

# European sectoral social dialogue: Facts and figures

## Introduction

European social dialogue is a process involving discussions, consultations, negotiations and joint actions with the organisations representing the two sides of industry: employers and workers.

European sectoral social dialogue is an important and essential contribution to the EU institutional setting, formalised in 1998 when the European Commission established the first sectoral dialogue committees with a view to promoting dialogue between the social partners in the various sectors at European level (Commission decision 98/500/EC). The European sectoral social dialogue committees bring together the social partners from the 28 EU Member States – representatives of trade unions and employer organisations – to engage in dialogue on behalf of specific sectors. European sectoral social dialogue committees can be important in influencing, shaping, or implementing EU labour legislation. Both trade unions and employer organisations value their positive role.

A select number of European-level trade union organisations and European employer organisations in each sector have been deemed as representative in terms of the workers and the companies in the sector. These EU social partners can also meet within their European sectoral social dialogue committee to discuss matters and issue joint opinions or agreements.

There are 43 European sectoral social dialogue committees that together represent more than an estimated 80% of the EU workforce.

## Key messages

- **Sectoral diversity:** Each sector varies in the share of the workforce represented by social partners, the types and sizes of companies in the sector, and the impact of technological innovations and sectoral policies. Sectors can also change over time. All these aspects are considered when comparing sectors and assessing the representativeness of the sectoral social partners.
- **Social partner organisations:** The social partner landscape in each sector varies greatly in most Member States. On average, there are more sectoral trade unions than employer organisations at national level, while the opposite is true at EU level. These averages, however, do not capture the diversity of Member States and sectors.
- **Representativeness:** On average, the proportion of sectoral trade unions represented in European sectoral social dialogue committees is higher than the proportion of sectoral employer organisations. While this calculation inevitably gives equal weight to every trade union or employer organisation, it should be noted that there are substantial differences in terms of membership domain, organisational density, involvement in collective bargaining, and representativeness status.

To look at representativeness in context, Eurofound's analysis shows that a truer calculation can be achieved by looking at the number of Member States for which there is a member organisation affiliated with the social partners involved in a European sectoral social dialogue committee and the relative representativeness of these organisations that are represented at EU level in each country.

## Representativeness of European sectoral social partners

*'Representativeness' is a criterion used by the European Commission to identify the 'management and labour' whom it must consult and who may initiate the social dialogue, and reach and implement agreements (Articles 154 and 155 Treaty on the Functioning of the European Union). – Eurofound Industrial Relations Dictionary*

For an organisation to be recognised as a partner in European social dialogue, it must be organised at EU level, relate to specific sectors or categories, and be capable of taking part in consultations and negotiating agreements. Social partners that qualify can jointly request the establishment of a European sectoral social dialogue committee and, once such a committee is established, it is entitled to receive support from the Commission. The criteria for assessing the representativeness of social partners were defined in the 1998 Commission Decision on promoting dialogue between the social partners at European level (Decision 98/500/EC).

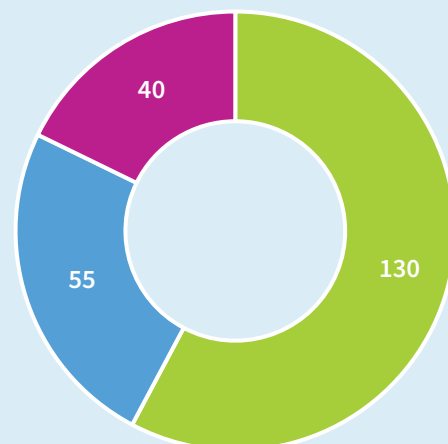
In 2006, the Commission tasked Eurofound with conducting regular studies to analyse the representativeness and features of EU-level sectoral organisations. Eurofound has carried out and published representativeness studies for all but one sector – professional football.<sup>1</sup> These studies are designed to provide the information needed for the setting up and functioning of the European sectoral social dialogue committees. Due to the changes in sectors over time, Eurofound updates each of these studies every seven to eight years. The findings of Eurofound's representativeness studies, and a horizontal comparative analysis of them provide useful insights for further EU policymaking on European sectoral social dialogue committees in the coming years (Eurofound, 2016).

In 2010, a European Commission Staff Working Document on the functioning and potential of European sectoral social dialogue (SEC(2010) 964 final) provided clarifications on the 1998 Commission Decision (European Commission).

