CCOO del Hábitat	Yes	No	100
ES	FeSMC-UGT	Yes	No	100
FI	PAM	No	Yes	25–35
FR	CFTC-CSFV	Yes	Yes	100
FR	CGT Commerce et Services	Yes	Yes	100
FR	FGTA-FO	Yes	Yes	100
FR	UNSA Commerces et Services	Yes	Yes	100
HR	HSMP	No	No	no collective bargaining
HR	Novi Sindikat	No	No	0
IE	SIPTU	No	No	n.d.
IT	Filcams Cgil	Yes	No	51
IT	Fisascat Cisl	Yes	No	51
IT	Uiltucs	Yes	No	51
LU	OGB-L	No	Yes	n.d.
MT	GWU	No	No	No collective bargaining
NL	CNV Vakmensen	Yes	No	75
PT	Sitese	Yes	No	2

⁽¹²⁾ DFKF is a part of the trade union federation Serviceforbundet, which is an alliance of independent trade unions. Serviceforbundet provides support during collective bargaining negotiations, but the negotiations are between DFKF and DOFK.

Member State	Trade union	Involvement in collective bargaining for the personal services sector		Collective bargaining coverage of the personal services workforce (%)
		Sector level	Company level	
SE	Handels	Yes	No	50 (hair); 5–10 (beauty)

Notes: n/a, not applicable; n.d., data not available.

Source: Network of Eurofound Correspondents, 2024.

3.2.3. Representativeness status at the national level of UNI Europa members

Of the 41 trade unions, there are 31 that are considered representative within the national industrial relations setting (Table 12). Among the 26 sectoral trade unions affiliated to UNI Europa, 19 are considered representative within the national industrial relations setting. Thus, 19 of the 31 national representative trade unions (61 %) are affiliated to UNI Europa. Of the affiliated trade unions, five – OIYE in Greece, HSMP and Novi Sindikat in Croatia, SIPTU in Ireland and GWU in Malta – reported that they were not representative. None of these five trade unions is involved in collective bargaining in the personal services sector. DFKF is a part of the trade union federation Serviceforbundet, which is an alliance of independent trade unions. Serviceforbundet provides support during the collective bargaining negotiations, but the negotiations are between DFKF and DOFK.

Table 12: Representative status of national-level trade unions, with reference to UNI Europa affiliation, EU-27, 2024

	Recognised as representative based on national recognition criteria
Total number of personal services trade unions (share of the total number of 41 identified unions)	31 (76 %)
Number of Member States	14
Number of trade unions affiliated to UNI Europa (share of the total number of 26 affiliated unions)	19 (73 %)
Number of Member States	11

Source: Network of Eurofound Correspondents, 2024.

3.3. UNI Europa's structures to ensure effective participation

Of the 26 sectoral trade unions affiliated to UNI Europa, at least 1 (62 %) are involved in UNI Europa's decision-making structure (the executive committee). Data for seven trade unions were unavailable in this regard. A total of 22 (85 %) of the affiliated sectoral trade unions indicated that they pay membership fees for their members in the personal services sector, while five trade unions did not provide data in this regard.

There are at least ten affiliated sectoral trade unions (31 %) that are actively involved in UNI Europa's working groups. Examples include ABVV-FGTB AC and ACV-CSC BIE in Belgium, which

contributed to the conference preparatory committee for the 2025 Belfast Congress; ver.di in Germany and DFKF in Denmark, which participate in discussions on sector-specific health and safety measures, including glove use; Fisascat Cisl and Filcams Cgil in Italy, which contribute to the health, safety and social policy tables; CNV Vakmensen in the Netherlands, which participates in the health and safety working group; and Handels in Sweden, involved in the working time group.

The details for each of the 26 affiliated trade unions are presented in Table 13.

Table 13: Involvement of sectoral trade unions in UNI Europa bodies, 2024

Member State	Trade union	Involved in UNI Europa's executive committees	Paying affiliation fees to UNI Europa for its members in the personal services sector	Involved in UNI Europa's working groups
AT	Vida	Yes	Yes	Participates in UNI Europa campaign on daytime cleaning
BE	ABVV-FGTB AC	Yes	Yes	Yes, conference preparatory committee
BE	ACV-CSC BIE	Yes	Yes	Yes
BE	Synova	Yes	Yes	Yes
DE	Ver.di	Yes	Yes	Yes
DK	DFKF ⁽¹³⁾	Yes ⁽¹⁴⁾	Yes	Yes
DK	Serviceforbundet ⁽¹⁵⁾	n.d.	n.d.	n.d.
EL	OIYE	No	Yes	No
ES	CCOO del Hábitat ⁽¹⁶⁾	Yes, as a substitute member	Yes	No
ES	FeSMC-UGT ⁽¹⁷⁾	n.d.	n.d.	n.d.
FI	PAM	Yes	No	No
FR	CFTC-CSFV	n.d.	n.d.	n.d.
FR	CGT Commerce et Services	No	Yes	n.d.
FR	FGTA-FO	Yes	Yes	No
FR	UNSA Commerces et Services	n.d.	Yes	n.d.
HR	HSMP	No	Yes	No

⁽¹³⁾ DFKF is part of Serviceforbundet.

⁽¹⁴⁾ DFKF is represented on the hair and beauty steering committee.

⁽¹⁵⁾ Serviceforbundet is part of the private security working group.

⁽¹⁶⁾ CCOO del Hábitat is part of the private security working group and the property service steering committee.

⁽¹⁷⁾ FeSMC-UGT is part of the property services steering committee.

Member State	Trade union	Involved in UNI Europa's executive committees	Paying affiliation fees to UNI Europa for its members in the personal services sector	Involved in UNI Europa's working groups
HR	Novi Sindikat	No	Yes	No
IE	SIPTU ⁽¹⁸⁾	Yes	Yes	No
IT	Filcams Cgil	Yes	Yes	Yes
IT	Fisascat Cisl	Yes	Yes	Yes
IT	Uiltucs	Yes	Yes	n.d.
LU	OGB-L	No	Yes	No
MT	GWU	No	Yes	No
NL	CNV Vakmensen	Yes	Yes	Yes
PT	Sitese	n.d.	Yes ⁽¹⁹⁾	n.d.
SE	Handels	Yes	Yes	Yes

Note: n.d., data not available.

Source: Network of Eurofound Correspondents, 2024.

3.4. UNI Europa's negotiation capacity

UNI Europa Hair & Beauty serves as the European trade union federation for hairdressers and beauticians, organising a majority of the sector's labour unions across Europe. It currently brings together 26 national trade unions from 16 Member States. This hair and beauty section operates within the multisector structure of UNI Europa (the European branch of UNI Global Union), and its domain is largely congruent with the personal services (hair and beauty) industry.

UNI Europa's statutes provide a formal basis for its capacity to negotiate European agreements on behalf of member unions, albeit in a broad and general manner (UNI Europa, 2021). Unlike some federations that spell out detailed mandating procedures, 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. Article 3 of UNI Europa's statutes obliges the organisation to represent its affiliates in European institutions on issues affecting their social, economic and cultural interests. Furthermore, the statutes explicitly list 'undertaking collective bargaining and negotiating agreements in the region upon mandate of the UNI Europa Executive Committee' as one of the federation's methods of action.

In practice, this means that any European sectoral negotiation or joint text in the hairdressing and beauty sector is prepared in close cooperation with the UNI Europa Secretariat and must align with the policies set by UNI Europa's governing bodies. A mandate or approval from the UNI Europa Executive Committee (which is composed of affiliates' representatives) is required before entering into any binding agreement, thereby ensuring that all national member unions are consulted. Thanks

⁽¹⁸⁾ SIPTU is part of the property services steering committee.

⁽¹⁹⁾ Sitese pays affiliation fees in various UNI Europa sectors.

to this governance structure, UNI Europa Hair & Beauty has the authority to negotiate and even conclude binding European agreements on the sector's behalf. To date, however, no legally binding European sectoral agreements (under Article 155 of the TFEU) have been concluded in the hairdressing and beauty industry. The social partners in this sector have instead focused on autonomous frameworks and joint statements.

UNI Europa Hair & Beauty and its employer organisation counterpart (Coiffure EU) have been particularly active in the ESSDC for personal services (hair and beauty), jointly producing an innovative framework agreement on health and safety, autonomously implemented at the national level with the assistance of the European Commission, and a text on training certification in hairdressing. These joint outcomes, numbering 16 since 2000, demonstrate a strong capacity to act at the European level, even if no actions have yet taken the form of a legally binding accord. In summary, UNI Europa Hair & Beauty possesses a clear (if mostly implicit) mandate and the internal mechanisms needed to negotiate on behalf of its affiliates, ensuring that the interests of hairdressers and beauticians can be collectively represented and advanced through European social dialogue.

3.5. UNI Europa members' effective participation in the ESSDC

Commission Decision 98/500/EC from 1998, on the establishment of ESSDCs, stipulates in its Article 1(c) that European social partner organisations 'shall have adequate structures to ensure their effective participation in the work of the Committees'. The adequacy of the structures to enable them to represent their members in the ESSDC, European Commission consultations and the negotiation of binding agreements has been analysed in the previous section. In Table 14, the effective participation of UNI Europa's members in ESSDC meetings is outlined. Between 2022 and 2025, UNI Europa members from 12 Member States participated in ESSDC meetings, whereas members from four Member States did not participate (Austria, Luxembourg, Malta and Portugal).

Table 14: Overview of UNI Europa members' participation in personal services ESSDC meetings between 2022 and 2025

Participation	Member States	Number of Member States
Member States with participating trade union delegates	BE, DE, DK, EL, ES, FI, FR, HR, IE, IT, NL, SE	12
Member States in which UNI Europa has members but no delegates participating between 2022 and 2025	AT, LU, MT, PT	4

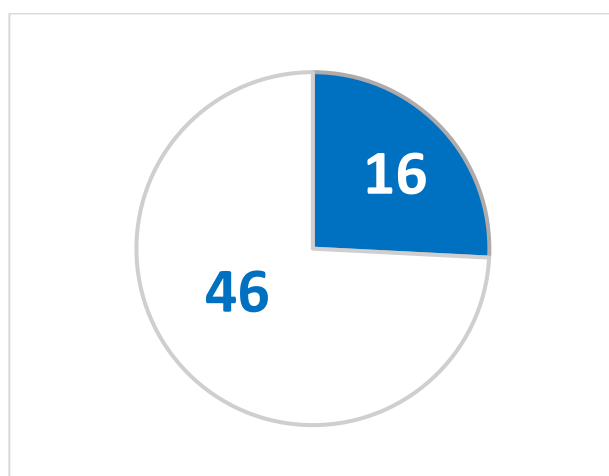
Source: Data provided by the Directorate-General for Employment, Social Affairs and Inclusion for this study.

4. Coiffure EU

The membership-based representativeness of Coiffure EU is summarised in the scoreboard (Figure 7). This illustrates on the left, in blue, that 16 of the 62 sector-related employer organisations (26 %), in 13 Member States, are affiliated to Coiffure EU.

Figure 7: Scoreboard of the representativeness of Coiffure EU in the personal services (hair and beauty) sector, EU-27, 2024

16 employer organisations are affiliated to Coiffure EU



Coiffure EU has at least one member organisation in **13 Member States**.

AT	ES	LV
BE	FI	MT
BG	FR	NL
CY	HR	PL
CZ	HU	PT
DE	IE	RO
DK	IT	SE
EE	LT	SI
EL	LU	SK

Notes: The blue part of the chart corresponds to the number of sectoral employer organisations affiliated to Coiffure EU. Blue-shaded cells indicate Member States in which Coiffure EU has at least one affiliated sectoral employer organisation. Bold font indicates Member States in which all sectoral employer organisations are affiliated to Coiffure EU. Grey-shaded cells indicate Member States in which there are no employer organisations representing companies in the sector. Cells with no shading indicate Member States in which none of the sectoral employer organisations is affiliated to Coiffure EU.

Source: Table 15.

Across the EU, employer organisations affiliated to Coiffure EU represent modest but significant shares of companies and workers in the personal services sector. According to data compiled from national correspondents and Coiffure EU sources, the 16 affiliated employer organisations together represent at least 55 000 companies employing over 90 000 workers, corresponding to approximately 5 % of the total EU sectoral workforce of 1.7 million. These figures are likely to underestimate actual coverage, due to missing membership data for several affiliates, particularly in Belgium, Denmark and Germany, which did not report detailed company or employee data.

A comparison with the previous representativeness study is challenging due to a significant amount of missing data in the 2016 report. As shown in Table 15, density rates vary significantly from Member State to Member State. When counting only the share of employees represented by companies that are members of Coiffure EU in the Member States for which data are available (10 Member States have such data), the density figure rises to 12.7 %.

Direct comparison with other service sectors covered by Eurofound representativeness studies is difficult. The available information in earlier studies on sectors such as industrial cleaning or private security is incomplete and in some cases dates back more than seven years, making meaningful comparison of employer organisation density challenging. Nevertheless, the relatively modest coverage observed in the hairdressing and beauty sector is consistent with its structural characteristics. The sector is dominated by microenterprises and self-employed professionals, with many businesses operating as single-person enterprises or very small salons. This tends to limit both the incentives and the organisational capacity for formal employer organisation membership. In

addition, in several Member States, employer representation is fragmented across multiple local or regional business associations rather than a single national organisation affiliated to Coiffure EU.

Coiffure EU currently has affiliated members in 13 of the 27 Member States: Austria, Belgium, Croatia, Cyprus, Denmark, Finland, France, Germany, Ireland, Italy, Lithuania, Malta and the Netherlands. Among these, 10 Member States have their largest national employer organisation affiliated (Table 15). In total, Coiffure EU members organise employers in Member States accounting for roughly 45 % of all companies and over 50 % of the workforce in the EU hairdressing and beauty sector.

National coverage is, however, uneven. In Member States such as Austria, the Coiffure EU-affiliated Bundesinnung der Friseure (BIF) represents many of the sector's employers and employees. BIF represents about 9 200 companies employing around 15 600 workers, equivalent to roughly 40 % of the sectoral workforce. High representation is also found in Denmark, Finland, Italy and the Netherlands, where national employer organisations affiliated to Coiffure EU are the main employer counterparts in collective bargaining or sectoral representation.

By contrast, Coiffure EU has no affiliated employer organisation in 12 of the Member States where such organisations exist – Bulgaria, Czechia, Greece, Hungary, Luxembourg, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and Sweden – which together account for more than 40 % of all hairdressing and beauty businesses in the EU. In several of these Member States (such as Bulgaria, Greece and Romania), national employer organisations were created or restructured after 2016 but have not thus far joined Coiffure EU. Some, such as Luxembourg's new CHBTG, replaced former affiliates that ceased activity or reorganised outside the European structure. Others, such as Portugal's local commerce associations or Spain's fragmented sectoral organisations, continue to operate independently of Coiffure EU, often due to the absence of a single recognised national umbrella organisation for the sector. There are no employer organisations active in the personal services sector in Estonia and Latvia.

Compared with the previous representativeness study (Eurofound, 2016), the overall structure of employer representation has remained stable, but Coiffure EU's national membership composition has slightly decreased from 18 to 16 affiliates, mainly due to organisational restructuring and the dissolution or withdrawal of several small members. Notably, Sweden's Frisörföretagarna and Luxembourg's Fédération des Patrons Coiffeurs are no longer affiliated and have since merged with other organisations. Conversely, new or reactivated members include the Pan-Cyprus Federation of Hairdressers and Barbers (ΠΟΚΚ) and Lithuania's Association of Hairdressers and Beauty Professionals (KIGSA).

Table 15: Membership strength of employer organisations affiliated to Coiffure EU, by Member State, 2024

Member State	Number of Coiffure EU-affiliated employer organisations / total number of employer organisations	Including the largest	Including the second largest	Number of companies affiliated to all the sectoral employer organisations	Number of companies affiliated to Coiffure EU members	Number of employees in companies affiliated to employer organisations that are members of Coiffure EU	Total number of sectoral companies	National sectoral workforce	Employer organisation density in relation to national workforce (%)
AT	1/2	Yes	n/a	27 134	9 211	15 600	17 525	39 081	40
BE	1/5	n.d.	n.d.	n.d.	n.d.	n.d.	21 883	32 085	n.d.
BG	0/2	n/a	n/a	615	0	0	14 650	23 433	0
CY	1/2	Yes	n/a	3 700	2 500	2 500	4 974	7 444	34
CZ	0/1	n/a	n/a	n.d.	0	0	41 082	33 639	0
DE	1/1	Yes	n/a	n.d.	n.d.	n.d.	81 520	264 363	n.d.
DK	1/1	Yes	n/a	2 100	2 100	n.d.	8 723	15 191	n.d.
EE	0/0	n/a	n/a	0	0	0	4 543	5 734	0
EL	0/3	n/a	n/a	64 ⁽²⁰⁾	0	0	19 264	46 426	0
ES	0/9	n/a	n/a	13 099 ⁽²¹⁾	0	0	136 210	210 384	0
FI	1/4	n/a	Yes	2 092	500	2 000	19 236	15 917	13
FR	1/4	Yes	n/a	77 998	5 677	17 287	151 272	239 396	7
HR	1/1	Yes	n/a	70	70	1 566	9 187	15 655	10

⁽²⁰⁾ Missing data for one employer organisation: Kokkke.⁽²¹⁾ Missing data for seven employer organisations: FANAE, ANEIP, Fedcat, Fepega, Asociación Provincial de Peluquerías de Burgos, EGIE and Asociación profesional de peluquerías de Gipuzkoa.

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

Member State	Number of Coiffure EU-affiliated employer organisations / total number of employer organisations	Including the largest	Including the second largest	Number of companies affiliated to all the sectoral employer organisations	Number of companies affiliated to Coiffure EU members	Number of employees in companies affiliated to employer organisations that are members of Coiffure EU	Total number of sectoral companies	National sectoral workforce	Employer organisation density in relation to national workforce (%)
HU	0/1	n/a	n/a	116	0	0	45 799	48 394	0
IE	1/1	Yes	n/a	450	450	n.d.	11 966	30 357	n.d.
IT	4/6	n.d.	n.d.	30 390 ⁽²²⁾	30 390 ⁽²³⁾	36 000 ⁽²⁴⁾	137 466	282 182	> 13
LT	1/1	Yes	n/a	250	250	250	20 268	18 887	1
LU	0/1	n/a	n/a	260	0	0	1 107	3 459	0
LV	0/0	n/a	n/a	0	0	0	8 566	9 503	0
MT	1/2	Yes	n/a	320	200	200	2 334	3 579	6
NL	1/1	Yes	n/a	4 180	4 180	14 740	78 818	86 452	17
PL	0/1	n/a	n/a	n.d.	0	0	95 688	146 102	0
PT	0/7	n/a	n/a	106 ⁽²⁵⁾	0	0	49 780	59 292	0
RO	0/1	n/a	n/a	n.d.	0	0	38 283	54 194	0
SE	0/1	n/a	n/a	4 668	0	0	25 271	33 925	0
SI	0/3	n/a	n/a	3 300	0	0	5 086	14 799	0

⁽²²⁾ Missing data for four employer organisations: CB, CLAAI, Casartigiani and the Camera Italiana dell'Acconciatura.

