PHS Industry Monitor

Statistical overview of the personal and household services sector in the European Union
ABOUT US

Since 2006, the European Federation for Services to Individuals (EFSI) brings together national federations and associations as well as private companies that are involved in the development of Personal and Household Services (PHS) in Europe. Through its members, EFSI is present in 22 EU Members States. As such, it promotes, defends, develops and creates opportunities for PHS providers and stakeholders while giving them voice on the EU scene.

PHS include a broad range of activities that contribute to well-being at home of families and individuals: child care, long term care for the elderly and for persons with disabilities, ironing, cooking, cleaning, gardening, remedial classes, small repair work, and home administrative tasks.

More information: [www.efsi-europe.eu](http://www.efsi-europe.eu)
Personal and household services (PHS) are a dynamic and fundamental sector for our society. It is indeed in constant evolution and subject to numerous pressures such as population ageing, women’s increased participation to the labour market and insufficient support from public authorities. This often leads to situations which are detrimental to both PHS workers and users, and which are not sustainable over the long term. As Commissioner for Employment, Social Affairs, Skills and Labour Mobility, Marianne Thyssen wrote in 2016 “[i]t is essential to address these issues and to be able to harness the potential of this sector, both in terms of job creation and in response to future needs that population change will bring”.

Whilst a growing number of voices on the local, national, European and global levels are calling for better support to the PHS sector with the aim to reduce undeclared work, to improve working conditions, and access to PHS solutions, its importance in terms of macroeconomic contribution is relatively unknown across the European Union.

The lack of consideration is in part the result of a statistical gap in the sector at an European level as well as national levels of individual Member States. We believe that providing accurate statistical information regarding the sector is an important tools because this raises awareness of the key role played by PHS in nowadays economy.

This is the reason why, with the publication of the PHS Industry Monitor, the European Federation for Services to Individuals (EFSI) seeks to actively tackle the challenge of the under representation of the sector in the public debate, by providing a new methodology which is based on workers’ occupations and not only on economic activities. By this approach, the report highlights the limitations of European statistical nomenclatures, as well as inaccuracies of past estimates whilst providing in a didactic manner a more accurate overview of the size and the main features of the PHS sector’s employment market.

The PHS Industry Monitor consists of the first initiative of its kind, and aims at being improved over the years: if some past inaccuracies could be corrected, the task proved to be harder for others, and further research is therefore needed. With this goal in mind, the EFSI calls Eurostat to launch a thorough work on the subject in partnership with national statistical bodies.

Since 2016, many actors have come into action in favour of a better support to the PHS sector. It is now time to give them the necessary means so that their involvement can be translated into concrete actions for the wellbeing of all European citizens. We hope that the PHS Industry Monitor will contribute to this.

Philippe Symons

President of the European Federation for Services to Individuals
CEO – Sodexo Childcare Domain

1 See IMPact, “PHS policies – implementation and monitoring guide”, European project co-funded by the PROGRESS Programme of the European Union, March 2016.
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INFOGRAPHIC ON THE MAIN RESULTS

- PHS jobs in the EU economy

  In the EU, the PHS sector represents 8 million jobs 4% of total employment vs. Hospitality sector: 4.7% vs. Construction sector: 6.72%

- Women and the PHS sector

  91% of PHS workers are women

  In the EU, 1 woman out of 13 works in the PHS sector, which represents 7.5% of women total employment

- Employment distribution in the PHS sector

  With 70% of PHS total employment, the provider organisation model is predominant

  40% of PHS workers mainly provide household support services

- Challenges and development trends

  UDW still prevails in the sector

  70% of PHS are delivered by undeclared workers

  Demand keeps increasing

  By 2030, 36.8 million Europeans will be over 80

  +7.4% since 2001 women’s participation in the labour market keeps increasing

  WLB dissatisfaction grew by 11% in the past decade

  At least, 5 million jobs could be created in the sector

  12.4 to 13 million

  Currently 8 million workers
1. THE PERSONAL AND HOUSEHOLD SERVICES SECTOR

What are PHS?

The personal and household services sector (PHS) brings together activities carried out mainly in users’ home relating to personal assistance services (early childhood, child care, dependence, disability, invalidity, etc.) summarized under the term “care-related services” and to services of daily living (cleaning, ironing, gardening, small DIY, maintenance, remedial classes, etc.) united under the term “household support”. This report will attempt to analyse both the PHS sector as a whole as well as its two sub-sectors – care-related services and household support services – separately.

These activities are characterized by a very high employment content and until now they reached low productivity gains and their imported content is almost non-existent. Given the tax and parafiscal wedge, the cost of these activities sometimes represents twice the net salary of the worker but also a high share of the users’ own salary or income. Thus, the opportunity cost of these activities favors self-production (see women’s dual activity, e.g. paid and unpaid) as well as undeclared work (where gross and net costs are equal).

Historically, people access PHS by directly hiring the worker (hereafter referred as the direct employment model). This corresponds to the definition of a domestic worker given by the Convention No.189 of the International Labour Organisation (ILO). For its part, the development of the provider organisation model appeared firstly in the context of social services through bodies emanating from public organisations or private non-profit organisations. In the last thirty years as part of the liberalization of markets and the implementation of fiscal incentives to fight notably undeclared work, PHS have been opened to private for-profit organisations. Finally, in recent years the recourse of self-employed individuals has increased thanks to the development of digital platforms. Depending on the national situation, this phenomenon affects the whole PHS sector or both sub-sectors separately.

Traditionally, care-related services are considered social policies and are intended to develop care for dependent persons, childcare, and so on. In many countries, access to these services are needs and income tested by public bodies. Public support to household-related services is generally more recent and considered a part of employment policies and is intended to tackle undeclared-work, create new jobs, reintegrate the unemployed into the labour market and so on. Finally, both care-related and household support services can be supported through work-life balance policies.

