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WIBAR Report No. 7
THE INDUSTRY REPORT
covering 13 industries and six themes

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Post-conference Update

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1. Introduction

This is a report in the framework of the WIBAR project. This project aims to promote the input of cross-country, comparative analyses at the level of themes and industries using the *WageIndicator* survey data about wages, working conditions and working hours. The Amsterdam Institute of Advanced Labour Studies (AIAS) / University of Amsterdam has developed the WIBAR project in co-operation with the European Trade Union Confederation (ETUC): the project is focused on the European trade union involvement in developing workplace industrial relations and Europe-wide bargaining. ETUC has formulated four major bargaining spearheads and related guidelines for 2006: wages in general and low pay work; working time; gender equality; training and lifelong learning. For the ETUC, the European industrial secretariats and their national trade unions, the need for detailed and industry-specific comparisons is more urgent than ever. The WIBAR project should produce usable tools and intensify dissemination and debate on Europe-wide bargaining.

In the first six WIBAR reports, we presented outcomes of the *WageIndicator* survey in six union policy fields: working time, low pay, training, older workers, collective bargaining coverage, and work-related stress. In these reports we compared these outcomes across industries, across countries and related to a number of employee characteristics. Wherever appropriate, we also confronted the outcomes with those of other (mostly official) statistical sources. We did so for the eight EU member states, for which sufficient *WageIndicator* data has been gathered: Belgium, Denmark, Finland, Germany, the Netherlands, Poland, Spain, and the UK, and partly also for Hungary. These data covers the period September 2004 – September 2006, and includes 89% of the total sample, as we restrict our analyses to employees. The outcomes for Hungary only cover 2006, as the *WageIndicator* survey started later here.

In this 7th report we focus the presentation and analyses of *WageIndicator* data on 13 single industries. We will compare our data across countries.

2. Agriculture

2.1. Working time in agriculture

In seven out of eight countries (the exception being Denmark) the working week in agriculture is among the longest across industries, in Finland, the UK and Belgium even the longest. Indeed, in Finland and in the UK the longest hours of all have been found: in both countries 38% reports working usually more than 40 hours per week. They are followed by Germany (32%). Annualised hours can be found in agriculture to some extent (about 4%) in the majority of countries, as well as to a lesser extent in the Netherlands and the UK. Compared with other industries, the shares of shift or irregular work are modest, be it substantial in Denmark (27%) and the UK (25%).

Regarding the shares of those regularly working in the evening, it can be noticed that Spain like in other industries reveals a high share (70%), most likely as a consequence of the prevailing climatic conditions and the siesta tradition. Under other conditions, the Netherlands, Belgium and the UK also show up with rather high scores of evening work.

In the agricultural industry working on Saturdays is widespread in the Netherlands (48%), followed by the UK, and working on Sundays notably in the UK and Germany alike (both 25%). For employees with full-time agreed working weeks, the average contractual hours are longest in Poland, with over 40 hours per week. The variation

across countries of the average hours of employees with annualised hours is quite large, with Belgium (average over 41 hours) on top. Employees in agriculture with on call work have the longest working weeks in Germany (average 60 hours).

Table 2.1. Various working time patterns, agriculture, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Categories of usual working hours								
0-40 hrs	80	95	62	68	81	85	79	62
40.1-48 hours	13	3	32	21	11	15	11	21
48.1-99 hrs	7	2	6	11	8		10	17
Total %	100	100	100	100	100	100	100	100
Total N	71	96	132	406	1256	27	130	130
Categories of usual working hours, only those compensated for extra hours, either in cash or in time								
0-40 hrs	90	100	65	75	85	89	91	65
40.1-48 hours	10		32	20	11	11	9	28
48.1-99 hrs			2	5	4			7
Total %	100	100	100	100	100	100	100	100
Total N	30	1	81	214	674	9	32	60
Shares of those having agreed annualised hours								
Total	3.6		4.4	3.8	2.3		3.6	2.6
Shares of shift or irregular work								
Total	21	27	0	9	12	0	14	25
Shares of those regularly working in the evening								
Total	26	0		0	36		70	31
Shares of those regularly working on Saturdays								
Total	28	0	0	25	48		24	35
Shares of those regularly working on Sundays								
Total	8	0	0	25	17		12	25
Mean hours per week by sort of working hours agreed								
1 Full-time hours per week	37.7	36.4	39.3	39.9	39.6	41.5	39.2	40.2
2 Part-time hours per week	23.7	28.5	28.2	21.3	24.6	30.0	16.0	16.4
3 Annualised hours	41.2	.	35.9	38.7	35.2		30.9	37.6
4 Flexible hours	13.0	13.3	34.6	21.9	30.2		30.0	34.7
6 I work on call	.			60.0	30.5		42.0	53.1

Source: *WageIndicator* dataset Sept. 2004-Sept. 2006

2.2. Low pay in agriculture

The incidence of low pay, measured as the share of those under 2/3 of the hourly median wage, is comparatively high in all countries, except in Denmark and Finland. In the UK even 50% of all workers in the agricultural industry is paid under the low pay threshold, followed by Poland (47%) and Belgium (38%).

Table 2.2. Incidence of low pay (under 2/3 median wage threshold) and country ranking across 13 industries, agriculture, adults aged 21 and over, breakdown by country, 2005

	Belgium		Denmark		Finland		Germany		Netherlands		Poland		Spain		UK	
Incidence	38%	12	25%	5	5%	6	24%	12	30%	10	47%	12	26%	13	50%	13

Source: *WageIndicator* dataset 2005 (unweighted)

2.3. Training in agriculture

Concerning the shares of employees having received at least one day of employer-provided training last year, Belgium, the Netherlands and Spain reveal the highest scores. However, compared across industries the shares of agriculture all rank low in the five countries for which we have data.

Table 2.3.1. Shares of employees having received at least one day of employer-provided training last year and average number of employer-provided training days last year, incl. country ranking across 13 industries, agriculture, breakdown by country, 2004-2006

	Belgium		Finland		Germany		Netherlands		Spain	
Shares of employees	51%	11	0%	13	26%	13	41%	13	41%	8
Average no. of training days	3.3	11	0.0	13	4.0	3	3.7	12	6.6	3

Source: *WageIndicator* data, September 2004-September 2006

The shares of employees having received at least one day of self-paid training last year vary widely, from 15% in the Netherlands to 43% in Spain. In this respect agriculture scores comparatively good in Spain.

Table 2.3.2. Shares of employees having at least one day of self-paid training last year and average number of self-paid training days last year, incl. country ranking across 13 industries, agriculture, breakdown by country, 2004-2006

	Belgium		Germany		Netherlands		Spain	
Shares of employees	17%	9	21%	9	15%	9	43%	3
Average no. of training days	2.5	13	1.3	13	2.9	11	15.2	2

Source: *WageIndicator* data, September 2004-September 2006

2.4. Older workers in agriculture

Across industries, in most countries agriculture takes a middle position concerning age distribution. The share of workers over 45 years of age is highest in the agriculture workforce in Hungary and Finland. It is lowest in Poland, where particularly the share of workers 25-34 of age is high. With 24%, the Netherlands shows by far the highest share of respondents in the youngest age group. In this country, agriculture is also the 'youngest' of all 13 industries.

Table 2.4. Average age and distribution over age groups, agriculture, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherl.	Poland	Spain	UK
Average age	36.3	43.0	40.7	37.3	40.9	33.3	31.4	34.3	38.4
Distribution over age groups									
1 < 25 yr	13		5	8	4	24	7	7	9
2 25-34	39		24	34	26	34	70	55	30
3 35-44	18		33	37	27	26	7	23	34
4 45-54	27		31	16	36	12	15	14	19
5 >=55	3		8	6	8	3	0	1	8
Total	100		100	100	100	100	100	100	100

Source: *WageIndicator* data, September 2004-September 2006

2.5. Collective bargaining coverage in agriculture

The picture concerning collective bargaining coverage that emerges for agriculture is quite varied: a comparatively good position in the Netherlands (88% coverage), slightly lower for Spain, Belgium, Germany and Hungary, but low coverage in the UK and Poland. In four countries the share of those agreeing that it is important to be covered by a collective agreement is higher than the share actually covered by an agreement, but not in the Netherlands. In the UK only 23% is covered by an agreement while nearly twice as many respondents (45%) agree that it is important to be covered.

Table 2.5. Collective bargaining coverage and share of those agreeing that it is important to be covered by a collective agreement, incl. country ranking across 13 industries, agriculture, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Hungary		Netherlands		Poland		Spain		UK	
Coverage	68%	11	87%	8	.	.	56%	8	50%	10	88%	6	0%	11	70%	8	23%	8
Agree with importance	71%	12			.	.	72%	5			77%	6			88%	9	45%	6

Source: *WageIndicator* data, September 2004-September 2006

2.6. Work-related stress in agriculture

The ranking of the mean values of all five indicators of work-related stress we used jointly varies widely across countries, from the no. 1 position in Denmark and the no. 2 position in Belgium, Germany and Spain on the one hand, to a very high ranking in terms of stress problems in Finnish agriculture on the other. In Finland the combination of high scores on all five items is striking. The mean of the scores on three factors in the UK is also comparatively high.

Table 2.6. Indicators for incidence of work-related stress, mean values and country ranking across 13 industries, agriculture, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Netherlands		Spain		UK	
Work physically exhausting	3.0	12	3.0	4	5.0	13	3.5	12	3.0	11	3.5	10		
Work mentally exhausting	3.0	1	3.0	3	4.0	13	3.5	6	2.8	1	3.7	2		
Work at very high speed	3.0	1	3.5	2	4.0	12	3.2	3	3.5	4	3.0	2	3.8	7
Work cannot be finished in allocated time	2.7	6	1.0	1	5.0	13	1.0	1	2.2	5	2.3	2	3.4	12
Work to tight deadlines	3.0	2	4.0	5	4.0	13	3.5	9	2.8	2	3.1	2	4.3	9
Mean of five factors*)	2.9	2	2.9	1	4.4	13	2.9	2	2.9	4	3.1	2	3.8	11

*) for the UK mean of three factors

Source: *WageIndicator* data, September 2004-September 2006

2.7. Conclusions concerning agriculture

Agriculture shows, though to a slightly lesser extent than the hospitality industry, in nearly all eight EU member states an accumulation of problems concerning long working hours, a high incidence of low pay, and lack of training, in some countries combined with substantial problems of bargaining coverage. Nevertheless, in most countries work-related stress does not show up as a particular problem among agricultural workers.

3. Manufacturing

3.1. Working time in manufacturing

As for the length of the working week, across industries manufacturing at large in most countries takes a middle position; in Germany it even displays the lowest shares of long working hours. Yet, against the background of overall long working hours in Germany, in international comparison the longest hours are found in German manufacturing, followed by Polish, Spanish and UK manufacturing. In these four countries about 20% reports a working week of usually over 40 hours.

Table 3.1. Various working time patterns, manufacturing, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Categories of usual working hours								
0-40 hrs	89	98	92	79	88	80	80	81
40.1-48 hours	8	2	6	15	8	12	11	13
48.1-99 hrs	4	1	2	6	4	8	8	6
Total %	100	100	100	100	100	100	100	100
Total N	4547	560	3495	22719	12880	936	1966	3536
Categories of usual working hours, only those compensated for extra hours, either in cash or in time								
0-40 hrs	96	100	95	85	92	82	87	84
40.1-48 hours	3		4	13	6	13	8	12
48.1-99 hrs	1		1	3	2	6	5	4
Total %	100	100	100	100	100	100	100	100
Total N	2097	5	2488	12938	7254	381	518	1351
Shares of those having agreed annualised hours								
Total	0.3	2.5	2.7	1.8	0.4	0.1	4.8	2.5
Shares of shift or irregular work								
Total	31	38	33	23	21	31	21	29
Shares of those regularly working in the evening								
Total	38	18	25	26	41		66	31
Shares of those regularly working on Saturdays								
Total	20	27	10	10	25		14	21
Shares of those regularly working on Sundays								
Total	12	18	8	6	13		8	14
Mean hours per week by sort of working hours agreed								
1 Full-time hours per week	38.1	36.7	38.9	38.9	38.8	40.2	40.0	38.9
2 Part-time hours per week	27.0	23.9	30.3	26.1	27.0	23.9	29.9	26.0
3 Annualised hours	33.1	11.3	33.7	38.4	34.1	27.5	33.1	39.8
4 Flexible hours	32.9	33.0	29.3	26.1	33.4	14.6	22.9	23.2
6 I work on call	38.0		19.5	10.0	25.1	.	40.0	24.9

Source: *WageIndicator* dataset Sept. 2004-Sept. 2006

More detailed analyses on the incidence of long working hours in the food² and metal³ industries, using the shares of a usual working week over 40 hours, show that

² NACE 3-digit codes 150-159. Because of the small number of respondents we left out the outcomes for Denmark.

³ NACE 3-digit codes 270-275, 280-287, 290-297, 300-316, 320-323, 330-335, 340-343, 350-355. Again, we left out the results for Denmark.

in food manufacturing in a number of countries this share is (substantially) above the manufacturing average, while in the metal industry in all countries the share of those working over 40 hours is below that manufacturing average. In German food manufacturing this share was 24% (manufacturing at large: 21%), in the Netherlands 13% (12%), in Poland 24% (20%), and in UK food manufacturing even 26% (19%). On the other hand, in Belgian food manufacturing this share was only 9% (manufacturing at large: 12%), in Finland 7% (8%), and in Spain 15% (19%). As said, the shares of long working hours in the metal trades were everywhere low i.e. below the manufacturing average: in Belgium 10%, in Finland 6%, in Germany 15%, in the Netherlands 11%, and in Poland, Spain and the UK all 14%.

In the manufacturing industry at large annualised hours can be found to some extent (5%) in Spain, followed by Finland, Denmark and the UK. As for the shares of shift or irregular work, in all countries investigated manufacturing again takes a middle position. These shares are rather high in Denmark (38%), followed by Finland, Poland and Belgium, the three too with over 30%.

Regarding the shares of those regularly working in the evening, it can be noticed that Spain like in other industries reveals a high share (66%), most likely as a consequence of its climatic conditions and siesta tradition. Under other conditions, the Netherlands and Belgium also show up with rather high scores of evening work.

In manufacturing working regularly on Saturdays is notably reported for Denmark, the Netherlands, the UK and Belgium (all 20% or more), and working regularly on Sundays in the same countries, be it with lower shares (12-18%). For employees with full-time agreed working weeks, the average contractual hours are longest in Poland with over 40 hours per week, and in Spain with exactly 40 hours. The variation across countries of the average working week of employees with annualised hours is quite large, with the UK (average almost 40 hours) on top. Employees with on call work turn out to have the longest working weeks in Spain (average 40 hours).

3.2. Low pay in manufacturing

Compared across industries, manufacturing does not show a high incidence of low pay; in the Netherlands it has the worst relative position (no. 6). In Poland, 21% of all workers in manufacturing industry is paid under the threshold, followed by the Netherlands (19%).

