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Work and Life Quality in
New & Growing Jobs

The Cleaning Sector:
Office Cleaning



EUROPEAN COMMISSION
European Research Area



SEVENTH FRAMEWORK
PROGRAMME

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WALQING The Project

Funded by the EU's 7th Framework Programme, the **walqing** project (2009–2012) investigates selected sectors with potentially problematic working conditions, precarious employment and low wages. It explores the linkages between new and expanding jobs, the conditions of work and employment in these jobs and the more or less favourable outcomes for employees' quality of work and life. It does so by integrating several analytical levels and research paradigms:

- the analysis of **Europe-wide survey data** on the development of employment, the quality of work and life,
- the exploration of **sectoral and cross-sectoral stakeholder policies**,
- the **analysis of strategies of companies and public-sector work organisations** in selected industries,
- and the investigation of **individual jobholders' careers**, perspectives and aspirations.
- Specific attention is given to **vulnerable groups** on the labour market such as young people, older workers, migrants or women. ●

Imprint

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The walqing research in office cleaning

In the cleaning sector, the **walqing** project focused mainly on the formal labour market, the private sector and specifically the area of **office cleaning**, with some excursions to other areas that proved promising, such as the Belgian service voucher system for household services and a Norwegian cleaning section within the public sector. Research in the cleaning sector was carried out in Austria, Belgium, Norway and Spain.

For each country, stakeholder interviews with relevant social partners and other sector experts and actors were carried out. The findings of this work package on stakeholder policies are collected in the **walqing** social partnership series available on the website www.walqing.eu.

In addition, each partner involved in the cleaning sector research carried out **2–3 organisational case studies**, consisting of interviews with management, works councillors and workers, and a total of **10–20 employee** interviews per country and sector. In total the material from these work packages consists of **9 national organisational case study reports** and **4 national reports on employees' individual perspectives, agency and vulnerability**.

The organisations, mostly companies, in which case studies were conducted, are listed in the table below (please note that all organisation names are pseudonyms). ●

Overview of case studies in the cleaning sector

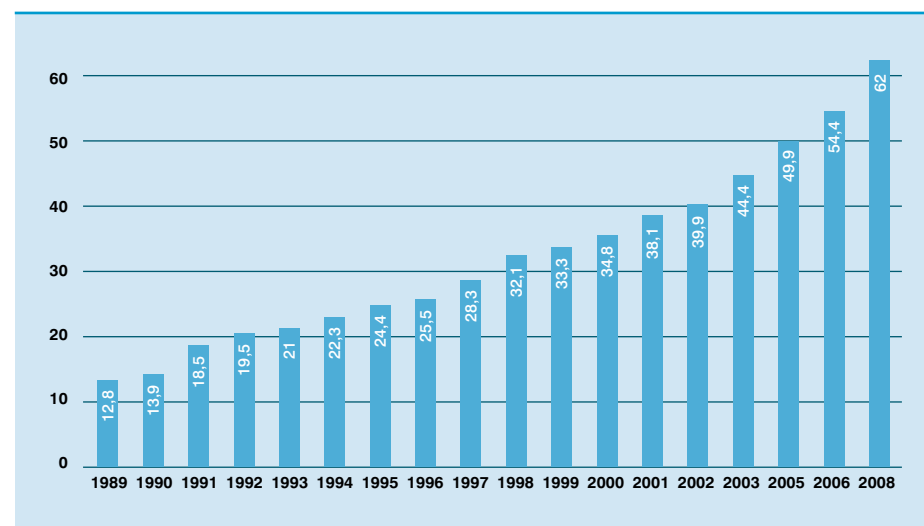
AUSTRIA	CLEANCOMP, a medium sized private sector cleaning and facility service company LARGECLEAN, a large private sector cleaning facility service company
BELGIUM	CLEANHOUSE, a medium to large sized cleaning and domestic services company applying the Belgian service voucher system CENTIPEDE, a large multinational private sector cleaning and facility service company
NORWAY	MUNICLEAN, cleaning division of a Norwegian municipality REGIOCLEAN, a medium sized private company offering cleaning and other services BIGCLEAN, a large multinational cleaning and facility service company
SPAIN	INTERCLEAN, a large multinational private sector facility service company SERVICECOMPANY, a large private sector company offering cleaning and other services

