



*European Economic and Social Committee*

**CCMI/076**  
**Textile services**  
**sub-sector**

Brussels, 14 July 2010

**OPINION**  
of the  
European Economic and Social Committee  
on  
**Changes and prospects for the textile services sub-sector in Europe**  
(own-initiative opinion)

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Rapporteur: **Mr Pezzini**  
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On 18 February 2010 the European Economic and Social Committee, acting under Rule 29(2) of its Rules of Procedure, decided to draw up an own-initiative opinion on

*Changes and prospects for the textile services sub-sector in Europe.*

The Consultative Commission on Industrial Change (CCMI), which was responsible for preparing the Committee's work on the subject, adopted its opinion on 1 July 2010.

At its 464th plenary session, held on 14 and 15 July 2010 (meeting of 14 July), the European Economic and Social Committee adopted the following opinion by 138 votes to 1 with 6 abstentions.

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**1. Conclusions and recommendations<sup>1</sup>**

- 1.1 The EESC stresses the importance of the textile services industry in Europe, whose development shows promise, both in economic and technological terms and because it is closely related to local operating contexts and employment situations, with the potential to continue making a significant contribution to the development of a European economy providing jobs and economic and social cohesion.
- 1.2 The EESC calls on the European Foundation for the Improvement of Living and Working Conditions to launch a pilot initiative to map the size and geographical distribution of businesses in the sector and living and working conditions, as well as the extent of the sector's informal economy. At the same time, the EESC calls for a thorough reflection on the NACE definitions for the sector, to ensure that proper definitions are provided with regard to its economic, social and employment development.
- 1.3 In the context of the Europe 2020 initiatives to combat global warming, the EESC recommends to the European Parliament, the Council and the Commission that the sustainability and efficiency of resources in the textile services industry and its potential for job creation and investment generation be taken into due account in the drafting of the new environmental provisions.

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<sup>1</sup> Further information relevant to the opinion, such as presentations at hearings, technical appendices or the results of statistical surveys, can be consulted on the European Economic and Social Committee website: [http://www.eesc.europa.eu/sections/ccmi/Hearingsandconferences/Textile\\_2010/index\\_en.asp](http://www.eesc.europa.eu/sections/ccmi/Hearingsandconferences/Textile_2010/index_en.asp).

1.4 The EESC believes building structured social dialogue at both European and national and regional levels to be essential, and proposes that the Community fund networks for exchange of best practices for:

- development of qualifications and professionalism, and the relevant training requirements, to be defined by means of a specific CEDEFOP initiative;
- definition of fair working, safety and health conditions, with the support of the European Agency for Safety and Health at Work in Bilbao;
- adequate representation of the sector's social partners in the European maintenance services committee.

1.5 The EESC stresses the importance of correctly applying Community provisions on information, consultation of workers and correct establishment and management of European Works Councils, developing a participatory foresight exercise for the sector at European level, with the support of the Institute for Prospective Technological Studies (IPTS) in Seville.

1.6 The application of European social and environmental standards in "green and social" procurement, with full, transparent implementation of the relevant provisions, is, in the EESC's view, a prerequisite for healthy development of the sector, with all its components respecting technical and social quality standards, particularly as regards the system of subcontracting and responsibilities, which concern the whole certified supply chain.

1.7 The EESC calls for:

- the annual work programmes under the 7th Framework Programme for RTD,
- the multiannual competitiveness and innovation programme, and
- the Structural Funds,

to give sufficient consideration to technological and organisational innovation projects in the sector, particularly as regards efficiency and saving of resources, integrated logistics and traceability of products supplied, not least using Galileo applications. The EIB should facilitate investment, especially as regards SMEs.

1.8 The EESC calls for the European standards bodies to continue the drive to draw up technical regulatory standards applying to all the components in the sector which are increasingly advanced from an environmental, social and technological point of view, including on the basis of instructions from the Commission, to ensure high-quality products, processes and services, reflected in improved working conditions for staff.

1.9 The EESC believes the Structural Funds should be used at regional level to enhance networks of European districts in the sector in an innovative way and develop bilateral bodies, on the

basis of successful experiences in various Member States, particularly with a view to training and education, including in the area of languages.

- 1.10 The EESC attaches importance to the dissemination and exchange of good practices, such as the establishment of bilateral bodies, present in various countries, which have successfully brought about development in respect of human resources in the sector.
- 1.11 The EESC stresses the importance of a European campaign for safety at work, economic, social and environmental transparency in the textile services industry and better working conditions and employment prospects in the sector, with full implementation of the Charter of Fundamental Rights, in particular trade union and collective bargaining rights.
- 1.12 The EESC recommends to the European Parliament, the Council and the Commission that a strategic framework for the textile services industry be defined, exploiting the fact that its economic development and growth in the areas of production and employment are fully compatible with the sustainable growth targets provided for by the 20/20/20 targets for 2020.