⁽²³⁾ Missing data for two employer organisations: CB and the Camera Italiana dell'Acconciatura.

⁽²⁴⁾ Missing data for three employer organisations: CAN, CB and the Camera Italiana dell'Acconciatura.

⁽²⁵⁾ Missing data for five employer organisations: ACP, ACA, ACISTDS, AEDVC and Acecoa.

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

Member State	Number of Coiffure EU-affiliated employer organisations / total number of employer organisations	Including the largest	Including the second largest	Number of companies affiliated to all the sectoral employer organisations	Number of companies affiliated to Coiffure EU members	Number of employees in companies affiliated to employer organisations that are members of Coiffure EU	Total number of sectoral companies	National sectoral workforce	Employer organisation density in relation to national workforce (%)
SK	0/1	n/a	n/a	120	0	0	12 819	6 976	0
EU-27	16/62	10 Member States	1 Member State	> 171 032	> 55 458	> 90 143	1 063 320	1 746 849	> 5

Notes: n/a, not applicable; n.d., data not available (denoting where no data are available to make the assessment).

Sources: Eurostat (sbs_oww_act) and Network of Eurofound Correspondents, 2024.

4.1. Sector-relatedness of Coiffure EU member organisations in the personal services sector

Based on the current statistical classification (NACE Rev. 2 code 96.02 'Hairdressing and other beauty treatment'), Coiffure EU has affiliated employer organisations in 13 of the 25 Member States where such organisations are active in the sector. In total, 16 out of 62 sector-related employer organisations identified across the EU (around 26 %) are affiliated to Coiffure EU (Table 16).

Under NACE Rev. 2, hairdressing and beauty care activities are aggregated within a single category. However, from 2026 onwards, the updated NACE Rev. 2.1 classification will distinguish between four subcodes: 96.21 'Hairdressing and barber activities', 96.22 'Beauty care and other beauty treatment activities', 96.23 'Day spa, sauna and steam bath activities' and 96.4 'Intermediation service activities for personal services'. Preliminary mapping has enabled an early approximation of Coiffure EU's coverage across these future categories.

The broadest representational coverage lies in hairdressing and barber activities (96.21), where 15 of the 44 employer organisations identified (around 34 %) are affiliated to Coiffure EU. This corresponds to 12 of the 24 Member States with employer organisations in this activity, reflecting the traditional core of Coiffure EU's membership. Representation is somewhat lower in beauty care and other beauty treatment activities (96.22), where 11 of 42 employer organisations (26 %) from 8 of 21 Member States are affiliated.

Coverage decreases further in the smaller and more diversified segments. In day spa, sauna and steam bath activities (96.23), 4 of 18 organisations (22 %) from three Member States are affiliated to Coiffure EU, while, in intermediation service activities for personal services (96.4) – a newly emerging subsector – 3 of 12 organisations (25 %) from two Member States are represented.

Table 16: Sector-relatedness of Coiffure EU members in terms of sector activities, EU-27, 2024

NACE Rev. 2 code	Specific activities in the personal services sector	Sectoral workforce in these activities (%)	Total number of employer organisations in these activities	Number of Coiffure EU members	Number of Member States with affiliated employer organisations organising these activities out of all Member States with sectoral employer organisations
96.02	Hairdressing and other beauty treatment	100	62	16 (26 %)	13/25
Total		100	62	16 (26 %)	13/25
NACE Rev. 2.1 subcodes (*)					

96.21	Hairdressing and barber activities	n.d.	44	15 (34 %)	12/24
96.22	Beauty care and other beauty treatment activities	n.d.	42	11 (26 %)	8/21
96.23	Day spa, sauna and steam bath activities	n.d.	18	4 (22 %)	3/11
96.4	Intermediation service activities for personal services	n.d.	12	3 (25 %)	2/4
Total		100	62	16 (26 %)	13/25

(*) CHBTG in Luxembourg, HBF in Malta and ZRP in Poland (non-members of Coiffure EU) did not disclose data on specific activities under the NACE Rev. 2.1 codes; therefore, these employer organisations are not included in the data presented in this part of the table. Data on the total workforce engaged in relevant activities under the NACE Rev. 2.1 codes are not available.

Notes: 12 Member States (Bulgaria, Czechia, Greece, Hungary, Luxembourg, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and Sweden) do not have an affiliated employer organisation. Another two Member States (Estonia and Latvia) do not have a sectoral employer organisation.

Source: Network of Eurofound Correspondents, 2024.

The 62 employer organisations active in the personal services sector across the EU represent a diverse range of company sizes, from single-person salons to chains of establishments.

Representation is strongest among microenterprises, which dominate the sector's structure (Table 17). A total of 35 employer organisations across 19 Member States organise companies with 1–9 employees. Among these, 11 organisations (31 %) are affiliated to Coiffure EU, active in nine Member States. Among small companies (10–49 employees), 32 employer organisations are active in 17 Member States, of which 10 (31 %) are Coiffure EU affiliates, covering eight Member States.

Coverage among medium-sized companies (50–249 employees) remains more limited: 21 employer organisations represent companies of this size in 12 Member States, of which seven (33 %) are affiliated to Coiffure EU and active in six Member States. Only two organisations representing companies with 250 or more employees in two Member States are affiliated to Coiffure EU (2 out of 11 organisations, or 18 %), reflecting the generally low presence of large-scale or chain-based employers in the sector.

Across company-size categories, Coiffure EU affiliates account for around one quarter of all employer organisations that represent companies with employees, and their coverage extends to most Member States with formal employer representation structures in hairdressing and beauty services. This underlines Coiffure EU's continued role as the main European-level interlocutor for

small and medium-sized businesses in the sector, although its presence among large corporate employers remains marginal.

Representation of the self-employed, an essential component of the hairdressing and beauty sector, constitutes another dimension of employer organisation coverage. In total, 39 employer organisations across 21 Member States explicitly organise self-employed professionals (solo practitioners or microentrepreneurs operating without employees). Of these, 13 organisations (33 %) are affiliated to Coiffure EU, covering 11 Member States. This confirms Coiffure EU's distinctive dual representation profile, encompassing both traditional employer enterprises and self-employed salon operators. Affiliates such as FHA in Finland, DOFK in Denmark and ANKO in the Netherlands explicitly include self-employed members in their statutes, contributing to Coiffure EU's relevance in addressing labour market developments, such as chair renting and hybrid employment forms.

Table 17: Number of employer organisations by company size, with reference to Coiffure EU affiliation, EU-27, 2024

Company size (number of employees)	Total number of employer organisations organising companies in this size group	Number of Coiffure EU-affiliated employer organisations	Number of Member States with a Coiffure EU-affiliated employer organisation / number of Member States with a sectoral employer organisation
1–9	35	11 (31 %)	9/19
10–49	32	10 (31 %)	8/17
50–249	21	7 (33 %)	6/12
250+	11	2 (18 %)	2/6

Notes: This table takes into account Member States where companies of certain sizes do not exist. A total of 21 non-affiliated employer organisations did not provide data on membership domain by company size; five affiliated employer organisations did not provide data on membership domain by company size, namely Febelhair in Belgium, FHA in Finland, ZV in Germany, the Camera Italiana dell'Acconciatura in Italy and HBF in Malta.

Source: Network of Eurofound Correspondents, 2024.

4.2. Coiffure EU's role in sectoral industrial relations at the national level

This section analyses the role of Coiffure EU members in line with the relevant representativeness criteria outlined above.

4.2.1. Coiffure EU members' participation in Member States' social dialogue structures

Employer organisations in the sector are engaged in a variety of social dialogue and consultative structures across Europe. According to the data provided by the Network of Eurofound Correspondents, at least 25 employer organisations (40 %) participate in bipartite social dialogue bodies, 22 (35 %) in tripartite structures and 20 (32 %) in paritarian organisations; 32 (52 %) are

consulted by government on sector-related issues. These forms of participation are reported in 11, 9, 9 and 8 Member States, respectively (Table 18).

Among Coiffure EU's affiliates, participation is particularly high in formal collective and institutional dialogue: 10 affiliated organisations (63 %) are involved in bipartite bodies and eight (50 %) in tripartite forums – both above the overall average for employer organisations in the sector. By contrast, participation is lower in paritarian organisations (25 %) and in government consultations (50 %).

Bipartite social dialogue is the most common form of participation. In Belgium, Coiffure EU members Febelhair as well as the non-affiliated UNEB, Besko, BBF&W and BMF play a central role in Joint Committee 314, the national body responsible for collective bargaining in the hairdressing and beauty trades. Within this framework, employer and worker representatives negotiate pay scales, working time arrangements, and health and safety provisions, while also managing sectoral training and pension funds. In Austria, BIF participates informally in sectoral discussions under the Chamber of Commerce structure, focusing on apprenticeship training and professional certification. In Germany, ZV collaborates with ver.di through the Alliance against Undeclared Work in the Hairdressing Trade, established with the Federal Ministry of Finance in 2016. In France, the Union Nationale des Entreprises de Coiffure (UNEC) and UPB are active in several joint committees, including the Commission Paritaire Permanente de Négociation et d'Interprétation and the Commission Paritaire Nationale de l'Emploi et de la Formation Professionnelle, where they negotiate collective agreements, vocational training content and professional standards. In Italy, Coiffure EU affiliates such as the Camera Italiana dell'Acconciatura, CNA and CB participate in bipartite bargaining structures within the craft and SME sector, dealing with wage frameworks and workplace safety.

Tripartite dialogue is reported for Coiffure EU affiliates in eight Member States. These bodies address regulatory matters, vocational standards and efforts to formalise undeclared work. In Germany, ZV's Alliance against Undeclared Work functions both as a bipartite and tripartite mechanism, linking social partners with government enforcement agencies. In Denmark, DOFK cooperates with trade unions and the Ministry of Education in setting apprenticeship frameworks and training curricula. In Finland, FHA sits on national advisory councils for education and training together with the trade union PAM and public authorities. In Cyprus, ΠΟΚΚ participates in the Registration Council of Hairdressers, a formal tripartite body that oversees licensing and professional entry requirements, while, in France, UNEC and UPB engage with the Ministries of Labour and Economy through the same joint committees that also include public representatives. In Italy, Coiffure EU-affiliated organisations are members of national craft-sector councils consulted by ministries on employment and SME policy.

Participation in paritarian organisations is less widespread but institutionally significant. In Belgium, Coiffure EU affiliates within the Joint Committee 314 co-manage sectoral training and pension funds together with trade unions, helping to ensure the implementation of lifelong learning and retirement benefits schemes. In France, the UPB collaborates closely with Opco EP, the joint body administering training funds for personal service professions. In Italy, Coiffure EU members CNA and CB take part in national bilateral funds such as Ente Bilaterale Nazionale Artigianato and San.Arti, which finance training and welfare programmes for small businesses and their employees.

Finally, consultation by national authorities remains a central component of social dialogue for many Coiffure EU members. In France, UNEC provides expert input on labour law, vocational standards and hygiene regulation within consultative commissions. In Italy, Coiffure EU affiliates are routinely invited to advise ministries on apprenticeship reform, labour market policies and SME competitiveness. In smaller Member States such as Malta, HBF contributes ad hoc opinions during legislative consultations, while, in Cyprus, ΠΟΚΚ provides feedback to authorities on professional licensing and training standards.

Table 18: Employer organisations' involvement in social dialogue, with reference to Coiffure EU affiliation, EU-27, 2024

	Involved in a bipartite social dialogue body	Involved in a tripartite social dialogue body	Involved in a paritarian organisation	Consulted by government on sector-related matters
Total number of personal services employer organisations (share of the total number of 62 employer organisations identified)	25 (40 %)	22 (35 %)	20 (32 %)	32 (52 %)
Number of Member States	11	9	9	8
Number of employer organisations affiliated to Coiffure EU (share of the total number of affiliated employer organisations)	10 (63 %)	8 (50 %)	4 (25 %)	8 (50 %)
Number of Member States	8	6	3	8

Notes: Data (partially) missing for five affiliated employer organisations: DOFK in Denmark, FHA in Finland, ZV in Germany and CB and the Camera Italiana dell'Acconciatura in Italy. Data (partially) missing for 12 non-affiliated employer organisations: CNEC and CNAIB-SPA in France; CLAAI and Casartigiani in Italy; CHBTG in Luxembourg; ZRP in Poland; ACP, ACA, ACISTDS, AEDVC and Acecoa in Portugal; and Fepega in Spain.

Source: Network of Eurofound Correspondents, 2024.

4.2.2. Coiffure EU members' capacity to negotiate collective agreements

Of the 62 employer organisations identified in the sector, 37 (60 %) are involved in collective bargaining at either the sector or the company level (Table 19). Among these, 9 of the 16 Coiffure EU-affiliated employer organisations (56 %) participate in collective bargaining, an engagement rate closely matching the overall sector average. All nine are active at the sector level, demonstrating a strong orientation towards national or branch-wide bargaining frameworks rather than company-level agreements (Table 20).

Coiffure EU affiliates are involved in collective bargaining in seven Member States (Austria, Belgium, Denmark, France, Germany, Italy and the Netherlands), all of which have established traditions of institutionalised social dialogue. The majority of Coiffure EU affiliates conduct collective bargaining

at the sector level. In Austria, BIF negotiates the national collective agreement for the hairdressing sector within the Austrian Economic Chamber structure. The agreement covers virtually all sectoral companies (100 % coverage) and sets wage scales, training standards and leave provisions for salon employees.

In Belgium, Febelhair plays a central role in Joint Committee 314, the bipartite body for hairdressing and beauty services. Together with the representative trade unions, it negotiates agreements on wages, training rights and pension arrangements. Collective bargaining in Belgium covers almost all companies in the sector (96 % coverage) and extends to small and microenterprises, which dominate the market. In Germany, ZV concludes regional collective agreements with ver.di, defining wage levels, apprentice remuneration and employment conditions. While formal national coverage data are unavailable, these agreements apply across all federal regions where employer organisations and unions are represented.

In Denmark, DOFK negotiates at both the sector and the company levels with DKFK, establishing pay scales, working hours and vocational training rules. Collective bargaining is conducted under the general Danish model, allowing company-level adaptation of the sectoral framework. In France, UNEC is the primary employer signatory to the Convention Collective Nationale de la Coiffure et des Professions Connexes, covering pay, classification, training and social protection. Its counterpart unions include FGTA-FO, CGT Commerce et Services, UNSA Commerces et Services and CFTC-CSFV. The agreement covers roughly 64 % of companies in the sector, with extensions making it applicable to both hairdressing and beauty salons.

In Italy, several Coiffure EU affiliates (CNA, CB and the Camera Italiana dell'Acconciatura) are signatories to the Contratto Collettivo Nazionale di Lavoro for hairdressers and beauticians. The Contratto Collettivo Nazionale di Lavoro, negotiated with Filcams Cgil, Fisascat Cisl and Uiltucs, applies to the artisanal and SME subsector, covering about 49 % of workers in the personal services field. Agreements set pay scales, apprenticeship conditions and provisions on continuing training, health and safety, and welfare funds. In the Netherlands, Koninklijke Algemene Nederlandse Kappersorganisatie (ANKO) negotiates national agreements for the hairdressing industry with the trade union CNV Vakmensen. The collective agreement covers pay, working time, and occupational health and safety, reaching approximately 66 % of companies in the sector.

While sectoral bargaining is the dominant model, a smaller number of Coiffure EU affiliates, particularly in Belgium, Denmark, France and Italy, are also involved in company-level agreements. These agreements generally apply to larger or chain-based salons and complement sectoral frameworks by regulating bonuses, scheduling flexibility and working time arrangements. In Belgium, Febelhair supports its member companies in local negotiations within the Joint Committee 314 system. In Denmark, DOFK negotiates directly with salons employing multiple staff, while, in France and Italy, UNEC and CB occasionally assist larger enterprises in implementing national agreements at the company level.

Across these seven Member States, Coiffure EU-affiliated organisations predominantly represent microenterprises (salons employing fewer than 10 people) and small enterprises, which make up the vast majority of the workforce. Collective agreements thus primarily regulate employment conditions for salon employees, apprentices and part-time staff, while coverage of self-employed professionals remains indirect or limited. In Belgium, France and Italy, employer organisations

formally include self-employed salon owners among their members, but collective agreements apply only to their employees.

In terms of the NACE Rev. 2.1 sector breakdown, the parts of the sector covered by collective bargaining generally correspond to code 96.21 (hairdressing and barber activities) and, in France and Italy, also to code 96.22 (beauty care and other beauty treatment activities). No Coiffure EU affiliate currently reports collective bargaining coverage in newer or related activities, such as day spa activities or intermediation services (codes 96.23 and 96.4).

Table 19: Employer organisations' involvement in collective bargaining, with reference to Coiffure EU affiliation, EU-27, 2024

	All employer organisations	Affiliated to Coiffure EU	
	Total number of personal services employer organisations involved in any collective bargaining	Number of Coiffure EU member employer organisations involved in any collective bargaining (share of the total number of 16 affiliated employer organisations)	Number of Coiffure EU member employer organisations involved bargaining at the sector level
Number of employer organisations (share of the total number of 62 employer organisations identified)	37 (60 %)	9 (56 %)	9 (56 %)
Number of Member States	13 AT, BE, DE, DK, EL, ES, FI, FR, IT, NL, PT, SE, SI	7 AT, BE, DE, DK, FR, IT, NL	7 AT, BE, DE, DK, FR, IT, NL
Number of employer organisations with no data on any level of collective bargaining	1 PL	0	0
Member States in which none of the personal services sector employer organisations is involved in any collective bargaining	BG, CY, CZ, HR, HU, IE, LT, LU, MT, RO, SK	HR, IE, LT, MT	HR, IE, LT, MT

Note: No employer organisations are present in Estonia or Latvia, and employer organisations have no trade union counterparts in Bulgaria, Cyprus, Czechia, Hungary, Lithuania, Poland or Slovakia.

Source: Network of Eurofound Correspondents, 2024.