Economic development: The cleaning industry – a growing sector

The cleaning industry is growing in Europe, but there are significant differences between the situations in the different countries. At present, according to the European Federation of Cleaning Industries (EFCI), industrial cleaning represents one of the most dynamic areas of corporate services with more than 158,000 cleaning contractors across Europe and generating a turnover of nearly 62 billion EUR. The

cleaning sector in Europe has seen **significant growth** during the last 20 years. As data for the industry show and the table below illustrates, the turnover has increased almost 5 times from 1989 to 2008. ●

Turnover of the European cleaning industry, 1989–2008, billion EUR



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

Employment: Almost 4 million employees in the European Union

In 2008, more than 3.75 million people were employed in the cleaning industry in the EU countries, as opposed to 3.57 million in 2006 and 1.65 million in 1989. This represents an increase of 5% over

two years (2006–2008), thus an average growth of 2.5% per year. For comparison, general EU-27 employment growth in these two years (2006–2008) was limited to a growth of 1.8% and 1.0% respectively. However, some of these jobs may have shifted from other sectors that have outsourced cleaning services. The table below provides details on employment in the countries investigated. ●

The cleaning industry in the examined countries

	AUSTRIA	BELGIUM	NORWAY	SPAIN
NUMBER OF EMPLOYEES	51,003 (2008)	46,237	56,000 (2008)	477,000
% OF WOMEN	65.3%	n.a.	80%	78.6%
% OF PART TIME WORK	16.4% men 66% women	About 70%	1 out of 10 men works part-time, compared to 4 out of 10 women	About 70%
EMPLOYEES IN LARGE ENTERPRISES	n.a.	70%	8,400 (employed in the largest 34 enterprises within the private sector/ working within NHO Service)	n.a.

Source: National walqing reports (walqing social partnership series, online available at: <http://www.walqing.eu>).

Sector structure and trends: Outsourcing and diversification of services

The sector is dominated by a number of large companies, some of them multinational companies. After years of continuing outsourcing of services in Europe, an emerging trend for the diversification of these large companies' activities towards integrated services and facili-

ties management is observed in all EU member states. Office cleaning is still the main subsector, but other segments such as industrial cleaning (including the hygiene of food chains), specialised cleaning services (hospital cleaning, etc.), façade and window cleaning, cleaning of public transport vehicles, cleaning of schools, etc. have grown in importance. Taken together, these services represent almost half the sector's turnover. ●

Characteristics of the sector and their impact on quality of work

The cleaning industry is a highly **labour-intensive** sector where about 75% of the total employers' costs are labour costs.¹ A trend of constantly increasing **rationalisation** is observed in the sector: Since the wage cost is the most important cost in this labour-intensive sector, this is where competition is toughest. With fairly comprehensive or generally binding collective agreements, competition on wages mainly revolves around getting people to do the same type of job in fewer hours, which leads to a spiral of lower incomes and increasing work intensity. The provision of **outsourced** cleaning services is regulated through contract awarding (public procurement in the case of public clients). It is thus crucial for the quality of work whether other criteria than price are taken into account in **public procurement**.

Furthermore, the quality of work is shaped by the **triangular relationship** between the employer, the employee and the client organisation in which the cleaning takes place. Cleaning is typically one of those 'mobile' jobs, comparable to construction and domiciliary care services or consulting, in which a worker is employed at a site which is not the place where the employer resides and the control of work is distributed between the employer and the client. This may imply problems for companies, with regard to an unclear division

of control tasks and responsibilities between the companies, but also for workers if they lack contact to their employer or face bad working conditions at the customer company. **Customer requirements** play a significant part in shaping quality of work. They include preferences for cleaning work to be done 'invisibly' and thus in the early morning or in the evening, but they are also influential in that office cleaners spend their workdays not at the employer's but at the customer's company.

In addition to the commercial cleaning sector, cleaning work is also performed in **households**, in varied configurations of unpaid housework, informal work and formal employment. Indeed, the largest part of cleaning across Europe is done informally. Domestic cleaning provides a precarious labour market alternative to cleaning workers and also impacts recruitment and turnover in the commercial sector. Various initiatives in Europe have tried to draw workers from the informal sector to the formal economy, using different types of service vouchers and being more or less successful. ●

¹ EFCL, www.efcl.eu.