Table 3.2. Incidence of low pay (under 2/3 median wage threshold) and country ranking across 13 industries, manufacturing, adults aged 21 and over, breakdown by country, 2005

	Belgium		Denmark		Finland		Germany		Netherlands		Poland		Spain		UK	
Incidence	12%	2	8%	1	4%	3	9%	5	19%	6	21%	4	9%	3	13%	5

Source: *WageIndicator* dataset 2005 (unweighted)

More detailed analyses on low pay in the food and metal industries show variations around the manufacturing average. The outcomes for food manufacturing are mostly above that average: slightly in Belgium (a 13% incidence), Finland (6%) and the Netherlands (20%), more substantially in Germany (19%, 10%pts above manufacturing at large), Poland (24%) and the UK (20%). Spain is an exception, with a low pay incidence in food of only 6%.

Nearly everywhere the metal industry scores equal to or better than manufacturing at large as for low pay: 10% in Belgium, 4% in Finland, 8% in Germany, 15% in the

Netherlands, only 4% in Spain, and 12% in the UK. Here the exception is Poland, with an incidence in the metal trades of 22%, 1%pt over the manufacturing average.

3.3. Training in manufacturing

Concerning the shares of employees having received at least one day of employer-provided training last year, in all five countries manufacturing holds the 8th position. Finland and Belgium reveal the highest absolute scores and Spain the lowest. The relative picture on average number of training days is slightly better. On average 3 to 6.5 days of training was received.

Table 3.3.1. Shares of employees having received at least one day of employer-provided training last year and average number of employer-provided training days last year, incl. country ranking across 13 industries, manufacturing, breakdown by country, 2004-2006

	Belgium		Finland		Germany		Netherlands		Spain	
Shares of employees	58%	8	60%	8	52%	8	55%	8	41%	8
Average no. of training days	4.5	5	4.8	7	3.2	7	5.3	7	6.5	4

Source: *WageIndicator* data, September 2004-September 2006

Except for Germany, the position of manufacturing concerning the share of employees having received at least one day of self-paid training last year is slightly worse than that concerning employer-paid training. The figures vary from 13% in the Netherlands to 29% in Spain. In the latter country, the number of training days in the last year exceeds 10.

Table 3.3.2. Shares of employees having at least one day of self-paid training last year and average number of self-paid training days last year, incl. country ranking across 13 industries, manufacturing, breakdown by country, 2004-2006

	Belgium		Germany		Netherlands		Spain	
Shares of employees	16%	10	23%	7	13%	12	29%	10
Average no. of training days	3.2	10	4.0	8	2.6	12	10.2	9

Source: *WageIndicator* data, September 2004-September 2006

Across the board it holds that the higher the shares of employees receiving or taking training days, the higher their average number of days.

3.4. Older workers in manufacturing

Table 3.4. Average age and distribution over age groups, breakdown by country, manufacturing, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherl.	Poland	Spain	UK
Average age	38.4	45.9	37.3	37.7	40.7	36.6	32.4	35.9	38.2
Distribution over age groups									
1 < 25 yr	6		6	5	6	10	8	5	8
2 25-34	32		39	35	26	35	63	48	34
3 35-44	34		30	37	27	33	16	29	30
4 45-54	22		18	18	31	17	11	15	20
5 >=55	6		7	5	10	5	1	3	8
Total	100		100	100	100	100	100	100	100

Source: *WageIndicator* data, September 2004-September 2006

Across industries, manufacturing mostly takes a middle position across industries concerning age distribution, with the exceptions of Belgium (highest average age) and the Netherlands (third highest average age). In manufacturing, the share of workers over 45 years of age is highest in the workforce in Hungary, followed by the UK and Belgium. It is lowest in Poland, where particularly the share of workers 25-34 of age is high. Again, the Netherlands shows the highest share in the youngest age group.

3.5 Collective bargaining coverage in manufacturing

The picture concerning collective bargaining coverage for the manufacturing industry is quite varied: a comparatively good position in Finland, Denmark, Belgium and Netherlands (80% coverage or higher), slightly lower for Hungary and Spain, and low outcomes in the UK and in Poland. The share of those agreeing that it is important to be covered by a collective agreement is mostly higher than the share covered by an agreement (with the exceptions of the Netherlands and Germany), although in this respect the relative position of manufacturing is worse than concerning coverage.

Table 3.5. Collective bargaining coverage and share of those agreeing that it is important to be covered by a collective agreement, incl. country ranking across 13 industries, manufacturing, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherlands	Poland	Spain	UK
Coverage	82% 4	91% 7	91% 6	64% 6	78% 3	80% 8	18% 6	73% 7	23% 8
Agree with importance	78% 8		87% 7	64% 11		69% 11		87% 11	36% 12

Source: *WageIndicator* data, September 2004-September 2006

More detailed analyses on collective bargaining coverage in the food and metal industries show that the perceived coverage in both sub-sectors is nearly everywhere higher than, or at least equal to, the manufacturing average. The figures for food are most clearly above the national averages for manufacturing at large: in Belgium 85% against 82%, in Finland 93% (91%), in the Netherlands 90% (80%), in Poland 23% (18%), in Spain even 87% (73%), and in the UK 31% (23%). Most outcomes for the metal trades came closer to the manufacturing averages: Belgium 82%, Finland 93%, Germany 65%, the Netherlands 87%, Poland 20%, the UK 23%, and with 71% the Spanish metal outcome was below that of Spanish manufacturing.

3.6. Work-related stress in manufacturing

As Table 3.6. (next page) shows, the ranking of the mean values of all five indicators for work-related stress in manufacturing jointly does not vary that much across countries: from the no. 2 position in the UK to the no. 7 position in Denmark. Also for the single issues no extreme values show up, except the high score for the Netherlands on 'Work to tight deadlines'.

Table 3.6. Indicators for incidence of work-related stress, mean values and country ranking across 13 industries, manufacturing, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Netherlands		Spain		UK	
Work physically exhausting	2.6	3	3.0	6	2.8	7	2.7	6	2.6	5	3.3	7		
Work mentally exhausting	3.1	3	3.8	7	3.4	3	3.5	6	2.9	3	3.8	3		
Work at very high speed	3.5	6	3.8	5	3.5	3	3.4	5	3.5	4	3.3	6	3.6	5
Work cannot be finished in allocated time	2.6	3	2.8	5	2.3	3	2.5	4	2.3	9	2.5	6	2.7	5
Work to tight deadlines	3.4	6	3.8	4	3.5	1	3.5	9	3.3	11	3.5	9	3.9	2
Mean of five factors*)	3.0	4	3.6	7	3.1	4	3.1	4	2.9	4	3.3	6	3.3	2

*) for the UK mean of three factors

Source: *WageIndicator* data, September 2004-September 2006

3.7. Conclusions concerning manufacturing

Of course, manufacturing is a large and heterogeneous industry. One should be aware that the aggregate figures presented here may hide quite diverse outcomes in for example steel and metal industries, chemicals, food manufacturing, textile and garment manufacturing, and the printing industry. We indicated this variation somewhat by presenting more detailed results for food and metal manufacturing respectively, with metal mostly showing more favorable outcomes concerning low wage and long working hours, and food concerning collective bargaining coverage.

As for most issues, across industries manufacturing can be found in a middle position, with the positive exception of the incidence of low pay (in all countries above the median wage) and the negative exception of the incidence of self-paid training and the share of those agreeing that it is important to be covered by a collective agreement. In the longer run, the discrepancy between these positive and negative aspects may lead to tensions, and may notably aggravate wage pressure.

4. Utilities

4.1. Working time in utilities

As for the length of the working week in utilities, the longest hours can be traced in Spain, as 24% reports working usually more than 40 hours a week, followed by Germany (22%) (See Table 4.1., next page). Annualised hours are widespread and can be found to a considerable extent in Denmark and Finland, followed by the UK and Spain. These are the highest figures concerning this practice of all industries. As for the shares of shift or irregular work, these are rather high in Poland (34%) and the UK (33%).

Regarding the shares of those regularly working in the evening, it can be noticed that Spain like in other industries reveals a high share (67%), most likely as a consequence of the siesta tradition in that country. Under other conditions, the UK, Belgium and the Netherlands also show up with rather high scores of evening work.

Table 4.1. Various working time patterns, utilities, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Categories of usual working hours								
0-40 hrs	88	97	93	78	90	83	76	85
40.1-48 hours	10	3	7	15	6	14	13	9
48.1-99 hrs	2			7	4	2	11	5
Total %	100	100	100	100	100	100	100	100
Total N	197	29	41	2245	349	127	277	241
Categories of usual working hours, only those compensated for extra hours, either in cash or in time								
0-40 hrs	93		94	82	91	82	83	90
40.1-48 hours	6		6	14	6	17	10	8
48.1-99 hrs	1			4	2	2	6	2
Total %	100		100	100	100	100	100	100
Total N	83		32	1322	216	60	78	102
Shares of those having agreed annualised hours								
Total	0.7	10.3	9.8	3.3	0.3	.	4.9	5.0
Shares of shift or irregular work								
Total	24	21	25	26	18	34	15	33
Shares of those regularly working in the evening								
Total	35	.	0	24	33		67	38
Shares of those regularly working on Saturdays								
Total	22	27	10	10	25		14	21
Shares of those regularly working on Sundays								
Total	18	.	0	12	14		10	21
Mean hours per week by sort of working hours agreed								
1 Full-time hours per week	37.2	35.4	38.7	39.4	39.2	40.5	38.9	38.0
2 Part-time hours per week	21.9	.	.	27.9	28.0	40.0	31.0	26.8
3 Annualised hours	39.0	35.0	23.4	37.6	43.3	.	29.3	35.0
4 Flexible hours	21.1	37.0	40.0	28.0	36.0	.	22.2	33.3
6 I work on call	.	.	50.8	.	.	.	26.0	38.0

Source: *WageIndicator* dataset Sept. 2004-Sept. 2006

In the utilities industry working on Saturdays proves to be rather widespread in Denmark and the Netherlands, and working on Sundays notably in the UK and Belgium. For employees with full-time agreed working weeks, the average contractual hours are longest in Poland, with over 40 hours per week. The variation across countries of the average hours of employees with annualised hours is quite large, with the Netherlands (average over 43 hours) and Belgium clearly on top. Employees with on call work have the longest working weeks in Finland (average 51 hours).

4.2. Low pay in utilities

As for the incidence of low pay, this is comparatively low in all countries, except in Finland. In that country, utilities is the worst paying industry, in full contrast to Poland and the UK, where it pays best (Table 4.2., next page).

Table 4.2. Incidence of low pay (under 2/3 median wage threshold) and country ranking across 13 industries, utilities, adults aged 21 and over, breakdown by country, 2005

	Belgium		Denmark		Finland		Germany		Netherlands		Poland		Spain		UK	
Incidence	14%	3	-	-1	14%	13	6%	2	11%	2	16%	1	10%	6	5%	1

Source: *WageIndicator* dataset 2005 (unweighted)

4.3. Training in utilities

Concerning the shares of employees having received at least one day of employer-provided training last year, Finland, the Netherlands and Belgium reveal the highest scores, and Spain has the lowest score. Compared to the other industries, these shares are high everywhere.

Table 4.3.1. Shares of employees having received at least one day of employer-provided training last year and average number of employer-provided training days last year, incl. country ranking across 13 industries, utilities, breakdown by country, 2004-2006

	Belgium		Finland		Germany		Netherlands		Spain	
Shares of employees	80%	1	88%	2	59%	4	81%	1	58%	1
Average no. of training days	8.7	1	3.9	10	3.2	7	8.8	3	10.4	1

Source: *WageIndicator* data, September 2004-September 2006

The shares of employees having received at least one day of self-paid training last year vary slightly in the five countries, between 15 and 25%.

Table 4.3.2. Shares of employees having at least one day of self-paid training last year and average number of self-paid training days last year, incl. country ranking across 13 industries, utilities, breakdown by country, 2004-2006

	Belgium		Germany		Netherlands		Spain	
Shares of employees	19%	5	19%	13	15%	9	25%	12
Average no. of training days	3.7	7	3.7	10	4.1	5	9.2	10

Source: *WageIndicator* data, September 2004-September 2006

4.4. Older workers in utilities

In utilities, the share of workers over 45 years of age is highest in the workforce in Hungary, Belgium and Finland. It is lowest in Poland, where particularly the share of workers 25-34 is high. The Netherlands and the UK show the highest shares in the youngest age group.

Table 4.4. Average age and distribution over age groups, breakdown by country, utilities, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherl.	Poland	Spain	UK
Average age	35.9	48.5	42.0	38.5	44.5	36.3	38.1	36.7	38.6
Distribution over age groups									
1 < 25 yr	16		2	5	1	10	2	6	9
2 25-34	34		27	33	11	40	41	42	30
3 35-44	20		24	35	34	27	28	28	31
4 45-54	21		32	22	41	18	22	19	20
5 >=55	8		15	6	13	5	6	4	10
Total	100		100	100	100	100	100	100	100

Source: *WageIndicator* data, September 2004-September 2006

4.5. Collective bargaining coverage in utilities

The picture concerning collective bargaining coverage for the utilities industry is quite varied: a comparatively good position in Finland, Denmark, Hungary, Belgium and the Netherlands (all at least 88% coverage), slightly lower for Spain and Germany, and lowest, but still more than 50% coverage, in Poland and UK. The shares of those agreeing that it is important to be covered by a collective agreement is about equal than the shares of those covered, with the exception of the Netherlands, where the percentage agreeing is much lower, and Spain, where the opposite holds.

Table 4.5. Collective bargaining coverage and share of those agreeing that it is important to be covered by a collective agreement, incl. country ranking across 13 industries, utilities, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Hungary		Netherlands		Poland		Spain		UK	
Coverage	90%	1	96%	2	100%	1	73%	3	90%	2	88%	6	59%	1	78%	4	56%	3
Agree with importance	85%	2			100%	1	72%	5			65%	12			88%	9	58%	4

Source: *WageIndicator* data, September 2004-September 2006

4.6. Work-related stress in utilities

The ranking of the mean values of all five indicators for work-related stress jointly varies widely across countries, from the no. 2 position in Belgium and the Netherlands, a middle position in most other countries, to a very high ranking of (problems in) the UK utilities industry. In the UK the combination of high scores on 'work at very high speed', 'work cannot be finished in allocated times', and 'work to tight deadlines' is predominant.

Table 4.6. Indicators for incidence of work-related stress, mean values and country ranking across 13 industries, utilities, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Netherlands		Spain		UK	
Work physically exhausting	2.6	3	-	-	3.3	11	2.5	3	2.3	1	3.2	2		
Work mentally exhausting	3.0	13	-	-	3.3	2	3.0	1	3.0	6	3.8	3		
Work at very high speed	3.2	4	-	-	3.5	3	3.3	4	3.3	1	3.1	3	3.8	7
Work cannot be finished in allocated time	2.4	2	-	-	2.5	6	3.0	11	2.1	2	2.4	4	4.0	13
Work to tight deadlines	3.2	5	-	-	3.8	10	3.3	4	3.2	8	3.3	4	4.8	13
Mean of five factors ^{*)}	2.9	2	-	-	3.3	9	3.0	3	2.8	2	3.2	3	4.2	13

^{*)} for the UK mean of three factors

Source: *WageIndicator* data, September 2004-September 2006

4.7. Conclusions concerning utilities

The utilities sector reveals a mixed picture. In some countries the industry shows quite long working weeks and deficiencies in training. Average pay levels are comparatively high (except for Finland), but in some countries work-related stress levels are high too. This is most strikingly the case in the UK.