Despite different national approaches, these two categories of activities have many interactions that justify a single sectorial approach under the concept of personal and household services. This single approach has notably been adopted by the European Commission in 2012 and France as of 2005. Hence, in a 2012 Staff working document, the European Commission described PHS as covering a broad range of activities that contribute to well-being in the home of families and individuals: child care (CC), long term care (LTC) for the elderly and for persons with disabilities, cleaning, remedial classes, home repairs, gardening, ICT support, etc..

Among these interactions, one can mention the fact that both types of services can be supported by the same kind of policy measures. Moreover, the same service (e.g. home cleaning or cooking) can be considered part of the overall care provided to a dependent person, or it can be delivered to non-dependent people with other socio-economical perspectives. As such, care-related services and household support services jobs can be very close. It may be added that the recourse to household related activities enable people to save time which in turn can enable them to free up time to take care of their relatives. Finally, we witness a prevalence of undeclared in both categories of PHS activities.

For a more detailed overview of the features of PHS, the reader is invited to refer to the IMPact guide “PHS policies – implementation and monitoring guide” published in 2016.

2 Household support services can also be referred to as “non-care activities”.

3 Indeed, the Convention adopted in June 2011 draws on the common and distinctive characteristic that domestic workers are employed by, and provide services for, third party private households. See, ILO (2011), Domestic Workers Convention (No. 189), Convention concerning decent work for domestic workers.

4 The guide is available in Czech, English, French, Italian and Spanish on the website: www.impact-phs.eu.
Few statistics on the PHS sector

Until today, PHS are not considered as an economic activity within European statistics (NACE). Therefore, PHS encompass a wide range of activities that do not constitute a simple aggregate of traditional activities, even at the finest level.

Until now, statistical overviews of the PHS sector were based on the data of NACE category 97 “Activities of households as employers of domestic personnel” and of category 88 “Social work activities without accommodation”. The category 97 can be regarded as the direct employment model and the category 88 as the provider employment model. These two categories only imperfectly cover the PHS sector because their scope is simultaneously too broad and too narrow.

Indeed, in reality the data in category 97 only describe the number of individual who employ a domestic worker and who do not have any another economic activity than this one. As such, the only useful information given from the NACE category 97 is an order of magnitude to the use of direct employment in the PHS sector.

This is why this report presents the results of research work aiming at giving a more accurate statistical overview of PHS and in particular of employment in the sector. Thus another approach has been developed based on the ISCO data. In this case, it is no longer the type of employment (direct employment model vs. provider employment model) which will be decisive but rather the occupation, that is if it is a care-related or a household-support related job. In this case, two groups will be of particular importance:

- group 9111 of domestic cleaners and helpers,
- group 5322 of home-based personal care workers.

Again, these two groups are simultaneously too broad and too narrow to give an accurate representation of employment in the PHS sector. However, our research work showed that the use of groups of occupations rather than economic activities is better, given the unreliable data of NACE category 97.

Lastly, the use of “4-digit” data raises issues of sample size and collection. Thus, Eurostat data related to the ISCO classification are not available for all Member States, especially when it comes to the group 9111. This is why, in order to obtain a wider coverage, data have been complemented with national sources, figures of the European Federation of Cleaning Industries (EFCI) and extrapolations. Furthermore, other statistical resources have been used such as from the OECD, the European Union Labour Force Survey (EU LFS) as well as Eurofound and Eurobarometer’s surveys.

To conclude, the objective of this report is to provide more accurate statistics on PHS and to provide for the first time a statistical overview only of the sector. The authors hope that it will contribute to a better account of its weight in our economies and societies and that it will show that we still have a long way to go to fully exploit its potential.

Being the first exercise of this kind, this report aims to be regularly updated and expanded in order to follow more closely the evolution trends of this ever growing sector.

A more detailed explanation of the statistical methodology used and of the limitations and precautions with the use of the data presented can be found in Annex 1 of this report.
2. THE PHS SECTOR: 8 MILLIONS JOBS THROUGHOUT EUROPE

In 2016, employment in the PHS sector represents almost 8 million jobs (7,918 million) in the EU 24\(^5\). The figures reveal a discrepancy among EU countries with some countries registering a high number of PHS workers such as the United-Kingdom (1.8 million workers), France (1.4 million workers), Spain and Italy (1.2 million) and some others with less than 15,000 workers in the sector (in decreasing order: Latvia, Croatia, Luxembourg, Malta and Slovenia).

![Chart 1: Employment in the PHS sector in 2016 - EU 24 (in thousands)](chart.png)

**Note**: data for the countries in brackets have been extrapolated or constructed with figures provided by EFCI.

**Sources**: Eurostat – ISCO-08 database 9111+ 5322 – EFCI - EFSI

With more than 155,000 new jobs created between 2011 and 2013 in Europe, the PHS sector is the second-fastest growing employment sector behind ICT according to the European Commission\(^6\).

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\(^5\) No data were available for Bulgaria, Estonia, Greece and Latvia.

\(^6\) European Commission (2015), *EEPO Thematic review on personal and household services*, Synthesis written by Nicolas Farvaque, Orseu.
3. **PHS JOBS IN THE EU ECONOMY: 4% OF EU EMPLOYMENT**

These 8 million jobs amount to almost 4% of total employment in EU24. This share varies greatly as it can reach 6% in some Member States and less than 1% in others. As such, Member States can be grouped in three clusters: countries with a share of PHS jobs below the EU average (in light blue in the map below); countries in the EU average (in medium blue) and countries above the EU average (in dark blue).