Workforce and vulnerable groups

The workforce in industrial cleaning across Europe comprises high shares of **women, low-skilled workers, immigrants and ethnic minorities**. Cleaning offers an opportunity for this segment of workers, who have limited opportunities in the European labour market. However, although conditions in cleaning vary between countries, many jobs are **part time**, include **atypical working hours** and are highly **fragmented**. Finally, there is an **increasing intensification** of work and a rising use of **less secure employment contracts**, all of which have implications for the most vulnerable groups.

Vulnerability refers to a potentially problematic social situation in the zone between 'normal' and 'excluded'. It concerns work processes characterised by uncertainty/weakness that expose a person or family to suffering particularly negative or damaging consequences if a problematic situation arises². In the examined countries, three groups appear particularly vulnerable. These are: women, immigrants/ethnic minorities, and older workers.

Cleaning is characterised by a high degree of **gender segregation** in terms of work tasks as well as wages, working conditions and working times. The few men in the sector usually work in specific niches, e.g. window cleaning, and

frequently work full time while **women** tend to work part time, have lower wages, have less discretion and are more closely monitored than men. The atypical working hours and part-time work on offer collide with care obligations, creating everyday problems for the groups of single mothers and immigrants without social networks.

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

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

Part-time, split shifts, mornings and evenings

The working time arrangements thus are an important issue in the sector. It refers both to the prevalence of **part-time work** and common working times in the

early **mornings** and in the **evenings**, often organised as **split shifts**. While these characteristics are a major issue in some countries, there has been a successful shift towards day-time cleaning in Norway; and in Belgium, a campaign promoting day-time cleaning is currently going on.

With some exceptions, cleaning services in Europe are predominantly performed **outside the usual periods of occupation** of the premises that are cleaned. This is particularly true for office cleaning, but it also applies to commercial premises or buildings with public access. There are significant differences between countries. In Norway and Sweden, daytime cleaning has become the rule and represents 80% and 70% of the total cleaning time³, followed by Poland and Denmark. In other countries daytime cleaning remains extremely limited, despite the fact that sector representatives see it as a desirable improvement of working conditions. They are, however, confronted with a reluctance of clients to have cleaners around during office times.

Part-time work remains the most frequent form of employment in this sector: 70 percent of the workforce in Europe hold part-time contracts.⁴ At the European level, about 75% of the employees in the sector are women, with men concentrating in the better-paid segments of outside cleaning. In general, part-time work combined with atypical working hours may have negative effects on the quality of work. Often it means that

employees receive **very small incomes** because they work short hours. This suits some workers' work-life balance but others would prefer to work more hours. Part-time work is one way of adapting to the dominant working hours in office cleaning, which make it difficult for companies in some countries to offer full-time jobs or additional hours.

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

"And now I need to work in the morning, come home to cook and do the laundry and this and that and leave again. When the children come home and my husband, I have to go to work. This is what every day is like."

a female office cleaner working split shifts in Austria

2 Ranci, C. (2010): Social vulnerability in Europe, in Ranci, C. (ed.), Social vulnerability in Europe: the new configuration of social risk. Basingstoke: Palgrave Macmillan, Basingstoke, 3-24. Michell, G. A. (2008): Dwindrift: Provoking Agents and Symptom-Formation Factors in the Process of Impoverishment, in Mingione, E. (ed.), Urban Poverty and the Underclass: A Reader. Oxford: Blackwell Publishers, 41-63.