5. Construction

5.1. Working time in construction

As for the length of the working week in the construction industry, the longest hours are found in Germany, where 32% of the respondents report working usually more than 40 hours a week, followed by Spain (28%), Poland (27%), and the UK (24%). Annualised hours can particularly be found in Germany, Spain and Finland; in the other countries this incidence is negligible. As for the shares of shift or irregular work, these are not very high in this industry. They are most reported in the UK, followed by Poland, and least in the Netherlands and Spain.

Regarding the shares of those regularly working in the evening, it can be noticed that Spain like in other industries reveals high shares, most likely as a consequence of the siesta tradition in that country. Under other conditions, Belgium and the Netherlands also show up with rather high scores (28%).

Table 5.1. Various working time patterns, construction, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Categories of usual working hours								
0-40 hrs	83	97	90	68	87	73	72	76
40.1-48 hours	9	2	7	22	6	15	16	15
48.1-99 hrs	8	1	3	10	6	12	12	9
Total %	100	100	100	100	100	100	100	100
Total N	1065	192	573	4598	4921	332	1006	1278
Categories of usual working hours, only those compensated for extra hours, either in cash or in time								
0-40 hrs	91	100	93	74	91	75	75	80
40.1-48 hours	5		5	20	5	16	14	12
48.1-99 hrs	3		2	5	3	9	11	9
Total %	100	100	100	100	100	100	100	100
Total N	447	7	402	2262	2685	92	201	493
Shares of those having agreed annualised hours								
Total	0.1	-	1.2	2.0	0.2	.	1.6	0.3
Shares of shift or irregular work								
Total	15	9	10	16	6	19	5	20
Shares of those regularly working in the evening								
Total	28	14	6	19	28		77	21
Shares of those regularly working on Saturdays								
Total	16	0	4	7	19		10	17
Shares of those regularly working on Sundays								
Total	4	0	3	0	6		2	7
Mean hours per week by sort of working hours agreed								
1 Full-time hours per week	39.6	36.9	39.2	40.4	39.6	40.7	40.8	39.8
2 Part-time hours per week	25.9	16.2	27.1	26.3	27.2	23.1	28.4	25.1
3 Annualised hours	44.0	.	23.9	41.0	34.2	.	35.8	43.7
4 Flexible hours	33.2	37.0	29.3	29.8	42.0	20.0	24.6	24.2
6 I work on call	50.0	.	0	.	26.0	.	20.0	0

Source: *WageIndicator* dataset Sept. 2004-Sept. 2006

In the construction industry working on Saturdays is not very common. Its incidence is highest in the UK and the Netherlands. Working on Sundays is far less common.

The shares are highest in the Netherlands, the UK and Belgium. Working regularly on Sundays is rather rare, with the highest incidence in the UK and the Netherlands. For employees with full-time agreed working weeks, the average contractual hours are longest in Spain, Poland and Germany, all with over 40 hours per week. The variation across countries of the average hours of employees having agreed flexible hours is larger than in most other industries, with the Netherlands (average 42 hours), Denmark and Belgium clearly on top. Employees with on call work have the longest working weeks in Belgium (average 50 hours).

5.2. Low pay in construction

Concerning the incidence of low pay the construction industry mostly takes a middle position in the industry ranking, except in the UK and Spain where good positions prevail. The shares of construction workers falling below the low pay threshold are considerable in Poland (25%), Belgium (19%), and the Netherlands (18%).

Table 5.2. Incidence of low pay (under 2/3 median wage threshold) and country ranking across 13 industries, construction, adults aged 21 and over, breakdown by country, 2005

	Belgium		Denmark		Finland		Germany		Netherlands		Poland		Spain		UK	
Incidence	19%	6	-	-	8%	10	15%	8	18%	4	24%	6	9%	3	10%	2

Source: *WageIndicator* dataset 2005 (unweighted)

5.3. Training in construction

Concerning the shares of employees having received at least one day of employer-provided training last year, Finland and the Netherlands reveal the highest scores, and Spain the lowest score. Compared to the other industries, these shares are low everywhere.

Table 5.3.1. Shares of employees having received at least one day of employer-provided training last year and average number of employer-provided training days last year, incl. country ranking across 13 industries, construction, breakdown by country, 2004-2006

	Belgium		Finland		Germany		Netherlands		Spain	
Shares of employees	44%	12	53%	12	36%	11	54%	10	31%	12
Average no. of training days	3.0	13	3.1	12	1.9	12	4.1	10	4.8	11

Source: *WageIndicator* data, September 2004-September 2006

The shares of employees having received at least one day of self-paid training last year vary considerably: in Germany and Spain they are double those of Belgium and the Netherlands. Across the board holds that the higher the shares of employees receiving or taking training days, the higher their average number of those days.

Table 5.3.2. Shares of employees having at least one day of self-paid training last year and average number of self-paid training days last year, incl. country ranking across 13 industries, construction, breakdown by country, 2004-2006

	Belgium		Germany		Netherlands		Spain	
Shares of employees	15%	11	30%	4	13%	12	30%	8
Average no. of training days	3.1	12	4.5	6	2.2	13	11.1	7

Source: *WageIndicator* data, September 2004-September 2006

5.4. Older workers in construction

In construction, the share of workers over 45 years of age is highest in the workforce in Hungary, Belgium and Finland. It is lowest in Poland, where particularly the share of workers 25-34 of age is high. The Netherlands and the UK show the highest shares in the youngest age group.

Table 5.4. Average age and distribution over age groups, breakdown by country, construction, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherl.	Poland	Spain	UK
Average age	36.9	44.6	37.8	37.2	39.4	35.5	31.8	33.7	37.3
Distribution over age groups									
1 < 25 yr	9		9	5	7	14	6	8	11
2 25-34	37		35	38	32	37	70	56	35
3 35-44	29		29	36	27	28	15	26	29
4 45-54	21		17	16	21	16	7	8	16
5 >=55	5		10	5	13	5	1	2	9
Total	100		100	100	100	100	100	100	100

Source: *WageIndicator* data, September 2004-September 2006

5.5. Collective bargaining coverage in construction

The picture concerning collective bargaining coverage for the construction industry is quite varied: a comparatively good position in Denmark, Finland and the Netherlands, but in the lowest ranks in the other countries. The ranking of the industry according to the share of those agreeing that it is important to be covered by a collective agreement is about equal.

Table 5.5. Collective bargaining coverage and share of those agreeing that it is important to be covered by a collective agreement, incl. country ranking across 13 industries, construction, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherlands	Poland	Spain	UK
Coverage	69% 9	92% 5	90% 7	46% 12	45% 11	92% 4	0% 11	57% 13	11% 12
Agree with importance	73% 12		85% 9	67% 8		79% 5		87% 12	28% 13

Source: *WageIndicator* data, September 2004-September 2006

5.6. Work-related stress in construction

Table 5.6. Indicators for incidence of work-related stress, mean values and country ranking across 13 industries, construction, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Netherlands		Spain		UK	
Work physically exhausting	2.8	7	3.9	7	3.0	10	3.1	11	2.8	10	3.4	8		
Work mentally exhausting	3.1	3	2.6	1	3.2	1	3.3	2	2.9	3	3.9	8		
Work at very high speed	3.5	6	3.5	2	3.2	1	3.6	12	3.5	4	3.3	6	3.5	4
Work cannot be finished in allocated time	2.8	1	2.5	4	2.0	1	2.7	5	2.2	5	2.6	10	2.9	7
Work to tight deadlines	3.5	10	3.0	1	3.8	10	3.7	13	3.2	8	3.5	9	3.9	2
Mean of five factors*)	3.1	7	3.1	3	3.0	1	3.3	12	2.9	4	3.3	6	3.5	5

*) for the UK mean of three factors

Source: *WageIndicator* data, September 2004-September 2006

Table 5.6. shows that in the construction industry the ranking of the mean values of the five indicators of work-related stress jointly varies widely across countries, from the no. 1 position in Finland, a middle position in most other countries, to a very low ranking of German construction. Especially here, the combination of high scores on 'Work physically exhausting', 'work at very high speed' and 'work to tight deadlines' is predominant.

5.7. Conclusions concerning construction

Throughout the eight countries construction is characterised by substantial working time and training problems, while in most countries collective bargaining coverage turns out to be quite low. Especially the outcomes for the German construction industry point at large problems in every respect. It may be likely that the dominance in Germany of large building companies that developed international subcontracting networks, leading to a large influx of foreign (posted) workers, has contributed to these problems. As the exception in European perspective, since 2001 the German construction industry showed a high unemployment rate and no labour shortages.⁴

6. Wholesale and retail

6.1. Working time in wholesale and retail

Table 6.1. (next page) shows the usual overview of various working time patterns for the wholesale and retail industry.

As for the length of the working week in wholesale and retail, the longest hours are found in Poland, as 30% reports working usually more than 40 hours a week, followed by Germany (25%), and then by Spain and the UK (both 23%). Annualised hours can particularly be found in Spain, followed by Germany; in the other countries this incidence is 1% or less. As for the shares of shift or irregular work, these are quite high in this industry (although not as high as in the hospitality industry). They are mostly reported in Finland, followed by Poland, and least in Spain and Denmark. Regarding the shares of those regularly working in the evening, it can be noticed that Spain like in other industries reveals high shares, most likely as a consequence of the siesta tradition in that country. In this industry working on Saturdays is quite common in all countries. Its incidence is highest in the UK and the Netherlands. Working on Sundays is far less common. It occurs particularly in Spain, where 72% reports to work regularly on Sundays. In all other countries this figure is 30% or less. For employees with full-time agreed working weeks, the average contractual hours are longest in Poland with more than 40 hours per week. Employees having agreed flexible hours vary hardly with regard to their average hours. Across countries, employees with on call work have the longest weeks in the UK.

It has to be noted that our data hardly covers a major working time issue in especially retail, related to flexible hours: the unilateral employer decisions concerning working times and days-off, with employers often indicating changes at short notice, consequently followed by many disputes on pay according to hours worked. According to recent research this is a major nuisance to both workers and shop-floor representatives in various EU member states.⁵ We can add that in most countries the share of those answering to work flexible hours in wholesale and retail

⁴ Fellini *et al*, 2007. See also EMCC, 2005a.

⁵ Van Klaveren *et al*, 2008.

is under the national average, except for Belgium, the Netherlands and Poland where it is slightly higher than that average.

Table 6.1. Various working time patterns, wholesale/retail, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Categories of usual working hours								
0-40 hrs	89	92	89	75	88	70	76	76
40.1-48 hours	7	5	8	17	8	19	14	16
48.1-99 hrs	4	3	2	8	4	11	9	7
Total %	100	100	100	100	100	100	100	100
Total N	1923	131	1194	6409	8306	332	1245	2286
Categories of usual working hours, only those compensated for extra hours, either in cash or in time								
0-40 hrs	96	84	93	82	92	74	88	83
40.1-48 hours	3		6	15	6	20	10	13
48.1-99 hrs	1		1	3	1	6	3	4
Total %	100	14	100	100	100	100	100	100
Total N	840	7	766	3131	4362	232	282	1062
Shares of those having agreed annualised hours								
Total	0.5	-	0.4	2.4	1.0	0.3	2.7	0.6
Shares of shift or irregular work								
Total	33	17	43	35	32	39	20	30
Shares of those regularly working in the evening								
Total	29	36	42	26	41		75	35
Shares of those regularly working on Saturdays								
Total	46	43	44	36	51		42	53
Shares of those regularly working on Sundays								
Total	11	21	12	6	15		72	30
Mean hours per week by sort of working hours agreed								
1 Full-time hours per week	37.8	37.5	37.1	39.9	38.6	40.7	39.7	39.4
2 Part-time hours per week	26.2	22.2	26.3	25.1	24.9	28.8	28.3	19.9
3 Annualised hours	22.3	.	23.3	38.5	29.5	58.3	31.9	35.8
4 Flexible hours	28.9	12.3	28.0	19.3	24.7	15.4	21.2	26.7
6 I work on call	14.2	.	0	0	19.6	.	0	33.8

Source: *WageIndicator* dataset Sept. 2004-Sept. 2006

6.2. Low pay in wholesale and retail

The incidence of low pay in wholesale and retail is comparatively high in all countries, except in Denmark. It is in absolute figures highest in the Netherlands and in Poland, where 39% respectively 35% of the wholesale/retail employees reports wages falling below the low pay threshold.

Table 6.2. Incidence of low pay (under 2/3 median wage threshold) and country ranking across 13 industries, wholesale/retail, adults aged 21 and over, breakdown by country, 2005

	Belgium		Denmark		Finland		Germany		Netherlands		Poland		Spain		UK	
Incidence	30%	11	18%	4	12%	11	22%	11	39%	12	35%	8	20%	11	27%	11

Source: *WageIndicator* dataset 2005 (unweighted)

6.3. Training in wholesale and retail

Concerning the shares of employees in wholesale and retail having received at least one day of employer-provided training last year, Finland and the Netherlands reveal the highest scores, and Spain and Germany show the lowest.

Table 6.3.1. Shares of employees having received at least one day of employer-provided training last year and average number of employer-provided training days last year, incl. country ranking across 13 industries, wholesale/retail, breakdown by country, 2004-2006

	Belgium		Finland		Germany		Netherlands		Spain	
Shares of employees	53%	10	59%	9	42%	10	51%	11	34%	10
Average no. of training days	3.6	9	4.6	8	2.8	9	4.0	11	3.8	12

Source: *WageIndicator* data, September 2004-September 2006

The shares of employees having received at least one day of self-paid training last year varies to some extent across countries, being highest in Spain and lowest in Belgium. Across the board holds that the higher the shares of employees receiving or taking training days, the higher their average number of days.

Table 6.3.2. Shares of employees having at least one day of self-paid training last year and average number of self-paid training days last year, incl. country ranking across 13 industries, wholesale/retail, breakdown by country, 2004-2006

	Belgium		Germany		Netherlands		Spain	
Shares of employees	14%	12	22%	8	15%	9	24%	13
Average no. of training days	3.3	9	4.3	7	3.4	9	7.5	13

Source: *WageIndicator* data, September 2004-September 2006

6.4. Older workers in wholesale and retail

In this industry, the share of workers over 45 years of age is highest in the workforces of Hungary and Belgium. It is lowest in Poland, where particularly the share of workers 25-34 is high. The Netherlands and Spain show considerable shares in the youngest age category.