**Map 1: Share of PHS jobs in total employment**

As highlighted by the map, countries where PHS activities are developed are Southern or Northern European countries as well as Belgium, France and the United-Kingdom. Conversely, countries with a low share of PHS in total employment are found in Central and Eastern Europe.

It is interesting to compare these figures with those of two others significant economic sectors who share some characteristics of the PHS sector (such as a high proportion of undeclared work or a high employment content) and which are recognised as major sectors of the EU economy, namely the construction sector and the accommodation and food services activities. According to Eurostat (EU LFS), in 2016 the construction sector with 14,7 million workers represented 6,72% of total employment in Europe. As for the hospitality sector, it represented 10,5 million of workers and amounted to 4,7% of total employment. We can thus conclude that the share of PHS workers amounts to 80% of the number of workers in the hospitality sector and 55% of employment in the construction sector.
4. WOMEN AND THE PHS SECTOR: 7.5% OF WOMEN EMPLOYMENT

The data below clearly illustrate the importance of female employment in the PHS sector since the share of female workers in PHS reaches 91% in the EU 24.

Note: data for the countries in brackets have been extrapolated or constructed with figures provided by EFCI. No estimates can be produced for Bulgaria, Estonia, Greece and Latvia.

Sources: Eurostat – ISCO-08 database 9111+ 5322 – EFCI - EFSI

If this fact is well-know, the figures reveal another less-known data: female employment in the PHS sector accounts for nearly 7.5% of all female employment in the EU 24. It means that almost one in ten (thirteen to be precise) women works in the sector, which is neither a lot nor a little.

Note: data for the countries in brackets have been extrapolated or constructed with figures provided by EFCI. No estimates can be produced for Bulgaria, Estonia, Greece and Latvia.

Sources: Eurostat – ISCO-08 database 9111+ 5322 – EFCI - EFSI
For those who considered that PHS development is nothing else than externalising from the household activities that women would perform themselves, this figure appears to be quite low. However, it highlights that nine out of ten women work in another economic sector, meaning that the women out of ten who provides PHS can be considered – in numerous situation – as essential for the work of other women.

It is crucial to always keep in mind the weight of self-produced PHS activities within a household, especially as they and mostly self-produced by women. On average, a European adult spends daily 2.5 hours on unpaid work. Whereas women spend on average 3.5 hours per day on PHS unpaid activities, men spend nearly 1.5 hours daily.

2. For a number of countries it was not possible to restrict the sample to the population aged 15-64. The age limits are Hungary: 15-74; Sweden: 20-64. A different upper age limit is unlikely to affect time use significantly. A lower age limit will diminish the importance of unpaid work.
3. Surveys for Denmark, France and Ireland do not cover a complete calendar year and thus, to varying degrees, under-represent holidays. As people do more unpaid work on weekends, excluding holidays overestimates paid work and underestimates unpaid work and leisure.
4. Ireland use a simplified time-use diary. Hence, estimates are less precise.
5. For Hungary, only pre-prepared tables on time use are available and the categories are not always entirely comparable with the aggregations used for the other countries. The comparison of Hungary with other countries should thus be interpreted with caution


Thus, the fact that one out of ten women in Europe works in the PHS sector also highlights that men are mostly absent from the sector, except in some specific activities such as gardening and small repair works. This gender division of work can be perceived as a cultural heritage. It can also be perceived as an inequality as this sector has generally less attractive working conditions and faces difficulties in recruitment and job retention.
5. EMPLOYMENT DISTRIBUTION IN THE PHS SECTOR

70% of PHS workers are hired through the provider employment model

As mentioned above, the data of NACE category 97 “Activities of households as employers of domestic personnel” only describe the number of individuals who employ a domestic worker and who do not have any another economic activity than this one. As such, it doesn’t illustrate the number of PHS workers employed through the direct employment model. However, these data can be useful in giving an order of magnitude of the recourse to this employment relationship.

Note: 1. There were no data available for Estonia, Lithuania, Sweden and Slovenia.
2. For a number of countries, the data are from 2014 (Latvia and Slovakia) and from 2015 (Denmark).
Source: Eurostat, NACE 97

The Chart above shows that in two Member States, more than 500,000 private households employ a domestic worker (Italy & Spain) and that in three other Member States they are more than 100,000 to do so (namely Germany, France and Portugal). Furthermore, by subtracting to the figures of total employment in PHS, the workers counted in the NACE category 88 “Social work activities without accommodation”, we can have an overview of the share of direct employment within the sector.

Note: There were no data available for Denmark, Estonia, Lithuania, Latvia, Sweden, Slovenia and Slovakia.
Source: Eurostat, NACE 97/(NACE 88+NACE 97)
We can conclude from the Chart 6, that the rate of recourse of direct employment model in the PHS sector was close to 30% in the European Union in 2016.

However, it should be underlined that the data of NACE 97 category translate only partially the level of direct employment in the sector in certain countries. As such, national statistics reveals that direct employment in France represents 60% of the total hours paid in the sector which is incoherent with the 18% mentioned here\(^7\). Thus, combining the results of Chart X with national statistics enables us to have a more accurate overview of the situation and to split EU Member States in two groups:

- firstly those in which the direct employment model is predominant such as Cyprus, France, Greece, Italy, Portugal, Spain and Romania (in dark blue in the map below);
- secondly the other Member States where the share of direct employment is equal or below 20%.

**Map 2: EU countries in which the direct employment relationship model were predominant in 2016**

\(^7\) For more information about France, please visit: [https://www.tresor.economie.gouv.fr/Ressources/File/427362](https://www.tresor.economie.gouv.fr/Ressources/File/427362)
Thus, employment through the provider organisation model, with 70% of PHS total employment, is predominant in the sector as shown explicitly in the Chart 7 below.