3 EFCI (2010): The Cleaning Industry in Europe: An EFCI Survey. Edition 2010 (data 2008).

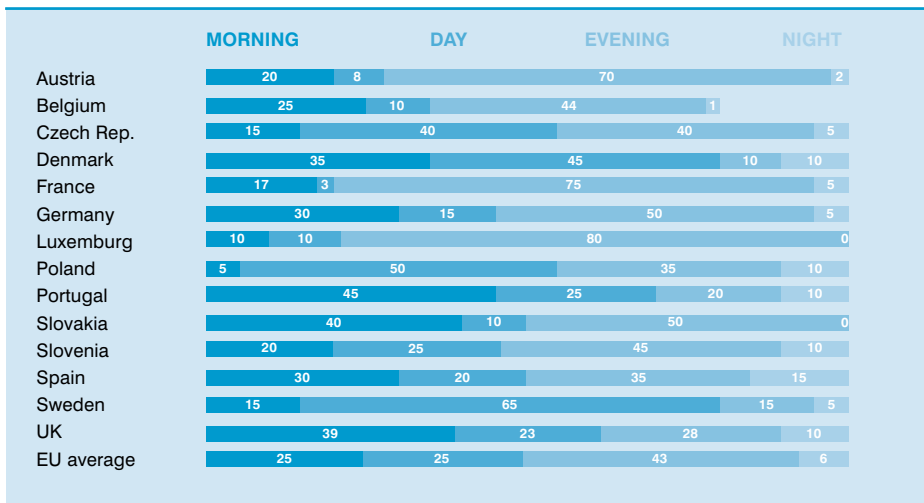
4 Ibid.

Reasons for working time arrangements

The prevailing arrangement of working hours is shaped by a number of related influences. First, sector experts and employers see the main reason for the prevalence of cleaning outside office hours in **customer preferences** to have cleaning done ‘invisibly’, i. e. without disturbing their employees. Second, collectively agreed pay supplements can play a part in shaping working hours. In Austria, for example, a night-time supplement has to be paid for cleaning done between 8 p.m. and 6 a.m. As companies and clients try to avoid paying this supplement, cleaners’ working times are compressed in the time slots of ca. 6 to 9 a.m. and 5 to 8 p.m. Third, **contracts** between the cleaning com-

pany and the customer often state very precisely what the customer pays for. This means that cleaning has to be done at particular times and with a particular number of cleaners. As a consequence, there are work peaks in the morning and evening hours, and little work in between. Companies adapt to this pattern by organising work as split shifts and (short-hours) part-time. In Continental European countries in particular, they draw on the traditional pattern of feminized service work that increasingly is at odds with women’s needs for sufficient incomes as ‘male breadwinners’ are becoming rarer. The table below illustrates working periods in the cleaning industry from morning to night in the EU. ●

Working periods in the cleaning industry



Source: Eurostat (2005).

GOOD PRACTICE EXAMPLE

Promoting *daytime* cleaning in Belgium

Monique Ramioul, HIVA

Description

The Vocational Training Centre for Cleaning (OpleidingsCentrum van de Schoonmaak – Centre de Formation du Nettoyage) is an organisation governed jointly by the employers’ federation, ABSU (Algemene Belgische SchoonmaakUnie), and the two largest trade unions, ACV and ABVV. The ABSU is the employer organisation covering approx. 76% of all cleaners in cleaning companies in Belgium.

Jointly these organisations launched a large-scale campaign to promote daytime cleaning to both their customers and public opinion. The campaign started in September 2011 and will last for two years. The main action is to stick large posters on public transport (busses and trams) at regular intervals. In addition, they individually addressed all cleaning companies and their clients by post to raise awareness of the benefits of daytime cleaning and offered a small present to the staff of their clients.

The key message is that **‘Daytime cleaning makes a world of difference’**. The campaign is built on 10 arguments why daytime cleaning is better (translation MR):

- 1 Cleaners are part of the team and consequently more motivated.
- 2 Communication between cleaners and other staff is quicker and thus more efficient.
- 3 Cleaners and other staff have the opportunity to see each other’s work and this fosters mutual respect.
- 4 Cleaners can have a normal family life and thus they are happier.
- 5 Cleaners can use the public transport and feel safer.
- 6 Light and heating can be switched off after office hours, this saves on energy costs.
- 7 You need less security staff, which is another saving.
- 8 There is more appreciation for the work done by cleaners and consequently less absenteeism.
- 9 Cleaning quality improves thanks to a situation of natural social control.
- 10 There is more awareness of an efficient and economical use of materials and cleaning products, which is good for the environment.

Context

The social partners observe that in Belgium only 12% of cleaning activities occur during daytime, which is very low compared to the EU average of 25% and to the situation in the Scandinavian countries, where this amounts to 80%.

The social partners argue that daytime cleaning creates win-win situations for all involved – the cleaners, the customers and the companies – as stated in the 10 arguments. The campaign also aims to improve the professionalisation of the industry.

The collaboration between the social partners for this campaign, the mutual recognition of the key issues of interests of their respective members and the acknowledgement that a win-win situation can be reached in social dialogue can be regarded as representative for social partnership in this sector.