Table 6.4. Average age and distribution over age groups, breakdown by country, wholesale/retail, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherl.	Poland	Spain	UK
Average age	37.2	38.9	34.5	36.3	37.8	33.5	29.5	33.4	34.7
Distribution over age groups									
1 < 25 yr	10		14	9	12	21	15	11	18
2 25-34	34		42	37	33	36	70	52	38
3 35-44	32		28	34	25	27	11	26	24
4 45-54	20		12	16	26	13	3	9	15
5 >=55	5		4	4	5	3	0	2	6
Total	100		100	100	100	100	100	100	100

Source: *WageIndicator* data, September 2004-September 2006

6.5. Collective bargaining coverage in wholesale and retail

Collective bargaining coverage is comparatively low in this industry, although in Finland it is 84%. In all countries except Spain, the ranking of the industry according to the share of those agreeing that it is important to be covered by a collective agreement is lower than that of those covered. Nevertheless, except for the Netherlands the share of those agreeing that it is important to be covered by such an

agreement is higher than the share actually covered. Especially for the UK the gap is striking. Here, only 14% is covered by an agreement while 40% agrees that it is important to be covered.

Table 6.5. Collective bargaining coverage and share of those agreeing that it is important to be covered by a collective agreement, incl. country ranking across 13 industries, wholesale/retail, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherlands	Poland	Spain	UK
Coverage	65% ¹²	72% ¹¹	84% ¹⁰	49% ¹¹	39% ¹³	79% ¹⁰	4% ¹⁰	62% ¹¹	14% ¹¹
Agree with importance	76% ¹⁰		85% ⁹	67% ⁸		76% ⁶		86% ¹³	40% ⁸

Source: *WageIndicator* data, September 2004-September 2006

6.6. Work-related stress in wholesale and retail

Compared across industries the mean values of the five indicators for work-related stress together do not show up unfavourably, except for Belgium. Yet, some single issues show high and disquieting scores. 'Work at very high speed' ranks high in five out of seven countries (the exceptions being Denmark and Germany), but is surpassed by 'work physically exhausting' in Germany and Spain. The scores on 'work mentally exhausting' are comparatively high in Finland and Spain.

Table 6.6. Indicators for incidence of work-related stress, mean values and country ranking across 13 industries, wholesale/retail, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Netherlands		Spain		UK	
Work physically exhausting	2.9	11	3.0	4	2.9	8	2.9	10	2.7	8	3.5	10		
Work mentally exhausting	3.2	5	3.7	5	3.5	9	3.3	2	2.9	3	4.0	9		
Work at very high speed	3.7	12	4.0	6	3.9	10	3.4	5	3.6	11	3.4	9	3.9	12
Work cannot be finished in allocated time	2.7	4	3.5	5	2.4	4	2.7	5	2.2	5	2.5	6	2.2	2
Work to tight deadlines	3.4	6	3.5	3	3.5	1	3.3	4	2.9	3	3.3	4	4.1	7
Mean of five factors*)	3.2	11	3.5	5	3.2	5	3.1	4	2.9	4	3.3	6	3.3	2

*) for the UK mean of three factors

Source: *WageIndicator* data, September 2004-September 2006

6.7. Conclusions concerning wholesale and retail

The wholesale and retail trade is an industry characterized by a combination of serious workers' problems, first and foremost struggling with working time issues, but also with a high incidence of low pay, a widespread lack of training, and low collective bargaining coverage rates, with in some countries high scores on some work-related stress indicators as well. In most countries, but most outspoken in the Netherlands, especially retail employers focus on youngsters. Unless the high incidence of low pay, especially for youngsters and adult women, retail often remains attractive for these categories because of the convenient working hours and the vicinity of stores and short commuting times.⁶

⁶ Van Klaveren & Tjeldens, 2005.

7. Hotels, restaurants and catering

7.1. Working time in hotels, restaurants and catering

As for working weeks in the hotel/restaurant/catering (hospitality) industry, these are quite long in Poland, where 40% reports working usually more than 40 hours a week, but also in Germany (34% working usually more than 40 hours) and the UK (33%). Annualised hours can particularly be found in Spain, followed by Germany and Denmark. The shares of shift or irregular work are extremely high in this industry. Such working patterns are most reported in Poland and the UK, and least in Spain.

Regarding the shares of those regularly working in the evening, all countries reveal high shares, but particularly the Netherlands does. Regularly working on Saturdays is common in all countries. It occurs mostly in the Netherlands and the UK. Working on Sundays is also very common, and this occurs mostly in Germany and the Netherlands. For employees with full time agreed working weeks, the average contractual hours are longest in Poland and Germany: over 40 hours per week.

Table 7.1. Various working time patterns, hotels/restaurants, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Categories of usual working hours								
0-40 hrs	84	82	87	65	87	60	78	67
40.1-48 hours	8	15	8	18	7	25	13	19
48.1-99 hrs	7	3	5	16	6	15	9	14
Total %	100	100	100	100	100	100	100	100
Total N	297	34	425	1405	3205	96	474	859
Categories of usual working hours, only those compensated for extra hours, either in cash or in time								
0-40 hrs	95	100	94	71	89	56	85	76
40.1-48 hours	4		6	20	7	34	11	17
48.1-99 hrs	1		1	10	4	10	4	6
Total %	100	100	100	100	100	100	100	100
Total N	120	1	270	599	1754	41	117	356
Shares of those having agreed annualised hours								
Total	1.7	3.2	-	3.4	2.0	-	5.0	0.9
Shares of shift or irregular work								
Total	51	61	65	48	66	76	41	71
Shares of those regularly working in the evening								
Total	55	.	54	50	71		64	63
Shares of those regularly working on Saturdays								
Total	64	.	58	59	73		66	68
Shares of those regularly working on Sundays								
Total	53	.	42	67	63		54	57
Mean hours per week by sort of working hours agreed								
1 Full-time hours per week	38.0	37.0	37.2	41.3	38.3	41.9	39.3	41.4
2 Part-time hours per week	21.7	23.5	26.9	26.9	24.6	34.5	22.5	20.6
3 Annualised hours	39.0	40.0		40.8	31.7	.	36.2	43.5
4 Flexible hours	24.2	14.8	28.3	24.2	25.1	13.7	24.0	14.7
6 I work on call	0	.	14.4	23.6	27.4	.	15.3	40.0

Source: *WageIndicator* dataset Sept. 2004-Sept. 2006

Employees in the hospitality industry having agreed flexible hours work longest in Finland, and employees with on call work have the longest working weeks in the UK, followed by the Netherlands and Germany.

7.2. Low pay in hotels, restaurants and catering

The incidence of low pay in hotels, restaurants and catering is very high in all countries, both comparatively and in absolute terms. In four countries, Belgium, Germany, the Netherlands and Poland, the incidence is even highest across industries. Its level is highest in Poland: here 58% of the employees in this industry reports wages falling below the low pay threshold. In Germany this share is 48%, in the Netherlands 47%, and in Belgium 45%.

Table 7.2. Incidence of low pay (under 2/3 median wage threshold) and country ranking across 13 industries, hotels/restaurants, adults aged 21 and over, breakdown by country, 2005

	Belgium		Denmark		Finland		Germany		Netherlands		Poland		Spain		UK	
Incidence	45%	13	-	-	13%	12	48%	13	47%	13	58%	13	20%	11	40%	12

Source: *WageIndicator* dataset 2005 (unweighted)

7.3. Training in hotels, restaurants and catering

Compared across industries, the shares of employees in the hospitality industry having received at least one day of employer-provided training last year are quite low in all five countries. Finland reveals the highest shares, and Spain and Germany the lowest. Compared cross industries the average number of training days in hospitality is on the low end too. Again, Finland has the highest score here.

Table 7.3.1. Shares of employees having received at least one day of employer-provided training last year and average number of employer-provided training days last year, incl. country ranking across 13 industries, hotels/restaurants, breakdown by country, 2004-2006

	Belgium		Finland		Germany		Netherlands		Spain	
Shares of employees	40%	13	54%	11	28%	12	43%	12	27%	13
Average no. of training days	3.1	12	3.7	11	1.9	12	3.2	13	3.4	13

Source: *WageIndicator* data, September 2004-September 2006

Concerning the shares of employees having received at least one day of self-paid training last year, countries vary hardly. Compared across industries, the position of the industry is somewhat better than concerning employer-provided training. Overall holds that the higher the shares of employees receiving or taking training days, the higher their average number of training days.

Table 7.3.2. Shares of employees having at least one day of self-paid training last year and average number of self-paid training days last year, incl. country ranking across 13 industries, hotels/restaurants, breakdown by country, 2004-2006

	Belgium		Germany		Netherlands		Spain	
Shares of employees	18%	6	21%	9	18%	7	27%	11
Average no. of training days	3.8	6	3.6	11	3.8	8	8.0	12

Source: *WageIndicator* data, September 2004-September 2006

7.4. Older workers in hotels, restaurants and catering

In this industry, the share of workers over 45 years of age is highest in the Hungarian and Belgian workforces. It is lowest in Poland, where particularly the share of workers aged 25-34 is high. Like in wholesale and retail, the share of young employees is also quite high in the Netherlands.

Table 7.4. Average age and distribution over age groups, breakdown by country, hotels/restaurants, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherl.	Poland	Spain	UK
Average age	35.5	40.3	34.0	34.2	35.0	30.9	29.0	32.9	32.9
Distribution over age groups									
1 < 25 yr	18		19	15	23	33	21	14	23
2 25-34	32		38	42	34	36	67	48	38
3 35-44	28		28	27	20	19	8	26	22
4 45-54	18		12	13	17	10	4	9	13
5 >=55	4		3	3	7	2	0	2	4
Total	100		100	100	100	100	100	100	100

Source: *WageIndicator* data, September 2004-September 2006

7.5. Collective bargaining coverage in hotels, restaurants and catering

Collective bargaining coverage is moderately high in this industry, i.e. at least 55%, except for Hungary with 41% and notably the UK with 7%. In all countries except the Netherlands, the share of those agreeing that it is important to be covered by a collective agreement is, sometimes substantially, higher than that of those actually covered.

Table 7.5. Collective bargaining coverage and share of those agreeing that it is important to be covered by a collective agreement, incl. country ranking across 13 industries, hotels/restaurants, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherlands	Poland	Spain	UK
Coverage	72% 8	68% 12	87% 9	55% 9	41% 12	93% 3	0% 11	62% 11	7% 13
Agree with importance	79% 6		90% 5	73% 4		81% 4		87% 12	37% 11

Source: *WageIndicator* data, September 2004-September 2006

7.6. Work-related stress in hotels, restaurants and catering

Table 7.6. (next page) shows that work at very high speed ranks highest in almost all countries in the hotel/restaurant industry, closely followed by the indication that work is felt to be physically exhausting. Combined with a mostly (except in the Netherlands) high incidence of 'work mentally exhausting', this brings about comparatively high scores on the mean of the five indicators in the industry – again, except for the Netherlands.

Table 7.6. Indicators for incidence of work-related stress, mean values and country ranking across 13 industries, hotels/restaurants, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Netherlands		Spain		UK	
Work physically exhausting	3.2	13	-	-	3.5	12	3.5	12	3.0	11	3.8	13		
Work mentally exhausting	3.2	5	-	-	3.4	3	3.7	12	2.8	1	4.0	9		
Work at very high speed	3.8	13	-	-	4.2	13	3.7	13	3.9	13	3.8	13	4.2	13
Work cannot be finished in allocated time	2.6	3	-	-	2.6	7	2.7	5	2.0	1	2.4	4	2.5	3
Work to tight deadlines	3.5	10	-	-	3.7	7	3.2	3	2.9	3	3.5	9	4.3	9
Mean of five factors*)	3.3	13	-	-	3.5	12	3.4	13	2.9	4	3.5	13	3.7	8

*) for the UK mean of three factors

Source: *WageIndicator* data, September 2004-September 2006

7.7. Conclusions concerning hotels, restaurants and catering

The hospitality industry shows an accumulation of workers' problems concerning working time, low pay, training, and work-related stress, in the UK, Hungary and Poland accompanied by low collective bargaining coverage. These problems turn out to be lower in Finland, except for those concerning work-related stress. It seems rewarding to have a closer look upon union policies in this country. Union progress in this industry is definitely not that easy. Large international chains are developing, but the industry is still dominated by small and very small enterprises. Especially the latter are slow in adapting to market needs, including raising the standards of working conditions and staff skills. As a Dublin Foundation study states, "legislation may be needed to take staff development more seriously and improve their career prospects", adding that small businesses are likely to find it hardest to conform to such legislation.⁷

8. Transport and communication

8.1. Working time in transport and communication

Table 8.1. (next page) shows that, as for working hours in the transport and communication industry, various country figures show long hours. Yet the longest hours are found in the UK: 32% of transport and communication workers reports working usually more than 40 hours a week. Working hours are also quite long (27% over 40 hours) in German transport and communication, and the share of excessive hours (over 48 hours) is considerable in the Netherlands too.

Annualised hours are particularly found in Germany. The shares of shift or irregular work are quite high compared across industries. They are highest reported in Denmark and the UK, and least in Spain. Regarding the shares of those regularly working in the evening, it can be noticed that Spain reveals the highest shares of evening work, most likely as a consequence of the siesta tradition in this country. These shares are also considerable (over 40%) in Belgium, the Netherlands, and the UK. Working on Saturdays is also widespread. Its incidence is highest in the Netherlands and the UK (both 42%). Working on Sundays shows the highest shares in the UK (31%), followed by the Netherlands (27%).

⁷ EMCC, 2005b.

For transport and communication employees with full-time agreed working weeks, the average contractual hours are longest in UK, the Netherlands, Poland, and Germany: in all four countries more than 40 hours. The average working weeks of those with part-time contracts are rather equal across the eight countries, with the shortest working weeks in the UK. Employees having agreed flexible hours have the longest weeks in the Netherlands, and employees with on call work have longest hours in Germany and Belgium.

Table 8.1. Various working time patterns, transport/communication, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Categories of usual working hours								
0-40 hrs	83	89	86	73	80	78	83	69
40.1-48 hours	9	6	6	15	7	14	9	18
48.1-99 hrs	8	5	9	12	13	7	8	14
Total %	100	100	100	100	100	100	100	100
Total N	1266	455	880	3883	5552	348	976	1510
Categories of usual working hours, only those compensated for extra hours, either in cash or in time								
0-40 hrs	90	75	92	79	84	81	91	72
40.1-48 hours	5	25	4	14	7	13	5	18
48.1-99 hrs	5		4	7	9	6	4	11
Total %	100	100	100	100	100	100	100	100
Total N	493	4	578	1851	3011	135	245	674
Shares of those having agreed annualised hours								
Total	0.8	2.7	1.2	13.8	0.7		5.6	3.6
Shares of shift or irregular work								
Total	35	52	40	34	36	30	26	45
Shares of those regularly working in the evening								
Total	46	33	29	32	54		63	42
Shares of those regularly working on Saturdays								
Total	32	33	26	27	42		24	42
Shares of those regularly working on Sundays								
Total	21	17	22	23	27		17	31
Mean hours per week by sort of working hours agreed								
1 Full-time hours per week	38.1	38.3	39.0	40.2	40.4	40.3	39.6	40.4
2 Part-time hours per week	27.3	25.6	27.7	25.6	26.7	28.0	29.2	24.1
3 Annualised hours	41.1	24.7	28.0	38.5	33.5	.	33.0	39.3
4 Flexible hours	28.9	18.1	30.3	19.3	34.3	26.7	21.7	24.6
6 I work on call	40.3	.	15.6	45.0	25.2	.	23.7	33.0

Source: *WageIndicator* dataset Sept. 2004-Sept. 2006

8.2. Low pay in transport and communication

Table 8.2. (next page) indicates that the incidence of low pay in transport and communication varies widely across countries. It is particularly high in the Netherlands. Here 28% of the employees in this industry reports wages falling below the low pay threshold: transport/communication ranks only ninth. The relative position of the industry seems slightly better in the other countries, and substantially better in Denmark and Spain.

