

UNIVERSITE CATHOLIQUE DE LOUVAIN

INSTITUT DES SCIENCES DU TRAVAIL



**MONOGRAPHS ON THE SITUATION OF SOCIAL PARTNER ORGANISATIONS
IN THE CANDIDATE COUNTRIES (BULGARIA, ROMANIA AND TURKEY): FURNITURE INDUSTRY**

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STAFF WORKING ON THIS STUDY

Author of the report

Delphine ROCHET, researcher

Coordinators

Prof. Armand SPINEUX and Prof. Evelyne LEONARD

Research Team

Prof. Bernard FUSULIER

Prof. Pierre REMAN

Cécile ARNOULD, researcher

Isabelle VANDENBUSSCHE, researcher

Administrative co-ordination

Myriam CHEVIGNE

Network of National Experts

Bulgaria: Rumiana Gladicheva, Department of Sociology - Sofia University

Romania: Ion Glodeanu, Sociology Institute – Romanian Academy

Turkey: Zeki Parlak, Department Labour Economics and Industrial Relations, Faculty of Economics and Administrative Science, University of Marmara

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INTRODUCTION

Presentation of the study

This report has been produced as part of the research into the institutional representativeness of social partners in the European Union, and the situation of trade unions and employers' associations in the candidate countries. The research has been conducted by the Institut des Sciences du Travail (Université catholique de Louvain) at the request of the Employment and Social Affairs Directorate-General of the European Commission (Call for tenders No VC/2004/0547).

The issue of the representativeness of European organisations came to the fore in the context of the promotion of social dialogue. In a communication published in 1993¹, the European Commission set out three criteria determining the access that employers' and workers' organisations had to the consultation process under Article 3 of the Agreement on Social Policy. According to the terms of this communication, the organisation must: (1) *be cross-industry or relate to specific sectors or categories and be organised at European level; (2) consist of organisations which are themselves part of the social partners structures of Member States which have the capacity to negotiate agreements, and which are representative of all Member States, as far as possible; (3) have adequate resources to ensure their effective participation in the consultation process.* In 1996, it adopted a consultation document² that sought to bring together the widest range of views on the measures to be employed in fostering and strengthening European social dialogue. At that point, given that the social partners at European level were, and still are, in the process of structuring themselves and accepting new applications for membership, the European Commission conducted a study on the representativeness of inter-professional and sector organisations in the European Union, and in a new communication³ in 1998, announced the measures that it proposed to take in order to adapt and promote social dialogue at European Union level. In it, the Commission reaffirmed the three criteria established by the 1993 Communication, permitting European organisations to be recognised as representative for consultation purposes under Article 3 of the Social Policy Agreement. Finally, in 2002, the Commission reaffirmed its support for a strengthening of social dialogue in its communication *The European social dialogue, a force for innovation and change*⁴. In the respect of the three criteria set up by the Commission, as has been pointed out in previous studies⁵, *the changes focus on the disappearance of demands relating to the inter-sector nature of organisations and on the fact that they are established in all Member States; the new rules have not been formulated in a very restrictive manner, they only require employers' and workers' organisations to represent "several" Member States. This relaxation of the implementation condition might pose a demarcation problem in the sense that there is no criterion setting out a minimum number of Member States to activate it.*

Against this background, it is clear that one of the main issues, both for the Commission and for the European social partners, is the enlargement of the European Union and its impact on the process of social dialogue at Community level: *The Communication underlines the vital role and the weaknesses of social dialogue in the candidate countries. Much has been achieved over the past decade with the support of Community programmes and initiatives. However, a lot remains to be done to strengthen the capacities of social partners and involve them in the accession*

¹ COM (93) 600 final of 14 December 1993, Communication from the Commission concerning *the application of the Protocol on Social Policy*.

² COM (96) 448 final of 18 September 1996 concerning *the development of the social dialogue at Community level*.

³ COM (98) 322 final of 20 May 1998, Communication from the Commission, *Adapting and promoting the Social Dialogue at Community level*.

⁴ COM (2002) 341 final of 26 June 2002, Communication from the Commission, *The European social dialogue, a force for innovation and change*.

⁵ Spineux A., Walthery P. et al., *Report on the representativeness of European social partners organisations*, Report coordinated by the Institut des Sciences du Travail of the Université catholique de Louvain, for the European Commission, Directorate General for Employment, Industrial Relations and Social Affairs, Louvain-la-Neuve, 1998.

process⁶. As far as the European Commission is concerned, it is *only with sufficiently robust national structures that the social partners will be able to participate effectively in negotiations and in other European social dialogue activities and also implement agreements at national level*⁷.