Links and references

Campaign information: <http://www.ocs-cfn.be>.



Source of the picture: <http://www.ocs-cfn.be>

Image and skills

Large segments of cleaning are **low-skilled work**, although in several countries there is formal **vocational training**, mostly for outdoors cleaning, but increasingly also for indoors and office cleaning. It appears that clients are beginning to require certain skill levels, especially for frontline managers. Nevertheless, with its flat hierarchies and high labour turnover, in most countries the sector still relies on operatives with lim-

ited opportunities and aspirations, and training tends to be limited to workers qualifying for management positions. The issue of improving skills is closely connected to the issue of **image improvement** of the cleaning profession. While different measures for skill upgrading can be observed on the **national level**, the **European social partners** also promote increasing investment in vocational training. ●

GOOD PRACTICE EXAMPLE

Professionalisation and training in Norway

Hans Torvatn, SINTEF; Vassil Kirov, ISSK-BAS

Cleaning is becoming increasingly professionalised in Norway. The term **professionalisation** describes a process of transforming the work of a cleaner from something that can be done by 'anybody' to something that is recognised as requiring a necessary set of skills and training. This can lead to increases in wage levels, status, and visibility as well as productivity.

Social partners do not address professionalisation as such, but do address many of its elements. The introduction of standards, new work methods, new technologies, new divisions of labour between client and cleaner and new relationships (i.e., contractual) between cleaners and clients have all contributed to a situation where cleaners' skills are being upgraded in Norway.

This upskilling is not necessarily formalised. Much training and instruction takes place on the job, by managers. However, after a reform in 1994 a **certificate of apprenticeship** in cleaning was approved in Norway. This certificate is a formal vocational education consisting of both practical and theoretical parts, where the candidate must pass several exams. About 3% of the labour force obtained this certificate during the period from 2008 to 2010.

Links and references

Torvatn, H. (2011): Cleaning in Norway – Between professionalisation and junk enterprises. working social partnership series 2011.5, A report for WP5 of the of the working project, SSH-CT-2009-24459, Trondheim, June 2011.

GOOD PRACTICE EXAMPLE

Making work and workers visible: Image campaigns for the Austrian cleaning sector

Karin Sardadvar, FORBA

Situation

In 2010 and 2011, the guild of commercial cleaning launched a series of media and advertisement campaigns in Austria, including radio spots and poster advertising. The aim was to make cleaning work more visible, point out its importance and professionalism and thus contribute to improving its image. The first poster campaign depicted real-life migrant workers and their work, themed 'Vienna says thank you'. The second campaign, consisting of radio spots and poster advertising, focussed on the spectrum of activities of commercial cleaning (hospitals, spas, offices, apartment buildings) and the relevance of cleaners' work for society. Though not actively involved, the trade union appreciated the initiative.

Prerequisites

The guild of commercial cleaning is part of the Austrian Economic Chamber (Wirtschaftskammern Österreichs, WKO). In Vienna, the guild represents roughly 4,000 companies. The guild is thus an important stakeholder, which is facilitated by the Austrian specialty of compulsory membership of small businesses and companies in the Economic Chamber. As all stakeholders in the sector are concerned about the low image of commercial cleaning, they mutually support initiatives to improve visibility and appreciation of cleaning work.

Limitations

Only parts of the campaign were launched nationally. Most activities were limited to Vienna. Support for the initiative was expressed by unionists as well as cleaning companies, even if opinions about the details and design of the campaigns differed. Public reactions to the campaign towards the WKO ranged from positive feedback to complaints about the focus on migrants. While the campaigns address the general public, it is less clear what impact they may have on powerful stakeholders in the sector who strongly influence quality of work, such as customer companies or decision-makers in public procurement.

Links and references

<http://portal.wko.at>

Holtgrewe, U.; Sardadvar, K. (2011): Social partnership in unlikely places: The commercial cleaning sector in Austria. walqng social partnership series 2011.1.1, A report for WP5 of the walqng project, SSH-CT-2009-244597, Vienna, April 2011.