Table 8.2. Incidence of low pay (under 2/3 median wage threshold) and country ranking across 13 industries, transport/communication, adults aged 21 and over, breakdown by country, 2005

	Belgium		Denmark		Finland		Germany		Netherlands		Poland		Spain		UK	
Incidence	19%	6	8%	1	7%	8	15%	8	28%	9	24%	6	9%	3	14%	7

Source: *WageIndicator* dataset 2005 (unweighted)

8.3. Training in transport and communication

Compared across industries, the shares of transport and communication workers having received at least one day of employer-provided training last year are modest in the five countries with sufficient data. The absolute shares of those having received such training hardly show any variation.

Table 8.3.1. Shares of employees having received at least one day of employer-provided training last year and average number of employer-provided training days last year, incl. country ranking across 13 industries, transport/communication, breakdown by country, 2004-2006

	Belgium		Finland		Germany		Netherlands		Spain	
Shares of employees	57%	9	57%	10	49%	9	56%	7	46%	4
Average no. of training days	4.4	6	4.4	9	2.8	9	5.3	8	5.8	7

Source: *WageIndicator* data, September 2004-September 2006

Concerning the shares of employees with at least one day of self-paid training last year, variations across countries are somewhat larger. In Spain self-paid training is most reported. Overall both tables show that the higher the shares of employees receiving or taking training days, the higher their average number of days.

Table 8.3.2. Shares of employees having at least one day of self-paid training last year and average number of self-paid training days last year, incl. country ranking across 13 industries, transport/communication, breakdown by country, 2004-2006

	Belgium		Germany		Netherlands		Spain	
Shares of employees	17%	8	20%	12	16%	8	30%	8
Average no. of training days	4.1	5	3.5	12	3.1	10	8.5	11

Source: *WageIndicator* data, September 2004-September 2006

8.4. Older workers in transport and communication

Table 8.4. Average age and distribution over age groups, breakdown by country, transport/communication, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherl.	Poland	Spain	UK
Average age	37.3	47.3	36.6	38.5	42.3	36.1	31.7	36.0	38.7
Distribution over age groups									
1 < 25 yr	7		9	4	3	13	11	6	6
2 25-34	35		32	32	20	35	64	44	32
3 35-44	32		31	39	33	30	16	32	33
4 45-54	20		17	20	31	17	9	16	21
5 >=55	5		5	5	12	5	1	2	8
Total	100		100	100	100	100	100	100	100

Source: *WageIndicator* data, September 2004-September 2006

The average age reported for transport/communication is lowest in Poland, and highest in Denmark and Hungary. Considerable groups of young employees can be found in this industry in the Poland, the Netherlands and Spain.

8.5. Collective bargaining coverage in transport and communication

The reported collective bargaining coverage in this industry is rather high, i.e. more than 70% in most countries, except for the UK with 40% and Poland with 27%. Except for the UK, the country ranking of those agreeing that it is important to be covered by a collective agreement is lower than the ranking on bargaining coverage. In Spain and the UK the shares of those valuing to be covered by a collective agreement are higher than the actual coverage; in the other countries they are (somewhat) lower.

Table 8.5. Collective bargaining coverage and share of those agreeing that it is important to be covered by a collective agreement, incl. country ranking across 13 industries, transport/communication, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherlands	Poland	Spain	UK
Coverage	82% 4	93% 3	88% 8	70% 4	91% 1	80% 8	27% 2	76% 5	40% 5
Agree with importance	79% 6		84% 11	69% 7		72% 9		91% 6	55% 5

Source: *WageIndicator* data, September 2004-September 2006

8.6. Work-related stress in transport and communication

The incidence of work at very high speed ranks highest in almost all countries, almost on par with 'work to tight deadlines'. In contrast, the item 'work cannot be finished in allocated time' ranks lowest in most countries. Similarly, there is relatively little reporting that work in transport / communication is physically exhausting. In the overall ranking across industries, transport/communication has a middle position, except for Belgium, where the scores on 'work at very high speed' and 'work to tight deadlines' are comparatively high.

Table 8.6. Indicators for incidence of work-related stress, mean values and country ranking across 13 industries, transport/communication, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Spain	UK
Work physically exhausting	2.7 5	2.7 3	2.9 8	2.5 3	2.6 5	3.2 2	
Work mentally exhausting	3.2 5	2.8 2	3.4 3	3.4 4	3.0 6	3.8 3	
Work at very high speed	3.6 11	3.3 1	3.9 10	3.4 5	3.6 11	3.4 9	3.3 2
Work cannot be finished in allocated time	2.7 4	3.0 6	2.6 7	2.7 5	2.2 5	2.5 6	3.1 10
Work to tight deadlines	3.6 12	3.3 2	3.8 10	3.3 4	3.3 11	3.5 9	3.9 2
Mean of five factors*)	3.2 11	3.0 2	3.3 9	3.1 4	2.9 4	3.3 6	3.5 5

*) for the UK mean of three factors

Source: *WageIndicator* data, September 2004-September 2006

8.7. Conclusions concerning transport and communication

Transport and communications shows a rather mixed picture. Notably in the UK, Germany, and the Netherlands the industry shows quite long working weeks, and especially in the Netherlands the incidence of low pay is high. With the partial exception of Belgium and Spain, the shares of those receiving and taking training

days as well as the average number of training days are comparatively quite modest. On the other hand, collective bargaining coverage is, except for the UK and Poland, rather high, as well as the share of those valuing to be covered by a collective agreement. In the ranking concerning work-related stress levels, transport and communication takes a middle position, except for Belgium where the high scores on 'work at very high speed' and work to tight deadlines' affect the sum score negatively.

9. Finance

9.1. Working time in finance

As for the length of the working week in finance, the longest hours are found in Germany and Poland, where 23% respectively 20% report working usually more than 40 hours a week. Spain and the UK follow here with each 15%, the other countries showing considerable lower figures.

Table 9.1. Various working time patterns, finance, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Categories of usual working hours								
0-40 hrs	91	93	93	78	93	80	85	86
40.1-48 hours	7	4	5	16	4	16	10	9
48.1-99 hrs	3	3	2	7	3	4	5	6
Total %	100	100	100	100	100	100	100	100
Total N	1145	29	666	4579	3630	479	905	1613
Categories of usual working hours, only those compensated for extra hours, either in cash or in time								
0-40 hrs	97		96	84	96	85	91	94
40.1-48 hours	2		4	14	3	13	8	5
48.1-99 hrs	1			2	1	2	1	1
Total %	100		100	100	100	100	100	100
Total N	479		464	2641	2037	131	95	590
Shares of those having agreed annualised hours								
Total	0.6	3.7	0.8	1.7	1.5		2.6	1.3
Shares of shift or irregular work								
Total	18	7	9	14	9	32	6	14
Shares of those regularly working in the evening								
Total	27		11	26	34		57	24
Shares of those regularly working on Saturdays								
Total	18		3	9	12		14	19
Shares of those regularly working on Sundays								
Total	3		1	8	4		3	5
Mean hours per week by sort of working hours agreed								
1 Full-time hours per week	36.7	36.1	37.7	39.4	38.0	40.0	38.7	37.1
2 Part-time hours per week	25.9	20.0	30.3	25.6	27.6	24.6	31.2	22.4
3 Annualised hours	34.8		36.1	37.5	34.1	.	28.4	36.8
4 Flexible hours	29.1		30.2	27.0	33.3	39.5	18.4	25.9
6 I work on call	36.0				32.0		41.2	

Source: *WageIndicator* dataset Sept. 2004-Sept. 2006

Annualised hours can be found notably in Denmark and Spain, and to a lesser extent in the other countries. As for the share of shift or irregular work, with 32% this is rather high in Poland, followed at distance by Belgium, Germany, and the UK. Regarding the shares of those regularly working in the evening, it can be noticed that Spain like in other industries reveals a high share (57%), most likely as a consequence of the siesta tradition in that country. Under other conditions, the Netherlands, Belgium, Germany and the UK also show up with rather high scores of evening work. In finance regularly working on Saturdays is to some extent (12-19%) reported for the UK, Belgium, the Netherlands, and Spain. Working on Sundays is rather rare in all countries.

For employees with full-time agreed working weeks, the average contractual hours are longest in Poland, with exactly 40 hours. The variation across countries of the average hours of employees with annualised hours is not that large, with Germany on top directly followed by Finland and the UK. As in other industries, employees with on call work have the longest working weeks in Spain (over 41 hours).

9.2. Low pay in finance

Compared to other industries the incidence in the finance industry of low pay is quite low, and in four countries even lowest. Yet, in absolute terms the figures for the Netherlands (18%) and Poland (16%) cannot be neglected.

Table 9.2. Incidence of low pay (under 2/3 median wage threshold) and country ranking across 13 industries, finance, adults aged 21 and over, breakdown by country, 2005

	Belgium		Denmark		Finland		Germany		Netherlands		Poland		Spain		UK	
Incidence	8%	1	-	-	2%	2	5%	1	18%	4	16%	1	6%	1	13%	5

Source: *WageIndicator* dataset 2005 (unweighted)

9.3. Training in finance

Concerning the shares of employees having received at least one day of employer-provided training last year, the scores are quite high, with Finland, the Netherlands and Belgium showing over 70%. In all five countries the scores on average days of training received are comparatively high too.

Table 9.3.1. Shares of employees having received at least one day of employer-provided training last year and average number of employer-provided training days last year, incl. country ranking across 13 industries, finance, breakdown by country, 2004-2006

	Belgium		Finland		Germany		Netherlands		Spain	
Shares of employees	74%	3	90%	1	68%	1	78%	3	58%	2
Average no. of training days	5.8	3	6.8	2	5.6	1	9.4	2	8.2	2

Source: *WageIndicator* data, September 2004-September 2006

The shares of employees having received at least one day of self-paid training last year vary considerably, from 14% in Belgium to 33% in Spain (Table 9.3.2., next page). In this respect, finance scores quite low in Belgium. Although the comparative score of finance in Spain is mediocre, the average number of self-paid training days exceeds 10 in Spain. The observation holds here as well that the higher the shares of employees receiving or taking training days, the higher their average number of those days.

Table 9.3.2. Shares of employees having at least one day of self-paid training last year and average number of self-paid training days last year, incl. country ranking across 13 industries, finance, breakdown by country, 2004-2006

	Belgium		Germany		Netherlands		Spain	
Shares of employees	14%	12	31%	3	21%	2	33%	7
Average no. of training days	3.2	10	6.0	1	4.8	1	10.9	8

Source: *WageIndicator* data, September 2004-September 2006

9.4. Older workers in finance

Compared across industries, the share of employees in finance over 45 of age is rather high, except for Poland. This share is highest in the workforce in Hungary, although the shares are also considerable in Belgium, Finland, and Spain. With Poland on top with over 73%, the other countries also show considerable percentages (29-44%) of the 25-34 aged.

Table 9.4. Average age and distribution over age groups, breakdown by country, finance, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherl.	Poland	Spain	UK
Average age	37.6	40.0	37.6	36.3	41.4	34.3	30.1	37.3	33.1
Distribution over age groups									
1 < 25 yr	6		6	5	7	12	10	4	18
2 25-34	38		41	42	29	44	73	44	44
3 35-44	29		26	35	17	29	13	28	23
4 45-54	23		20	14	31	13	3	21	11
5 >=55	4		8	4	16	2	0	4	3
Total	100		100	100	100	100	100	100	100

Source: *WageIndicator* data, September 2004-September 2006

9.5. Collective bargaining coverage in finance

The picture concerning the collective bargaining coverage is quite varied for finance: comparatively rather high in most countries, except in the Netherlands and Poland, and in absolute terms low in the UK and especially in Poland. Except for Spain and especially for the UK, the shares of those agreeing that it is important to be covered by a collective agreement remain lower than the actual coverage.

Table 9.5. Collective bargaining coverage and share of those agreeing that it is important to be covered by a collective agreement, incl. country ranking across 13 industries, finance, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Hungary		Netherlands		Poland		Spain		UK	
Coverage	88%	3	86%	9	96%	3	78%	2	74%	6	71%	11	6%	9	89%	1	28%	6
Agree with importance	77%	9			89%	6	57%	12			67%	11			94%	3	55%	5

Source: *WageIndicator* data, September 2004-September 2006

9.6. Work-related stress in finance

The ranking of the mean values of all five indicators of work-related stress jointly varies widely across countries, from the no. 1 position in Finland, a middle position in most other countries, to a high ranking in terms of problems for the UK finance employees (See Table 9.6., next page). Concerning the single indicators, the picture varies too, with comparatively high scores for Belgium and the Netherlands on 'Work exhausting mentally', for Spain on 'Work at very high speed', for Germany and Spain

on 'Work cannot be finished on allocated time', and for the UK on 'Work to tight deadlines'.

Table 9.6. Indicators for incidence of work-related stress, mean values and country ranking across 13 industries, finance, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Netherlands		Spain		UK	
Work physically exhausting	2.5	1	-	-	2.4	1	2.6	5	2.3	1	3.2	2		
Work mentally exhausting	3.3	11	-	-	3.4	3	3.5	6	3.1	11	3.9	6		
Work at very high speed	3.5	6	-	-	3.7	8	3.4	5	3.5	4	3.5	11	3.8	7
Work cannot be finished in allocated time	2.7	4	-	-	2.0	1	2.9	10	2.3	9	2.7	13	3.0	8
Work to tight deadlines	3.4	6	-	-	3.5	1	3.5	9	3.2	8	3.4	7	4.7	12
Mean of five factors*)	3.1	7	-	-	3.0	1	3.2	8	2.9	4	3.3	6	3.8	11

*) for the UK mean of three factors

Source: *WageIndicator* data, September 2004-September 2006

9.7. Conclusions concerning finance

Across industries, finance shows up with a rather favorable position. Although in four countries (Germany, Poland, Spain, and the UK) the share of long working hours is rather high, the incidence of low pay everywhere is quite low indeed, and the shares of those having received at least one day of employer-provided training are quite high. The average days of training received are also comparatively high. On the other hand, work-related stress levels vary considerably, and are notably high in the UK. Collective bargaining in the finance sector may (continue to) cause some problems on the union side. The ranking of finance for collective bargaining varies widely too, and is low in notably the Netherlands and Poland. The latter conditions may be quite relevant in the years to come, as with the liberalization of financial markets in the EU, including the introduction of the EMU, the euro and the Financial Services Action Plan, and with the rapid advance of information and communication technology (ICT), large-scale mergers and acquisitions as well as the massive (international) relocation of employment are at stake.⁸

10. Other commercial services

10.1. Working time in other commercial services

Other commercial services is an amalgam of sub-sectors, mostly indicated as real estate, renting and (other) business activities. It includes sub-sectors mainly positioned at the high end of the labour market, like the ICT sector (hardware and software development, production and maintenance, data processing, database activities etc.⁹), at the low end, like cleaning¹⁰, and many activities positioned

⁸ EMCC, 2004.