The development of social dialogue, therefore, formed part of the “*acquis communautaire*” (community achievement): *The Treaty requires that social dialogue be promoted and gives additional powers to the social partners. The candidate countries are, therefore, invited to confirm that social dialogue is accorded the importance required and that the social partners are sufficiently developed in order to discharge their responsibilities at European Union and national level, and to indicate whether they are consulted on legislative drafts relating to the taking over of the employment and social policy acquis... Therefore, the development not only of tripartite structures but also of autonomous, representative bipartite social dialogue is an important aspect for the future involvement of the candidates countries' social partners in the social dialogue activities developed at European and national level*⁸.

Enlargement of the European Union is a major issue from a quantitative and qualitative point of view: *The quantitative leap is quite clear as soon as the number of partners rises. The delegations taking part in social dialogue will be enlarged, and that, as we know, does not facilitate dialogue. However, the leap is also qualitative in that the new entrants present the industrial relations systems they have inherited from their national histories*⁹.

The aim of the report is to produce a study that sets out both brief descriptions of the way that social dialogue functions in the countries concerned, and descriptions of the various workers' and employers' organisations involved in social dialogue at sector level. This study may be seen as a tool to help understand these quantitative and qualitative factors.

Research approach and comments on methodology

For the purposes of this study, a network of University researchers throughout the three candidates countries (Bulgaria, Romania and Turkey) was set up. These researchers are independent of both the European Commission and employers' and workers' organisations. Each researcher was charged with drawing up a report based on a common template. A questionnaire tailored to the specific realities of the furniture industry was elaborated to that effect. Each national report issued by the expert was submitted to the national organisations in order to enable them to make comments on collected data. The IST took charge of coordinating the study and drawing up the summaries. Constant communication and ongoing collaboration between the IST, national experts and national organisations takes place in order to associate the various players of the process of research. The report is also checked by the European organisations and their members in order to enable them to make comments on the report. This phase of consultation represents an important stage of research. Lastly, the report is checked by the European Commission's services. The IST wishes to stress its independence with regard to the political consequences and decisions which may be made on the basis of this study.

The research process, in its design, comprises a phase of collection of data on the players and the social dialogue in which they participate, but also an active approach embracing the building of a consensus, which is an integral part of the process of social dialogue itself. Thus, whereas in a good number of cases the data collected do not permit total definition of the role played by

⁶ COM (2002) 341 final of 26 June 2002, Communication from the Commission, *The European social dialogue, a force for innovation and change*.

⁷ Op cit.

⁸ *Enlargement of the European Union. Guide to the negotiations. Chapter by chapter*, European Commission, DG Enlargement, June 2003.

⁹ Léonard E., Spineux A., *Les relations industrielles en Europe aujourd'hui*, Institut des Sciences du Travail, UCL, 2003 (unpublished).

the organisations, the contacts made during the data collection and the discussions with the different players concerned should be an integral part of a process of mutual recognition¹⁰. The main sources used within the framework of this study are thus the social partners themselves.

Lastly, a few words on the consultation process involving the European social partners must be added. The organisations which have been consulted are cited in annex. The organisations included in this study are organisations, which are members of the European organisations which belong to the European sector social committee for the furniture industry (EFBWW and UEA) and/or organisations which take part in the collective bargaining for the sector (or have the legal capacity to negotiate in sector-level collective bargaining). At the request of the European Commission, organisations which are members of EFIC have also been included in the report. The comments that the IST received from these organisations, and those of their members have been incorporated in different ways, depending on the kind of information received:

- The observation is directly included in the content of the report
- When a difference of opinion exists between the employers' or workers' organisation and the expert, the observation is included as a footnote in the report, as well as the justification of the expert.

The consultation for the report on the furniture industry took place during the month of October 2006.

Finally, given that national situations are very changeable and evolve rapidly, it is important to stress that the aim of this study is to take "a snapshot" of the situation of the organisations in 2006. Interviews with the organisations took place, and the national reports were written, between February and September 2006.

Delimitation of the sector

Basically, the manufacture of furniture industry may be limited to activities included in the *NACE classification, Rev. 1.1, section DN, division 36.1: Manufacture of furniture*.