Today there are 43 sectoral social dialogue committees, covering key sectors such as transport, energy, agriculture, construction, trade, fisheries, public services, metal, shipyards and education. It is estimated that together these committees represent 185 million workers, or more than 80% of the EU workforce (Eurofound, 2019). There are eight European sectoral social dialogue committees that represent a workforce of more than 10 million workers each (and collectively represent 130 million workers, or 58% of the EU workforce) (Figure 1).

Sectors with a smaller EU workforce can have crucial importance for the European economy and they often provide very specific working conditions. Thus an analysis of European-level sector social dialogue should not only look at the size of the workforce covered by a specific

Figure 1: Worker representation in European sectoral social dialogue committees (in millions)



- Number of workers represented in 8 committees
- Number of workers represented in the other 35 committees
- Number of workers not represented in committees

Source: Author's own calculations based on data from the Network of Eurofound Correspondents.

sector, but consider also the impact it has on the working conditions in the sector.

As defined by the NACE codes (the statistical classification of economic activities in the European Union) there are 10 sectors with a workforce of 500,000 or more that do not yet have a European sectoral social dialogue committee. These sectors are:

- warehousing and support activities for transportation (NACE 52)<sup>2</sup>
- activities of households as employers of domestic personnel (NACE 97)
- legal and accounting activities (NACE 69)
- activities of membership organisations (NACE 94)
- civil engineering (NACE 42)
- office administrative, office support and other business support activities (NACE 82)
- waste collection, treatment and disposal activities; materials recovery (NACE 38)
- advertising and market research (NACE 73)
- scientific research and development (NACE 72)<sup>3</sup>
- travel agency, tour operator and other reservation service and related activities (NACE 79)

In addition, the following two sectors, each accounting for about 450,000 workers, have not yet established a European sectoral social dialogue committee:

- water collection, treatment and supply (NACE 36)
- rental and leasing activities (NACE 77)

<sup>1</sup> A representativeness study will be carried out on this remaining sector in 2020.

<sup>2</sup> Some of the people employed within this NACE code may be represented in the European sectoral social dialogue committee in the transport sector.

<sup>3</sup> Higher education is included in the European sectoral social dialogue committee for education.

## Determining representativeness

To carry out a representativeness study into a given sector, the scope of the sector is outlined and the key characteristics of the workforce and companies in the sector investigated. The first step is to consult with the relevant actors at EU level for the sector to be studied, which is most commonly defined through the relevant NACE codes.

It is often the case that the domains in which the national trade unions and employer organisations operate do not correspond exactly to the NACE demarcation. The extent to which, and the manner in which, the bodies and agreements relate to the sector differ. Eurofound has identified four approaches to determine the sector-relatedness of an organisation.

- **Congruence:** The domain of the organisation or scope of the collective agreement is identical to that of the sectoral NACE demarcation.
- **Sectionalism:** The domain of the organisation or scope of the agreement covers only part of the sector, as defined by the sectoral NACE demarcation.
- **Overlap:** The domain of the organisation or scope of the agreement covers the entire sector as demarcated by NACE, along with parts of one or more other sectors.
- **Sectional overlap:** The domain of the organisation or scope of the agreement covers part of the given sector as demarcated by NACE, as well as parts of one or more other sectors (Eurofound, 2015).

Within these conditions, the scope of a sector may correspond to the membership domain of the organisations involved (this is frequently the case for

employer organisations); may be smaller than them (where organisations also cover other sectors – this is frequently the case for trade unions); or may be larger than them (where several organisations each cover a different part of the sector).

In terms of their representativeness, there is a wide variation between the 43 sectors that have European sectoral social dialogue committees, as the section below illustrates.