![Chart 7: Number of PHS workers employed by services providers in 2016 in EU 28 (in thousands)](chart)

**Box 1: Focus on PHS employment models**

As described in the introductory part, there actually exist two types of employment models in the PHS sector. The direct employment model was historically the first one to be developed. It is characterised by the fact that the user is legally the employer of the PHS worker (often described as a bilateral relationship). It corresponds to the definition of a domestic worker given by the Convention No. 189 of the International Labour Organisation (ILO) according to which the common and distinctive characteristic of domestic workers is to be employed by, and to provide services for, third party private households.

On the other hand, the provider organisation model corresponds to a classical form of employer-employee relationship. In this case, the PHS worker is always a salaried employee. It is often described as an “intermediated” or triangular form of employment, whereby the worker is employed by an organisation (private for profit or not) who sells services on the market or by an organisation providing the services (e.g. a public organisation). The beneficiary of the service simply buys this service on the market or receives the service from public entities. In this form of work, organisations are the employers of PHS workers. Ultimately, this provider organisation model also covers the recourse to self-employed individuals or auto-entrepreneurship because there is no employment relationship between them and PHS users but instead a sales contract (in this last case though we cannot talk of “triangular relationship”). This limited mode of recourse has increased in recent years thanks to the development of digital platforms.

As such, in a perspective based on the employment models, we can illustrate the structuration of the PHS sector in the following way:
Household support represents almost 40% of PHS activities

Based on data from ISCO groups 5322 “Home-based personal care workers” and 9111 “Domestic cleaners and helpers”, a distinction can be made between care-related services workers and household support workers, thus giving an overview of the significance of each sub-sector in the total of PHS activities.

Note: data for the countries in brackets have been extrapolated or constructed with figures provided by EFCI. No estimates can be produced for Bulgaria, Estonia, Greece and Latvia.

Sources: Eurostat – ISCO-08 database 9111+ 5322 – EFCI - EFSI
Thus, as showed in Chart 8 above, the average share of household support activities is 37% whereas care-related activities represents 63% of PHS in EU 24.

Map 3: Share of household support employment in total PHS employment in 2016

Source: Eurostat – ISCO-08 9111+ 5322 – EFCI - EFSI

Although similarities appear between Map 2 and Map 3, the weight of the direct employment model – which gathers both household support and care related activities – does not seem to be the only explanation for the share of household support activities in PHS. A closer look at the situations of countries such as Belgium, Denmark and France reinforces this finding. Indeed, in these three countries, public supporting measures have been implemented and they have considerably reduced the price of PHS on the formal market, thus making access to household support activities more affordable for many citizens.
6. UNDECLARED WORK IN THE PHS SECTOR: 70% OF THE MARKET IN THE ABSENCE OF PUBLIC SUPPORT

A 2016 report from the European Commission reveals that PHS are the third most common identified sector for undeclared work, after the construction sector and hotels, restaurant and catering\(^5\). The prevalence of undeclared work in the sector is not unrelated to its inherent characteristics (for more information, see box below).

**Box 2: Undeclared work and the PHS sector/self-production**

One of the main characteristics of the PHS sector is that a large part of its services are provided by undeclared workers\(^1\). This is mostly the results of the sector’s high employment content (i.e. the price paid for the services is made up almost entirely of workers’ wages), which means that the formal provision of PHS is relatively much more costly (when taking into account taxes, and so on) than undeclared provision.

PHS development can be described as an externalisation of family activities and seen through the prism of the economic analysis of household production developed by Gary S. Becker (Nobel Memorial Prize in Economic Science in 1992). According to the latter, the family can be likened to a place of production, the household. The theory states that households spend time on three kind of activities: paid work, personal care and leisure. The time allocation between these three types of activities will depend on the value of each activity. When it comes to PHS – or personal care – the household wants to produce satisfactions such as a clean house and ironed linen. This production will be based on its monetary budget, its time budget and the relative prices of the different inputs.

The provision of PHS is a time-based resource allocation problem that is typically a scarce resource. Therefore, it is the net salary of each member of the household that sets the opportunity cost\(^2\) of the time they are willing to spend on PHS self-production. Thus, an increase of their net wage will lead the household to substitute unpaid work by externalised services. Consequently, the actual price of one hour of PHS is therefore not the same for all because the price of time varies from one person to another according to his net salary.

Therefore, household will face several choices:
- Self-production of PHS by one or both members of the household (as stated in above in Chapter 4, women do the highest share of unpaid works, this is due in part by the differences of salary between men and women).
- Externalisation of PHS on the undeclared market, in which the gross and net wage of the worker is equal.

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Externalisation of PHS on the formal market. In this case, the cost of PHS will be based on the workers’ gross wage.

This economic reasoning is relevant for household support services. When it comes to care-related services, one should add another arbitration factor: the impossibility of self-production.

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1 It’s important to distinguish undeclared work from informal done in the private sphere. The European Commission defines undeclared work as “any paid activities that are lawful as regards their nature but not declared to the public authorities”. It means that in a PHS undeclared work relationship a third person provides care or household related services to a family or dependent people in exchange of a payment. It is thus strictly different from the situation in which a family member, friends, or neighbours provide help informally and without any monetary compensation in his/her spare time.

2 Valuing household activities can be done through the opportunity cost approach. This theory is based on the assumption that when an individual chooses to undertake unpaid work, such as household activities or leisure, the possibility of spending that time at paid work is precluded. Thus, the person foregoes the salary associated with that activity.