This class includes:

- 36.11: Manufacture of chairs and seats
- 36.12: Manufacture of other office and shop furniture
- 36.13: Manufacture of other kitchen furniture
- 36.14: Manufacture of other furniture

This item includes:

- o manufacture of furniture for bedrooms, living rooms, gardens, etc.
- o finishing of furniture such as spraying, painting, French polishing and upholstering except of chairs and seats

¹⁰ Reply to Call for Tenders VT/2002/83. Studies on the representativeness of the social partners at sector level in the European Union and monographs on the situation of the social partners in the candidate countries, Institut des Sciences du Travail, UCL, 2002.

- 36.15: Manufacture of mattresses

Note: The tables have been completed with “ND” when data are not available and “0” when the figure is 0.

NATIONAL REPORTS

BULGARIA

1. Description of the sector

Delimitation and activities of the sector

In Bulgaria, the National Statistical Institute (NSI) collects data according to NACE. Therefore statistical data presented in this report corresponds to the code 36.1 of the NACE nomenclature.

From the industrial relations point of view, the furniture sector (NACE 36.1) and the woodworking sector (NACE 20) are perceived as inseparable by the social partners. They are covered by the same collective bargaining process, the same collective agreement (even if the agreement is clearly separated into two chapters - one for wood and one for furniture) and the same organisations. So, there is a strong link between these two sub-sectors and there is not much sense in distinguishing between them in the Bulgarian case.

Socio-economic features of the sector

Share of the sector in GDP (%)

	2000	2001	2002	2003	2004
NACE DN 36.1	0.238%	0.291%	0.332%	0.345%	0.398%

Source: National Statistical Institute – the latest data available as of 1 April 2006.

Share of the sector in the Produced Gross Value Added (%)

	2000	2001	2002	2003	2004
NACE DN 36.1	0.269%	0.328%	0.376%	0.394%	0.449%

Source: National Statistical Institute – the latest data available as of 1 April 2006.

Summary table: Companies (2004)

Sub-sectors	Number of companies	% companies without employees	% companies with < 10 employees	% companies with 10 to 49 employees	% companies with 50 to 249 employees	% companies with > than 249 employees
DN 36.11	126	31%	35%	19%	11%	4%
DN 36.12	183	11%	56%	29%	4%	0
DN 36.13	214	24%	52%	22%	2%	0
DN 36.14	967	25.4%	46.7%	20.5%	7%	0.4%
DN 36.15	35	20%	49%	28%	3%	0
Total of the sector	1,525	24%	48%	22%	6%	0,7%

Source: National Statistical Institute – the latest data available as of 1 April 2006

1,525 companies were active in the sector in 2004. Most of the companies (63.4%) are in the sub-sector NACE DN 36.14. 95% of companies in the sector are SMEs (24% do not employ workers, 48% employ between 1 and 9 workers and 22% employ between 10 and 49 workers). The highest number of companies has always been located in the capital Sofia. The three biggest companies are located in the town of Stara Zagora (530 workers), the town of Troyan in the region of the town of Lovech (430 workers) and Town of Shumen (180 workers). The most significant increase is observed in the region of Pazardjik (central south part of the country) where the companies have doubled from 2000 to 2004.

There are no data regarding the underground economy in the sector. According to the estimate of the Federation of Trade Union Organisations in Forestry and Woodworking Industry about 10% of employees in the sector work without any employment contract (the national average was estimated at 15% in 2005 by a national sociological survey amongst the working population¹¹).

Summary table: Workers (2004)

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/total number of employees in the country (%)	Number of employees in companies < 10 workers/Number of employees in the sector (%)	Number of employees in companies with 10-49 workers/ Number of employees in the sector (%)	Number of employees in companies with 50-249 workers/ Number of employees in the sector (%)	Number of employees in companies with > 249 workers/ Number of employees in the sector (%)
DN 36.11	145	4,086	0.2%	3.8%	13.8%	33.8%	48.6%
DN 36.12	146	2,142	0.1%	19.1%	48.8%	32.1%	0
DN 36.13	183	1,668	0.07%	20.8%	57.7%	21.5%	0
DN 36.14	1,102	13,172	0.6%	11.6%	32%	46.5%	9.9%
DN 36.15	33	619	0.03%	9.9%	36.8%	53.3%	0
Total of the sector	1,609	21,687	1%	11.6%	32.4%	40.9%	15.1%

Source: National Statistical Institute – the latest data available as of 1 April 2006

The sector is dominated by blue-collar workers¹² (80%) and by female workers¹³ (60%). According to the Federation of Trade Union Organisations in Forestry and Woodworking Industry, about 20% of employees in the sector have higher education, some 70% have secondary level and about 10% have primary or lower educational degree (estimate). The average remuneration in the furniture branch is much below the national average (in 2004 wages in the sector reached 65% of the national average). The share of atypical forms of work (part-time in particular) is negligible in this sector (2.7% in 2004 according to the NSI).