Table 20: List of Coiffure EU-affiliated employer organisations involved in collective bargaining, with coverage levels, 2024

Member State	Employer organisation	Involvement in collective bargaining for the personal services sector		Collective bargaining coverage of the personal services sector companies
		Sector level	Company level ⁽²⁶⁾	
AT	BIF	Yes	No	100 %
BE	Febelhair	Yes	Yes	96 %
CY	ΠΟΚΚ	No	No	n/a
DE	ZV	Yes	No	n.d.
DK	DOFK	Yes	Yes	n.d.
FI	FHA	No	No	n/a
FR	UNEC	Yes	Yes	64 %
HR	UPOZ	No	No	n/a
IE	IHF	No	No	n/a
IT	Camera Italiana dell'Acconciatura	Yes	No	n.d.
IT	CB	Yes	Yes	50 % ⁽²⁷⁾
IT	CNA	Yes	No	49 % ⁽²⁸⁾
IT	Cosmetica Italia	n.d.	No	n.d.
LT	KIGSA	No	No	n/a
MT	HBF	No	No	n/a
NL	ANKO	Yes	No	66 %

Notes: n/a, non-applicable; n.d., data not available.

Source: Network of Eurofound Correspondents, 2024.

4.2.3. Representative status at the national level of Coiffure EU members

The great majority of employer organisations active in the personal services sector are formally recognised as representative within their national industrial relations systems. According to data from the Network of Eurofound Correspondents, 53 of the 62 employer organisations identified (85 %) enjoy recognised representativeness status across 21 Member States. Thus, 16 of the 53 national representative employer organisations (30 %) are affiliated to Coiffure EU (Table 21).

All 16 employer organisations affiliated to Coiffure EU (100 %) hold such recognition in their respective Member States, confirming that the European federation's membership consists

⁽²⁶⁾ Employer organisations can play a role in company-level bargaining by providing legal assistance to their company members.

⁽²⁷⁾ Based on input from the Network of Eurofound Correspondents (140 000 workers covered) and Eurostat data on persons employed in NACE Rev. 2 code 96.02 in Italy (282 182).

⁽²⁸⁾ Based on input from the Network of Eurofound Correspondents (140 000 workers covered) and Eurostat data on persons employed in NACE Rev. 2 code 96.02 in Italy (282 182).

exclusively of the principal, nationally acknowledged organisations in the hairdressing and beauty field. Coiffure EU therefore draws its membership from those employer bodies that are legally or institutionally mandated to participate in social dialogue and collective bargaining.

In Belgium, Febelhair is recognised through its participation in Joint Committee 314, which defines sectoral agreements and manages joint training and welfare funds. In France, UNEC and the non-Coiffure-EU-affiliated UPB are signatory social partners in the Convention Collective Nationale de la Coiffure et des Professions Connexes and sit on national joint commissions, giving them formal recognition as the sector's employer representatives. In Germany, ZV holds statutory status as the national craft guild representing all hairdressing enterprises. In Italy, the Camera Italiana dell'Acconciatura, CNA and CB are among the confederations that sign the national collective agreement covering hairdressers and beauticians, and they are thus officially recognised as representative employer organisations. Similarly, in Austria, BIF operates within the Austrian Economic Chamber, which grants its sectoral trade guilds formal representational status in social dialogue and collective bargaining.

Other Coiffure EU affiliates also hold recognised roles within their respective institutional frameworks. DOFK is a registered social partner under the Danish collective bargaining model, while, in the Netherlands, ANKO is a nationally recognised employer organisation entitled to negotiate binding collective agreements for the industry.

Considering the overall landscape of employer representation in the sector, it can be seen that Coiffure EU affiliates constitute the most institutionally anchored organisations. While a small number of non-affiliated bodies, particularly regional, multisectoral or newly formed associations in southern and eastern Europe, lack formal recognition or bargaining rights, all Coiffure EU members meet their national legal criteria for representativeness. This distinguishes them from smaller or informal associations that act primarily as business networks or professional clubs, without having social partner status.

Table 21: Representative status of national-level employer organisations, with reference to Coiffure EU affiliation, EU-27, 2024

	Employer organisation recognised as representative based on national recognition
Total number of personal services sector employer organisations (share of the total number of 62 employer organisations identified)	53 (85 %)
Number of Member States	21
Number of employer organisations affiliated to Coiffure EU (share of the total number of 16 affiliated employer organisations)	16 (100 %)
Number of Member States	13

Source: Network of Eurofound Correspondents, 2024.

Of the 16 Coiffure EU member organisations, 13 consider themselves to be employer organisations (BIF, Febelhair, ΠΟΚΚ, ZV, DOFK, UNEC, UPOZ, IHF, CAN, CB, the Camera Italiana dell'Acconciatura, Cosmetica Italia and HBF) and three view themselves as business associations (FHA, KIGSA and ANKO).

4.3. Coiffure EU's structures to ensure its members' effective participation

Of the 16 sectoral employer organisations affiliated to Coiffure EU, at least 9 (56 %) are involved in Coiffure EU's decision-making structure (the executive committee). Data for five employer organisations were unavailable in this regard. A total of 12 (75 %) of the affiliated sectoral employer organisations indicated that they pay affiliation fees for their member companies in the personal services sector, while four employer organisations did not provide data in this regard.

There are at least 10 affiliated sectoral employer organisations (63 %) that are actively involved in Coiffure EU's working groups. The details for each of the 16 affiliated employer organisations are presented in Table 22.

Table 22: Involvement of sectoral employer organisations in Coiffure EU bodies, 2024

Member State	Employer organisation	Involved in Coiffure EU's executive committees	Paying affiliation fees to Coiffure EU for its member companies in the personal services sector	Involved in Coiffure EU's working groups
AT	BIF	n.d.	n.d.	n.d.
BE	Febelhair	n.d.	n.d.	n.d.
CY	ΠΟΚΚ	Yes	Yes	Yes
DE	ZV	n.d.	n.d.	n.d.

Member State	Employer organisation	Involved in Coiffure EU's executive committees	Paying affiliation fees to Coiffure EU for its member companies in the personal services sector	Involved in Coiffure EU's working groups
DK	DOFK	Yes	Yes	Yes
FI	FHA	n.d.	n.d.	n.d.
FR	UNEC	Yes	Yes	Yes
HR	UPOZ	Yes	Yes	Yes
IE	IHF	Yes	Yes	Yes
IT	Camera Italiana dell'Acconciatura	Yes	Yes	Yes
IT	CB	Yes	Yes	Yes
IT	CNA	Yes	Yes	Yes
IT	Cosmetica Italia	Yes	Yes	Yes
LT	KIGSA	No	Yes	No
MT	HBF	n.d.	Yes	n.d.
NL	ANKO	No	Yes	Yes

Notes: n.d., data not available. CNA, CB and Cosmetica Italia all participate in social dialogue for the hairdressing sector within Coiffure EU, as a member of the Camera Italiana dell'Acconciatura.

Source: Network of Eurofound Correspondents, 2024.

4.4. Coiffure EU's negotiation capacity

Coiffure EU's statutes provide the framework for its ability to negotiate European-level agreements on behalf of member organisations (Coiffure EU, 2016). Article 5 of the statutes ('Goal') mandates Coiffure EU to 'promote the interests of affiliated hairdressing organisations and employers' as an umbrella of national associations and 'represent the interests of the sector at EU level in general on behalf of the members'. In other words, Coiffure EU is explicitly established to act as the collective voice of hairdressing employers in Europe. This suggests an implicit negotiating mandate: the association is expected to engage in European social dialogue and any discussions or agreements at the EU level that advance its members' interests.

Notably, the same article of the statutes introduces an important condition – Coiffure EU must pursue any such sector-related economic or labour relations activities 'for the benefit of and with the approval of' its member organisations. This clause serves as a safeguard, ensuring that Coiffure EU cannot enter into European-level commitments without its national member associations' agreement. In practice, this means that Coiffure EU's capacity to negotiate is consensus based: the European body can lead negotiations with trade union counterparts, but its authority to conclude any European agreement is contingent on an internal mandate from the member organisations.

In terms of internal mandate and decision-making structures, the statutes entrust ultimate decision-making power to the General Members' Meeting – effectively Coiffure EU's General Assembly comprising all active national member associations. The General Members' Meeting holds 'full

powers' (Coiffure EU, 2016) over the association's affairs, except for those powers expressly delegated to the board by law or the statutes. Strategic decisions related to European negotiations (for example, whether to enter into a sector-wide agreement or to sign a joint text with labour representatives) would typically fall under the General Assembly's remit, unless explicitly delegated.

Coiffure EU's Board of Directors, composed of member representatives, is the executive body that manages day-to-day activities. According to Article 12 of the statutes, the board's authority is to 'manage the association and to represent it judicially and extra-judicially', but always in line with the mandate given by the members. The board's tasks include proposing policy directions to the General Assembly and implementing the policy decisions determined by the General Members' Meeting. This means that, while the board (or its smaller working groups) might handle the practical conduct of negotiations with European trade unions, it does so under the policy framework and instructions approved by the member organisations collectively. In concrete terms, before entering into negotiations or committing to any European-level accord, Coiffure EU's leadership seeks a mandate from its members – often via a General Assembly resolution or a formal decision by the members – that authorises them to negotiate on specific issues and sets the boundaries of what can be agreed. The requirement in the statutes that Coiffure EU act 'with the approval' of its affiliates effectively codifies this practice, ensuring that the negotiating mandate is internally conferred rather than assumed unilaterally by the leadership.

Regarding decision-making and the approval process for agreements, within Coiffure EU's structure, the General Assembly approves or ratifies EU-level agreements on behalf of all members. The statutes do not enumerate a special procedure exclusively for approving social dialogue agreements, but general rules of governance apply. Typically, any draft joint text or framework agreement resulting from European sectoral negotiations would be presented to the members (either in the General Members' Meeting or via an extraordinary meeting or written procedure) for discussion and approval. The General Assembly's majority vote (or consensus, if that is the internal norm) would confer the official mandate to sign. If the membership is divided, Coiffure EU would need to resolve those differences internally before proceeding, since acting without broad member support would violate the statutes' stipulation of acting with the members' agreement. In this way, the statutes impose an implicit coordination requirement: Coiffure EU must coordinate among national associations to forge a common position.

Indeed, the board may establish temporary committees on specific subjects – for instance, a social dialogue or collective bargaining committee – to advise and prepare common positions before and during negotiations. Such committees, composed of experts or representatives from member federations, help ensure that all member organisations are consulted and their interests reflected, thereby facilitating a unified negotiating stance. Nonetheless, any final decision to enter an agreement rests with the official organs (the board and ultimately the General Members' Meeting), rather than with a committee.

Once an internal mandate is secured, Coiffure EU's statutes empower its leaders to act as signatories in the European arena. Article 22 on representation specifies that 'in dealings with third parties and in legal proceedings, the Association will be represented by the Chairperson of the Board, acting individually, or by at least two Board members acting jointly'. In practice, this means that the President of Coiffure EU (the Chairperson of the Board) is authorised to sign European joint texts, agreements or other commitments on behalf of the entire membership. The president's signature, or that of two delegated board members, legally binds Coiffure EU to the terms of an agreement.

However, in line with the rule requiring an internal mandate mentioned above, the president can sign only after the member organisations have collectively agreed to the content. The combination of these provisions – broad external representational authority for the president and the prerequisite of member approval – ensures that Coiffure EU can effectively negotiate at the European level while remaining accountable to its base. In other words, Coiffure EU has the legal capacity to enter European agreements (through its president's signatory power) but exercises that capacity only when a sufficient internal consensus or formal decision supports the action.

In summary, Coiffure EU's statutes give it a clear role as the employers' negotiating agent in the European hairdressing sector, but the statutes also build in checks and balances. The association has an implicit negotiating mandate drawn from its objective to represent members' interests at the EU level. There is no explicit mention of collective agreements in the statutes, yet the authority to engage in European sectoral social dialogue is inherently part of Coiffure EU's purpose. This authority is, however, conditioned by internal governance requirements: Coiffure EU must act on behalf and with the agreement of its members. Practically, this translates into a negotiation capacity that is only as strong as the unity of its member federations. When members agree on a common position, the statutes enable Coiffure EU to negotiate forcefully and sign European agreements as the legitimate representative of the sector's employers. When members are divided or withholding approval, the statutes constrain Coiffure EU's leaders from moving forward, thereby preventing any European commitments that lack domestic backing. Additionally, the decision-making structure – with the General Assembly setting mandates and the board/president executing them – provides a safeguard that European-level engagement is always anchored in democratic decisions by the national associations.

4.5. Coiffure EU's members' effective participation in the ESSDC

Commission Decision 98/500/EC from 1998, on the establishment of ESSDCs, stipulates in its Article 1(c) that European social partner organisations 'shall have adequate structures to ensure their effective participation in the work of the Committees'. The adequacy of the structures to enable them to represent their members in the ESSDC, European Commission consultations and the negotiation of binding agreements has been analysed in the previous section. In this section, the effective participation of Coiffure EU's members in ESSDC meetings is outlined in Table 23.

Between 2022 and 2025, Coiffure EU members from 12 Member States participated in the ESSDC meetings, with only the member from Cyprus not participating.

Table 23: Overview of Coiffure EU members' participation in personal services ESSDC meetings between 2022 and 2025

Participation	Member States	Number of Member States
Member States with participating employer organisation delegates	AT, BE, DE, DK FI, FR, HR, IE, IT, LT, MT, NL	12
Member States in which Coiffure EU has members but no delegates participating between 2022 and 2025	CY	1

Source: Data provided by the Directorate-General for Employment, Social Affairs and Inclusion for this study.

5. Social partner organisations not represented on the personal services ESSDC

5.1. National sectoral trade unions not represented on the ESSDC

A total of 41 national trade unions across the EU are identified as representing workers in the personal services sector, of which 15 (37 %) are not affiliated to UNI Europa and are therefore not represented on the ESSDC for personal services (Table 24). These 15 unions not represented on the ESSDC operate in 12 Member States, mainly in those with fragmented trade union structures or where sectoral representation remains locally or occupationally organised rather than integrated into national or European federations.

Under the general NACE Rev. 2 classification (96.02 'Hairdressing and other beauty treatment'), non-affiliated trade unions represent a smaller segment of the sector's workforce. Non-affiliated trade unions are reported to have 11 236 sectoral employees, corresponding to 0.6 % of all 1 746 849 workers (27 % of all workers affiliated to a trade union). Across all subactivities, the data show that UNI Europa affiliates dominate representation, while non-represented unions tend to cluster in smaller subsectors or in Member States where industrial relations structures are less institutionalised.

The pattern of non-affiliated trade unions largely mirrors the distribution of all trade unions across the subcategories of the sector under NACE Rev. 2.1. In hairdressing and barber activities (96.21), 14 non-represented trade unions (37 %) are active across 10 of the 18 Member States with unions in this subsector. Despite their number, they account for a relatively modest share of organised workers, as the main representative unions in most Member States – such as Vida in Austria, PAM in Finland, ver.di in Germany and Filcams Cgil in Italy – are UNI Europa affiliates.

In beauty care and other beauty treatment activities (96.22), 14 unions (36 %) are also non-affiliated, operating in 10 of the 19 Member States where such unions exist. These unions are particularly common in southern and eastern Europe, where the organisational density of UNI Europa affiliates remains limited. In day spa, sauna and steam bath activities (96.23), there are fewer non-represented unions: only six organisations (29 %) across four of the eight Member States with unions in this subsector. This segment is smaller overall but tends to be covered by multisector or service unions already linked to UNI Europa in Member States like Finland, France and Germany, leaving few non-affiliated actors.

In intermediation service activities for personal services (96.4), five non-represented unions (31 %) are active across four of the seven Member States with representation in this category. These unions generally organise workers in intermediary agencies or franchised salon networks, where representation structures are still emerging. Overall, hairdressing (96.21) and beauty treatment (96.22) activities are the most represented parts of the sector among non-affiliated trade unions, whereas the day spa and intermediation segments (96.23 and 96.4) show considerably less non-affiliated representation.

Trade unions not represented on the ESSDC are concentrated in 12 Member States, while UNI Europa affiliates cover 16 of the 19 Member States where any trade unions are active in the sector. In other words, the ESSDC covers roughly 84 % of Member States with active sectoral trade unions,

whereas non-represented unions operate in about two thirds of these. In the remaining Member States (including Bulgaria, Cyprus, Czechia, Estonia, Hungary, Lithuania, Poland and Slovakia), there are no trade unions active in the sector at all, indicating broader gaps in sectoral representation.

Taken together, the data indicate that UNI Europa affiliates organise the majority of trade unions and workers across all major activities of the personal services sector. Non-represented trade unions account for a minority, largely confined to smaller or less formalised national contexts. Their presence nonetheless highlights ongoing fragmentation in parts of the sector.

While non-affiliated unions play an important role in providing occupational or local representation, their exclusion from the ESSDC means that roughly one third of all sectoral unions (and an estimated 20–25 % of organised workers) are not directly represented in European-level social dialogue.

Table 24: Sector-relatedness of national trade unions not represented on the personal services sector ESSDC in terms of sector activities, EU-27, 2024

NACE Rev. 2 code	Specific activities in the personal services sector	Sectoral workforce in these activities (%)	Total number of trade unions in these activities	Non-represented trade unions	Number of Member States with non-represented trade unions out of all Member States
96.02	Hairdressing and other beauty treatment	100	41	15 (37 %)	12/19
NACE Rev. 2.1 subcodes					
96.21	Hairdressing and barber activities	n.d.	38	14 (37 %)	10/18
96.22	Beauty care and other beauty treatment activities	n.d.	39	14 (36 %)	10/19
96.23	Day spa, sauna and steam bath activities	n.d.	21	6 (29 %)	4/8
96.4	Intermediation service activities for personal services	n.d.	16	5 (31 %)	4/7

Notes: n.d., data not available. Data for the total workforce engaging in activities under NACE Rev. 2.1 codes are not available.

Source: Network of Eurofound Correspondents, 2024.

These non-affiliated organisations vary widely in size, scope and institutional strength, ranging from small occupational associations to large general confederations that include hairdressing and beauty workers among many other categories.

Available data show that non-affiliated unions represent an estimated 13 000 workers in the sector across 13 Member States, equivalent to roughly 0.6 % of the EU personal services workforce.

Membership numbers are reported for a subset of Member States, with the largest national organisations found in the Netherlands (FNV MOOI, 8 000 members), Greece (Union of Employees in Cosmetics Companies, 1 600), Portugal (CESP, 900) and Slovenia (SOPS, ~ 700). Smaller memberships are reported in Romania (SCM Bucharest, 467) and Luxembourg (LCGB, 120), while some generalist unions (such as CFDT Services, CFE-CGC and Unionen) include significant numbers of workers in the sector, but without disaggregated data (Table 25).