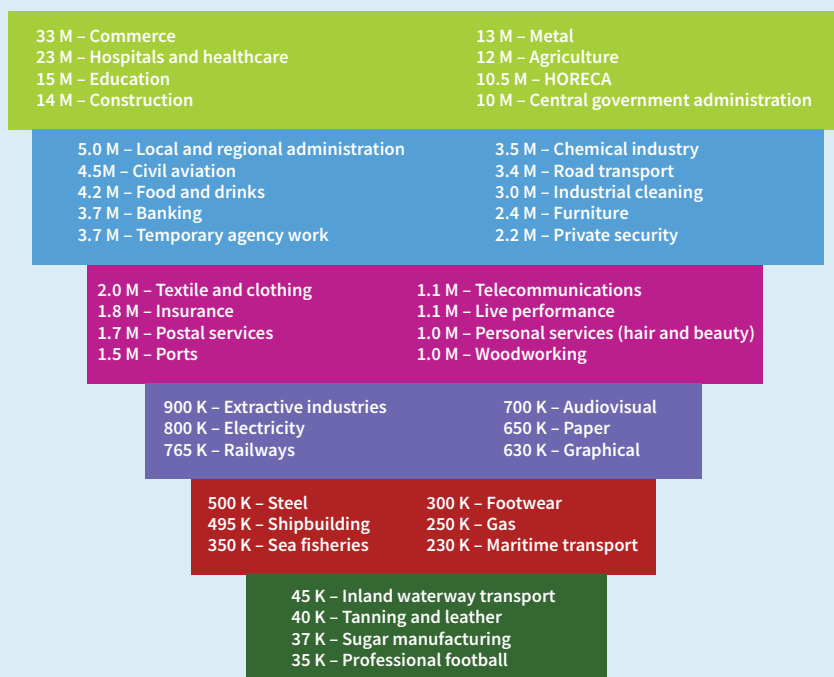
## Size of workforce and number of social partners per sector

### Workforce by sector

The commerce sector represents the largest share of the EU workforce (33 million workers) followed by those sectors having at least 10 million workers: hospitals and healthcare, education, construction, metal, and agriculture. In contrast, the following sectors each represent fewer than 50,000 workers: inland waterway transport, tanning and leather, sugar manufacturing, and professional football (Figure 2).

Some sectors, such as personal services (hair and beauty) and inland waterway transport, are characterised by an abundance of small companies. In contrast, the commerce, private security, and industrial cleaning sectors have a combination of small companies and large companies. At the other end of the scale are sectors, such as banking and telecommunications, that are dominated by a few very large companies.

Figure 2: Size of workforce by sector, EU28



**Note:** K denotes thousands, M denotes millions.

**Source:** Author's own calculations based on data from the Network of Eurofound Correspondents.

There is also variation in terms of the size of the workforce. Some sectors – notably steel, banking, and footwear – have a declining workforce, while in others, such as private security and industrial cleaning, the workforce is expanding.

Sectors change and evolve over time, due to technological developments and policies (for example, liberalisation of the single market). Associated changes in the workforce and in companies can have an impact on the representativeness of the national and European social partners in those sectors.

### Social partners by sector

The number of trade unions and employer organisations in each sector differs, as does the average number of each in Member States. Sectors that are broadly defined and have subsectors are more likely to have more social partners than sectors that are narrowly defined and smaller. For example, there are more than 150 trade unions and 145 employer organisations in the audiovisual sector, as well as separate social partners for different professional groups and parts of the sector. In contrast, there are few social partner organisations in the graphical sector and in personal services (hair and beauty).

Most sectors have more trade unions than employer organisations. The exceptions are construction, road transport, food and drink, commerce, HORECA (hotel,

restaurant and café); and personal services (hair and beauty), where there are more employer organisations than trade unions.

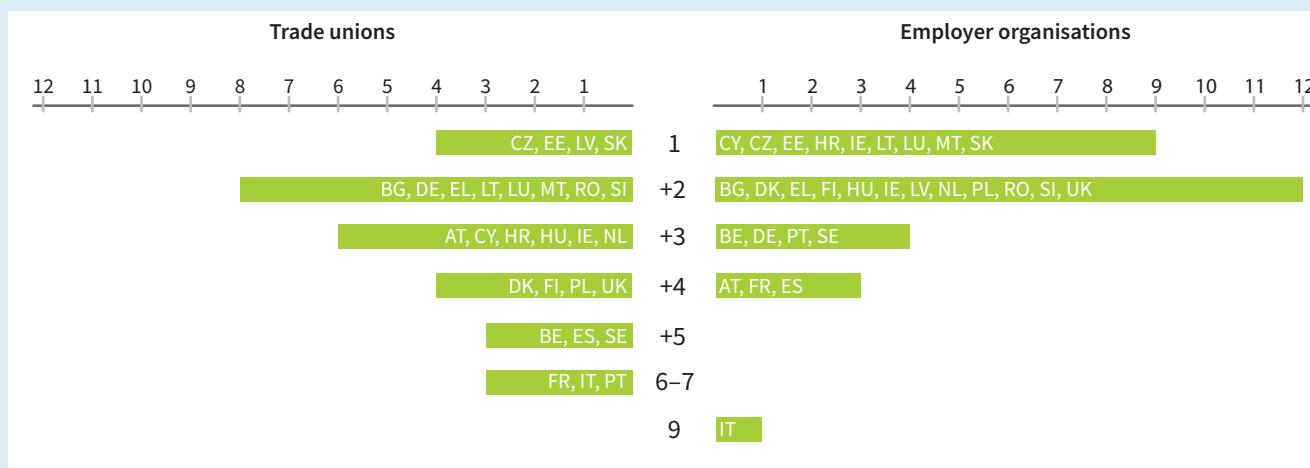
At EU level, there are five times more European employer organisations than European trade unions. Most trade unions cover more than one sector, while six cover three or more sectors. Most employer organisations only cover one sector.