⁹ NACE 3-digit codes 720-727, Computer and related activities.

¹⁰ NACE 3-digit code 747, Industrial cleaning. This sub-sector could not be separated for Germany and for Poland the number of respondents was too small to take into account.

somewhere in between, like those of call centres.¹¹ Below, we will give some extra information on outcomes for these three sub-sectors.

Table 10.1. Various working time patterns, other commercial services, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Categories of usual working hours								
0-40 hrs	87	96	91	74	91	81	80	82
40.1-48 hours	10	3	6	16	6	12	14	11
48.1-99 hrs	3	1	3	10	3	7	6	7
Total %	100	100	100	100	100	100	100	100
Total N	3082	157	3052	11514	12249	1087	3335	5021
Categories of usual working hours, only those compensated for extra hours, either in cash or in time								
0-40 hrs	96	100	94	81	94	85	85	87
40.1-48 hours	3		5	14	4	9	13	9
48.1-99 hrs	1		1	4	2	5	3	4
Total %	100	100	100	100	100	100	100	100
Total N	1136	8	1908	5209	6244	367	595	1873
Shares of those having agreed annualised hours								
Total	0.5	2.0	1.3	6.0	0.4	0.1	2.3	0.5
Shares of shift or irregular work								
Total	21	23	14	18	10	24	8	15
Shares of those regularly working in the evening								
Total	37	47	20	35	37		77	29
Shares of those regularly working on Saturdays								
Total	19	20	10	8	16		11	18
Shares of those regularly working on Sundays								
Total	10	27	6	5	10		6	11
Mean hours per week by sort of working hours agreed								
1 Full-time hours per week	38.1	37.4	38.0	40.1	39.3	39.8	39.4	38.4
2 Part-time hours per week	27.0	23.9	26.5	25.9	28.5	27.0	28.9	23.6
3 Annualised hours	26.6	24.8	33.6	37.8	31.9	0	36.6	39.8
4 Flexible hours	30.6	28.4	28.8	28.2	30.7	21.4	23.1	24.9
6 I work on call	28.3	0	22.7	0	36.5	.	23.7	23.1

Source: *WageIndicator* dataset Sept. 2004-Sept. 2006

Concerning the length of the working week in other commercial services, the longest hours are found in Germany, as 26% reports working usually more than 40 hours a week, followed by Spain (20%), Poland (19%) and the UK (18%). The pattern across countries in the ICT industry remains the same, although at a lower level, with Germany (18% over 40 hours), Poland (17%) and Spain (16%) on top. In cleaning, Finland (10%) goes on top, the shares of the others remaining under 10%. The call centre industry shows Poland (19%) on the lead, followed by Germany (9%) and the UK (8%), with the other countries lower than 8%.

¹¹ NACE 4-digit code 7486, Call centres, including call centre occupations in other industries as indicated by the respondents.

In other commercial services annualised hours can be found to a considerable extent in Germany, to a lesser extent in Denmark and Spain, and in the other countries in small amounts.

The shares of shift or irregular work in this industry are considerable in Poland (24%), in Denmark (23%), and in Belgium (21%). Regarding the shares of those regularly working in the evening, it can be noticed that Spain like in other industries reveals a high share (77%), most likely as a consequence of the siesta tradition in that country. Under other conditions, the other countries also show up with rather high scores of evening work, with the exception of Finland.

In other commercial services regular working on Saturdays is not very widespread; even in the countries with the highest percentages, Denmark (20%), Belgium (19%) and the UK (18%), these are rather modest. Regular working on Sundays seems rather widespread in Denmark.

For employees with full-time agreed working weeks, the average contractual hours in other commercial services are longest in Germany: just over 40 hours per week. The variation across countries of the average hours of employees with annualised hours is rather large, with the UK and Germany on top. Employees with on call work clearly have the longest working weeks in the Netherlands.

10.2. Low pay in other commercial services

Concerning the incidence of low pay, other commercial services has a rather good comparative position in all countries, except Spain and to a lesser extent the Netherlands. In the latter country the absolute incidence of low pay (21%) remains rather high, as well in Poland (20%).

Table 10.2. Incidence of low pay (under 2/3 median wage threshold) and country ranking across 13 industries, other commercial services, adults aged 21 and over, breakdown by country, 2005

	Belgium		Denmark		Finland		Germany		Netherlands		Poland		Spain		UK	
Incidence	17%	5	12%	3	4%	3	12%	6	21%	8	20%	3	12%	10	12%	4

Source: *WageIndicator* dataset 2005 (unweighted)

As could be expected, the three sub-sectors under closer scrutiny show a widely varying picture here. The incidence of low pay in the ICT industry is rather low, 1-7%points below the average for the industry as shown above, varying from 3% in Finland to 14% in the Netherlands and 16% in Poland.

On the other side of the spectrum, the incidence in cleaning is quite high, from 24% in Finland up to 38% in the Netherlands, 41% in Belgium and even 71% in Poland.

Call centres show a remarkable pattern. Although the low pay incidence here is comparatively low i.e. somewhat above the industry average in Finland (11%) and Spain (14%), it is quite high in all other countries, notably in Germany (42%) and the Netherlands (43%), but also in Belgium (33%), Poland (35%) and the UK (31%).

10.3. Training in other commercial services

Table 10.3.1 Shares of employees having received at least one day of employer-provided training last year and average number of employer-provided training days last year, incl. country ranking across 13 industries, other commercial services, breakdown by country, 2004-2006

	Belgium		Finland		Germany		Netherlands		Spain	
Shares of employees	67%	6	67%	7	54%	6	66%	6	44%	7
Average no. of training days	5.3	4	5.0	5	3.6	5	6.2	4	6.3	5

Source: *WageIndicator* data, September 2004-September 2006

Concerning the shares of employees in other commercial services having received at least one day of employer-provided training last year, Finland, the Netherlands and Belgium (each with 66-67%) show the highest scores, and Spain shows the lowest score. Compared to the other industries, these shares remain in the middle range.

The picture concerning the shares of employees in this industry having received at least one day of self-paid training last year is slightly better. The shares vary between 19% (the Netherlands) and 35% (Spain). Like in other industries, the figures show that the higher the shares of employees receiving or taking training days, the higher their average number of days.

Table 10.3.2 Shares of employees having at least one day of self-paid training last year and average number of self-paid training days last year, incl. country ranking across 13 industries, other commercial services, breakdown by country, 2004-2006

	Belgium		Germany		Netherlands		Spain	
Shares of employees	22%	3	28%	5	19%	4	35%	6
Average no. of training days	4.2	4	5.9	2	4.2	4	13.0	5

Source: *WageIndicator* data, September 2004-September 2006

10.4. Older workers in other commercial services

In other commercial services, the share of workers over 45 years of age is highest in the workforce in Hungary. It is lowest in Poland, where particularly the share of workers 25-34 is high. The UK shows the highest shares in the youngest age group.

Table 10.4. Average age and distribution over age groups, breakdown by country, other commercial services, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherl.	Poland	Spain	UK
Average age	34.8	42.2	35.5	35.6	40.5	34.0	29.7	32.3	34.2
Distribution over age groups									
1 < 25 yr	11		6	6	6	12	12	8	15
2 25-34	45		49	45	32	47	74	63	44
3 35-44	28		28	34	24	27	9	23	25
4 45-54	14		13	12	21	12	5	5	12
5 >=55	3		4	3	17	2	0	1	5
Total	100		100	100	100	100	100	100	100

Source: *WageIndicator* data, September 2004-September 2006

10.5. Collective bargaining coverage in other commercial services

The outcomes concerning collective bargaining coverage for the other commercial services may worry unionists from most countries under study: except for Hungary

and Poland, coverage is among the lowest of all industries. On the other hand, except for Belgium the share of those agreeing that it is important to be covered by a collective agreement is higher than the share actually covered by an agreement.

Table 10.5. Collective bargaining coverage and share of those agreeing that it is important to be covered by a collective agreement, incl. country ranking across 13 industries, other commercial services, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherlands	Poland	Spain	UK
Coverage	65% ¹²	61% ¹³	82% ¹¹	30% ¹³	57% ⁸	46% ¹³	8% ⁸	64% ¹⁰	15% ¹⁰
Agree with importance	64% ¹³		83% ¹²	43% ¹³		50% ¹³		89% ⁸	31% ¹²

Source: *WageIndicator* data, September 2004-September 2006

In three countries, Belgium, Spain and the UK, collective bargaining coverage for the ICT industry is exactly at par with coverage in other commercial services at large; in Germany (22%), the Netherlands (39%) and Poland (6%) it is lower, in Finland (90%) higher. In the five countries with sufficient data, bargaining coverage in cleaning is higher than the industrial average, varying from 36% in the UK to 96% in the Netherlands, with the three others in the 81-85% range.

Collective bargaining coverage as perceived in the call centre sector remains rather low, be it above the industry average, in the UK (26%) and Germany (45%), yet is substantial in the Netherlands (73%), and notably in Belgium (83%), Finland and Spain (both 86%).

10.6. Work-related stress in other commercial services

The ranking across countries of the mean values of the five indicators of work-related stress jointly varies slightly: other commercial services takes a rather favorable until middle position everywhere. Yet, the high ranking (except for Denmark) on 'Work mentally exhausting' and partially also on 'Work to tight deadlines' too indicates (combined) problems concerning these aspects.

Table 10.6. Indicators for incidence of work-related stress, mean values and country ranking across 13 industries, other commercial services, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Netherlands		Spain		UK	
Work physically exhausting	2.5	1	2.6	2	2.4	1	2.4	2	2.4	5	3.2	2		
Work mentally exhausting	3.3	11	3.3	4	3.6	12	3.6	11	3.1	11	4.0	9		
Work at very high speed	3.5	6	3.5	2	3.6	6	3.4	5	3.5	4	3.3	6	3.8	7
Work cannot be finished in allocated time	2.7	3	3.4	7	2.6	7	2.4	3	2.3	9	2.6	10	2.8	6
Work to tight deadlines	3.6	12	4.1	7	3.7	7	3.5	9	3.4	13	3.5	9	4.3	9
Mean of five factors*)	3.1	7	3.4	4	3.2	5	3.1	4	2.9	4	3.3	6	3.7	8

*) for the UK mean of three factors

Source: *WageIndicator* data, September 2004-September 2006

10.7. Conclusions concerning other commercial services

Other commercial services especially in Germany, Poland, Spain and the UK show a considerable share working long hours, although ICT, cleaning and call centres, the three sub-sector investigated in detail, remain below the industry averages. Except for Spain, the industry outcomes concerning low pay incidence are in the middle range. As could be expected, the low pay incidence is low in the ICT sub-sector, while it is quite high in cleaning; the share of call centre workers under the low pay threshold is high in five out of seven countries. The shares of those having employer-provided remain in the middle range, the industry position concerning self-paid training being slightly better. Collective bargaining coverage may be a point of worry, as except for Hungary and Poland these are quite low. Notably in Germany, the Netherlands and Poland coverage in ICT is low. In this industry, scores on one work-stress related item, 'Work mentally exhausting', are markedly high.

11. Public administration

11.1. Working time in public administration

Concerning the length of the working week in public administration, the longest hours are clearly found in Germany, with 24% reporting working usually more than 40 hours a week, followed by Poland (16%) and the UK (14%), although the share of excessive hours (over 48 hours) is highest in Poland. (See Table 11.1., next page). Annualised hours can be found here to a considerable extent in Denmark, and to some extent in Spain, Germany and the Netherlands too.

As for the shares of shift or irregular work, these are rather high in public administration in the Netherlands (25%) and Belgium (23%), but elsewhere they remain below 20%. Regarding the shares of those regularly working in the evening, it can be noticed that Spain unlike in other industries reveals a share hardly higher than countries located more North, notably the Netherlands and Belgium. The Netherlands also has a considerable incidence of regularly working on Saturdays (23%), followed in this respect by Belgium and Spain. The same pattern is shown regarding working on Sundays.

For employees with full-time agreed working weeks, the average contractual hours are longest in Poland and Germany, although they remain below 40 hours per week. The variation across countries of the average hours of employees with annualised hours is quite large, with Poland (average 49 hours weekly) on top, followed by Germany with 40 hours. Employees in public administration with on call work have the longest working weeks in the UK (average 37 hours).

Table 11.1 Various working time patterns, public administration, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Categories of usual working hours								
0-40 hrs	92	97	94	76	95	89	92	85
40.1-48 hours	5	1	4	21	3	9	5	12
48.1-99 hrs	3	2	1	3	2	7	3	2
Total %	100	100	100	100	100	100	100	100
Total N	998	98	1312	4351	4919	633	1042	1536
Categories of usual working hours, only those compensated for extra hours, either in cash or in time								
0-40 hrs	96		96	76	97	94	97	88
40.1-48 hours	3		4	21	2	6	3	11
48.1-99 hrs	1		0	2	1	0	1	1
Total %	100		100	100	100	100	100	100
Total N	522		827	3024	3365	250	259	882
Shares of those having agreed annualised hours								
Total	0.7	6.1	1.1	1.90	1.5	0.4	3.0	1.0
Shares of shift or irregular work								
Total	23	18	13	18	25	16	17	17
Shares of those regularly working in the evening								
Total	25		12	17	35		36	22
Shares of those regularly working on Saturdays								
Total	17		7	11	23		16	14
Shares of those regularly working on Sundays								
Total	12		5	4	20		13	11
Mean hours per week by sort of working hours agreed								
1 Full-time hours per week	37.8	36.3	37.0	39.4	37.2	39.5	37.0	37.6
2 Part-time hours per week	26.6	26.0	24.8	26.8	28.2	24.5	28.3	25.0
3 Annualised hours	38.0	37.0	29.8	40.3	35.3	49.0	34.4	39.0
4 Flexible hours	32.1	37.5	28.0	26.8	34.5		19.3	24.4
6 I work on call				21.0	18.2	.	22.5	37.0

Source: *WageIndicator* dataset Sept. 2004-Sept. 2006

11.2. Low pay in public administration

The incidence of low pay varies in public administration. Based on this yardstick, it is the best paying industry in Finland, the Netherlands and Spain, does rather well in Germany and the UK too, but takes a middle position in Belgium and notably in Poland.