## **2. Introduction**

- 2.1 The textile services industry covers a wide, varied range of businesses which provide the following services on an industrial scale:
  - industrial laundries and cleaners, as well as textile rental for manufacturing and service companies and for individuals;
  - rental, repair etc. and maintenance of clothing and workwear, uniforms and protective and safety clothing;
  - washing, rental, repair etc. and finishing of linen for hotels, restaurants and cafes;
  - washing, rental, sterilising, repair etc. and finishing of clothing and linen for medics, paramedics and patients in hospital facilities, nursing homes and communities;
  - rental and sterilising of surgical instruments and textiles and provision/supply of sterile medical kits;
  - supply, rental and repair etc. of smart textile products, with integrated high-comfort, user-friendly functionalities;
  - industrial finishing, filters, absorbent materials for dust control and similar textile services, for production plant and sterile processing environments;
  - hygiene-related textile services, complementary/alternative to textile products;

– finishing and specific services related to the "fashion system".

- 2.2 Industrial laundry services are vital to a range of activities linked to the hospitality industry and tourism, such as restaurants, hotels, communities, cruise ships, etc., and to the supply of advanced protective textiles in a wide spectrum of manufacturing and commercial sectors, maintaining a strong local basis with low risks of relocation outside the EU.
- 2.3 Laundry services are also important to the textile industry, since clothing manufacturers need to subject their products to a testing and washing phase before they can be put on the market. Given the size of the workload and the absolute necessity that the washing gives perfect results, laundry services for the textile industry require operators to be equipped with advanced machinery, and professionally trained staff working in suitable conditions.
- 2.4 Industrial laundry services supplied to the hotel sector involve the care and washing of all hotel linen, which needs to go through a continuous cycle of maintenance and washing. This rapid turnover requires the laundry service provider to be able to keep up with the pace – through efficient work organisation and professional staff – and thus avoid any delays.
- 2.5 Alongside laundry services, increasingly sophisticated rental services have developed which have to comply with more advanced technical and operational requirements and increasingly stringent environmental and technical regulatory requirements, in particular for protective equipment and advanced military supplies.
- 2.6 In recent years, the textile services industry as a whole has developed important high-tech systems, both "B to B" and "B to C"<sup>2</sup>, both with regard to the quality and technical and environmental standards pertaining to traditional services – including hygiene-related – provided to hotels and hospitals, and with regard to the supply of advanced or smart protective textiles<sup>3</sup>.
- 2.7 The traditional industry operates on a considerable scale; it has a turnover of some EUR 9 billion (2007), is concentrated geographically and dominated by a few multinational corporations<sup>4</sup>. The rest of the market is highly fragmented with myriad small enterprises that generally operate locally. It is a rapidly expanding market, both in terms of turnover (some EUR 10 billion per annum) and staff numbers (over 200 000 employed).
- 2.8 The high-performance protective clothing sector is fast developing and is related to the new generation of smart textiles, based on: smart materials, advanced production processes, integrated, user-friendly and high comfort functionalities, and risk prevention and

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<sup>2</sup> See *complex services* in Developments in the business service sector in Europe (exploratory opinion) – *OJ C 27, 3.2.2009, p. 26–33*

<sup>3</sup> See Europe INNOVA – INNOVATION WATCH. Sectoral Innovation Foresight: Textiles and Clothing – INTERIM REPORT JUNE 2009 pp.3-4, 9-10.

<sup>4</sup> Elis, Rentokil, Johnson Service, Davis, Alisco, HTS, etc.

management. The market in personal protective equipment (PPE), which is one of the EU's most promising lead markets<sup>5</sup>, is estimated at between EUR 9.5 billion and EUR 10 billion, with approximately 200 000 workers directly or indirectly involved in PPE products and services.

- 2.9 Market demand for these products and services is dependent on more stringent regulation of personal safety standards in the workplace; higher safety performance and more rigorous safety requirements for all staff, and better personal risk management; and dissemination of a culture of reliability and a desire to avert potential claims.
- 2.10 Of particular importance is the attention that the sector is giving to the environmental impact of textile processing and services. Environmental impact assessments have been carried out on the textile services industry, in the form of life cycle assessments<sup>6</sup>.

### 3. **Aim of the opinion**

- 3.1 This opinion examines the conditions for development of the textile services industry which:
- respects the living and working conditions of human resources, particularly as regards health and safety;
  - is based on sectoral structural dialogue between the social partners at the various levels;
  - is accompanied by increasing staff skilling and professionalism, and employability prospects based on a faster education and training process;
  - ensures greater environmental protection and protection of energy and water resources throughout the life cycle and recycling of the product;
  - invests in technological and logistics/organisational innovation in an open environment, preventing abuse of dominant positions, ensuring an environment conducive to setting up and developing small and medium-sized businesses;
  - promotes competition based on quality and drafting and implementing of advanced technical regulatory standards;
  - ensures transparent public procurement, fully respecting environmental requirements and social clauses, particularly in the subcontracting chain;
  - gives the sector a higher profile and greater transparency, to improve its image.
- 3.2 On 11 May 2010 the EESC held a public hearing on the subject in Brussels, with participation by national and European trade union and employers' representatives from the sector, as well as representatives from the European Agency for Safety and Health at Work (Bilbao) and the Commission (DG ENTR), bilateral entities active in various national initiatives and individual businesses representative of large-scale production and service enterprises.