### Social partners by Member State

On average, there are three national trade unions and two employer organisations at sectoral level per Member State (Figure 3).

- Member States with the highest number of sectoral trade unions: Belgium, France, Italy, Portugal, Spain and Sweden.
- Member States with a lower average number of sectoral trade unions: Czechia, Estonia, Latvia and Slovakia (around 1.5 on average).
- Member States with the highest number of employer organisations per sector: Austria, France, Italy and Spain.
- Member States with the lowest number of employer organisations per sector: Croatia, Cyprus, Czechia, Estonia, Ireland, Lithuania, Luxembourg, Malta and Slovakia.<sup>4</sup>

Figure 3: Average number of sectoral social partners in Member States and pluralism rate



**Note:** The pluralism rate denotes the number of organisations that coexist in the same area of representation (employees or employers).  
**Source:** Author's own calculations based on data from the Network of Eurofound Correspondents.

<sup>4</sup> Indicated calculations based on data from 28 representativeness studies published between 2012 and 2018.

# Representativeness across sectors and Member States

## Representativeness within sectors

To provide an insight into representativeness at EU level across sectors, 30 sectors<sup>5</sup> were compared in terms of:

- number of national sector-related trade unions and representation in European sectoral social dialogue committees (Figure 4)
- number of national sector-related employer organisations and representation in European sectoral social dialogue committees (Figure 5)

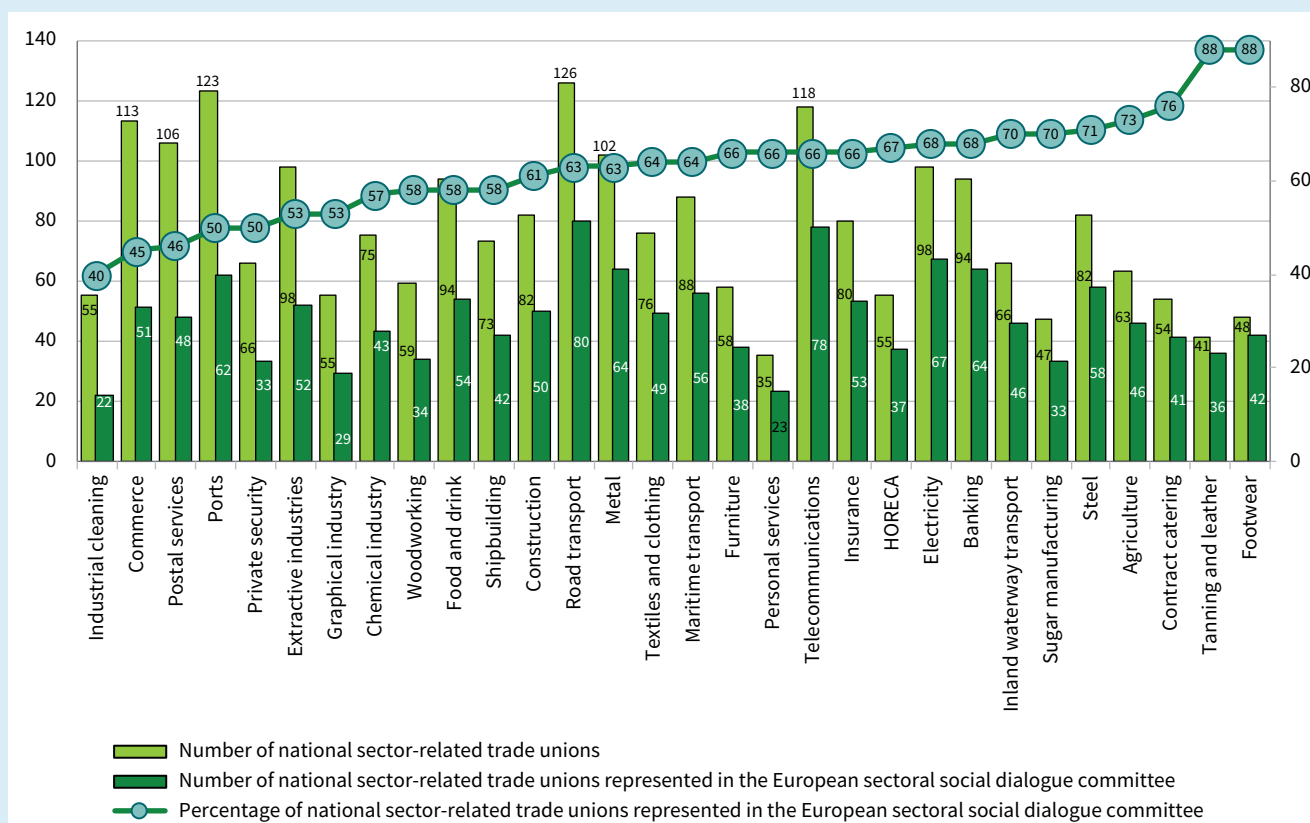
Of the 30 sectors analysed, 65% of trade unions and 45% of employer organisations are represented in European sectoral social dialogue committees. These averages must be considered in light of the variation between the different sectors.