Table 11.2. Incidence of low pay (under 2/3 median wage threshold) and country ranking across 13 industries, public administration, adults aged 21 and over, breakdown by country, 2005

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Incidence	19% 6	- -	1% 1	8% 3	10% 1	39% 9	6% 1	11% 3

Source: *WageIndicator* dataset 2005 (unweighted)

11.3. Training in public administration

Concerning the shares of employees having received at least one day of employer-provided training last year, Finland and the Netherlands and Belgium reveal the

highest scores, which compared to other industries are quite high indeed: 86% and 78% respectively. In this respect Spain has the lowest score, but the country shows the highest share of employees having received at least one day of self-paid training last year. Here, the figures for Belgium, Germany and the Netherlands are much lower.

Table 11.3.1 Shares of employees having received at least one day of employer-provided training last year and average number of employer-provided training days last year, incl. country ranking across 13 industries, public administration, breakdown by country, 2004-2006

	Belgium		Finland		Germany		Netherlands		Spain	
Shares of employees	77%	2	86%	3	68%	2	78%	2	56%	3
Average no. of training days	6.3	2	7.6	1	4.6	2	10.6	1	6.0	6

Source: *WageIndicator* data, September 2004-September 2006

Table 11.3.2 Shares of employees having at least one day of self-paid training last year and average number of self-paid training days last year, incl. country ranking across 13 industries, public administration, breakdown by country, 2004-2006

	Belgium		Germany		Netherlands		Spain	
Shares of employees	18%	7	24%	6	19%	4	40%	5
Average no. of training days	4.4	3	4.9	5	4.3	3	12.5	6

Source: *WageIndicator* data, September 2004-September 2006

11.4 Older workers in public administration

Across industries, the public administration share of workers over 45 years of age is quite high. It is highest in the workforces of Finland and Hungary, and lowest in Poland, where particularly the share of workers aged 25-34 is high. Everywhere the shares in the youngest age group remain below 10%.

Table 11.4. Average age and distribution over age groups, breakdown by country, public administration, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherl.	Poland	Spain	UK
Average age	39.4	48.3	43.1	39.5	42.6	37.6	31.6	40.2	38.1
Distribution over age groups									
1 < 25 yr	4		2	6	2	8	8	2	9
2 25-34	31		22	27	24	36	67	27	31
3 35-44	32		30	34	27	28	14	39	31
4 45-54	25		29	24	32	22	8	27	21
5 >=55	7		16	9	14	6	2	6	7
Total	100		100	100	100	100	100	100	100

Source: *WageIndicator* data, September 2004-September 2006

11.5. Collective bargaining coverage in public administration

The picture for public administration concerning collective bargaining coverage varies: in a majority of countries quite high, in four countries (Denmark, Germany, the Netherlands and the UK) even the highest of industries, but in Belgium, Poland and Hungary rather mediocre. The share of those agreeing that it is important to be covered by a collective agreement is rather high in all six countries where this data is available. In Belgium this percentage is substantially higher than the actual coverage (Table 11.5., next page).

Table 11.5. Collective bargaining coverage and share of those agreeing that it is important to be covered by a collective agreement, incl. country ranking across 13 industries, public administration, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherlands	Poland	Spain	UK
Coverage	69% 9	98% 1	96% 3	86% 1	59% 7	97% 1	9% 7	85% 2	83% 1
Agree with importance	81% 5		94% 3	84% 1		83% 3		89% 8	80% 1

Source: *WageIndicator* data, September 2004-September 2006

11.6. Work-related stress in public administration

Public administration has a comparatively low incidence of the joint mean values of the five indicators of work-related stress, and holds the no. 1 position except in the UK. In the latter country, notably the item 'Work cannot be finished in allocated time' shows a high score, but the other scores are also less favorable than elsewhere.

Table 11.6. Indicators for incidence of work-related stress, mean values and country ranking across 13 industries, public administration, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Spain	UK
Work physically exhausting	2.7 5	- -	2.4 1	2.3 1	2.3 1	3.0 1	
Work mentally exhausting	3.2 5	- -	3.4 3	3.5 6	3.0 6	3.6 1	
Work at very high speed	3.0 1	- -	3.4 2	3.0 1	3.3 1	2.8 1	3.7 6
Work cannot be finished in allocated time	2.2 1	- -	2.4 4	2.2 2	2.1 2	2.1 1	3.3 11
Work to tight deadlines	3.0 2	- -	3.5 1	3.0 1	3.0 5	2.9 1	4.1 7
Mean of five factors*)	2.8 1	- -	3.0 1	2.8 1	2.7 1	2.9 1	3.7 8

*) for the UK mean of three factors

Source: *WageIndicator* data, September 2004-September 2006

11.7. Conclusions concerning public administration

Comparing across industries, public administration shows rather favorable outcomes on a number of issues. Except for Germany, long working hours are rather rare. Except for Belgium and especially Poland, the low pay incidence is rather low, while the levels of employer-provided training are high. And except for the UK, scores on work-related stress indicators are rather low. Thus, unless nearly virtually omnipotent budget constraints and efforts of public authorities to rely on market mechanisms as a means to increase efficiency, affecting pay and working conditions, public administration seems to offer good practices to the benefit of other industries.

12. Education

12.1. Working time in education

Overall, the incidence of long working hours in education is modest. Again, the main exception is Germany, where 19% reports working usually more than 40 hours a week (and 7% over 48 hours), followed by Poland (15%) and Spain (13%). Annualised hours are quite widespread in education, and can be found to a considerable extent in Denmark and Finland, followed by the Netherlands and the UK. As for the shares of shift or irregular work, these are quite high in Poland (41%) and Belgium (33%) (Table 12.1., next page).

Table 12.1. Various working time patterns, education, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Categories of usual working hours								
0-40 hrs	93	98	93	81	97	85	86	89
40.1-48 hours	4	1	6	12	2	10	7	7
48.1-99 hrs	3	1	1	7	1	5	6	4
Total %	100	100	100	100	100	100	100	100
Total N	525	113	1601	5745	9124	315	762	1993
Categories of usual working hours, only those compensated for extra hours, either in cash or in time								
0-40 hrs	97		95	82	93	93	92	95
40.1-48 hours	3		5	16	6	5	6	4
48.1-99 hrs	0		0	2	1	2	2	21
Total %	100		100	100	100	100	100	100
Total N	148		373	1114	1197	224	102	586
Shares of those having agreed annualised hours								
Total	2.7	23.5	11.9	3.1	5.2	2.2	1.9	4.7
Shares of shift or irregular work								
Total	33	20	15	21	21	41	7	16
Shares of those regularly working in the evening								
Total	49		27	51	47		60	34
Shares of those regularly working on Saturdays								
Total	26		7	11	23		16	14
Shares of those regularly working on Sundays								
Total	15		5	24	15		4	12
Mean hours per week by sort of working hours agreed								
1 Full-time hours per week	33.9	36.9	34.8	39.2	37.9	32.9	35.9	36.7
2 Part-time hours per week	22.8	26.0	28.3	26.4	26.8	17.9	19.2	22.6
3 Annualised hours	30.0	25.7	32.2	37.4	32.3	23.8	30.3	29.8
4 Flexible hours	25.5	11.7	24.6	31.9	28.7	3.3	19.7	20.4
6 I work on call	38.0		34.0		11.6			

Source: *WageIndicator* dataset Sept. 2004-Sept. 2006

Regarding the shares of those regularly working in the evening, figures are everywhere high, not only for Spain with its siesta tradition, but also in Germany, Belgium and the Netherlands. In education working on Saturdays is rather widespread in Belgium and the Netherlands, and working on Sundays occurs notably in Germany, followed by Belgium and the Netherlands.

For employees with full-time agreed working weeks, the average contractual hours are longest in Germany, with over 39 hours per week. The variation across countries of the average hours of employees with annualised hours is substantial, with again Germany on top (average over 37 hours). Employees with on call work have the longest working weeks in Belgium and Finland.

12.2. Low pay in education

In incidence the incidence of low pay is rather low in education, except for the UK where the sector ranks 8th. The absolute level of low pay remains considerable in Poland, and to a somewhat lesser extent also in Belgium, the Netherlands and the UK (See Table 12.2., next page).

Table 12.2 Incidence of low pay (under 2/3 median wage threshold) and country ranking across 13 industries, education, adults aged 21 and over, breakdown by country, 2005

	Belgium		Denmark		Finland		Germany		Netherlands		Poland		Spain		UK	
Incidence	14%	3	-	-	4%	3	8%	3	16%	3	21%	4	6%	1	15%	8

Source: *WageIndicator* dataset 2005 (unweighted)

12.3. Training in education

Concerning the shares of employees having received at least one day of employer-provided training last year, Finland, the Netherlands and Belgium reveal the highest scores, and Spain the lowest score. Compared to the other industries, these shares are consistently at the 5th position. In Belgium, Germany and Spain the average number of training days is relatively low.

Table 12.3.1 Shares of employees having received at least one day of employer-provided training last year and average number of employer-provided training days last year, incl. country ranking across 13 industries, education, breakdown by country, 2004-2006

	Belgium		Finland		Germany		Netherlands		Spain	
Shares of employees	70%	5	74%	5	58%	5	69%	5	45%	5
Average no. of training days	3.5	10	5.0	5	2.6	11	6.1	5	5.5	9

Source: *WageIndicator* data, September 2004-September 2006

Although education takes the first position in all four countries at stake, the shares of employees having received at least one day of self-paid training last year vary substantially, from 48% in Spain till 22% in the Netherlands.

Table 12.3.2 Shares of employees having at least one day of self-paid training last year and average number of self-paid training days last year, incl. country ranking across 13 industries, education, breakdown by country, 2004-2006

	Belgium		Germany		Netherlands		Spain	
Shares of employees	28%	1	40%	1	22%	1	48%	1
Average no. of training days	4.6	2	5.7	3	4.8	1	17.7	1

Source: *WageIndicator* data, September 2004-September 2006

12.4. Older workers in education

Table 12.4. Average age and distribution over age groups, breakdown by country, education, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherl.	Poland	Spain	UK
Average age	38.2	45.5	40.5	39.6	43.5	38.3	35.4	37.3	38.8
Distribution over age groups									
1 < 25 yr	9		2	2	3	8	5	5	8
2 25-34	34		30	34	21	34	54	40	33
3 35-44	25		33	32	25	26	21	33	26
4 45-54	24		25	22	36	25	15	18	24
5 >=55	8		10	9	16	7	5	5	9
Total	100		100	100	100	100	100	100	100

Source: *WageIndicator* data, September 2004-September 2006

In education, the share of workers over 45 years of age is highest in the workforce in Hungary, followed by Finland. It is lowest in Poland, where particularly the share of workers 25-34 is high.

12.5. Collective bargaining coverage in education

The picture in the education sector concerning collective bargaining coverage is clear: everywhere the sector has a position in the upper middle segment. In three countries the share agreeing that it is important to be covered by a collective agreement is higher than the share actually covered (Germany, Spain, and the UK), in the other three it is lower.

Table 12.5. Collective bargaining coverage and share of those agreeing that it is important to be covered by a collective agreement, incl. country ranking across 13 industries, education, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherlands	Poland	Spain	UK
Coverage	82% 4	92% 5	95% 5	69% 5	76% 4	90% 5	23% 3	75% 6	59% 2
Agree with importance	81% 4		85% 6	75% 3		84% 2		92% 5	67% 2

Source: *WageIndicator* data, September 2004-September 2006

12.6. Work-related stress in education

The ranking of the mean values of all five indicators of work-related stress jointly in education varies substantially across countries, from the no. 1 position in the UK to the no. 9 position in Finland. This may partly be explained by the fact that 'Work mentally exhausting' has not been asked for in the UK; in all other countries the scores on this item are high. Yet the main mutual differences show up on the scores for 'Work cannot be finished in the allocated time'. Here the scores for Finland, Germany and the Netherlands indicate problems, while in other countries this is less clear.

Table 12.6. Indicators for incidence of work-related stress, mean values and country ranking across 13 industries, education, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Spain	UK
Work physically exhausting	2.8 7	- -	2.6 4	2.8 7	2.6 5	3.4 8	
Work mentally exhausting	3.3 11	- -	3.5 9	3.8 13	3.1 11	4.0 9	
Work at very high speed	3.0 1	- -	3.5 3	3.0 1	3.4 3	3.1 3	3.1 1
Work cannot be finished in allocated time	2.8 2	- -	3.3 12	3.3 13	2.6 13	2.5 6	2.5 3
Work to tight deadlines	2.9 1	- -	3.5 1	3.1 2	3.0 5	3.1 2	3.5 1
Mean of five factors ^{*)}	3.0 4	- -	3.3 9	3.2 8	2.9 4	3.2 3	3.0 1

^{*)} for the UK mean of three factors

Source: *WageIndicator* data, September 2004-September 2006

12.7. Conclusions concerning education

With the exception of Germany and Poland, the incidence of long working hours in education is rather low, although figures on evening work are high everywhere. Except for the UK, the incidence of low pay is low. Surprisingly, the position of the sector concerning the employer-provided training is not outstanding. Yet, education workers seem to compensate this by comparatively large efforts of self-paid training.

Finally, although the ranking of the mean outcomes on work-related stress varies, education shows high scores on 'Work mentally exhausting', and in some countries on a second stress factor, 'Work cannot be finished in allocated time', too.

13. Health care and social work

13.1. Working time in health care and social work

As for the length of the working week in health care, the longest hours are found in Germany, where 19% reports working usually more than 40 hours a week, followed by Poland (15%). Annualised hours can be found to a considerable extent in Spain, and to a lesser extent in Denmark, Finland, and the Netherlands. As for the shares of shift or irregular work, these are high in all countries, but especially in the Netherlands (54%), Belgium (49%), and Poland (48%).

Regarding the shares of those regularly working in the evening, all countries again show rather high figures, with Spain on top, closely followed by Denmark, Belgium and the Netherlands. Working on Saturdays is reported for all countries again, with Denmark, the Netherlands, and Belgium on top. Concerning working on Sundays the Netherlands has the highest incidence.

For employees with full-time agreed working weeks, the average contractual hours are longest in Poland and Germany, both with nearly 40 hours per week. The variation across countries of the average hours of employees with annualised hours is large, with the UK (average almost 43 hours) on top. Employees with on call work have the longest working weeks again in the UK, followed by Spain (See Table 1, next page).