In terms of ranking within the national sector, 9 of the 15 non-affiliated unions are identified as either the largest or second-largest in their Member States. These include FNV MOOI (Netherlands), CESP (Portugal), SOPS (Slovenia) and the Greek Union of Employees in Cosmetics Companies, all of which have a dominant position in at least one sub-branch of the sector. Others, such as GPA (Austria), CFDT Services (France) and Unionen (Sweden), are multisector unions ranking second or lower in hairdressing and beauty, where the main bargaining role is held by UNI Europa affiliates. The remaining organisations, such as CIG (Spain), ELA-STV (Spain) and Sindces (Portugal), have limited membership and operate primarily at the regional or the company level.

At the national level, 11 of the 15 non-affiliated unions (73 %) hold formal representativeness status in accordance with national law or practice, giving them the right to participate in social dialogue and collective bargaining. These include all major non-affiliated unions in western and southern Europe, including GPA (Austria) ⁽²⁹⁾, CFDT Services, CFE-CGC, FNV MOOI, CESP and SOPS, as well as several multisector or general unions such as Unionen (Sweden). In contrast, smaller or occupational unions in Greece, Latvia and Romania often lack official representativeness, limiting their ability to participate in formal negotiations despite their presence.

More than two thirds of the non-affiliated unions (11 out of 15, or 73 %) are involved in collective bargaining, primarily multi-employer bargaining. These include GPA in Austria, the main French and Portuguese unions (CFDT Services, CFE-CGC, CESP and Sindces), FNV MOOI in the Netherlands and SOPS in Slovenia. CFDT Services and CFE-CGC also engage in single-employer bargaining in France, typically within large beauty companies or retail chains, while CIG and ELA-STV in Spain take part in regional- or company-level bargaining under autonomous Basque or Galician frameworks. LCGB is involved in one company-level agreement in Luxembourg. Conversely, several unions, including Unionen (Sweden) and SCM Bucharest (Romania), report no current collective bargaining involvement, either because there is no collective bargaining or because negotiations are conducted exclusively by employer organisations and UNI Europa affiliates.

Where they are active, non-affiliated unions often achieve moderate to high coverage rates. FNV MOOI reports coverage of approximately 75 % of Dutch salons, as its agreements are generally extended to all establishments in the sector. CESP in Portugal reaches an estimated 98 % coverage, as the agreements negotiated jointly with other unions are nationally extended. In contrast, GPA in Austria covers roughly 20 % of the sector, SOPS in Slovenia covers roughly 15 % and CFE-CGC in France covers around 36 % of French beauty-sector employees. For smaller or less institutionalised unions, such as CIG, ELA-STV and Sindces, coverage remains limited (around 2–3 %) and largely confined to specific companies or regional agreements.

⁽²⁹⁾ GPA is affiliated to UNI Europa but belongs to the commerce sector.

Overall, non-affiliated trade unions collectively represent a minority of the sector's organised workforce but retain a visible presence in several Member States, particularly where national union systems are plural or decentralised. Many of these organisations are legally recognised and active in bargaining, but their influence tends to be either regional or confined to subsectors such as beauty care, cosmetics retail or wellness services. By contrast, UNI Europa affiliates dominate the main collective bargaining frameworks in Member States with strong sectoral systems, such as Belgium, France, Germany, Italy and the Nordic states, where non-affiliated unions have only marginal roles.

Table 25: Membership strength of national trade unions not represented on the personal services sector ESSDC, by Member State, 2024

Member State	Trade union	Number of members in personal services sector	Share of the personal services sector national workforce (%)	Size ranking in sector	Representative status (national level)	Involvement in collective bargaining	Collective bargaining coverage	European affiliation
AT	GPA	n.d.	n.d.	Second largest	Yes	MEB	20 %	None
EL	Union of Employees in Cosmetics Companies	1 600	3 %	Largest	Yes	MEB	n.d.	None
ES	CIG	n.d.	n.d.	Neither largest nor second largest	Yes	MEB and SEB	2 %	None
ES	ELA-STV	n.d.	n.d.	n.d.	No	MEB	2 %	None
FR	CFDT Services	n.d.	n.d.	Second largest in beauty, fourth largest in hair	Yes	MEB and SEB	100 %	EFFAT, industriAll, ETUC
	CFE-CGC	n.d.	n.d.	Sixth largest	Yes	MEB and SEB	36 %	n.d.
IE	Unite	n.d.	n.d.	Second largest	n.d.	n.d.	n.d.	n.d.
LU	LCGB	120	3 %	Second largest	Yes	SEB	n.d.	None
LV	LAFA	50	1 %	Largest	No	None	n.d.	None
NL	FNV MOOI	8 000	9 %	Largest	Yes	MEB	75 %	None
PT	CESP	900	2 %	Largest	Yes	MEB	98 %	None

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

Member State	Trade union	Number of members in personal services sector	Share of the personal services sector national workforce (%)	Size ranking in sector	Representative status (national level)	Involvement in collective bargaining	Collective bargaining coverage	European affiliation
	Sindces	n.d.	n.d.	Neither largest nor second largest	Yes	MEB	2 %	None
RO	SCM Bucharest	467	1 %	n.d.	No	None	n.d.	None
SE	Unionen	327	1 %	Second largest	Yes	None	n.d.	None
SI	SOPS	~ 700	10 %	Largest	Yes	MEB	15 %	None

Notes: MEB, multi-employer bargaining; n.d., data not available; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2024.

5.2. National sectoral employer organisations and business associations not represented on the ESSDC

Of the 62 employer organisations identified as representing companies in the personal services sector across the EU, 46 organisations (74 %) are not affiliated to Coiffure EU and therefore are not represented on the ESSDC for personal services. These non-represented organisations are active in 19 of the 25 Member States where employer organisations exist in the sector, illustrating that national employer representation in hairdressing and beauty remains highly fragmented and decentralised.

However, many of these non-affiliated organisations are professional, beauty, wellness or regional business associations that focus primarily on professional promotion, training, certification or local networking rather than industrial relations or collective bargaining. In several Member States where Coiffure EU affiliates exist (such as Austria, France, Germany and the Netherlands), the affiliated organisations are the main national employer bodies involved in sectoral social dialogue, while many of the additional organisations operate in specific subsectors or at the regional level.

Under the general NACE Rev. 2 classification (96.02 'Hairdressing and other beauty treatment'), non-represented employer organisations account for nearly three quarters of all sectoral organisations. The distribution of non-represented employer organisations broadly mirrors the overall structure of the sector under NACE Rev. 2.1 but reveals important differences in coverage and institutional capacity across subsectors (Table 26).

For hairdressing and barber activities (96.21), 29 non-represented organisations (66 %) operate across 14 of the 24 Member States with employer representation in this field. While Coiffure EU affiliates typically cover the main national organisations (in Austria, France, Germany and the Netherlands, for example), numerous smaller associations remain unaffiliated.

For beauty care and other beauty treatment activities (96.22), 31 non-represented organisations (74 %) are active in 16 of the 21 Member States with employer bodies in this area. This subsector shows the greatest fragmentation, as representation often overlaps between hairdressing, aesthetics and spa activities. Non-affiliated organisations here frequently combine business association roles (training, certification, lobbying) with limited or no involvement in industrial relations.

For day spa, sauna and steam bath activities (96.23), 14 employer organisations (78 %) are non-affiliated, present in 9 of 11 Member States. In intermediation service activities for personal services (96.4), which covers franchising and agency-based operations, 9 of the 12 identified organisations (75 %) are non-represented, active in all four Member States where this activity is recorded. These organisations mainly represent intermediaries or franchisors in fast-growing beauty and salon chains, where social dialogue frameworks are still emerging.

Coiffure EU affiliates are active in 16 Member States, whereas non-represented employer organisations operate in 19 Member States. This means that in most Member States with employer structures, there are both represented and non-represented actors, but the balance varies. In Member States such as Bulgaria, Greece, Poland, Portugal, Romania and Spain, employer representation in the sector is composed entirely of non-affiliated bodies, while, in Austria,

Denmark, France, Germany and the Netherlands, Coiffure EU members are the primary recognised social partners, coexisting with a smaller number of local associations.

In practical terms, this distribution implies that the ESSDC currently represents employer organisations covering the larger and more institutionally established part of the sector (roughly 25% of all national bodies identified, but concentrated in Member States with strong social dialogue systems). The non-represented employer organisations, although more numerous, are dispersed across many smaller markets and often have narrower scopes or informal structures.

Table 26: Sector-relatedness of national employer organisations not represented on the personal services ESSDC in terms of sector activities, EU-27, 2024

NACE Rev. 2 code	Specific activities in the personal services sector	Sectoral workforce in these activities (%)	Total number of employer organisations in these activities	Non-represented employer organisations	Number of Member States with non-represented employer organisations out of all Member States
96.02	Hairdressing and other beauty treatment	100	62	46 (74 %)	19/25
Total		100	62	46 (74 %)	19/25
NACE Rev. 2.1 subcodes					
96.21	Hairdressing and barber activities	n.d.	44	29 (66 %)	14/24
96.22	Beauty care and other beauty treatment activities	n.d.	42	31 (74 %)	16/21
96.23	Day spa, sauna and steam bath activities	n.d.	18	14 (78 %)	9/11
96.4	Intermediation service activities for personal services	n.d.	12	9 (75 %)	4/4

Notes: n.d., data not available. Data on the total workforce engaged in activities under the NACE Rev. 2.1 codes are not available.

Source: Network of Eurofound Correspondents, 2024.

The 46 employer organisations who are not affiliated to Coiffure EU vary widely in size, scope and institutional influence, ranging from small craft associations and local chambers to large

multisectoral confederations that include hairdressing and beauty businesses among a broader membership base (Table 27). Of these organisations, 11 are affiliated, directly or indirectly, to European cross-sectoral employer organisations, such as SMEUnited or EuroCommerce, while five others participate in sectoral European industry or professional bodies, such as EuropeActive, Cosmetics Europe or European Estheticians United. However, these latter affiliations generally relate to broader business representation or professional interests rather than participation in the European sectoral social dialogue for personal services.

Membership data are available for a subset of these organisations and show large disparities across Member States. Reported membership figures range from tens of firms in smaller associations to tens of thousands in major national federations. The largest non-affiliated organisations include CNAIB-SPA (France), with around 56 000 member companies; UPB (France), with over 15 000; and ANEPE-IMPE (Spain), with about 12 700. In Sweden, Frisörföretagarna covers nearly 4 700 hairdressing establishments.

At the national level, around 60 % of non-affiliated employer organisations are either the largest or second largest in their sector, while the rest are small, regional or single-activity associations. In Member States such as France, Portugal and Spain, multiple employer bodies coexist within the same subsector or even region, often with overlapping membership. For instance, Spain hosts at least six separate associations covering different territories or segments of the hairdressing and beauty market. By contrast, in smaller Member States, like Luxembourg and Slovenia, a single non-affiliated organisation (CHBTG and SF OZS, respectively) represents the sector.

A large majority of non-affiliated employer organisations (around 80 %) are recognised as representative under national law or established practice. This is the case for BIFKM (Austria), the main French organisations (CNAIB-SPA, UPB, CNEC) and ANEIP and FANAE in Spain, all of which participate in official social dialogue or consultation structures. Similarly, in Portugal, the regional commerce associations (such as Acilis, ACIFF, Acecoa, AEDVC) are formally recognised within the Portuguese Confederation of Commerce and Services (CCP), which is itself a national social partner. In contrast, some organisations in Czechia, Hungary and Malta report no formal representativeness status, functioning primarily as professional or business associations rather than social partners.

Roughly half of the non-affiliated employer organisations (around 22) are involved in collective bargaining, and most of them in multi-employer bargaining. Active participants include BIFKM (Austria), the Belgian federations (UNEB, Besko, BBF&W and BMF), the French organisations (CNAIB-SPA, UPB and CNEC) and the Italian associations CLAAI and Casartigiani. Their bargaining activity typically covers employment conditions, wage levels and vocational training frameworks.

In Belgium, four non-affiliated federations take part in the Joint Committee 314, the national bipartite body that negotiates collective agreements for hairdressers and beauticians. In France, the three main non-affiliated employer organisations – CNAIB-SPA, UPB and CNEC – negotiate in parallel with Coiffure EU's affiliate UNEC within the Convention Collective Nationale de la Coiffure et des Professions Connexes, achieving coverage rates between 36 % and 64 % of sectoral companies. In Austria, BIFKM participates in multi-employer bargaining within the Austrian Economic Chamber structure, covering approximately 30 % of the national workforce.

Multi-employer bargaining also operates in Spain, where organisations such as FANAE and ANEPE-IMPE are party to regional or national agreements, although coverage remains low, generally below 30 % of the sector's workforce. For ANEIP, the coverage stands at 60%. In Italy, CLAAI and

Casartigiani are signatories to national craft-sector collective agreements (CCNL Artigianato), covering up to 140 000 workers in small personal-services firms. Elsewhere, however, most non-affiliated employer organisations, particularly in eastern and smaller southern Member States, are not engaged in collective bargaining at all, due either to the absence of institutional frameworks or to limited organisational resources.

Where collective bargaining occurs, coverage levels vary widely. The highest coverage rates among non-affiliated organisations are observed in Belgium (96 %) and in France (36–64 %) and Portugal (2–22 %), with the figure depending on region and association. Moderate coverage is reported in Austria (30 %) and Sweden (50 %) while in most other Member States coverage remains limited or non-existent. In several cases, such as Cyprus (ΣAK), Hungary (MFKKE) and Romania (PADIR), organisations represent significant portions of small business owners but are not party to any collective agreements.

Overall, non-affiliated employer organisations constitute the majority of sectoral associations across the EU, but they play a more heterogeneous role than Coiffure EU's members. Many are formally recognised at the national level and active in consultation, yet only 59 % participate in collective bargaining. Their representational strength tends to be strongest in western Europe (Austria, Belgium, France and Italy) and weakest in central, eastern and smaller southern Member States, where representation remains fragmented among numerous local associations.

While some non-affiliated bodies, such as CNAIB-SPA, BMF or ANEIP, hold considerable membership and bargaining influence nationally, most operate as professional or business associations with limited industrial relations functions. Consequently, their absence from the ESSDC means that a significant share of national employer representation, especially among smaller and regionally based associations, remains outside the formal framework of European-level social dialogue.

Table 27: Membership strength of national employer organisations not represented on the personal services sector ESSDC, by Member State, 2024

MS	Employer organisation	Number of member companies in personal services	Share of sectoral workforce of member companies	Share of the personal services national workforce	Size ranking in sector	Representative at the national level	Involvement in collective bargaining	Collective bargaining coverage	European affiliation
AT	BIFKM	n.d.	100 %	17 %	Second largest	Yes	MEB	30 %	None
BE	BBF&W	n.d.	n.d.	n.d.	n.d.	Yes	MEB	96 %	EuropeActive
	Besko	n.d.	n.d.	n.d.	n.d.	Yes	MEB	96 %	None
	BMF	n.d.	n.d.	n.d.	n.d.	Yes	MEB and SEB	96 %	None
	UNEB	n.d.	n.d.	n.d.	n.d.	Yes	MEB	96 %	None
BG	AKB	122	1 %	1 %	Second largest	Yes	None	n.d.	None
	H3K	491	3 %	2 %	Largest	Yes	None	n.d.	None
CY	ΣAK	1 700	34 %	23 %	Second largest	Yes	None	n.d.	European Estheticians United
CZ	AKO ČR	n.d.	n.d.	n.d.	Largest (only)	No	None	n.d.	None
EL	PSVAK	57	0.3 %	n.d.	Largest business association	Yes	MEB	n.d.	Cosmetics Europe
	Osedae	7	0.04 %	3 %	Largest employer organisation in the beauty sector	No	None	n.d.	European Estheticians United

MS	Employer organisation	Number of member companies in personal services	Share of sectoral workforce of member companies	Share of the personal services national workforce	Size ranking in sector	Representative at the national level	Involvement in collective bargaining	Collective bargaining coverage	European affiliation
	Kokkke	n.d.	n.d.	n.d.	Largest employer organisation in the hairdressing sector	No	None	n.d.	None
ES	ANEPE-IMPE	12 779	9 %	45 000	Third largest	Yes	MEB	10 %	None
	FANAE	n.d.	n.d.	n.d.	Second largest	Yes	MEB	30 %	None
	ANEIP	n.d.	n.d.	n.d.	Largest	Yes	MEB	60 %	None
	Fedcat	n.d.	n.d.	n.d.	Not among the largest	Yes, only for a single region (Catalonia)	MEB	30 %	None
	Asociación Navarra de Peluquerías	230	0.2 %	21 %	Not among the largest	Yes, only for a single region (Navarra)	None	n.d.	None
	Fepega	n.d.	n.d.	n.d.	Not among the largest	Yes, only for a single region (Galicia)	MEB	2 %	None
	Asociación Provincial de Peluquerías de Burgos	n.d.	n.d.	n.d.	Not among the largest	Yes, only for a single region (Burgos)	None	0.2 %	None
	EGIE	n.d.	n.d.	n.d.	Not among the largest	Yes, only for a single region (Gipuzkoa)	MEB	1 %	None

MS	Employer organisation	Number of member companies in personal services	Share of sectoral workforce of member companies	Share of the personal services national workforce	Size ranking in sector	Representative at the national level	Involvement in collective bargaining	Collective bargaining coverage	European affiliation
	Asociación profesional de peluquerías de Gipuzkoa	n.d.	n.d.	n.d.	Not among the largest	Yes, only for a single region (Gipuzkoa)	MEB	1 %	None
FI	SY	1 581	8 %	n.d.	Largest	No	None	n.d.	SMEunited
	Kaupani liitto	~ 1	0 %	3 %	Not among the largest	No	None	25 %	EuroCommerce
	Palta	~ 10	0.05 %	n.d.	Not among the largest	Yes	None	n.d.	None
FR	CNEC	1 000	0.7 %	0.4 %	Not among the largest	Yes	MEB	64 %	n.d.
	CNAIB-SPA	56 021	37 %	n.d.	Largest	Yes	MEB	36 %	European Estheticians United
	UPB	15 300	10 %	26 %	Second largest	Yes	MEB	36 %	None
HU	MFKKE	116	0.3 %	n.d.	Largest	No	None	n.d.	None
IT	CLAAI	n.d.	n.d.	n.d.	Not among the largest	Yes	MEB	140 000	n.d.
	Casartigiani	n.d.	n.d.	n.d.	Not among the largest	Yes	MEB	140 000	n.d.
LU	CHBTG	260	23 %	n.d.	Largest (only)	Yes	None	n.d.	None
MT	Malta Chamber of SMEs	~ 120	5 %	3 %	Second largest	No	None	n.d.	SMEunited

MS	Employer organisation	Number of member companies in personal services	Share of sectoral workforce of member companies	Share of the personal services national workforce	Size ranking in sector	Representative at the national level	Involvement in collective bargaining	Collective bargaining coverage	European affiliation
PL	ZRP	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
PT	ACP	n.d.	n.d.	n.d.	n.d.	Yes	MEB	22 %	None
	ACA	n.d.	n.d.	n.d.	n.d.	Yes	MEB	2 %	Indirectly to SMEunited and EuroCommerce via the Portuguese confederation CCP ACA
	Acilis	63	0.1 %	0.9 %	n.d.	Yes	MEB	4 %	Indirectly to SMEunited and EuroCommerce via the Portuguese confederation CCP ACA
	ACIFF	43	0.1 %	0.1 %	n.d.	Yes	MEB	3 %	Indirectly to SMEunited and EuroCommerce via the Portuguese confederation CCP ACA
	ACISTDS	n.d.	n.d.	n.d.	n.d.	Yes	MEB	4 %	Indirectly to SMEunited and EuroCommerce via the Portuguese confederation CCP ACA
	AEDVC	n.d.	n.d.	n.d.	n.d.	Yes	MEB	2 %	Indirectly to SMEunited and EuroCommerce via the Portuguese confederation CCP ACA
	Acecoa	n.d.	n.d.	n.d.	n.d.	Yes	MEB	2 %	None
RO	PADIR	n.d.	n.d.	18 %	Largest (only)	n.d.	None	n.d.	None

MS	Employer organisation	Number of member companies in personal services	Share of sectoral workforce of member companies	Share of the personal services national workforce	Size ranking in sector	Representative at the national level	Involvement in collective bargaining	Collective bargaining coverage	European affiliation
SE	Frisörföretagarna	4 668	18 %	9 %	Largest	Yes	MEB	50 % of hairdressing sector	None
SI	SF OZS	1 500	29 %	n.d.	Largest	Yes	None	n.d.	SMEunited
	SK OZS	900	18 %	n.d.	Second largest	Yes	None	n.d.	SMEunited
	ZDOPS	900	18 %	n.d.	Third largest	Yes	MEB	15 %	SMEunited
SK	SŽK	n.d.	n.d.	n.d.	Largest (only)	Yes	None	n.d.	None

Notes: MEB, multi-employer bargaining; MS, Member State; n.d., data not available; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2024.