**Trade unions:** In some sectors, more than 80% of the sectoral trade unions are represented by the EU-level trade unions involved in the European sectoral social dialogue committee (for example, the footwear sector and the tanning and leather sector). In the industrial cleaning, commerce, and postal services sectors, slightly less than 50% are represented in the respective committee (Figure 4).

**Employer organisations:** More than 75% of employer organisations are represented in the European sectoral social dialogue committees for the road transport sector and the insurance sector. Less than one-third are represented in the committees for catering, personal services (hair and beauty), and construction sectors (Figure 5).

While, for the purposes of these calculations, each national sectoral trade union or employer organisation<sup>6</sup> is counted equally, there could be differences in their membership domain, the proportion of the sectoral workforce they

Figure 4: National trade unions and representation at EU level for 30 sectors



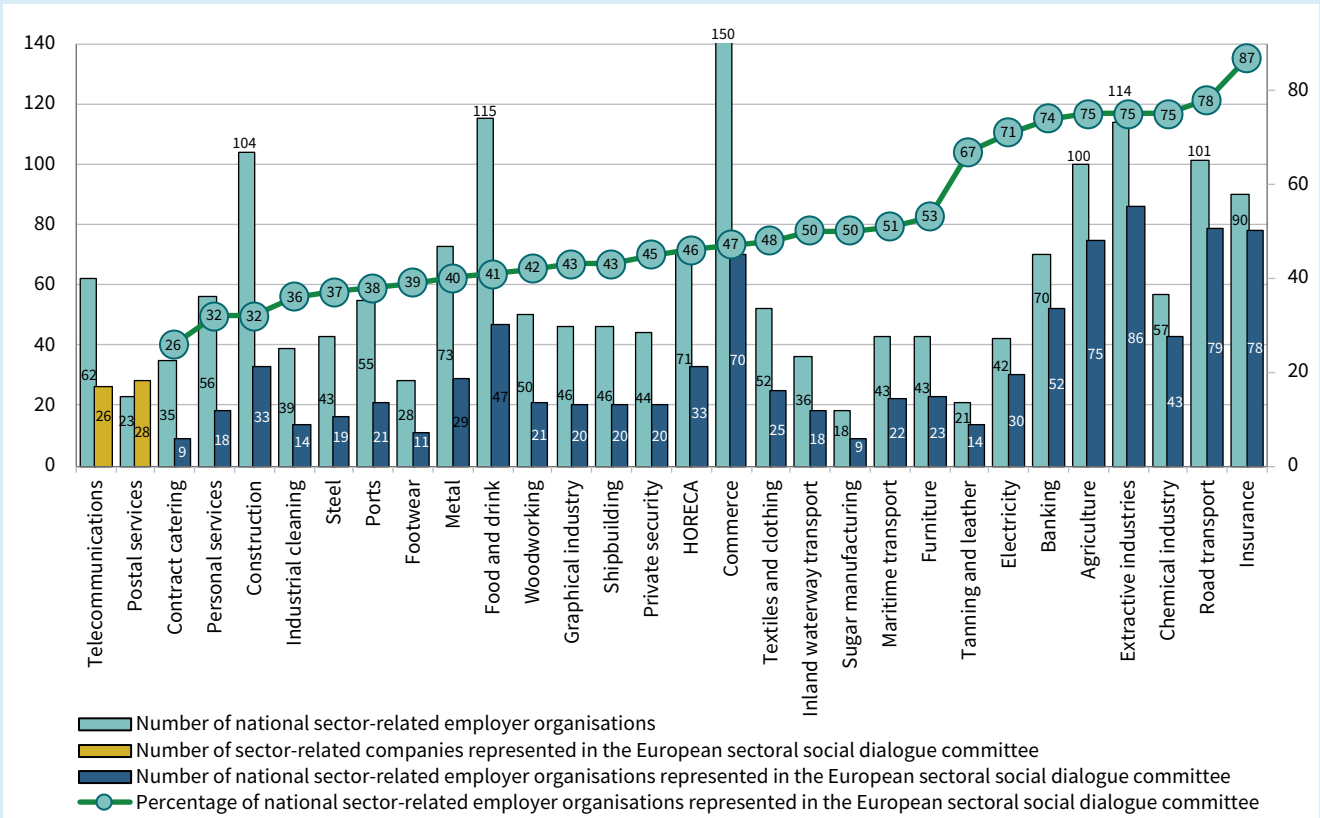
Notes: The data for each sector are based on the most recent representativeness study carried out by Eurofound for this sector – see <http://eurofound.link/representativenessstudies>