Source: IMPact, « PHS policies – implementation and monitoring guide », European project co-funded by the PROGRESS Programme of the European Union, March 2016

Estimating the importance of undeclared work in the sector, as in any other sector, is by definition difficult. In the case of PHS, we can refer to two sources:

- a comparative study at European level conducted by the French Directorate General for Trade, Industry and Services (DGCIS) within the Ministry of Economy in 2011,
- a Eurobarometer survey on undeclared work conducted in 2013 which contains a section dedicated to PHS.

According to the work of the DGCIS, in countries where no PHS supporting policies are implemented towards household related services, undeclared services represent around 70% of all transactions. Conversely, it reaches around 30% in countries where supporting measures are implemented (e.g. price reduction for users, cost reduction for providers, increase of the quality of services, etc.).

Chart 9: estimated share of undeclared work in the PHS sector in 2010 (in % of total PHS employment)

2- For France, this estimate of 30% is consistent with a newest study conducted in 2014 by the Directorate for the Animation of Research, Studies and Statistics (DARES) within the French Ministry of Labour. According to their study\textsuperscript{12}, about 25% of household using PHS services would have had recourse to undeclared work in 2011.


In the Spring 2013, the European Commission conducted a Eurobarometer survey on UDW in the European Union. It reveals that 11% of the respondents admitted having bought goods or services involving undeclared work in the previous year. Among them:

- 15% acquired goods or services in relation to home cleaning, which is most likely to be purchased in Luxembourg, Cyprus, the Netherlands and Austria. With the exception of Romania and Croatia, home cleaning services are not purchased by more than 6% of the respondents in any country in Eastern and Central Europe as well as in Malta,

- 10% of the respondents purchased gardening services or products, which are most likely to be bought in the UK, Romania and Ireland and are at the second most widely mentioned purchase in these countries,

- 3% of them said they paid for assistance for a dependant or elderly relative. These services are particularly prevalent purchases among respondents in Austria, Luxembourg and Sweden.

We can add that respondents also admitted having purchased home babysitting (5%), ironing clothes services and tutoring (3%) as well as babysitting services outside their homes (2%).

![Chart 10: relative importance of two PHS activities in undeclared work (in %)](chart.jpg)

\textit{Note}: Due to the small size of the sample for the Eurobarometer survey, it is not possible to extract any meaningful national trends.


Extrapolating these numbers to the entire EU population reveals that close to 12 million EU citizens bought PHS services on the undeclared market. Taking into account the probability of the people surveyed or under-reporting their recourse to undeclared work, we can consider that these estimates are rather conservatives.

The recourse of undeclared work is all the more easier in the sector as barriers to the provision of PHS activities are low, especially when it comes to household support services. Indeed, no material is needed

\textsuperscript{12} DARES (2014), \textit{Les SAP, qui y recourt et à quel coût ?}, available at \url{https://www.entreprises.gouv.fr/services-a-la-personne/etude-dares-qui-recourt-aux-sap-et-a-quel-cout}
(as it is usually provided by the user) and limited technical competencies are required. Furthermore, direct employment model relationships can encourage the use of undeclared employment relationships. Given its place in the sectoral chart of undeclared work, it is to be hoped that the PHS sector will soon be given special attention by the European Platform Tackling Undeclared Work. Such attention would be all the more useful as some public supporting measures have proven that they can significantly reduce the share of undeclared work in the sector.
7. **PHS SECTOR DEVELOPMENT TRENDS**

The EU must face significant societal challenges

Population ageing will be a determining factor for the evolution of PHS needs. As such, the share of over 80 years in the European Union will increase from 5.4% of the population in 2016 to 7.2% in 2030. Thus, there will be approximately 36.8 million Europeans over 80 years of age in 2030 in the EU.

**Chart 11: population ageing, EU 28, 2016 & 2080 (% of total population)**

This unprecedented and general ageing of our societies increases demand for home help and care services. Currently, ageing people’s wish to remain at home longer is partially met by informal help and care coming from family carers and undeclared workers. As such, across Europe about 80% of care provision hours are delivered by informal carers, predominantly women aged 45 or more. Some of them provide care to their relative out of choice, but others do not and are obliged to reduce their working hours or, in some cases, to withdraw from the labour market to meet their relatives’ needs. In the long term, this situation is not sustainable, nor is it economically or socially acceptable. In addition, the number of family carers is expected to decrease by 2050 in parallel with the shrinking of the working age population.

These future needs are to be compared with the constant increase in the female employment rate, from 57.9% in 2001 compared to 65.3% in 2016. However, women are the main providers of PHS self-production.

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The recourse to PHS is an option for EU workers – and especially women – for determining their life choices. It complements the possibility to use parental leave, part-time work and other forms of flexibility. Reconciling between work and life is a long-standing concern of the EU and it remains high on the agenda of European Institutions. The latest European Quality of Life Survey (EQLS) revealed that the proportion of respondents claiming that they experience work-life balance issues at least several times a month increased substantially between 2007 and 2016, but especially so between 2011 and 2016. Thus, 60% of the respondents claim to be too tired from work to do household jobs in 2016, compared to 49% in 2007. The countries were this imbalance has increased most substantially since 2007 for both men and women are Croatia, the Czech Republic and Romania. Furthermore, the survey shows clearly that work-life balance is affected by the number of children and the caring responsibilities a person has and their working hours.

Again, women experience tiredness due to work more than men. Thus in 2016, 2/3 of women under 34 claim to be too tired from work to do household jobs at least several times a month. In general, 62% of women report that they experience work-life balance issues at least several times a month compared to 57% for men.