Table 13.1. Various working time patterns, health care, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Categories of usual working hours								
0-40 hrs	93	98	93	81	97	85	86	89
40.1-48 hours	4	1	6	12	2	10	7	7
48.1-99 hrs	2	1	1	7	1	5	6	4
Total %	100	100	100	100	100	100	100	100
Total N	2061	113	1312	5745	9124	315	762	1993
Categories of usual working hours, only those compensated for extra hours, either in cash or in time								
0-40 hrs	96		94	84	98	82	91	92
40.1-48 hours	3		5	11	1	11	6	6
48.1-99 hrs	1		10	5	1	7	3	2
Total %	100		100	100	100	100	100	100
Total N	1238		1258	3734	6279	123	192	1213
Shares of those having agreed annualised hours								
Total	1.3	7.8	2.9	1.9	2.4	0.3	9.1	1.0
Shares of shift or irregular work								
Total	49	42	37	39	54	48	32	32
Shares of those regularly working in the evening								
Total	48	50	31	42	48		51	40
Shares of those regularly working on Saturdays								
Total	43	50	26	36	44		31	37
Shares of those regularly working on Sundays								
Total	35	0	23	32	42		21	33

Mean hours per week by sort of working hours agreed								
1 Full-time hours per week	37.5	36.9	37.9	39.6	35.9	39.7	37.9	37.6
2 Part-time hours per week	25.5	25.7	26.3	26.7	26.5	21.7	26.8	23.7
3 Annualised hours	30.8	15.6	26.0	37.2	30.6	21.9	30.1	42.9
4 Flexible hours	29.6	37.0	22.1	23.5	27.3		22.7	23.9
6 I work on call	18.5	17.0	20.0	0	22.1	.	24.0	27.1

Source: *WageIndicator* dataset Sept. 2004-Sept. 2006

13.2. Low pay in health care and social work

In most countries the incidence of low pay is substantial in health care. Especially in Belgium, Poland and the UK the industry ranks high in low pay. In Poland, even 44% of all workers in health care is paid under the threshold, followed by Belgium (20%) and the Netherlands (19%).

Table 13.2. Incidence of low pay (under 2/3 median wage threshold) and country ranking across 13 industries, health care, adults aged 21 and over, breakdown by country, 2005

	Belgium		Denmark		Finland		Germany		Netherlands		Poland		Spain		UK	
Incidence	20%	10	-	-	7%	8	15%	8	19%	6	44%	11	11%	7	18%	9

Source: *WageIndicator* dataset 2005 (unweighted)

13.3. Training in health care and social work

Concerning the shares of employees having received at least one day of employer-provided training last year, Finland, Belgium and the Netherlands reveal the highest scores and Spain the lowest. On average 3 to 6 days of training was received.

Table 13.3.1 Shares of employees having received at least one day of employer-provided training last year and average number of employer-provided training days last year, incl. country ranking across 13 industries, health care, breakdown by country, 2004-2006

	Belgium		Finland		Germany		Netherlands		Spain	
Shares of employees	72%	4	77%	4	60%	3	72%	4	45%	5
Average no. of training days	3.8	7	5.4	3	3.8	4	5.6	6	5.3	10

Source: *WageIndicator* data, September 2004-September 2006

Health care and social work shows a high ranking across industries concerning self-paid training, in three countries the second after education. The shares of employees having received at least one day of self-paid training last year varies from 21% in the Netherlands to 42% in Spain. Only in the latter country, the average number of trainings days in the last year exceeds 10.

Table 13.3.2 Shares of employees having at least one day of self-paid training last year and average number of self-paid training days last year, incl. country ranking across 13 industries, health care, breakdown by country, 2004-2006

	Belgium		Germany		Netherlands		Spain	
Shares of employees	24%	2	34%	2	21%	2	42%	4
Average no. of training days	3.7	7	5.0	4	4.1	5	13.5	4

Source: *WageIndicator* data, September 2004-September 2006

13.4. Older workers in health care and social work

In health care, the share of workers over 45 years of age is highest in the workforce in Hungary, followed by Finland and the UK. It is lowest in Poland, where particularly the share of workers 25-34 is high (50%). The Netherlands shows the highest shares in the youngest age group.

Table 13.4. Average age and distribution over age groups, breakdown by country, health care, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherl.	Poland	Spain	UK
Average age	37.7	45.6	39.3	38.3	41.6	36.6	34.7	36.9	38.5
Distribution over age groups									
1 < 25 yr	7		5	6	3	14	7	6	10
2 25-34	35		31	33	28	33	50	42	30
3 35-44	29		31	35	28	26	26	27	29
4 45-54	25		25	21	28	22	15	21	22
5 >=55	3		8	5	14	4	2	4	9
Total	100		100	100	100	100	100	100	100

Source: *WageIndicator* data, September 2004-September 2006

13.5. Collective bargaining coverage in health care and social work

The picture concerning collective bargaining coverage for health care is rather consistent: a relatively good position in most countries, except Germany (7th position). In four out of six countries, the share of those agreeing that it is important to be covered by a collective agreement is higher than the share actually covered; the Netherlands and Finland, with both an already high coverage, are the exceptions.

Table 13.5. Collective bargaining coverage and share of those agreeing that it is important to be covered by a collective agreement, incl. country ranking across 13 industries, health care, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherlands	Poland	Spain	UK
Coverage	90% 1	93% 3	97% 2	63% 7	75% 5	95% 2	21% 4	79% 3	42% 4
Agree with importance	92% 1		87% 7	78% 2		90% 1		95% 1	46% 6

Source: *WageIndicator* data, September 2004-September 2006

13.6. Work-related stress in health care and social work

The ranking of the mean values of all five work-related stress jointly varies considerably across countries, from a favorable position in Belgium and the Netherlands and Spain to a no. 12 ranking in Spain. The scores on single indicators also show a mixed picture, with high scores in Spain on 'Work physically exhausting', in Germany and Spain on 'Work at very high speed', and on 'Work cannot be finished in allocated time' in Finland and, again, Spain (See Table 13.6, next page).

Table 13.6. Indicators for incidence of work-related stress, mean values and country ranking across 13 industries, health care, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Netherlands		Spain		UK	
Work physically exhausting	2.8	7	-	-	2.7	5	2.8	7	2.7	8	3.5	10		
Work mentally exhausting	3.2	5	-	-	3.5	9	3.5	6	3.0	6	3.9	6		
Work at very high speed	3.5	6	-	-	3.7	8	3.5	11	3.5	4	3.6	12	3.4	3
Work cannot be finished in allocated time	2.6	3	-	-	2.7	10	2.7	5	2.3	9	2.6	10	3.0	8
Work to tight deadlines	3.1	4	-	-	3.5	1	3.3	4	2.7	1	3.4	7	3.9	2
Mean of five factors*)	3.0	4	-	-	3.2	5	3.2	8	2.8	2	3.4	12	3.5	5

*) for the UK mean of three factors

Source: *WageIndicator* data, September 2004-September 2006

13.7. Conclusions concerning health care and social work

Health and social work is characterized by more variation across countries than most other industries. The working hours' pattern of the industry follows those of public administration and education, with comparatively long hours in Germany and Poland. Notably in Germany, Poland and the UK considerable low pay rates are combined with rather low collective bargaining rates. The outcomes on work-related stress indicate working conditions problems related to physical exhaustion and problems of time. These problems may well point at the disadvantages of the current tendencies of relying on market mechanisms and of budget constraints.¹²

14. Other community and personal services

14.1. Working time in other community and personal services

Concerning the length of the working week in other community services, the longest hours are found in Germany and the UK, as in these countries respectively 23 and 17% reports working usually more than 40 hours a week. Annualised hours can be found to some extent in Spain, Denmark and Germany, in the other countries this remains under 2%. As for the shares of shift or irregular work, these are quite high in this industry, notably in Poland (44%), the UK (38%), Finland and Germany. Regarding the shares of those regularly working in the evening, it can be noticed that Spain like in other industries reveals a high share (73%), most likely as a consequence of the siesta tradition in that country. Under other conditions, the Netherlands, Belgium and the UK also show up with rather high scores of evening work.

In other community services regularly working on Saturdays is rather widespread in, again, the Netherlands, Belgium and the UK, and working on Sundays notably in the Netherlands and the UK alike, be it to a lesser extent. For employees with full-time agreed working weeks, the average contractual hours are longest in Germany and Poland, with over 39 hours per week. The variation across countries of the average hours of employees with annualised hours is rather modest, with Belgium (average 38 hours) on top. Employees with on call work have the longest working weeks in Spain (28 hours) (Table 14.1, next page).

¹² EMCC, 2005c.

Table 14.1. Various working time patterns, other community services, breakdown by country, 2004-2006

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Categories of usual working hours								
0-40 hrs	89	93	91	76	92	86	87	83
40.1-48 hours	8	6	6	14	5	9	6	12
48.1-99 hrs	4	1	3	9	3	5	7	5
Total %	100	100	100	100	100	100	100	100
Total N	869	102	785	2181	3010	209	604	951
Categories of usual working hours, only those compensated for extra hours, either in cash or in time								
0-40 hrs	96		95	84	94	90	90	86
40.1-48 hours	4		3	13	4	7	4	11
48.1-99 hrs	1		2	3	2	3	6	3
Total %	100		100	100	100	100	100	100
Total N	374		536	1031	1682	72	122	435
Shares of those having agreed annualised hours								
Total	0.3	3.3	0.6	2.3	1.2	1.6	4.0	1.0
Shares of shift or irregular work								
Total	26	21	35	33	30	44	15	38
Shares of those regularly working in the evening								
Total	46	75	32	44	53		73	42
Shares of those regularly working on Saturdays								
Total	33	0	23	27	48		25	36
Shares of those regularly working on Sundays								
Total	20	0	14	22	27		14	27
Mean hours per week by sort of working hours agreed								
1 Full-time hours per week	37.0	37.5	37.1	39.5	38.1	39.3	38.1	38.2
2 Part-time hours per week	23.6	23.13	24.4	26.0	26.1	25.4	23.9	20.5
3 Annualised hours	38.0		32.8	36.5	28.8	33.5	35.4	32.0
4 Flexible hours	31.5	22.4	23.8	23.7	28.3	27.8	27.5	20.0
6 I work on call			0	13.7	21.8	.	16.0	28.0

Source: *WageIndicator* dataset Sept. 2004-Sept. 2006

14.2. Low pay in other community and personal services

As for the incidence of low pay in other community and personal services, four countries can be located in a middle group of industries. Yet, in the Netherlands, Poland and the UK the industry shows a rather bad ranking in this respect.

Table 14.2. Incidence of low pay (under 2/3 median wage threshold) and country ranking across 13 industries, other community services, adults aged 21 and over, breakdown by country, 2005

	Belgium	Denmark	Finland	Germany	Netherlands	Poland	Spain	UK
Incidence	19% 6	- -	6% 7	14% 7	34% 11	40% 11	11% 7	18% 9

Source: *WageIndicator* dataset 2005 (unweighted)

14.3. Training in other community and personal services

Concerning the shares of employees having received at least one day of employer-provided training last year, Finland and Belgium reveal the highest scores, and Spain the lowest score. The average number of training days fluctuates between 3 and 6.

Table 14.3.1 Shares of employees having received at least one day of employer-provided training last year and average number of employer-provided training days last year, incl. country ranking across 13 industries, other community services, breakdown by country, 2004-2006

	Belgium		Finland		Germany		Netherlands		Spain	
Shares of employees	63%	7	68%	6	53%	7	55%	8	33%	11
Average no. of training days	3.7	8	5.3	4	3.4	6	4.7	9	5.8	8

Source: *WageIndicator* data, September 2004-September 2006

The shares of employees having received at least one day of self-paid training last year varies from 19% in the Netherlands to 45% in Spain.

Table 14.3.2 Shares of employees having at least one day of self-paid training last year and average number of self-paid training days last year, incl. country ranking across 13 industries, other community services, breakdown by country, 2004-2006

	Belgium		Germany		Netherlands		Spain	
Shares of employees	20%	4	21%	9	19%	4	45%	2
Average no. of training days	4.7	1	3.8	9	4.1	5	14.5	3

Source: *WageIndicator* data, September 2004-September 2006

14.4. Older workers in other community and personal services

In other community services, the share of workers over 45 years of age is highest in the workforce in Hungary, followed by Finland and Belgium. It is lowest in Poland and Spain, where particularly the share of workers 25-34 is high. The Netherlands shows the highest share in the youngest age group, followed by the UK.

Table 14.4. Average age and distribution over age groups, breakdown by country, other community services, 2004-2006

	Belgium	Denmark	Finland	Germany	Hungary	Netherl.	Poland	Spain	UK
Average age	37.3	47.7	38.3	37.8	41.1	33.8	33.5	34.7	34.2
Distribution over age groups									
1 < 25 yr	7		6	5	9	22	7	6	18
2 25-34	37		35	38	31	36	59	49	41
3 35-44	28		30	33	21	24	17	32	22
4 45-54	23		20	19	19	15	14	11	13
5 >=55	5		8	6	20	4	3	2	5
Total	100		100	100	100	100	100	100	100

Source: *WageIndicator* data, September 2004-September 2006

14.5. Collective bargaining coverage in other community and personal services

The picture concerning collective bargaining coverage for other community services is varied, but may in most countries give rise to concerns for unionist, with rankings varying from no. 5 in Poland to no. 12 in Finland and the Netherlands. In all countries the share of those agreeing that it is important to be covered by a collective agreement is higher than the share covered by an agreement (Table 14.5, next page).

Table 14.5. Collective bargaining coverage and share of those agreeing that it is important to be covered by a collective agreement, incl. country ranking across 13 industries, other community services, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Hungary		Netherlands		Poland		Spain		UK	
Coverage	77%	7	86%	9	77%	12	50%	10	55%	9	70%	12	19%	5	63%	9	26%	7
Agree with importance	84%	3			80%	13	66%	10			73%	8			94%	3	49%	6

Source: *WageIndicator* data, September 2004-September 2006

14.6. Work-related stress in other community and personal services

The outcomes of the mean values of all five indicators of work-related stress jointly vary widely across countries, from the no. 2 position in the UK till the no. 10 position in the Netherlands. In this country, 'Work physically exhausting' shows a quite high score, while in Finland and Germany this is the case with 'Work cannot be finished in allocated time'. These variety of outcomes may point at the opinions of different occupational groups among the respondents.

Table 14.6. Indicators for incidence of work-related stress, mean values and country ranking across 13 industries, other community services, breakdown by country, 2004-2006

	Belgium		Denmark		Finland		Germany		Netherlands		Spain		UK	
Work physically exhausting	2.8	7	1.3	1	2.7	5	2.9	7	3.5	13	3.2	2		
Work mentally exhausting	3.2	5	3.7	5	3.4	3	3.4	4	3.0	6	4.0	9		
Work at very high speed	3.4	5	4.7	7	3.6	6	3.4	5	3.5	4	3.2	5	3.8	7
Work cannot be finished in allocated time	2.7	5	3.7	7	2.7	10	3.1	12	2.1	2	2.3	2	2.1	1
Work to tight deadlines	3.4	6	4.0	5	3.7	7	3.3	4	3.0	5	3.3	4	3.9	2
Mean of five factors*)	3.1	7	3.5	5	3.2	5	3.2	8	3.0	10	3.2	3	3.3	2

*) for the UK mean of three factors

Source: *WageIndicator* data, September 2004-September 2006

14.7. Conclusions concerning other community and personal services

Other community and social services reveal notably problems with employer-provided training, and overall also with low pay and collective bargaining coverage. The ranking of this industry concerning these two issues is especially worrisome in the Netherlands, and to a lesser extent also in Germany. The high ranking in terms of work-related stress further adds to the Dutch problems.

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