6. Other European organisations

6.1. Other European trade union organisations

A small number of national-level trade unions representing workers in the personal services sector maintain dual or alternative affiliations with European trade union organisations beyond UNI Europa. These cases are concentrated in France, where sectoral and cross-sectoral union structures overlap significantly across the services domain. In these cases of other affiliations, it is not always certain whether these relate to workers in the hairdressing and beauty sector specifically (although this information is sought in the national data collection).

In total, four French trade unions active under NACE Rev. 2 code 96.02 ‘Hairdressing and other beauty treatment’ hold membership with other European or international trade union federations in addition to, or instead of, UNI Europa (Table 28). CGT Commerce et Services, UNSA Commerces et Services and CFTC-CSFV are all affiliated to the European Trade Union Confederation (ETUC) through their respective national confederations and simultaneously belong to UNI Europa, ensuring their representation both through sectoral and cross-sectoral European channels. Their dual affiliation reflects the integrated nature of France’s union system, where large confederations maintain multiple European-level connections corresponding to different branches of activity.

By contrast, CFDT Services, which also represents some employees in the hairdressing, beauty and spa segments, is affiliated to UNI Europa, but not for the hairdressing sector. Other affiliations are to the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT), industriAll Europe and the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers’ Associations (UITA), alongside its confederal affiliation to ETUC, but these affiliations are not for the hairdressing sector.

Table 28: Other European trade unions with affiliated national sectoral trade unions, EU-27, 2024

Member State	Trade union	NACE Rev. 2 code 96.02 ‘Hairdressing and other beauty treatment’	European affiliation
FR	CFDT Services	Yes	UNI Europa ⁽³⁰⁾ , EFFAT, industriAll Europe, UITA, ETUC
FR	CFTC-CSFV	Yes	ETUC, UNI Europa
FR	CGT Commerce et Services	Yes	ETUC, UNI Europa
FR	UNSA Commerces et Services	Yes	ETUC, UNI Europa

Source: Network of Eurofound Correspondents, 2024.

⁽³⁰⁾ Not for the hairdressing sector.

6.2. Other European employer organisations and business associations

Several national employer organisations representing companies in the personal services sector hold dual or alternative affiliations with other European business and employer federations in addition to, or instead of, membership of Coiffure EU. These multiple affiliations reflect the multisectoral nature of many national associations, which often represent not only hairdressing and beauty services but also broader craft, retail or SME constituencies.

According to information from the Network of Eurofound Correspondents, at least 18 national employer organisations in nine Member States are affiliated to other European-level federations outside the Coiffure EU structure (Table 29). These include bodies linked to SMEUnited, EuroCommerce, EuropeActive and Cosmetics Europe, as well as a number of organisations with indirect affiliations through national confederations. Reference is also made to European Estheticians United; however, no evidence could be found of any activity on the part of this organisation.

In Belgium, BBF&W is affiliated to EuropeActive, reflecting its focus on spa and wellness services rather than traditional hairdressing. In Cyprus and France, the beauty-sector federations ΣAK and CNAIB-SPA are members of European Estheticians United, a specialised European association for beauticians and cosmeticians. Similar dual affiliation exists in Italy, where CNA and Cosmetica Italia are both members of Coiffure EU and other European organisations: CNA also belongs to SMEUnited and European Estheticians United, while Cosmetica Italia is part of Cosmetics Europe, the European cosmetics and personal care industry federation.

In the Nordic and central European Member States, affiliations mainly reflect cross-sectoral representation of SMEs and in commerce. In Finland, SY (Suomen Yrittäjät) is affiliated to SMEUnited, while Kaupan liitto belongs to EuroCommerce. SY is classified as a business association rather than an employer organisation. In Slovenia, all three relevant organisations (SF OZS, SK OZS and ZDOP) are affiliated to SMEUnited, mirroring their national roles as craft and SME employer organisations. Similarly, in Malta, the Malta Chamber of SMEs is also a member of SMEUnited.

In Portugal, a group of regional commerce and service associations (ACA, Acilis, ACIFF, ACISTDS and AEDVC) are indirectly affiliated to both SMEUnited and EuroCommerce through their national confederation, the Confederação do Comércio e Serviços de Portugal (CCP). These links provide a European-level channel for small business representation in the personal services sector, even though the organisations themselves are not members of Coiffure EU.

Table 29: Other European employer organisations with affiliated personal services sector national employer organisations, by Member State, 2024

Member State	Employer organisation	NACE Rev. 2 code 96.02 'Hairdressing and other beauty treatment'	European affiliation
BE	BBF&W	Yes	EuropeActive
CY	ΣAK	Yes	European Estheticians United ⁽³¹⁾

⁽³¹⁾ No evidence could be found of any activity on the part of this organisation.

Member State	Employer organisation	NACE Rev. 2 code 96.02 'Hairdressing and other beauty treatment'	European affiliation
EL	Osedae	Yes	European Estheticians United
EL	PSVAK	Yes	Cosmetics Europe
FI	Kaupani liitto	Yes	EuroCommerce
FI	SY	Yes	SMEUnited
FR	CNAIB-SPA	Yes	European Estheticians United
IT	CNA	Yes	European Estheticians United, SMEUnited, Coiffure EU
IT	Cosmetica Italia	Yes	CosmeticsEurope, Coiffure EU
MT	Malta Chamber of SMEs	Yes	SMEUnited
PT	ACA	Yes	Indirectly to SMEUnited and EuroCommerce through membership of CCP ACA
PT	ACIFF	Yes	Indirectly to SMEUnited and EuroCommerce through membership of CCP ACA
PT	Acilis	Yes	Indirectly to SMEUnited and EuroCommerce through membership of CCP ACA
PT	ACISTDS	Yes	Indirectly to SMEUnited and EuroCommerce through membership of CCP ACA
PT	AEDVC	Yes	Indirectly to SMEUnited and EuroCommerce through membership of CCP ACA
SI	SF OZS	Yes	SMEUnited
SI	SK OZS	Yes	SMEUnited
SI	ZDOPS	Yes	SMEUnited

Source: Network of Eurofound Correspondents, 2024.

7. Conclusion

There are 1 746 849 workers in the personal services (hair and beauty) sector in the EU and 1 063 320 companies. The workers are organised by 41 trade unions in 19 Member States and the employers by 62 employer organisations in 25 Member States. The eight Member States where there are no trade unions are Bulgaria, Cyprus, Czechia, Estonia, Hungary, Lithuania, Poland and Slovakia. The two Member States where there are no employer organisations are Estonia and Latvia.

UNI Europa has 26 affiliated national sectoral trade unions in 16 Member States. The 11 Member States where it has no affiliated trade union are Bulgaria, Cyprus, Czechia, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia. In all but Latvia, Romania and Slovenia, there are no unions representing workers in the sector. In terms of sector-relatedness, UNI Europa organises all types of workers in the sector, in all economic activities and all categories of company size. In terms of membership strength, UNI Europa organises 63 % of all national sectoral trade unions and 74 % of all individual trade union members, which corresponds to 1.8 % of the entire sectoral workforce. This rises to 3.4 % when taking into account only Member States in which UNI Europa has members.

Among the Member States with trade unions involved in collective bargaining in the sector, only Greece and Slovenia have no UNI Europa-affiliated union involved in collective bargaining. UNI Europa has a fully formalised mandating procedure and statute-based negotiation capacity.

In terms of future capacity building, there are 15 national sectoral trade unions that are not members of UNI Europa and are therefore not represented on the ESSDC. Additionally, the non-participation of UNI Europa member organisations from four Member States in ESSDC meetings (as indicated in Table 14) suggests further potential for developing participation in the sectoral social dialogue framework. Chapter 6 indicates that some trade unions are affiliated to other European-level organisations, but it is not always clear whether these affiliations relate specifically to their members in the hairdressing and beauty sector. A few unions declared membership of EFFAT, industriAll or ETUC at the cross-sectoral level.

Based on the findings documented in this study, it can be concluded that **UNI Europa is the most representative European trade union organisation** in the personal services sector.

Coiffure EU has 16 affiliated employer organisations in 13 Member States. In Estonia and Latvia, there are no national sectoral employer organisations. The 12 Member States where there are national sectoral employer organisations but none affiliated to Coiffure EU are (in descending order by the size of the national sectoral workforce) Spain, Poland, Portugal, Romania, Hungary, Greece, Sweden, Czechia, Bulgaria, Slovakia, Slovenia and Luxembourg. Spain's workforce is over 210 000 and Poland's is about 146 000.

Overall, 16 of the 62 national sectoral employer organisations identified (around 26 %) are affiliated to Coiffure EU, meaning that more than 70 % of sectoral employer organisations operate outside the organisation's membership. In terms of sector-relatedness, Coiffure EU covers all types of companies in all economic activities in the sector and in all company size groups, but it has a stronger focus on the hairdressing sector. In terms of membership strength, the affiliated organisations together represent at least 55 458 companies employing an estimated 90 000 workers. This corresponds to roughly 5 % of all sectoral companies and around 5 % of the sectoral workforce in the EU. However,

when considering only the Member States where Coiffure EU has affiliated members and for which membership data are available (with a combined sectoral workforce of 754 141 workers), the share of the workforce in companies represented by Coiffure EU affiliates is considerably higher: 13 %. While Coiffure EU affiliates are the main employer organisations involved in social dialogue in several Member States, the overall structure of employer representation in the sector remains fragmented, with numerous additional organisations operating at the national, regional and subsector levels.

Coiffure EU has affiliated organisations involved in sectoral collective bargaining in seven Member States: Austria, Belgium, Denmark, France, Germany, Italy and the Netherlands.

In Belgium, Denmark, France and Italy, Coiffure EU has a member organisation that assists in company-level collective bargaining. Coiffure EU has a statutory negotiation capacity. All national members of Coiffure EU except the member from Cyprus participated in ESSDC meetings between 2022 and 2025 (see Table 23)

The following other European organisations have some representativeness in the sector: EuropeActive, SMEunited, EuroCommerce and Cosmetics Europe. Some of these organisations mainly represent broader business, SME or industry interests rather than acting as sector-specific employer organisations for hairdressing and beauty services. Although European Estheticians United is mentioned, there is no evidence of any activity on the part of this organisation. A complete list is provided in Chapter 6.

Based on the findings documented in this study, it can be concluded that **Coiffure EU is the most representative European employer organisation** for the personal services sector.

Table 30: Comparative overview of the social partners in the personal services sector based on Commission Decision 98/500/EC criteria, 2024

Criteria	UNI Europa	Coiffure EU	Trade unions not represented on the personal services sector ESSDC	Employer organisations not represented on the personal services sector ESSDC
Sector-relatedness	26/41 trade unions	16/62 employer organisations	15/41 trade unions	46/62 employer organisations
Coverage of the sectoral workforce in the Member States	~ 3 % of the total EU workforce in 16/27 Member States	~ 5 % of the total EU workforce in 13/27 Member States	~ 1 % of the total EU workforce in 19/27 Member States	No data
Capacity to negotiate	Statutory mandate	Statutory mandate	n/a	n/a
Adequate structures	12 Member States represented in ESSDC meetings during 2022–2025, out of 16 Member States where UNI Europa has affiliates.	12 Member States out of 13 represented in ESSDC meetings during 2022–2025	n/a	n/a

Notes: n/a, not applicable. Percentages calculated based on the available membership data. Given the high share of national-level trade unions and employer organisations that did not provide data, these calculations should be treated with caution.

Source: Authors, based on Coiffure EU (2016) and UNI Europa (2021), for capacity to negotiate, and Network of Eurofound Correspondents, 2024.

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Annex

Table 31: Number of companies in the personal services sector, by Member State, 2023

Member State	Number of companies under NACE Rev. 2 code 96.02	Number of persons employed in the sector	Share of total national employment (%)	Relative change in number of companies compared with the latest year covered in the previous representativeness study on the sector (%)
EU-27	1 063 320	1 746 849	100	72.8
AT	17 525	39 081	1.03	119.2
BE	21 883	32 085	0.81	261.8
BG	14 650	23 433	1.07	71.5
CY	4 974	7 444	1.86	52.4
CZ	41 082	33 639	0.79	n.d.
DE	81 520	264 363	0.69	2.3
DK	8 723	15 191	0.68	23
EE	4 543	5 734	1.04	n.d.
EL	19 264	46 426	1.33	– 13.1
ES	136 210	210 384	1.33	n.d.
FI	19 236	15 917	0.9	44.8
FR	151 272	239 396	1.15	23.2
HR	9 187	15 655	1.2	177.8
HU	45 799	48 394	1.45	80.4
IE	11 966	30 357	1.29	n.d.

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

Member State	Number of companies under NACE Rev. 2 code 96.02	Number of persons employed in the sector	Share of total national employment (%)	Relative change in number of companies compared with the latest year covered in the previous representativeness study on the sector (%)
IT	137 466	282 182	1.51	10.9
LT	20 268	18 887	1.47	n.d.
LU	1 107	3 459	0.87	35.7
LV	8 566	9 503	1.41	83.5
MT	2 334	3 579	1.38	89.4
NL	78 818	86 452	1	54.5
PL	95 688	146 102	1.27	49.2
PT	49 780	59 292	1.28	69.2
RO	38 283	54 194	1.12	756
SE	25 271	33 925	0.83	7.8
SI	5 086	6 976	0.88	37.9
SK	12 819	14 799	0.8	43.5

Note: n.d., data not available.

Sources: Eurofound (2016) and Eurostat (sbs_oww_act).

Table 32: Categories of personal services workers covered by each sectoral trade union identified, 2024

Member State	Trade union	Self-employed	Self-employed (without employees)	Self-employed with employees	Other staff	Number of staff members				European affiliation
						1–9	10–49	50–249	250+	
AT	GPA	Yes	No	No	Yes	Yes	Yes	Yes	Yes	None
AT	Vida	Yes	Yes	No	No	Yes	Yes	Yes	Yes	UNI Europa
BE	ABVV-FGTB AC	Yes	No	No	Yes	Yes	Yes	Yes	Yes	UNI Europa
BE	ACV-CSC BIE	Yes	No	No	Yes	Yes	Yes	Yes	Yes	UNI Europa
BE	Synova	Yes	No	No	Yes	Yes	Yes	Yes	No	UNI Europa
DE	Ver.di	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	UNI Europa
DK	DFKF	Yes	No	No	No	Yes	Yes	Yes	No	UNI Europa
DK	Serviceforbundet	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	UNI Europa
EL	OIYE	Yes	No	No	No	No	Yes	Yes	Yes	UNI Europa
EL	Union of Employees in Cosmetics Companies	Yes	No	No	No	Yes	Yes	Yes	Yes	None
ES	CCOO del Hábitat	Yes	No	No	No	Yes	Yes	Yes	Yes	UNI Europa
ES	CIG	Yes	No	No	No	Yes	Yes	Yes	Yes	None
ES	ELA-STV	Yes	No	No	No	Yes	Yes	Yes	Yes	None
ES	FeSMC-UGT	Yes	No	No	No	Yes	Yes	Yes	Yes	UNI Europa
FI	PAM	Yes	No	No	No	Yes	Yes	Yes	Yes	UNI Europa

Member State	Trade union	Self-employed	Self-employed (without employees)	Self-employed with employees	Other staff	Number of staff members				European affiliation
						1–9	10–49	50–249	250+	
FR	CFDT Services	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	EFFAT, industriAll, UITA, ETUC
FR	CFE-CGC	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	n.d.
FR	CFTC-CSFV	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	UNI Europa, ETUC
FR	CGT Commerce et Services	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	UNI Europa, ETUC
FR	FGTA-FO	Yes	No	No	Yes	Yes	Yes	Yes		UNI Europa
FR	UNSA Commerces et Services	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	UNI Europa, ETUC
HR	HSMP	Yes	Yes	No		Yes	Yes	No	No	UNI Europa
HR	Novi Sindikat	Yes	Yes	No	No	Yes		No	No	UNI Europa
IE	SIPTU	Yes	No	No	Yes	Yes	Yes	No	No	UNI Europa
IE	Unite	Yes	No	No	No	n.d.	n.d.	n.d.	n.d.	None
IT	Filcams Cgil	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	UNI Europa
IT	Fisascat Cisl	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	UNI Europa
IT	Uiltucs	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	UNI Europa
LU	LCGB	Yes	Yes	Yes	Yes	n.d.	n.d.	n.d.	n.d.	None
LU	OGB-L	Yes	No	No	Yes	n.d.	n.d.	n.d.	n.d.	UNI Europa
LV	LAFA	Yes	Yes	Yes	No	Yes	No	No	No	None

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

Member State	Trade union	Self-employed	Self-employed (without employees)	Self-employed with employees	Other staff	Number of staff members				European affiliation
						1–9	10–49	50–249	250+	
MT	GWU	Yes	Yes	Yes	Yes	Yes	No	No	No	UNI Europa
NL	CNV Vakmensen	Yes	No	No	Yes	Yes	Yes	Yes	Yes	UNI Europa
NL	FNV MOOI	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	None
PT	CESP	Yes	No	No	Yes	Yes	Yes	Yes	No	None
PT	Sindces	Yes	No	No	Yes	Yes	Yes	Yes	No	None
PT	Sitese	Yes	No	No	Yes	Yes	Yes	Yes	No	UNI Europa
RO	SCM Bucharest	Yes	No	Yes	No	Yes	No	No	No	None
SE	Handels	Yes	No	No	Yes	Yes	Yes	Yes	Yes	UNI Europa
SE	Unionen	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	None
SI	SOPS	Yes	No	No	No	Yes	Yes	Yes	No	None

Note: n.d., data not available.