Table 1: Proportion of respondents in employment claiming that work-life balance issues occur at least several times a month (%)

<table>
<thead>
<tr>
<th></th>
<th>Men</th>
<th></th>
<th></th>
<th>Women</th>
<th></th>
<th></th>
<th>EU28 Total</th>
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<tr>
<td></td>
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<td>35-49</td>
<td>50-64</td>
<td>18-34</td>
<td>35-49</td>
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<td>Too tired from work to do household jobs</td>
<td></td>
<td></td>
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<tr>
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<td>57</td>
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<td>61</td>
<td>53</td>
<td>66</td>
<td>62</td>
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<td>60</td>
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<tr>
<td>Difficulty in fulfilling family responsibilities because of time spent at work</td>
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<td>20</td>
<td>20</td>
<td>16</td>
<td>23</td>
<td>21</td>
<td>17</td>
<td>19</td>
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</tbody>
</table>

Notes: Q20 (Q12) in previous rounds) *How often has each of the following happened to you during the last 12 months? a. I have come home from work too tired to do some of the household jobs which need to be done b. It has been difficult for me to fulfil my family responsibilities because of the amount of time I spend on the job c. I have found it difficult to concentrate at work because...
of my family responsibilities”. Answer categories are: Every day, Several times a week, Several times a month, Several times a year, Less often/rarely, Never. The category “every day” was added for the 2016 wave. The table shows the percentage of respondents in employment claiming to have a work-life balance problem “every day”, “several times a week” or “several times a month”. EU28 data.


At least 5 million jobs to create

Faced with the necessity to regularize undeclared work, to better meet the needs of frail and elderly people and to ensure a better reconciliation of work and private life, Member States can implement different PHS policies. As indicated above in part 6, the economic rationality will favor the outsourcing of PHS services at a price for the users which equal its net salary. Such public schemes exist and can have a balanced budgetary costs for public authorities.\(^{15}\)

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**Box 3: PHS policy measures**

PHS public interventions can result from two main objectives. Firstly policy interventions supporting employment related objectives (e.g. employment creation, reducing undeclared work, fostering and developing economic activities) main goal is to bring back the final price paid by users on the formal market close to the price they would have pay on the undeclared market. In this case, the main measures implemented are tax deduction/exemption for users and cost reductions for providers through employers’ contribution exemptions or reduced VAT rates. While estimating the budgetary effects of these measures, it’s important to take into account the revenue generated for the State (additional social contributions and taxes), as they make it possible to reach a net cost for the State which is close to zero.

On the other hand, policy interventions supporting the sector can follow social objectives such as improving access to childcare or improving access to elderly care/long-term care/care for people with disabilities. In this case, the main goal is to reduce the amount to be paid by users after reimbursement of public social protection systems. The most common measures implemented are thus targeted tax exemptions and social subsidies that can vary depending on levels of dependency and income. In this case, there is no requirement for the net cost paid by public authorities to be close to zero. On the contrary, the net cost will depend on the level of solidarity desired by society to allow as universal access as possible to these services.

Finally, another policy objective can be to foster the development of PHS activities. In this case, policy interventions consist mostly in cost reduction for providers. In this regard, the most common measures are direct subsidies to suppliers, reductions in VAT rates as well as employer’s contribution exemptions.

These objectives are interlinked and can positively affect one another. It is not uncommon that PHS supporting policies follow several objectives as it is the case in France. A financial analysis conducted by the French Ministry of Finance in 2016 assessed the fiscal impact of PHS schemes. The findings show that the fiscal balance for household support services seems to be in equilibrium on the whole whereas the net cost for the State for its support for care services reached €2.6 bn.

Sources: IMPact, « PHS policies – implementation and monitoring guide », European project co-funded by the PROGRESS Programme of the European Union, March 2016
French Ministry of Finance and Public accounts, “Policies to support personal and household services”, Trésor-Economics No. 175, August 2016.

\(^{15}\) For more information on this topic, see EFSI (2013), *Public intervention‘ earn-back effects and the economic rationale of supporting the formal supply of PHS*. 

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If an appropriate public supporting scheme is implemented, it can be considered that the PHS sector would create several million jobs throughout Europe.

In 2012 already, the European Commission in its staff working document on the sector’s employment\textsuperscript{16} indicated that assuming that the 331 million of EU population aged 15-65 (active and inactive) each spend 2.5 hours per day on housework and care, his represents +/- 830 million hours per day of household work in the EU or nearly 100 million full time equivalents.

In this project, a first estimate has been derived from an extrapolation of the employment shares of this sector at the level of the countries with the largest share of employment. Thus, if Sweden’s share of 5.8% of total employment is retained, the gain would be a little over 5 million jobs in Europe. If the level of France is chosen (5.4%), then the job creation would be around 4.4 million jobs. Therefore, we can conclude that the sector could potentially employ 12.4 to 13 million workers in the EU.

A second approach would be to assume a small increase in the outsourcing of PHS activities for each European adult. As such, outsourcing 1% of PHS tasks for each adult would equal on average 2 minutes per day per adult. That would create 2.5 million full-time equivalent jobs in the sector. However, as there is in the sector a majority of part-time jobs, we can say that 5 million new jobs are possible.

ANNEXES

Statistical nomenclatures and the PHS industry: limitations and precautions with the use of data

Measuring and analysing PHS employment and its characteristics at European level presents difficulties. Indeed, the PHS sector brings together a variety of activities which are difficult to define with the European statistical nomenclatures, namely the Statistical classification of economic activities in the European Community (NACE). Personal and Household services comprise of a broad range of activities such as cleaning, cooking, ironing, home repairs, gardening, maintenance, remedial classes, care for the elderly, care for persons with disabilities, childcare (in or outside the home). This set of activities do not constitute a sector of activity within the NACE nomenclature, even defined at the finest level.

As such at EU level, employment in the PHS sector is traditionally measured through the addition of the following NACE categories:
- 97. “Services of households as employers of domestic personnel”,
- 88. “Social work activities without accommodation”.