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<sup>5</sup> See Lead Market Initiative for Europe/Mid-term progress report. SEC(2009) 1198 final of 9.9.2009.

<sup>6</sup> See Appendix I <http://www.eesc.europa.eu/?i=portal.fr.textile-services-sub-sector-in-europe>.

#### **4. General comments**

- 4.1 The EESC believes that a prerequisite for drawing up a strategy and action plan for the sector is the launch of a pilot project at European level to map and analyse the various, widely-differing sectors of the European textile services industry and their size and geographical distribution in EU-27, bearing in mind the substantial gender factors and the existence of an unregulated informal sector.
- 4.2 The EESC feels that a better way of defining the sector should be found, with clearer definitions in the Eurostat NACE code system, to make it easier to keep abreast of its economic trends, investment and innovation, employment and professional qualifications.
- 4.3 The textile services industry is particularly dynamic and fast-developing, and its development potential is closely related to improvement of the socio-cultural context and the technical and economic capacities of businesses.
- 4.4 The EESC believes it is important for the European standards bodies to draw up technical regulatory standards for all parts of the sector which are increasingly advanced from an environmental, social and technological point of view, including on the basis of instructions from the Commission, so as to ensure high-quality products, processes, services and working conditions for staff and to be able to be globally competitive.
- 4.5 The sector's development must be supported by structured social dialogue at both European and national and regional levels to define fair working conditions which can provide a common basis in the sector in Europe, in line with the Community directives on both gender equality, organisation of working time, and worker information and consultation. The EESC believes that the sector should strike a better balance between customer satisfaction and employment motivation principles, as is the case in certain cutting-edge production businesses.
- 4.6 The EESC feels that full implementation of the Charter of Fundamental Rights, in particular trade union and collective rights, in all areas of the EU production and service sector is essential for the sector's development.
- 4.7 The EESC feels that exchange of best practice between bodies in the Member States is a European-level solution which could be pursued, funding relevant European cross-border projects.
- 4.8 The industry must give priority to environmental protection, encouraging dissemination of EMAS and Ecolabels and application of ISO 14000 standards.

- 4.8.1 The 2006 industry data are an excellent basis for reflection and analysis to study the development of the various sectors<sup>7</sup>, but they should be updated at least every two years and analyses of their environmental impact carried out and submitted to the European Parliament and the EESC.
- 4.8.2 A full assessment should be carried out of the sector's endeavours to disseminate EN 14065 certification with the help of the social partners in order to combat unfair competition, regulating the market and providing tax and other incentives to encourage dissemination of best practices with quality labels.
- 4.8.3 The functionalities and durability of these characteristics throughout the textile product's life cycle need to be taken into consideration when deciding which clothing should be treated with "full service" solutions.
- 4.8.4 The EESC feels it is important for the sector to play an active role in how solvents and chemical substances subject to the EU REACH Regulation are used, as well as in the implementation of European legislation on water.
- 4.9 The EESC calls for the annual work programmes under the 7th Framework Programme for RTD, the multiannual competitiveness and innovation programme, and Structural Funds operations to give sufficient consideration to technological and organisational innovation projects in the sector as regards integrated logistics and traceability of products supplied, not least using Galileo logistics applications. The EIB should facilitate investment, especially as regards SMEs.
- 4.10 In procurement, full, transparent implementation of the relevant provisions is a prerequisite for "green and social" development of the sector, particularly as regards the system of subcontracting and responsibilities, which must concern the whole supply chain.
- 4.11 Technological and logistics/organisational innovation require an open environment to prevent abuse of dominant positions, ensuring an environment which is conducive to setting-up and development of small and medium-sized businesses.
- 4.12 Increasing staff skilling and professionalism, and employability prospects based on a faster education and training process, are needed, with development of a participatory foresight exercise with the support of the Institute for Prospective Technological Studies (IPTS) in Seville; Structural Funds measures should be dedicated to developing bilateral consultation bodies for staff training and skilling and education, including in the area of languages.
- 4.13 Safety and health at work must be one of the priorities for improving quality in the sector: the sector's social partners at European level must build up structured dialogue and be properly represented in the European committee on safe maintenance.

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See footnote 5.

- 4.14 The EESC calls on the Commission to submit without delay a Communication on a potential European economic and employment strategy to develop the textile services industry, with a view to drawing up an EU action plan for the industry tying in with the Lead Market Initiative for Europe, where textile services are referred to in terms of strategic potential for success.

Brussels, 14 July 2010.

The President  
of the  
European Economic and Social Committee

Mario Sepi

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