Source: Network of Eurofound Correspondents, 2024.

Table 33: Categories of personal services sector companies covered by each sectoral employer organisation identified, 2024

Member State	Employer organisation	Self-employed	Microcompanies (1–9 employees)	Small companies (10–49 employees)	Medium companies (50–249 employees)	Large companies (250+ employees)	European affiliation
AT	BIF	Yes	Yes	Yes	Yes	Yes	Coiffure EU
AT	BIFKM	Yes	Yes	Yes	Yes	Yes	None
BE	BBF&W	No	n.d.	n.d.	n.d.	n.d.	EuropeActive
BE	Besko	Yes	n.d.	n.d.	n.d.	n.d.	None
BE	BMF	Yes	n.d.	n.d.	n.d.	n.d.	None
BE	Febelhair	Yes	n.d.	n.d.	n.d.	n.d.	Coiffure EU
BE	UNEB	Yes	n.d.	n.d.	n.d.	n.d.	None
BG	AKB	Yes	No	Yes	No	No	None
BG	H3K	Yes	n.d.	n.d.	n.d.	n/a	None
CY	ΠΟΚΚ	Yes	Yes	Yes	No	No	Coiffure EU
CY	ΣΑΚ	Yes	Yes	Yes	No	No	European Estheticians United ⁽³²⁾
CZ	AKO ČR	n.d.	n.d.	n.d.	n.d.	n.d.	None
DE	ZV	n.d.	n.d.	n.d.	n.d.	n.d.	Coiffure EU
DK	DOFK	Yes	Yes	Yes	Yes	No	Coiffure EU
EL	Kokkke	Yes	Yes	Yes	No	No	None
EL	Osedae	Yes	Yes	No	No	No	None

⁽³²⁾ It is unclear whether this organisation still exists, as no evidence could be found of any activity on its part.

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

Member State	Employer organisation	Self-employed	Microcompanies (1–9 employees)	Small companies (10–49 employees)	Medium companies (50–249 employees)	Large companies (250+ employees)	European affiliation
EL	PSVAK	No	Yes	Yes	Yes	Yes	None
ES	ANEIP	n.d.	n.d.	n.d.	n.d.	n.d.	None
ES	ANEPE-IMPE	Yes	Yes	Yes	No	No	None
ES	Asociación Navarra de Peluquerías	Yes	Yes	No	No	No	None
ES	Asociación profesional de peluquerías de Gipuzkoa	n.d.	n.d.	n.d.	n.d.	n.d.	None
ES	Asociación Provincial de Peluquerías de Burgos	n.d.	n.d.	n.d.	n.d.	n.d.	None
ES	EGIE	n.d.	n.d.	n.d.	n.d.	n.d.	None
ES	FANAE	n.d.	n.d.	n.d.	n.d.	n.d.	None
ES	Fedcat		Yes	Yes	No	No	None
ES	Fepega	n.d.	n.d.	n.d.	n.d.	n.d.	None
FI	FHA	Yes	n.d.	n.d.	n.d.	n.d.	Coiffure EU, Nordic Hair & Beauty Association
FI	Kaupari liitto	No	Can be affiliated	Can be affiliated	Can be affiliated	Yes	EuroCommerce

Member State	Employer organisation	Self-employed	Microcompanies (1–9 employees)	Small companies (10–49 employees)	Medium companies (50–249 employees)	Large companies (250+ employees)	European affiliation
FI	Palta	No	Can be affiliated	Can be affiliated	Can be affiliated	Can be affiliated	None
FI	SY	Yes	Yes	Yes	Yes	No	SMEUnited
FR	CNAIB-SPA	Yes	Yes	Yes	Yes	Yes	European Estheticians United
FR	CNEC	Yes	Yes	Yes	Yes	Yes	None
FR	UNEC	Yes	Yes	Yes	Yes	Yes	Coiffure EU
FR	UPB	Yes	Yes	Yes	Yes	Yes	None
HR	UPOZ	Yes	Yes	Yes	No	No	Coiffure EU
HU	MFKKE	Yes	Yes	Yes	Yes	No	None
IE	IHF	Yes	Yes	Yes	Yes	No	Coiffure EU
IT	Camera Italiana dell'Acconciatura	n/a	n/a	n/a	n/a	No	Coiffure EU
IT	Casartigiani	Yes	Yes	Yes	No	No	n.d.
IT	CB	Yes	Yes	Yes	Yes	No	Coiffure EU
IT	CLAAI	Yes	Yes	Yes	No	No	n.d.
IT	CNA	Yes	Yes	Yes	Yes	No	Coiffure EU, European Estheticians United, SMEUnited

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

Member State	Employer organisation	Self-employed	Microcompanies (1–9 employees)	Small companies (10–49 employees)	Medium companies (50–249 employees)	Large companies (250+ employees)	European affiliation
IT	Cosmetica Italia	Yes	Yes	Yes	No	No	Coiffure EU, Cosmetics Europe
LT	KIGSA	Yes	Yes	No	No	No	Coiffure EU
LU	CHBTG	n.d.	n.d.	n.d.	n.d.	n.d.	None
MT	HBF	n.d.	n.d.	n.d.	n.d.	n.d.	Coiffure EU
MT	Malta Chamber of SMEs	Yes	Yes	Yes	No	No	SMEunited
NL	ANKO	Yes	Yes	Yes	Yes	No	Coiffure EU
PL	ZRP	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
PT	ACA	n.d.	n.d.	n.d.	n.d.	No	Indirectly to SMEunited and EuroCommerce through membership of CCP ACA
PT	Acecoa	n.d.	n.d.	n.d.	n.d.	No	None
PT	ACIFF	No	Yes	No	No	No	Indirectly to SMEunited and EuroCommerce through membership of CCP ACA

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

Member State	Employer organisation	Self-employed	Microcompanies (1–9 employees)	Small companies (10–49 employees)	Medium companies (50–249 employees)	Large companies (250+ employees)	European affiliation
PT	Acilis	Yes	n.d.	n.d.	n.d.	No	Indirectly to SMEunited and EuroCommerce through membership of CCP ACA
PT	ACISTDS	n.d.	n.d.	n.d.	n.d.	No	Indirectly to SMEunited and EuroCommerce through membership of CCP ACA
PT	ACP	n.d.	n.d.	n.d.	n.d.	No	None
PT	AEDVC	n.d.	n.d.	n.d.	n.d.	No	Indirectly to SMEunited and EuroCommerce through membership of CCP ACA
RO	PADIR	Yes	Yes	Yes	Yes	Yes	None
SE	Frisörföretagarna	Yes	Yes	Yes	Yes	Yes	None
SI	SF OZS	Yes	Yes	Yes	Yes	No	SMEunited
SI	SK OZS	Yes	Yes	Yes	Yes	No	SMEunited
SI	ZDOPS	Yes	Yes	Yes	Yes	No	SMEunited

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

Member State	Employer organisation	Self-employed	Microcompanies (1–9 employees)	Small companies (10–49 employees)	Medium companies (50–249 employees)	Large companies (250+ employees)	European affiliation
SK	SŽK	Yes	n.d.	n.d.	n.d.	n.d.	None

Notes: n/a, not applicable; n.d., data not available.

Source: Network of Eurofound Correspondents, 2024.

Table 34: Classification of change factors for the number of national-level social partner organisations

Factor	Explanation
Organisational change	Refers to mergers, dissolutions, rebranding or internal restructuring of existing trade unions or employer organisations. This includes cases where organisations have merged into larger federations, become inactive or have been replaced by new entities within the same representative framework. Such changes usually reflect administrative consolidation or shifts in affiliation rather than new patterns of sectoral organisation.
Structural change	Refers to the creation, activation or recognition of new organisations in response to evolving sectoral realities, such as the growth of self-employment, new business models or the inclusion of related subsectors (such as wellness, spas, cosmetics). It also covers cases where representation has expanded to new occupational groups or geographical levels, signalling broader changes in the composition and boundaries of the sector itself.

Table 35: Largest employers in the personal services sector, by Member State, 2024

Member State	Subsector (NACE Rev. 2 code)	Largest employer in subsector	Estimated number of sector-related employees	Trade union(s) organising employees in the company	Employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable to employer
AT	96.02	Klipp	1 300	Vida, GPA	BIF	MEB
BE	96.02	Kreatos	600	n.d.	n.d.	MEB and SEB
BG	96.02	DIMA STIL	< 43	n.d.	n.d.	n.d.
CY	96.02	Dionysiou Medi Spa	25	None	ΣAK	None
CZ	96.02	Frisör Klier	227	None	None	None
DE	96.02	Klier Holding GmbH (Klier Hair Group)	5 200	Ver.di	ZV	MEB
DK	96.02	Rodeo ApS	85	n.d.	n.d.	n.d.
EE	96.02	TLG Hotell	316	None	None	None
ES	96.02	Peluquerías Dania	300	None	None	MEB
FI	96.02	S-ryhmä	500	PAM	Kaupan liitto	MEB
FR	96.02	VOG	> 2 000	n.d.	UNEC	MEB
HR	96.02	Studio Marcela	25	None	UPOZ	None
HU	96.02	HAJAS Fodrász és Kozmetikai Kereskedelmi Kft.	50	n.d.	n.d.	n.d.
IE	96.02	Peter Mark	1 000	n.d.	n.d.	n.d.
IT	96.02	n.d.	n.d.	n.d.	n.d.	n.d.
LT	96.02	UAB Sudaira	136	n.d.	n.d.	None

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

Member State	Subsector (NACE Rev. 2 code)	Largest employer in subsector	Estimated number of sector-related employees	Trade union(s) organising employees in the company	Employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable to employer
LU	96.02	n.d.	n.d.	n.d.	n.d.	n.d.
LV	96.02	Maija Valdemara	31	None	None	None
MT	96.02	n.d.	n.d.	n.d.	n.d.	n.d.
NL	96.02	Provalliance (Cosmo/Team/Brainwash)	> 1 000	CNV Vakmensen, FNV MOOI	ANKO	MEB
PL	96.02	Yasumi	n.d.	None	n.d.	None
PT	96.02	Grupoconcept	500	n.d.	n.d.	n.d.
RO	96.02	Societate Cooperativa Mestesugareasca Igiena	480	SCM Bucharest	n.d.	n.d.
SE	96.02	Raise Sweden AB	186	Handels, Unionen	Frisörföretagarna	MEB
SI	96.02	Lassana, d.o.o.	103	n.d.	n.d.	n.d.
SK	96.02	Frisör Klier, s.r.o.	170	None	None	None

Notes: MEB, multi-employer bargaining; n.d., data not available; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2024.

Table 36: Sector-relatedness of trade unions in the personal services sector, 2024

MS	Trade union	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
AT	GPA	n.d.	Yes	Yes	No	Yes	Yes	Almost all private sectors	No
AT	Vida	n.d.	Yes	Yes	No	Yes	Yes	Social services, health care, transport and logistics, railways, facility management, tourism, hospitality and catering	UNI Europa
BE	ABVV-FGTB AC	4 989	Yes	Yes	Yes	Yes	Yes	Chemicals, construction, cleaning and security services	UNI Europa
BE	ACV-CSC BIE	4 200	Yes	Yes	Yes	Yes	Yes	Construction, industry and energy	UNI Europa
BE	Synova	n.d.	Yes	Yes	Yes	Yes	Yes	Almost all	UNI Europa
DE	Ver.di	10 000	Yes	Yes	No	No	Yes	Financial services, communication and technology, culture, supply and disposal, public and private services, social security and transport, health, social services,	UNI Europa

MS	Trade union	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
								education and science, trade, postal services, freight forwarding and logistics	
DK	DFKF	< 3 100	No	No	No	No	Yes	No	UNI Europa
DK	Service-forbundet	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	UNI Europa
EL	OIYE	150	No	Yes	No	No	No	Commerce, cleaning, security, other private services, as well as the white-collar employees in all sectors	UNI Europa
EL	Union of Employees in Cosmetics Companies	1 600	No	Yes	No	No	Yes	No	No
ES	CCOO del Hábitat	n.d.	Yes	Yes	Yes	Yes	Yes	Construction, wood, furniture, cleaning, private security, home care,	UNI Europa

MS	Trade union	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
								domestic workers, urban sanitation	
ES	CIG	n.d.	Yes	Yes	Yes	Yes	Yes	Public administration, banking, insurance, office work, construction, woodworking and industry	No
ES	ELA-STV	n.d.	Yes	Yes	Yes	Yes	Yes	Public services, industry, logistics, hospitality, transports, etc.	No
ES	FeSMC-UGT	n.d.	Yes	Yes	Yes	Yes	Yes	Retail and department stores, practical information, communications and culture, financial sector, offices and insurance, hospitality, social catering, tourism, cleaning services, security, air transport, road transport, urban services, logistics, rail	UNI Europa

MS	Trade union	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
								transport, maritime port sector	
FI	PAM	~ 900	Yes	Yes	No	No	Yes	Commerce	UNI Europa
FR	CFDT Services	n.d.	Yes	Yes	Yes	No	Yes	CFDT as a whole covers all professional sectors. CFDT Services, however, only covers food retail, personal and household goods, accommodation, catering, tourism, seasonal workers, personal services and business services.	UNI Europa ⁽³³⁾ EFFAT, ETUC, industriAll, UITA
FR	CFE-CGC	n.d.	Yes	Yes	Yes	No	Yes	Agriculture, insurance, chemicals, communication, construction, energy, accounting, health, transportation, public service, metallurgy, media,	n.d.

⁽³³⁾ Not for the hairdressing sector.

MS	Trade union	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
								hotels / cafes / sports / casinos, commercial, executives/technicians. The federation FNECS CFE-CGC only covers commerce and services.	
FR	CFTC-CSFV	n.d.	Yes	Yes	No	No	Yes	Commerce (food and non-food), services, food industry, hotels/cafes/restaurants	ETUC, UNI Europa
FR	CGT Commerce et Services	n.d.	Yes	Yes	Yes	No	Yes	Trade, services and distribution sectors	ETUC, UNI Europa
FR	FGTA-FO	~ 400	No	Yes	No	No	Yes	Agriculture and food processing, craft and food processing, childcare, supermarkets and hypermarkets, hotels and restaurants, hairdressing and beauty salons	ETUC, UNI Europa

MS	Trade union	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
FR	UNSA Commerces et Services	n.d.	Yes	Yes	Yes	No	Yes	Trade (car and computer repairs), distribution of food and large goods, fast-food, railway and hotel catering, tourism and leisure, intermediary services	ETUC, UNI Europa
HR	HSMP	50	Yes	Yes	No	No	No	Handicrafts, services (like cleaning and body protection) and some graphical services	UNI Europa
HR	Novi Sindikat	10	No	No	No	No	No	Woodwork, passenger transport	UNI Europa
IE	SIPTU	29	Yes	Yes	No	Yes	No	Multiple (SIPTU has representation in almost every sector)	UNI Europa
IE	Unite	n.d.	Yes	No	No	No	n.d.	Multiple, particularly construction and engineering – Unite is a craft union	No

MS	Trade union	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
IT	Filcams Cgil	~ 1 600	Yes	Yes	Yes	Yes	Yes	Services, tertiary and tourism	UNI Europa
IT	Fisascat Cisl	~ 700	Yes	Yes	Yes	Yes	Yes	Services, tertiary and tourism	UNI Europa
IT	Uiltucs	n.d.	Yes	Yes	Yes	Yes	Yes	Services, tertiary and tourism	UNI Europa
LU	LCGB	120	Yes	Yes	Yes	Yes	No collective bargaining in sector	Services and commerce	No
LU	OGB-L	300	Yes	Yes	Yes	Yes	No collective bargaining in sector	Commerce, garages, hotels, restaurants, cafes	UNI Europa
LV	LAFA	50	Yes	Yes	No	No	No collective bargaining in sector	No	No
MT	GWU	< 50	Yes	Yes	No	No	No collective bargaining in sector	All sectors	UNI Europa
NL	CNV Vakmensen	~ 1 200	Yes	Yes	No	No	Yes	Sport	UNI Europa

MS	Trade union	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
NL	FNV MOOI	< 8 000	Yes	Yes	Yes	No	Yes	None	No
PT	CESP	~ 900	Yes	Yes	No	No	Yes	Commerce, services and administrative professionals from all sectors	No
PT	Sindces	n.d.	Yes	Yes	No	No	Yes	Service areas of companies in the primary, secondary and tertiary sectors, namely in commerce, offices, social security and public administration	No
PT	Sitese	~ 20	Yes	Yes	No	No	Yes	Services in all sectors, public, private or co-operative, namely commerce, catering and tourism	UNI Europa
RO	SCM Bucharest	467	Yes	Yes	No	Yes	n.d.	None	No
SE	Handels	3 007	Yes	Yes	No	No	Yes	Commerce/e-commerce, retail, grocery	UNI Europa

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

MS	Trade union	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
SE	Unionen	70	Yes	Yes	No	No	No	All sectors, primarily white-collar workers	No
SI	SOPS	n.d.	Yes	Yes	No	No	Yes	Crafts and entrepreneurship	No

Notes: MS, Member State; n.d., data not available.

Source: Network of Eurofound Correspondents, 2024.