However, these two categories only imperfectly cover the PHS sector because their scope is simultaneously too broad and too narrow. The following three major issues can be listed:

- According to Eurostat, the subcategory 97.00.10 includes “services provided by private households in their capacity of employing household personnel, such as maids, cooks, nannies and governesses”. As such, it describes the number of individuals who employ a domestic worker and who do not have any another economic activity than this one as it excludes “services of independent units (including individuals) providing services to households, see their principal product”. Taking the example of a dentist who employs a domestic worker to clean his/her home a couple of hours per week, it will not be recorded in this subcategory. On the contrary, a pensioner who no longer have an economic activity will be. Therefore, it is important to stress that the subcategory 97.00.10 records only a share of the private households employing a domestic workers and not the domestic workers themselves as one might think. This is why, the only useful information given from the NACE category 97 is an order of magnitude to the use of direct employment in the PHS sector.

- The category 88 is quite a broad category and seizing more accurately the reality of the PHS sector would require to rely exclusively on the subcategories 88.10 “Social work services without accommodation for the elderly and the disabled” and 88.91 “Child day-care services” and thus excluding activities that are recorded under category 88 and which do not belong to the PHS sector, such as guidance and counselling services related to children; welfare services without accommodation (e.g. day facility services for the homeless, credit and debt counselling services, etc.); vocational rehabilitation services for the unemployed; and other social services without accommodation (e.g. marriage guidance services, social assistance services to disaster victims, refugees and immigrants, etc.). However, the use of “4-digit” data is problematic at European level for several reasons. Firstly, it raises issues of sample size and collection. Secondly, Eurostat data at this finest level is not available for all Member States and thus does not allow for a European perspective nor a comparison between countries.

- It follows from the foregoing that only the activities of service provider organisations providing care-related services is recorded in the category 88. When it comes to the provision of household support services, their activity "is much harder to locate and measure, because these organisations come from different professional fields and may have a plurality of activities" and they are most of the time mixed with other activities. For instance, cleaning houses or apartments is registered under the subcategory 81.21 “General cleaning services of buildings” which also included industrial cleaning which is totally different and usually provided by other

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17 EFSI considers that the PHS sector comprises of all childcare services be they provided in the parents’ home or in an external childcare facility, as all childcare services contributes to increasing parents’ work-life balance and quality of life.
organisations. The table 2 below gives an overview of the classification of the major activities of
PHS service provider organisations in the NACE statistical nomenclature.

Table 2: PHS provider organisations in the NACE statistical nomenclature

<table>
<thead>
<tr>
<th>Main PHS activities</th>
<th>Corresponding NACE category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cleaning and ironing</td>
<td>81.21 “General cleaning services of buildings”</td>
</tr>
<tr>
<td></td>
<td>96.01 “Washing and (dry-) cleaning service of textile and fur products” (for ironing services provided outside the home)</td>
</tr>
<tr>
<td>Cooking</td>
<td>56.21 “Event catering services”</td>
</tr>
<tr>
<td></td>
<td>88.10 “Social work services without accommodation for the elderly and the disabled”</td>
</tr>
<tr>
<td></td>
<td>53.20 “Other postal and courier services” (for meal delivery)</td>
</tr>
<tr>
<td>Home repairs</td>
<td>43.2 “Electrical, plumbing and other construction installation works”</td>
</tr>
<tr>
<td></td>
<td>43.3 “Building completion and finishing works”</td>
</tr>
<tr>
<td>Gardening</td>
<td>81.30 “Landscape services”</td>
</tr>
<tr>
<td>Maintenance</td>
<td>80.10 “Private security services”</td>
</tr>
<tr>
<td>Remedial classes</td>
<td>85.59 “Other education not elsewhere classified”</td>
</tr>
<tr>
<td></td>
<td>85.51 “Sports and recreation education services” (marginally)</td>
</tr>
<tr>
<td></td>
<td>85.52 “Cultural education services” (marginally)</td>
</tr>
<tr>
<td>IT and Administrative</td>
<td>62.09 “Other information technology and computer services”</td>
</tr>
<tr>
<td>assistance</td>
<td>82.11 “Combined office administrative services”</td>
</tr>
<tr>
<td></td>
<td>82.19 “Photocopying, document preparation and other specialised office support services”</td>
</tr>
<tr>
<td></td>
<td>88.10 “Social work services without accommodation for the elderly and the disabled”</td>
</tr>
<tr>
<td>Care for the elderly</td>
<td>88.10 “Social work services without accommodation for the elderly and the disabled”</td>
</tr>
<tr>
<td>Care for persons with</td>
<td>88.10 “Social work services without accommodation for the elderly and the disabled”</td>
</tr>
<tr>
<td>disabilities</td>
<td></td>
</tr>
<tr>
<td>Childcare</td>
<td>88.91 “Child day-care services”</td>
</tr>
</tbody>
</table>

For the reasons already stated above, it is at present practically impossible to measure and analyse
employment in the PHS sector through the provider organisation model based on the various statistical
subcategories listed in this table.

Consequently, the authors have chosen to estimate the size of this employment model in the PHS sector
by relying solely on the category 88. This category being at the same time too broad (with the inclusion
of activities not belonging to the PHS sector) and too narrow (with the exclusion of most household
related activities provided to non-dependent people), it is assume that one weakness compensate the
other.

Therefore, in order to give a more accurate representation of employment in the PHS sector, the authors
relied on the International standard classification of occupations (ISCO) to assess the number of jobs in
the sector and workers’ profile. This occupational approach is not entirely satisfactory either as there is
no perfect correspondence between the various PHS activities with the list of occupations, but it reveals
to be closer to reality than NACE statistics.