Source: Author's own calculations based on data from the Network of Eurofound Correspondents.

<sup>5</sup> Generally, sectors that have had representative studies completed in the past six years were selected for this analysis. Additional sectors will be included in future analysis work.

<sup>6</sup> Employer organisations include organisations that have member companies in the sector that are either involved in collective bargaining (determining the working conditions in the sector) or earning their legitimacy as social partner organisations via their membership of European employer organisations.

Figure 5: National employer organisations and representation at EU level for 30 sectors



Notes: The data for each sector are based on the most recent representativeness study carried out by Eurofound for this sector – see <http://eurofound.link/representativestudies>.

Source: Author's own calculations based on data from Network of Eurofound Correspondents.

organise, their involvement in collective bargaining and social dialogue, and their representative status in the country. Turning to the European social partner organisations, some have a variety of affiliates in most Member States, while others have a statutory limitation of only one member organisation per country.

Given that some Member States have no activities in a particular sector, these countries cannot be represented at EU level for those sectors. The 1998 Commission Decision stipulates that 'several' Member States must be represented in each European sectoral social dialogue committee, although there is no set minimum number or proportion. It would not be advisable to specify a fixed minimum number for all sectors, as landlocked countries like Austria, Luxembourg and Slovakia do not have any economic activity in certain sectors (for example, sea fisheries or maritime transport). Furthermore, some Member States have a larger proportion of the European sectoral workforce than others.