Table 37: Sector-relatedness of employer organisations in the personal services sector, 2024

MS	Employer organisation	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the sector beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
AT	BIF	91 699 211	Yes	No	No	No	Yes	No	Coiffure EU
AT	BIFKM	17 923	No	Yes	No	Yes	Yes	No	No
BE	BBF&W	n.d.	No	No	No	Yes	Yes	No	EuropeActive
BE	Besko	n.d.	No	Yes	No	Yes	Yes	No	No
BE	BMF	n.d.	No	Yes	No	Yes	Yes	No	No
BE	Febelhair	n.d.	Yes	No	No	Yes	Yes	No	Coiffure EU
BE	UNEB	n.d.	No	Yes	No	Yes	Yes	No	No
BG	AKB	122	No	Yes	No	No	No	No	No
BG	H3K	491	Yes	No	No	No	No	Yes, every sector accepted as a craft by law	No
CY	ΠΟΚΚ	2 500	Yes	No	No	No	No	No	Coiffure EU
CY	ΣΑΚ	1 700	No	Yes	No	No	No	No	European Estheticians United

MS	Employer organisation	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the sector beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
CZ	AKO ČR	n.d.	Yes	Yes	No	No	No	No	No
DE	ZV	n.d.	Yes	Yes	No	No	Yes	No	Coiffure EU
DK	DOFK	~ 2 100	Yes	Yes	No	No	Yes	No	Coiffure EU
EL	Kokkke	n.d.	Yes	No	No	No	No	No	No
EL	Osedae	7	No	Yes	No	No	No	No	No
EL	PSVAK	57	No	Yes	No	No	Yes	Companies that produce cosmetics, as well as import and export businesses	No
ES	ANEIP	n.d.	No	Yes	No	No	Yes	No	No
ES	ANEPE-IMPE	12 779	Yes	Yes	No	Yes	Yes	No	No
ES	Asociación Navarra de Peluquerías	230	Yes	Yes	No	No	No	No	No

MS	Employer organisation	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the sector beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
ES	Asociación profesional de peluquerías de Gipuzkoa	n.d.	Yes	No	No	No	Yes	No	No
ES	Asociación Provincial de Peluquerías de Burgos	n.d.	Yes	No	No	No	No	No	No
ES	EGIE	n.d.	No	Yes	No	No	Yes	No	No
ES	FANAE	n.d.	No	Yes	No	No	Yes	No	No
ES	Fedcat	n.d.	Yes	Yes	No	Yes	Yes	No	No
ES	Fepega	n.d.	Yes	Yes	No	No	Yes	No	No
FI	FHA	~ 500	Yes	Yes	No	No	No	No	Coiffure EU, Nordic Hair &

MS	Employer organisation	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the sector beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
									Beauty Association
FI	Kaupan liitto	~ 1	Yes	No	No	No	No	Commerce	EuroCommerce
FI	Palta	~ 10	Yes	Yes	No	No	No	All services sectors, such as logistics, expert services, entertainment, pharmacies, information and communication, administration, technical services and other	No
FI	SY	1 581	Yes	Yes	No	No	No	No	SMEunited

MS	Employer organisation	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the sector beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
FR	CNAIB-SPA	56 021	No	Yes	No	No	Yes	No	European Estheticians United
FR	CNEC	1 000	Yes	No	No	No	Yes	No	No
FR	UNEC	5 677	Yes	Yes	No	No	Yes	No	Coiffure EU
FR	UPB	15 300	No	Yes	No	No	Yes	No	No
HR	UPOZ	70	Yes	Yes	No	No	No	No	Coiffure EU
HU	MFKKE	116	Yes	Yes	No	No	No	No	No
IE	IHF	> 450	Yes	No	No	No	No	No	Coiffure EU
IT	Camera Italiana dell'Acconciatura	n.d.	Yes	Yes	No	No	Yes	No	Coiffure EU

MS	Employer organisation	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the sector beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
IT	Casartigiani	n.d.	Yes	Yes	Yes	Yes	Yes	Handicraft enterprises	n.d.
IT	CB	n.d.	Yes	Yes	Yes	Yes	Yes	No	Coiffure EU
IT	CLAAI	n.d.	Yes	Yes	Yes	Yes	Yes	Handicraft enterprises	n.d.
IT	CNA	29 760	Yes	Yes	Yes	Yes	Yes	Handicraft enterprises	Coiffure EU, European Estheticians United, SMEunited
IT	Cosmetica Italia	630	Yes	Yes	Yes	No	n.d.	No	Coiffure EU, Cosmetics Europe
LT	KIGSA	1	Yes	Yes	No	No	No	No	Coiffure EU
LU	CHBTG	260	n.d.	n.d.	n.d.	n.d.	No	n.d.	No

MS	Employer organisation	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the sector beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
MT	HBF	~ 200	n.d.	n.d.	n.d.	n.d.	No	No	Coiffure EU
MT	Malta Chamber of SMEs	~ 120	Yes	Yes	Yes	No	No	Almost all other sectors	SMEunited
NL	ANKO	4 180	Yes	Yes	No	No	Yes	No	Coiffure EU
PL	ZRP	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
PT	ACA	n.d.	Yes	Yes	No	No	Yes	Commerce and services	Indirectly with SMEunited and EuroCommerce through membership of CCP ACA
PT	Acocoa	n.d.	Yes	No	No	No	Yes	Any sector of economic activity	No

MS	Employer organisation	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the sector beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
PT	ACIFF	43	Yes	Yes	No	No	Yes	Commerce, manufacturing, services and tourism	Indirectly to SMEunited and EuroCommerce through membership of CCP ACA
PT	Acilis	63	Yes	Yes	No	No	Yes	Commerce, industry, services, tourism	Indirectly to SMEunited and EuroCommerce through membership of CCP ACA
PT	ACISTDS	n.d.	Yes	No	No	No	Yes	Commerce, manufacturing, services, catering and tourism	Indirectly to SMEunited and EuroCommerce through membership of CCP ACA
PT	ACP	n.d.	Yes	No	No	No	Yes	No	No

MS	Employer organisation	Number of members in the sector	Part of the hairdressing and barber activities sector (NACE Rev. 2.1 code 96.21)	Part of the sector beauty care and other beauty treatment activities sector (NACE Rev. 2.1 code 96.22)	Part of the day spa, sauna and steam bath activities sector (NACE Rev. 2.1 code 96.23)	Part of the intermediation service activities for personal services sector (NACE Rev. 2.1 code 96.4)	Involved in any collective bargaining for the personal services sector	Other sectors covered	European affiliation
PT	AEDVC	n.d.	Yes	No	No	No	Yes	Any sector of economic activity	Indirectly to SMEunited and EuroCommerce through membership of CCP ACA
RO	PADIR	n.d.	Yes	Yes	Yes	No	No	No	No
SE	Frisörföretagarna	4 668	Yes	No	No	No	Yes	No	No
SI	SF OZS	1 500	Yes	No	No	No	No	No	SMEunited
SI	SK OZS	900		Yes	No	No	No	No	SMEunited
SI	ZDOPS	900	Yes	Yes	No	No	Yes	Craft and trade	SMEunited
SK	SŽK	120	Yes	Yes	No	No	No	Various craft activities	No

Notes: MS, Member State; n.d., data not available.

Source: Network of Eurofound Correspondents, 2024.

Table 38: Personal services trade unions' involvement in collective bargaining and coverage levels, 2024

Member State	Trade union	Involvement in collective bargaining for the personal services sector ⁽³⁴⁾		Collective bargaining in which the trade union is involved is generally binding	Collective bargaining coverage of the personal services sector national workforce
		Sector level	Company level		
AT	GPA	Yes	No	Yes	20 %
AT	Vida	Yes	Yes	Yes	85 %
BE	ABVV-FGTB AC	Yes	Yes	Yes	96–100 %
BE	ACV-CSC BIE	Yes	Yes	Yes	96 %
BE	Synova	Yes	Yes	Yes	96 %
DE	Ver.di	Yes	Yes	Yes	70 %
DK	DFKF	Yes	Yes	Yes	n.d.
DK	Serviceforbundet ⁽³⁵⁾	n/a	n/a	n/a	n/a
EL	OIYE	No	No	n/a	No collective bargaining
EL	Union of Employees in Cosmetics Companies	Yes	No	No	n.d.
ES	CCOO del Hábitat	Yes	No	Yes	100 %
ES	CIG	Yes	Yes	Yes	2 %
ES	ELA-STV	Yes	No	Yes	2 %
ES	FeSMC-UGT	Yes	No	Yes	100 %
FI	PAM	No	Yes	No	25–35 %
FR	CFDT Services	Yes	Yes	Yes	100 %

⁽³⁴⁾ The two levels of bargaining are not mutually exclusive as a trade union can be involved in both sector-level and company-level collective bargaining simultaneously.

⁽³⁵⁾ Serviceforbundet is the federation that DFKF is part of.

Member State	Trade union	Involvement in collective bargaining for the personal services sector ⁽³⁴⁾		Collective bargaining in which the trade union is involved is generally binding	Collective bargaining coverage of the personal services sector national workforce
		Sector level	Company level		
FR	CFE-CGC	Yes	Yes	Yes	36 %
FR	CFTC-CSFV	Yes	Yes	Yes	100 %
FR	CGT Commerce et Services	Yes	Yes	Yes	100 %
FR	FGTA-FO	Yes	Yes	Yes	100 %
FR	UNSA Commerces et Services	Yes	Yes	Yes	100 %
HR	HSMP	No	No	No collective bargaining	No collective bargaining
HR	Novi Sindikat	No	No	No collective bargaining	No collective bargaining
IE	SIPTU	No collective bargaining as such ⁽³⁶⁾	No	No collective bargaining	No collective bargaining
IE	Unite	No	No	No collective bargaining	No collective bargaining
IT	Filcams Cgil	Yes	No	No	51 %
IT	Fisascat Cisl	Yes	No	No	51 %
IT	Uiltucs	Yes	No	No	51 %
LU	LCGB	No	Yes	No	n.d.
LU	OGB-L	No	Yes	No	n.d.
LV	LAFA	No	No	No collective bargaining	No collective bargaining
MT	GWU	No	No	No collective bargaining	No collective bargaining

⁽³⁶⁾ The Hairdressing Joint Labour Committee in Ireland operates an active employment regulation order, setting legally binding minimum rates of pay, Sunday premiums and working conditions for hairdressers and apprentices. It applies specifically to hairdressing undertakings, including salons and related services.

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

Member State	Trade union	Involvement in collective bargaining for the personal services sector ⁽³⁴⁾		Collective bargaining in which the trade union is involved is generally binding	Collective bargaining coverage of the personal services sector national workforce
		Sector level	Company level		
NL	CNV Vakmensen	Yes	No	Yes	75 %
NL	FNV MOOI	Yes	No	Yes	75 %
PT	CESP	Yes	No	No	98 %
PT	Sindces	Yes	No	No	2 %
PT	Sitese	Yes	No	No	2 %
RO	SCM Bucharest	No	No	No	n/a
SE	Handels	Yes	No	No	Hair: 50 %; beauty: 5–10 %
SE	Unionen	No	No	No	n/a
SI	SOPS	Yes	No	No	15 %

Notes: n/a, not applicable; n.d., data not available.

Source: Network of Eurofound Correspondents, 2024.

Table 39: Personal services employer organisations' involvement in collective bargaining and coverage levels, 2024

Member State	Employer organisation	Involvement in collective bargaining for the personal services sector		Collective bargaining in which the employer organisation is involved is generally binding	Collective bargaining coverage of the personal services sector national companies
		Sector level	Company level (advisory role only)		
AT	BIF	Yes	No	Yes	100 %
AT	BIFKM	Yes	No	Yes	30 %
BE	BBF&W	Yes	Yes	Yes	96 %
BE	Besko	Yes	Yes	Yes	96 %
BE	BMF	Yes	Yes	Yes	96 %
BE	Febelhair	Yes	Yes	Yes	96 %
BE	UNEB	Yes	Yes	Yes	96 %
BG	AKБ	No	No	No collective bargaining	No collective bargaining
BG	H3K	No	No	No collective bargaining	No collective bargaining
CY	ΠΟΚΚ	No	No	No collective bargaining	No collective bargaining
CY	ΣΑΚ	No	No	No collective bargaining	No collective bargaining
CZ	AKO ČR	No	No	No collective bargaining	No collective bargaining
DE	ZV	Yes	No	No	n.d.
DK	DOFK	Yes	Yes	No	n.d.
EL	Kokkke	No	No	No	n.d.
EL	Osedae	No	No	No	No
EL	PSVAK	Yes	No	No	No
ES	ANEIP	Yes	No	Yes	60 %

Member State	Employer organisation	Involvement in collective bargaining for the personal services sector		Collective bargaining in which the employer organisation is involved is generally binding	Collective bargaining coverage of the personal services sector national companies
		Sector level	Company level (advisory role only)		
ES	ANEPE-IMPE	Yes	No	Yes	10 %
ES	Asociación Navarra de Peluquerías	No	No	No	No
ES	Asociación profesional de peluquerías de Gipuzkoa	Yes	No	Yes	1 %
ES	Asociación Provincial de Peluquerías de Burgos	No	No	No collective bargaining	No collective bargaining
ES	EGIE	Yes	No	Yes	1 %
ES	FANAE	Yes	No	Yes	30 %
ES	Fedcat	Yes	No	Yes	30 %
ES	Fepega	Yes	No	Yes	2 %
FI	FHA	No	No	No	n/a
FI	Kaupani liitto	No	No	No	n/a
FI	Palta	No	No	No	n/a
FI	SY	No	No	No	n/a
FR	CNAIB-SPA	Yes	n.d.	Yes	36 %
FR	CNEC	Yes	n.d.	Yes	64 %
FR	UNEC	Yes	Yes	Yes	64 %
FR	UPB	Yes	n.d.	Yes	36 %

Member State	Employer organisation	Involvement in collective bargaining for the personal services sector		Collective bargaining in which the employer organisation is involved is generally binding	Collective bargaining coverage of the personal services sector national companies
		Sector level	Company level (advisory role only)		
HR	UPOZ	No	No	No collective bargaining	No collective bargaining
HU	MFKKE	No	No	No collective bargaining	No collective bargaining
IE	IHF	No	No	No collective bargaining	No collective bargaining
IT	Camera Italiana dell'Acconciatura	Yes	No	No	n.d.
IT	Casartigiani	Yes	No	No	51 % (*)
IT	CB	Yes	No	No	51 % (*)
IT	CLAAI	Yes	No	No	51 % (*)
IT	CNA	Yes	No	No	51 % (*)
IT	Cosmetica Italia	n.d.	No	No	n.d.
LT	KIGSA	No	No	No collective bargaining	No collective bargaining
LU	CHBTG	No	No	No collective bargaining	No collective bargaining
MT	HBF	No	No	No collective bargaining	No collective bargaining
MT	Malta Chamber of SMEs	No	No	No collective bargaining	No collective bargaining
NL	ANKO	Yes	No	Yes	66 %
PL	ZRP	n.d.	n.d.	n.d.	n.d.
PT	ACA	Yes	No	No	2 %
PT	Acecoa	Yes	No	No	2 %
PT	ACIFF	Yes	No	No	3 %

Member State	Employer organisation	Involvement in collective bargaining for the personal services sector		Collective bargaining in which the employer organisation is involved is generally binding	Collective bargaining coverage of the personal services sector national companies
		Sector level	Company level (advisory role only)		
PT	Acilis	Yes	No	No	4 %
PT	ACISTDS	Yes	No	No	4 %
PT	ACP	Yes	No	No	85 %
PT	AEDVC	Yes	No	No	2 %
RO	PADIR	No	No	No	n/a
SE	Frisörföretagarna	Yes	No	No	50 %
SI	SF OZS	No	No	No	n/a
SI	SK OZS	No	No	No	n/a
SI	ZDOPS	Yes	No	No	15 %
SK	SŽK	No	No	No collective bargaining	No collective bargaining

(*) Based on input from the Network of Eurofound Correspondents (140 000 workers covered) and Eurostat data on persons employed in NACE 96.02 in Italy (282 182).

Notes: n/a, not applicable; n.d., data not available.

Source: Network of Eurofound Correspondents, 2024.

Table 40: List of joint opinions in the personal services sector, 2007–2026

Date	Topic of the joint opinion or agreement
16 March 2007	Public consultation on the Simplification of Cosmetics Directive (Council Directive 76/768/EEC)
3 January 2013	Joint contribution to the public consultation reviewing reduced VAT rates for more efficient tax systems
29 October 2013	Joint statement on the social partner agreement on health and safety
22 October 2014	Securing employment in the hairdressing sector
2 December 2020	Joint statement on the autonomous implementation of the hairdressing social partner agreement in the hairdressing sector
30 November 2021	Hairdressing social partners' joint statement on the autonomous implementation of the hairdressing social partner agreement in the hairdressing sector
22 November 2022	Joint statement on the autonomous implementation of the hairdressing social partner agreement in the hairdressing sector
2 March 2026	Joint statement on bogus chair renting – a threat to the future of the hairdressing industry

Source: European Commission, social dialogue texts database.