In this case, it is no longer the type of employment (direct employment model vs. provider employment
model) which will be decisive but rather the occupation, that is if it is a care-related or a household-
support related job. In this case, three groups will be of particular importance:
- Group 9111 of “domestic cleaners and helpers”. This group includes “domestic cleaners and helpers sweep, vacuum clean, wash and polish, take care of household linen, purchase household supplies, prepare food, serve meals and perform other domestic duties”.
- Group 5311 of “Child Care Workers” defined as providing “care and supervision for children in residential homes and in before-school, after-school, vacation and day care centres”.
- Group 5322 of “home-based personal care workers” which are defined as providing “routine personal care and assistance with activities of daily living to persons who are in need of such care due to effects of ageing, illness, injury, or other physical or mental conditions, in private homes and other independent residential settings”.

Table 3: PHS occupations in the ISCO statistical nomenclature

<table>
<thead>
<tr>
<th>53. Personal care workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>531. Child Care Workers and Teachers’ Aides</td>
</tr>
<tr>
<td>5311. Child Care Workers</td>
</tr>
<tr>
<td>5312. Teacher’s Aides</td>
</tr>
<tr>
<td>532. Personal Care Workers in Health Services</td>
</tr>
<tr>
<td>5321. Health Care Assistants</td>
</tr>
<tr>
<td>5322. Home-based Personal Care Workers</td>
</tr>
<tr>
<td>5329. Personal Care Workers in Health Services Not Elsewhere Classified</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>91. Cleaners and Helpers</th>
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</thead>
<tbody>
<tr>
<td>911. Domestic, Hotel, and Office Cleaners and Helpers</td>
</tr>
<tr>
<td>9111. Domestic Cleaners and Helpers</td>
</tr>
<tr>
<td>9112. Cleaners and Helpers in Offices, Hotels and Other Establishments</td>
</tr>
<tr>
<td>912. Vehicle, Window, Laundry and Other Hand Cleaning Workers</td>
</tr>
<tr>
<td>9121. Hand Launderers and Pressers</td>
</tr>
<tr>
<td>9122 Vehicle Cleaners</td>
</tr>
<tr>
<td>9123 Window Cleaners</td>
</tr>
<tr>
<td>9129 Others Cleaning Workers</td>
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</tbody>
</table>

Again, the use of "4-digit" data raises issues of sample size and collection and Eurostat data related to the ISCO classification are not available for all Member States and the authors had to rely on the broader category. Consequently, the following calculation methods have been chosen for the countries for which data went missing:

- based on figures provided by the European Federation of Cleaning Industries (EFCI), which have been considered as data representing the sub-category 9112 of “Cleaners and Helpers in Offices, Hotels and Other Establishments”, the authors have been able to estimate the number of workers belonging only to the category 9111 by subtracting EFCI figures to figures of the 911 category provided by Eurostat.
- for the Groups 5311 and 5322, no other database was found in order to estimates the number of workers belonging to these categories stemming from the broader categories of 531 “Child Care Workers and Teachers’ Aides” and of 532 “Personal Care Workers in Health Services”. Thus, as they did when estimating the size of provider employment model in the sector, the authors have chosen to estimate the size of PHS workers providing care-related services by relying solely on the category 5322. This category being at the same time too broad (with the inclusion of health care assistants and nursing aide for examples) and too narrow, it is assume that the overestimate of personal care workers in some countries is partially compensated by the non-inclusion of child care workers in the whole EU.
By doing so, the authors have chosen the most prudent estimation method and it should thus be considered that the estimated number of workers in the PHS sector falls short of the reality. Time was lacking to do more research work on this specific issue and it is to be hoped that the estimates will be improved in the next edition of EFSI's PHS Industry Monitor.
<table>
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</table>
Glossary of used terms and abbreviations

Employment content: share of labour in total input for producing a good or providing a service.

Import content of a good/service: share of imported content in total input for producing a good or providing a service.


Long-term care (LTC): as defined by the OECD brings together a range of services for people who are dependent on help with basic daily living activities over an extended period of time. Such activities include bathing, dressing, eating, getting in and out of bed or a chair, moving around and using the bathroom. These long-term care needs are the result of long-standing chronic conditions that lead to physical or mental disability.

Maintenance: maintenance is one of the services included in PHS. It means the administrative and technology assistance provided to households.

NACE: Statistical classification of economic activities in the European Community.

OECD: Organisation for Economic Co-operation and Development.

Opportunity cost: in economic theory, the opportunity cost approach is based on the assumption that when an individual chooses to undertake unpaid work, such as household activities or leisure, the possibility of spending that time at paid work is precluded. Thus the person foregoes the salary associated with that activity.

Personal and household services (PHS): as stated by the European Commission, PHS are services that cover a broad range of activities that contribute to well-being at the homes of families and individuals: childcare (CC), long-term care (LTC) for the elderly and for persons with disabilities, cleaning, remedial classes, home repairs, gardening, ICT support, and so on.

Tax wedge: as defined by the OECD, tax wedge is the ratio between the amount of taxes paid by an average single worker (a single person at 100% of average earnings) without children and the corresponding total labour cost for the employer. The average tax wedge measures the extent to which tax on labour income discourages employment.

Undeclared work: at EU level, undeclared work is defined as “any paid activities that are lawful as regards their nature but not declared to public authorities, taking into account differences in the regulatory system of Member States”.

Work-life balance (WLB): as defined by Eurofound, “work-life balance” is a term used to describe a satisfactory state of equilibrium between an individual’s work and personal life. A good work-life balance is achieved when an individual’s right to a fulfilled life inside and outside paid work is accepted and respected as the norm – to the mutual benefit of the individual, business and society.