### Representativeness at Member State level

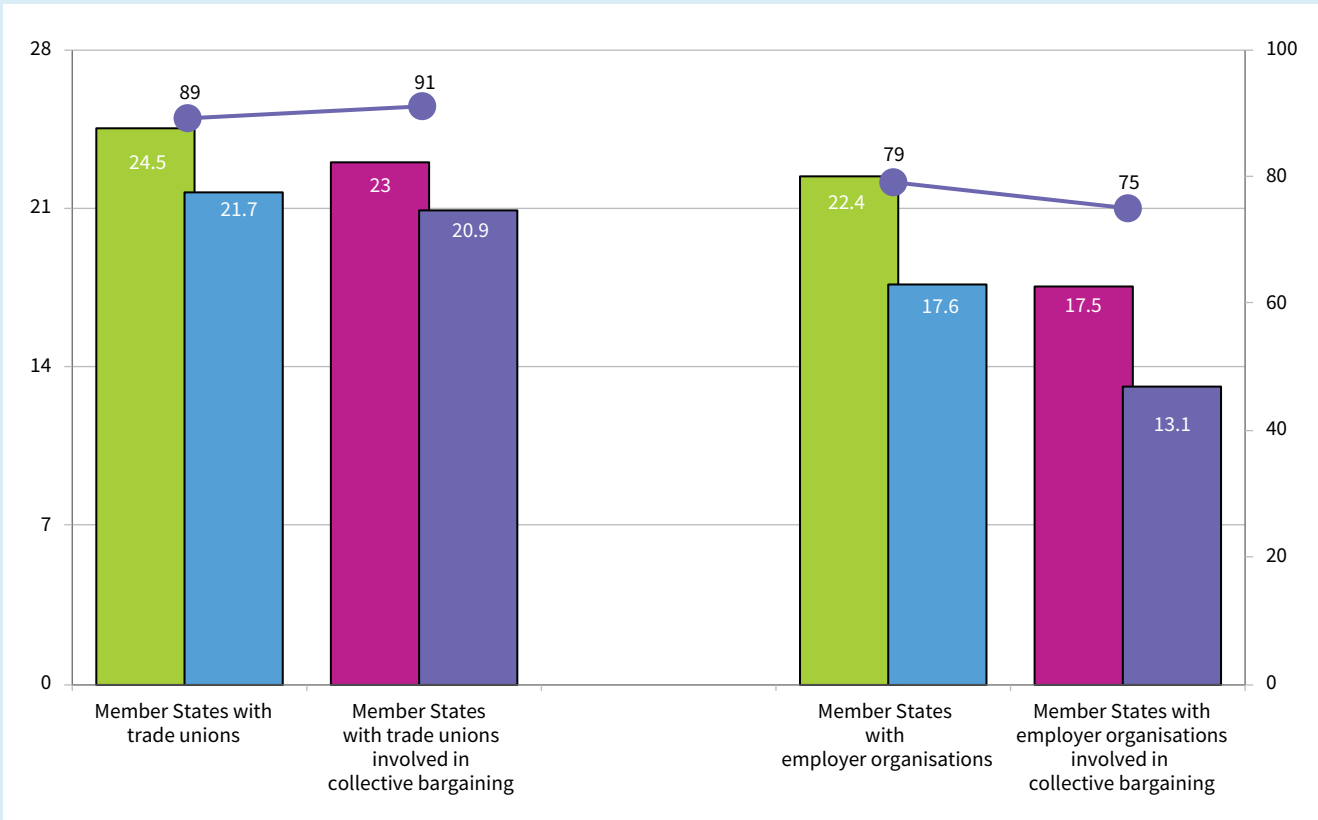
In Figures 4 and 5, the absolute number of trade unions and employer organisations at national level are presented for 30 different sectors, and the number and proportion of those that are represented at EU level.

Eurofound's analysis also includes an overall average to provide insights into overall representativeness, as well as a reference point to compare individual sectors to (Figure 6).

**Trade unions:** In any given sector, an average of 24.5 Member States have trade unions and an average of 21.7 have trade union representation at EU level. An average of 23 Member States have trade union involvement in collective bargaining and 20.9 have trade union involvement in collective bargaining represented at EU level. The percentages 89% and 91% are the proportion of the average number of EU Member States that are presented at EU level for trade unions.

**Employer organisations:** In any given sector, an average of 22.4 Member States have employer organisations and an average of 17.5 have employer organisations represented at EU level. An average of 17.5 Member States have

Figure 6: Representativeness of trade unions and employer organisations in EU Member States



**Notes:** Representativeness averages are based on same sectors that are considered in Figures 4 and 5. Green: Average number of Member States that have trade unions or employer organisations. Blue: Average number of Member States that have trade union or employer organisation representation at EU level. Pink: Average number of Member States that have trade union or employer organisation involvement in collective bargaining. Purple: Average number of Member States that have employer organisation involvement in collective bargaining represented at EU level. **Source:** Author's own calculations based on data from Network of Eurofound Correspondents.

employer organisation involvement in collective bargaining and an average of 13.1 have employer organisation involvement in collective bargaining represented at EU level. The percentages 79% and 75% are the proportion of the average number of Member States that are represented at EU level for the employer organisations.

In general, the European sectoral social dialogue committees from these 30 sectors have a greater representation of EU Member States on the trade union side than on the side of the employer organisations. These averages, however, mask differences between individual sectors.



## References

Eurofound publications are available at [www.eurofound.europa.eu](http://www.eurofound.europa.eu)

Eurofound (2015), *Studies on the representativeness of European sectoral social partner organisations: Methodology*, Publications Office of the European Union, Luxembourg, available at <http://eurofound.link/representativenessstudiesmethodology>.

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