*Translation: I love a day in the spa. Relaxing in wonderful surroundings.
But who cleans some 13,000 square meters of tiles every day?*

Social partnership

The cleaning sector has an established social partnership at European level, but the situation in the individual member states varies considerably – from cases with strong social partners and developed collective bargaining to

cases where most of the conditions are decided unilaterally by employers. The table below provides an overview on social partners and social dialogue in the investigated countries and on European level. ●

Social partners and social dialogue

COUNTRY	EMPLOYERS	UNIONS	CLA
AUSTRIA	<i>Economic Chamber/ Guild of commercial cleaning, compulsory membership</i>	VIDA (representing 12,000 employees from cleaning)	Developed social partnership/Sectoral Agreement covering all blue collar workers
BELGIUM	ABSU, the federation of cleaning companies, represents 71.7% of all the employed workers, in 183 firms	ACV and ABVV 18,136 employees	Constructive sectoral social dialogue/Detailed collective labour agreement (CLA)
NORWAY	<i>Business Confederation of Service in private sector and Kommunenes Sentralforbund (KS), organising all municipalities</i>	<i>Union of General Workers (private sector) and Norwegian Union of Municipal and General Employees (public sector), both in the Trade Union Council</i>	Strong social partnership CLAs covering part of the private sector (38% of cleaners working within NHO Services) and roughly all public sector
SPAIN	ASPEL (representing large enterprises)/ AFELIN (representing SMEs), low density	<i>Trade Union Confederation of Workers' Commissions (CCOO)/Federation of Diverse Activities General Workers' Confederation (UGT)/Service Federation</i>	National Framework Agreement of the Sector of Cleaning of Buildings and Premises (2005)
EU LEVEL	EFCI	UNI Europa	Good dialogue, Several initiatives for daytime cleaning, H&S, image of the sector

Source: National walqing reports (walqing social partnership series, available online at: <http://www.walqing.eu>).

GOOD PRACTICE EXAMPLE

Regulation of domestic cleaning through service vouchers in Belgium

Monique Ramioul, HIVA

Short description of the service voucher system

The service voucher system is set up to foster social inclusive labour markets and it has a double aim: (1) promote regular employment in the neighbourhood services for groups at risk of social exclusion; (2) formalise undeclared work. Service vouchers are used as a payment system for cleaning services offered by organisations to private persons. Individual users buy these vouchers to pay services to be delivered by a recognised company, which employs people at risk (mostly long-term unemployed). These are newly created or existing enterprises out of the profit as well as of the not-for-profit (public or private) sector. The user pays 5 to 7.5 EUR per hour and benefits from tax reduction, the service organisation receives 21.10 EUR per hour offered on the market and the worker earns between 9.5 and 10.5 EUR per hour worked.

Formalised employment in domestic cleaning: Benefits for the cleaners

The service voucher system is particularly beneficial for domestic cleaners employed by social profit organisations, which use the system fully in line with its original objectives. In these social profit organisations, the system makes it possible to offer decent working conditions and to establish professional human resources practices for groups of workers that are typically deprived of such a working environment. In addition, domestic cleaning is increasingly regulated at the sectoral level in bi- and tripartite organisations leading to additional benefits.

Prerequisites

This positive outcome is not guaranteed for all workers working with service vouchers. A serious problem is the large number of (very) small for-profit companies that do not offer these working conditions and mainly look for short-term profit. Here, the contracts are very small, no training is offered, there is a high company turnover, etc. This urged the government to increase regulation, for example by obliging to offer a minimum 13 hours a week and to stimulate training. Also, control of such companies has been identified.

Threats and traps

The system and the positive outcome are under threat for a number of reasons:

- Costs are escalating for the federal budget but abolishing the system would lead to an increase of undeclared work and cleaners, especially migrants, getting into invisibility again.
- Making life easier for citizens by offering regulated household support is criticised because it is highly subsidising dual-earner couples and middle class families.
- There is a blurring of boundaries with care work at homes, which requires other skills and is more expensive, and thus a risk of care jobs being replaced by service voucher services.
- There is a possible internal inconsistency, with some regions having high demand and little supply, and vice versa.

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The walqing sector brochures

- 1 **The Cleaning Sector: Office Cleaning**
- 2 **The Construction Sector: Green Construction**
- 3 **The Sewage & Refuse Disposal Sector: Waste Collection**
- 4 **The Health & Social Work Sector: Elderly Care**
- 5 **The Hotels & Restaurants Sector: Catering**