Table 41: Comparison of findings of the personal services representativeness studies, 2016 and 2026

2016		2026	
Sector-related trade unions identified 34 trade unions in 17 Member States ⁽³⁷⁾ (no trade unions in BG, CY, CZ, EE, HU, LT, LV, PL, RO or SK)	Sector-related employer organisations identified 40 employer organisations in 21 Member States ⁽³⁸⁾ (no employer organisations in BG, CZ, EE, LV, RO or SK)	Sector-related trade unions identified 41 trade unions in 19 Member States (no trade unions in BG, CY, CZ, EE, HU, LT, PL or SK)	Sector-related employer organisations identified 62 employer organisations in 25 Member States (no employer organisations in EE or LV)
Collective bargaining coverage was highly polarised across the EU – almost complete (80–100 %) in western and northern Member States with multi-employer bargaining systems but largely absent in most central and eastern and several southern Member States where sectoral social dialogue structures were undeveloped.		Collective bargaining is extensive (80–100 %) in most western and southern Member States, whereas in central and eastern Europe, as well as in several smaller Member States, it is largely absent or confined to a few companies or subsectors.	
Multi-employer bargaining at the intersectoral and sector levels: 10 Member States (AT, BE, DE, FI, IE, IT, NL, PT, SI, SE)		Multi-employer bargaining at the intersectoral and sector levels: 8 Member States (AT, DE, EL, IT, NL, PT, SE, SI)	
Single and multi-employer bargaining: 4 Member States (DK, EL, ES, FR)		Single and multi-employer bargaining: 4 Member States (BE, DK, ES, FR)	
Bargaining at the company level only: 1 Member State (MT)		Bargaining at the company level only: 2 Member States (FI, LU)	
No collective bargaining at all: 12 MS (BG, CY, CZ, EE, HR, HU, LV, LT, LU, PL, RO, SK)		No collective bargaining at all or no data: 6 Member States (HR, IE, LV, MT, RO)	
		No unions 8 Member States (BG, CY, CZ, EE, HU, LT, PL, SK)	
Representative European trade union UNI Europa is the representative trade union organisation and has 26 direct affiliations in 16 Member States (no	Representative European employer organisation Coiffure EU has 18 direct affiliations in 17 Member States	Representative European trade union UNI Europa is the representative trade union organisation and has 26 direct affiliations in 16 Member States (no members in LV, RO or SI, and	Representative European employer organisation Coiffure EU has 16 direct affiliations in 13 Member State

⁽³⁷⁾ Excluding one trade union from the United Kingdom.⁽³⁸⁾ Excluding one employer organisation from the United Kingdom.

members in BG, CY, CZ, EE, HU, LV, LT, PL, RO, SI or SK).	(no members in BG, CZ, EE, EL, ES, HR, LV, PT, RO or SK).	no relevant unions in BG, CY, CZ, EE, HU, LT, PL or SK).	(no members in BG, CZ, EL, ES, HU, LU, PL, PT, RO, SE, SI or SK, or in EE or LV, where there are no relevant employer organisations).
Other European trade union associations	Other European employer organisations	Other European trade union associations	Other European employer organisations
EFFAT: 5 direct affiliations in 4 Member States	No other EU-level employer federation comes close to Coiffure EU's coverage. The only notable alternative is the European Estheticians United, an association for the beauty sector. The European Estheticians United has 1 member organisation in 11 Member States.	No other EU-level trade union organisation has a significant number of members.	No other EU-level employer organisation has a significant number of members.
industriAll Europe: 5 direct affiliations in 4 Member States		ETUC: 4 direct affiliations in 1 Member State EFFAT: 1 direct affiliation in 1 Member State industriAll: 1 direct affiliation in 1 Member State UITA: 1 direct affiliation in 1 Member State	EuropeActive: 1 direct affiliation in 1 Member State European Estheticians United ⁽³⁹⁾ : 3 direct affiliations in 3 Member States SMEunited: 6 direct affiliations in 4 Member States EuroCommerce: 1 direct affiliation in 1 Member State Cosmetics Europe: 1 direct affiliation in 1 Member State
ETF: 4 direct affiliations in 4 Member States.			
EPSU: 4 direct affiliations in 3 Member States.			

Notes: All data from Eurofound, 2016; data exclude the United Kingdom.

Source: Authors, based on Eurofound (2016) and this current study.

⁽³⁹⁾ No evidence could be found of any activity on the part of this organisation.

Table 42: List of national trade unions included in the study

Member State	Name of the trade union in the original language	Name of the trade union in English	Short form
AT	Vida – Die Lebensgewerkschaft	Vida Trade Union	Vida
	Gewerkschaft der Privatangestellten	Union of Salaried Employees	GPA
BE	Algemene Belgische Vakbond – Algemene Centrale	General Belgian trade union – General Federation	ABVV-FGTB AC
	Algemeen Christelijk Vakverbond (Bouw – Industrie & Energie)	General Christian Union (Construction – Industry & Energy)	ACV-CSC BIE
	Algemene Centrale der Liberale Vakbonden van België	General Central of Liberal Unions of Belgium	Synova
DE	Vereinigte Dienstleistungsgewerkschaft	United Services Union	Ver.di
DK	Dansk Frisør & Kosmetiker Forbund	Danish Hairdresser & Cosmetician Union	DFKF
	Serviceforbundet	Services Union	Serviceforbundet
EL	Σωματείο Εργαζομένων στις Επιχειρήσεις Καλλυντικών	Union of Employees in Cosmetics Companies	Union of Employees in Cosmetics Companies
	Ομοσπονδία Ιδιωτικών Υπαλλήλων Ελλάδας	Greek Federation of Private Employees	OIYE
ES	Comisiones Obreras del Hábitat	Workers Commissions of Habitat	CCOO del Hábitat
	Confederación Intersindical Galega	Galician Inter-Union Confederation	CIG
	Federación de Servicios, Movilidad y Consumo de la Unión General de Trabajadores	Federation of Mobility and Consumer Services of the General Workers' Union	FeSMC-UGT
	Eusko Langileen Alkartasuna	Basque Employees Solidarity	ELA-STV
FI	Palvelualojen ammattiliitto	Service Union United	PAM
FR	Fédération Générale des Travailleurs de l'Alimentation, des Tabacs et des services annexes	General Federation of Food, Tobacco and Allied Workers	FGTA-FO
	Confédération générale du travail – Commerce	General Confederation for Labour Trade	CGT Commerce et Services
	Union nationale des syndicats autonomes – Commerce	National union of autonomous unions – Trade	UNSA Commerces et Services

Member State	Name of the trade union in the original language	Name of the trade union in English	Short form
	Confédération française démocratique du travail Services	French Democratic Confederation of Labour Services	CFDT Services
	Federation des Syndicats Commerce, Services, et Force de Vente	Federation of Trade, Services and Sales Force Unions	CFTC-CSFV
	Confédération française de l'encadrement – Confédération générale des cadres	French Confederation of management – General Confederation of executives	CFE-CGC
HR	Hrvatski sindikat malog i srednjeg poduzetništva	Croatian Union of Small and Medium Businesses	HSMP
	Novi Sindikat	New Trade Union	Novi Sindikat
IE	Services, Industrial, Professional and Technical Union	Services, Industrial, Professional and Technical Union	SIPTU
	Unite	Unite	Unite
IT	Federazione Italiana Lavoratori Commercio, Albergo, Mensa e Servizi in Confederazione Generale Italiana del Lavoro	Italian Federation of Trade, Hotel, Canteen and Service Workers in the Italian General Confederation of Labour	Filcams Cgil
	Federazione Italiana Sindacati Addetti Servizi Commerciali, Affini e del Turismo in Confederazione Italiana Sindacati Lavoratori	Federation of Italian Trade, Related and Tourism Services Workers' Unions in Confederation of Italian Workers' Unions	Fisascat Cisl
	Unione Italiana Lavoratori Turismo Commercio e Servizi	Italian Union of Tourism Trade and Services Workers	Uiltucs
LU	Confédération luxembourgeoise des syndicats chrétiens – Services et commerce	Luxembourg Federation of Christian Trade Unions – Services and Commerce	LCGB
	OGB-L Syndicat Commerce	Independent Trade Unions Confederation- Luxembourg / Commerce Trade Union	OGB-L
LV	Latvijas Apvienotā Frizieru arodbiedrība	Latvian United Hairdressers' Union	LAFA
MT	General Workers Union	General Workers Union	GWU
NL	Christelijk Nationaal Vakverbond Vakmensen	Christian National Trade Union Federation	CNV Vakmensen

Member State	Name of the trade union in the original language	Name of the trade union in English	Short form
		Professionals / Skilled Workers	
	Federatie Nederlandse Vakbeweging MOOI	Federation of Dutch Trade Unions	FNV MOOI
PT	Sindicato dos Trabalhadores do Comércio, Escritórios e Serviços de Portugal	Union for all Commerce, Office and Service Workers of Portugal	CESP
	Sindicato dos Trabalhadores do Setor de Serviços	Union of Service Sector Workers	Sitese
	Sindicato do Comércio, Escritórios e Serviços	Trade, Office and Service Workers' Union	Sindces
RO	Sindicatul Liber Societatea Cooperativa Mestesugareasca Igiena, Bucuresti	Free Trade Union Societatea Cooperativa Mestesugareasca Igiena, Bucharest	SCM Bucharest
SE	Handelsanställdas Förbund	Swedish Commercial Employees' Union	Handels
	Unionen	Unionen	Unionen
SI	Sindiklat obrti in podjetništva Slovenije	Trade Union of Crafts and Entrepreneurship of Slovenia	SOPS

Table 43: List of national employer organisations included in the study

Member State	Name of the employer organisation in the original language	Name of the employer organisation in English	Short form
AT	Bundesinnung der Friseure Österreich	Austrian Federal Association of Hairdressers	BIF
	Bundesinnung der Fußpfleger, Kosmetiker und Masseur	Federal Association of Podiatrists, Cosmetologists and Massage Therapists	BIFKM
BE	L'Union Nationale de l'esthétique et du bien-être	National Union of Aesthetics and Wellness	UNEB
	Beroepsvereniging voor bio-esthetiek en cosmetologie	Professional Association for Bio-aesthetics and Cosmetology	Besko
	Belgische Beroepsvereniging Voor De Fitness- En Wellnessindustrie	Belgian Professional Association for the Fitness and Wellness Industry	BBF&W
	Unie van de Belgische Kappers / Union des Coiffeurs belges	Union of Belgian Hairdressers	Febelhair
	Belgische Massage Federatie / Fédération Belge de Massage	Belgian Massage Federation	BMF
BG	Асоциация на козметиците в България	Bulgarian Association of Cosmetologists	AKB
	Национална Занаятчийска Камера	National Chamber of Crafts	H3K
CY	Παγκύπρια Ομοσπονδία Κομμωτών Και Κουρεών	Pan-Cyprus Federation of Hairdressers and Barbers	ΠΟΚΚ
	Σύλλογος Αισθητικών Κυπρου	Cyprus Association Of Beauticians	ΣΑΚ
CZ	Asociace kosmetických a kadeřnických oborů ČR	Association of Cosmetology and Hairdressing Professionals of Czechia	AKO ČR
DE	Zentralverband des Deutschen Friseurhandwerks	Central Association of the German Hairdressing Trade	ZV
DK	Danmarks organisation for selvstændige frisører og kosmetikere	Danish Organisation for Independent Hairdressers and Cosmeticians	DOFK
EL	Πανελλήνιος Σύνδεσμος Βιομηχάνων και Αντιπροσώπων Καλλυντικών και Αρωμάτων	Hellenic Cosmetic, Toiletry and Perfumery Association	PSVAK
	Ομοσπονδία Σωματείων Επαγγελματιών Διπλωματούχων Αισθητικών Ελλάδας	Federation of Professional and Qualified Beauticians of Greece	Osedae

Member State	Name of the employer organisation in the original language	Name of the employer organisation in English	Short form
ES	Κλαδική Ομοσπονδία Κουρέων Κομμωτών Καταστηματαρχών Ελλάδος	Greek Federation of Barbers, Hairdressers and Salon Owners	Kokkke
	Federación Nacional de Esteticistas de España	National Federation of Beauticians of Spain	FANAE
	Asociación Nacional de Empresarios de Peluquería, Estética e Imagen Personal	National Association of Hairdressing, Aesthetics and Personal Image	ANEPE-IMPE
	Asociación Nacional de Empresas de Imagen Personal	National Association of Personal Image Companies	ANEIP
	Federació Catalana de perruqueria i bellesa	Catalan Federation of Hairdressing and Beauty	Fedcat
	Asociación de Peluquerías de Navarra	Navarre Hairdressers' Association	Asociación Navarra de Peluquerías
	Federación de Empresarios de Peluquería e Estética de Galicia	Federation of Hairdressing and Beauty Salon Owners of Galicia	Fepega
	Asociación Provincial de Peluquerías de Burgos	Burgos Regional Association of Hairdressers	Asociación Provincial de Peluquerías de Burgos
	Asociación de Esteticistas de Gipuzkoa	Gipuzkoa Association of Beauticians	EGIE
	Asociación profesional de peluquerías de Gipuzkoa	Gipuzkoa Professional Hairdressers Association	Asociación profesional de peluquerías de Gipuzkoa
FI	Suomen Hiusyrittäjät	Finnish Hairdressers Association	FHA
	Suomen Yrittäjät	Federation of Finnish Enterprises	SY
	Kaupan liitto	Finnish Commerce Federation	Kaupan liitto
FR	Palvelualojen työnantajat	Service Sector Employers	Palta
	Union Nationale des Entreprises de Coiffure	National Union of Hairdressing Companies	UNEC
	Le Conseil National des Entreprises de Coiffures	National Council of Hairdressing Companies	CNEC

Member State	Name of the employer organisation in the original language	Name of the employer organisation in English	Short form
	Confédération Nationale Artisanale des Instituts de Beauté et Spas	National Confederation of Beauty Salons and Spas	CNAIB-SPA
	Union des Professionnels de la Beauté et du Bien-être	Union of Beauty and Wellness Professionals	UPB
HR	Udruga poslodavaca u obrtništvu, zadrugarstvu i malom poduzetništvu	Employers' Association in Craft, Cooperatives and Small-scale Business	UPOZ
HU	Magyar Fodrász Kozmetikus Körmös Közhasznú Egyesület	Hungarian Association of Hairdressers, Cosmetologists and Nail Technicians	MFKKE
IE	Irish Hairdressers Federation	Irish Hairdressers Federation	IHF
IT	Confederazione Nazionale dell'Artigianato e della Piccola e Media Impresa	National Confederation of Crafts and Small and Medium-sized Enterprises	CNA
	Confartigianato Benessere	Confartigianato Wellness	CB
	Confederazione delle Libere Associazioni Artigiane Italiane	Confederation of Free Italian Artisan Associations	CLAAI
	Confederazione Autonoma Sindacati Artigiani	Autonomous Confederation of Artisans' Trade Unions	Casartigiani
	Camera Italiana dell'Acconciatura	Italian Chamber of Hairdressing	Camera Italiana dell'Acconciatura
	Associazione Nazionale Imprese Cosmetiche	National Association of Cosmetic Companies	Cosmetica Italia
LT	Kirpėjų ir grožio specialistų asociacija	Association of Hairdressers and Beauty Professionals	KIGSA
LU	Hair Beauty Tattoo Guild	Hair Beauty Tattoo Guild	CHBTG
MT	Malta Chamber of SMEs	Malta Chamber of SMEs	Malta Chamber of SMEs
	Hair and Beauty Federation	Hair and Beauty Federation	HBF
NL	Koninklijke Algemene Nederlandse Kappersorganisatie	Royal Dutch Hairdressers Association	ANKO
PL	Związek Rzemiosła Polskiego	Polish Craft Association	ZRP
PT	Associação dos Cabeleireiros de Portugal	Portuguese Hairdressers' Association	ACP
	Associação Comercial e Empresarial do Distrito de Aveiro	Aveiro District Trade and Business Association	ACA

Member State	Name of the employer organisation in the original language	Name of the employer organisation in English	Short form
	Associação De Comércio, Indústria Serviços e Turismo da Região de Leiria	Trade, Industry, Services and Tourism Association of the Leiria Region	Acilis
	Associação Comercial e Industrial da Figueira da Foz	Commercial And Industrial Association of Figueira da Foz	ACIFF
	Associação do Comércio, Indústria, Serviços e Turismo do Distrito de Setúbal	Association Of Commerce, Industry, Services and Tourism of the District of Setúbal	ACISTDS
	Associação Empresarial do Distrito de Viana do Castelo	Viana do Castelo District Business Association	AEDVC
	Associação Comercial e Empresarial dos Concelhos de Oeiras e Amadora	Commercial and Business Association of the Municipalities of Oeiras and Amadora	Acecoa
RO	Patronatul Antreprenorilor din Industria Înfrumusețării din România	Employers' Association of Entrepreneurs in the Beauty Industry of Romania	PADIR
SE	Frisörföretagarna	Hairdressers' Association	Frisörföretagarna
SI	Sekcija frizerjev na Obrtni zbornici Slovenije	Hairdressers' Section of the Chamber of Craft and Small Business of Slovenia	SF OZS
	Sekcija kozmetikov na Obrtni zbornici Slovenije	Cosmeticians' Section of the Chamber of Craft and Small Business of Slovenia	SK OZS
	Združenje delodajalcev obrti in podjetnikov Slovenije	Employers' Association of Craft and Entrepreneurs of Slovenia	ZDOPS
SK	Slovenská živnostenská komora	Slovak Chamber of Commerce and Industry	SŽK

Table 44: Network of Eurofound Correspondents: national correspondents who contributed to this study

Member State	Correspondent	Organisation
AT	Georg Adam	Working Life Research Centre (FORBA)
BE	Dries Van Herreweghe	Katholieke Universiteit Leuven
BE	Noah Vangeel	Katholieke Universiteit Leuven
BG	Mina Kostova	Institute of Philosophy and Sociology, Bulgarian Academy of Sciences
CY	Pavlos Kalosinatos	Cyprus Labour Institute (INEK-PEO)
CZ	Soňa Veverková	Research Institute for Labour and Social Affairs (RILSA)
DE	Thilo Janssen	Hans Böckler Foundation
DE	Sandra Vogel	German Economic Institute
DK	Christoffer Andreasen Madsen	Moos Bjerre Consultants
EE	Miriam Lehari	Praxis Centre for Policy Studies
EE	Ann Gertrud Norberg	Praxis Centre for Policy Studies
EL	Penny Georgiadou	Labor Institute of the General Confederation of Greek Workers (GSEE)
ES	Juan Arasanz Díaz	NOTUS: Applied Social Research
FI	Elina Härmä	Oxford Research Sweden
FR	Ambre Grenier-Boley	IR Share
FR	Frédéric Turlan	IR Share
HR	Predrag Bejaković	Institute of Public Finance, Zagreb
HR	Irena Klemenčić	Faculty of Economics, Business and Tourism, University of Split
HU	Szilvia Borbély	Kopint-Tárki Institute for Economic Research
IE	Rosanna Angel	Industrial Relations News
IT	Alessandro Smilari	Fondazione Giacomo Brodolini
IT	Silvio Bologna	Fondazione Giacomo Brodolini
IT	Michele Faioli	Fondazione Giacomo Brodolini
IT	Barbara De Micheli	Fondazione Giacomo Brodolini
LT	Inga Blaziene	Lithuanian Centre for Social Sciences (DSTI)
LU	Franz Clément	Luxembourg Institute of Socio-Economic Research (LISER)
LV	Krišs Karnitis	EPC Ltd
MT	Vincent Marmara	University of Malta
NL	Charlotte Byrne	Panteia
NL	Thomas de Winter	Panteia
PL	Katarzyna Dębska	Polityka Insight
PT	Reinhard Naumann	University Institute of Lisbon
RO	Marcel Spatari	Syndex
RO	Nicoleta Voicu	Inovare Publica
SE	Nils Brandsma	Oxford Research Sweden
SI	Barbara Lužar	University of Ljubljana
SK	Miroslava Kordošová	Institute for Labour and Family Research (IVPR)

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This study provides information allowing for an assessment of the representativeness of the organisations involved in the European sectoral social dialogue committee for the personal services (hair and beauty) sector. Their relative representativeness legitimises their right to be consulted and their capacity to negotiate agreements. The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the sector. This study identifies UNI Europa Hair & Beauty, representing workers, and Coiffure EU, representing employers, as the most representative European-level social partner organisations in the personal services sector.

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