The sector is certainly expanding in terms of employment (most significantly since 2002), the number of companies and the share in GDP within the last five years.

Trends in the employment and companies (NACE DN 36.1)

	2000	2001	2002	2003	2004
Number of employees	14,850	14,859	15,622	18,979	21,687
Number of companies	1,223	1,252	1,233	1,382	1,525

Source: National Statistical Institute – the latest data available as of 1 April 2006.

¹¹ Survey by *The National Center of Public Opinion Survey*. Source of this info: *General Labour Inspectorate*, online publication in Bulgarian, 2005.

¹² National Statistical Institute – data for 2004.

¹³ Estimate from the Federation of Trade Union Organisations in Forestry and Woodworking Industry.

2. Organisations active in the sector

Workers' organisations

Two workers' organisations sign the collective agreement for the woodworking and furniture sectors: The Federation of Trade Union Organisations in Forestry and Woodworking Industry (member of CITUB) and the Federation of Light Industry Podkrepa (member of CL PODKREPA)¹⁴. However, the Federation of Light Industry Podkrepa is mainly active in the manufacture of textiles and clothing (NACE DB 17-18) and the manufacture of leather and leather products (DC 19) as well as in NACE DD 20 (woodworking). At present, it does not have any member from the furniture sector, even if it does sign the collective agreement for this sector (the reason for this is that there is one collective agreement covering both the woodworking and the furniture sectors).

The organisations' institutional characteristics (Estimates of respondents are marked by (*), while estimates of researchers are marked by (**))

	Member of Confederation of Independent Trade Unions in Bulgaria (CITUB)
Original name of the organisation	Федерация на синдикалните организации от горското стопанство и дървопреработващата промишленост
English name	Federation of Trade Union Organisations in Forestry and Woodworking Industry
Year of creation	1990
Structure of the organisation: sector/sub-sector	Covers all the activities of NACE DD 20 (woodworking) and DN 36.1 (Furniture); as well as AA 01 (Agriculture), AA 02 (Forestry) and DE 21 (Pulp, Paper).
Funding	Membership fee and projects
Staff	7.5 people, of which four are hired on full-time base and one is hired on part-time base; 3 persons on civil contracts; also 5 volunteers
Number of individual members	7,680 ¹⁵
Number of members working in the sector	2,118 in the woodworking and the furniture sectors (of which 869 in the furniture sector exclusively)
<i>staff/white-collar workers</i>	400* (19%) in the woodworking and the furniture sectors (of which 170* in the furniture sector exclusively)
<i>manual/blue-collar workers</i>	1,700* (81%) in the woodworking and the furniture sectors (of which 700* in the furniture sector exclusively)
Density %	5.5% of the total number of workers in the woodworking and the furniture sectors; 4% of the total number of workers in the furniture sector exclusively
Does the organisation negotiate and sign collective agreements at sector level?	Yes - it negotiates and is eligible to sign at sector level
Does the organisation take part in consultations at enterprise level?	Yes but indirectly via company sections
How many collective agreements have been signed by the organisation in 2004 and 2005	4 in total, of which 2 at sector and 2 at sub-sector level. However, only one of them concerns the woodworking and the furniture sectors. The Federation has regularly signed agreements since 1990.
Does the organisation take part in tripartite concertation?	Yes
Does the organisation have the power to sign	Yes

¹⁴ According to the Labour Legislation in Bulgaria, the organisations eligible, at sector level, are only those organisations which are members of central trade union organisations recognised as representative at national level.

¹⁵ Source: Organisational membership records last updated in January 2006. Similar figures were confirmed officially by the Ministry of Labour and Social Policy in the end of 2003 in the course of recent regular counting of social partners in Bulgaria; company membership records are signed by employers.

tripartite collective agreements for the sector?	
How many agreements has it signed in the framework of tripartite concertation in 2004 and 2005?	There is no signed tripartite collective agreement for the furniture sector

Workers' organisations: Summary Table

Organisation (English name)	Members		Estimate of density*	Collective Bargaining** (Yes/No)	Affiliations		
	Total number of members	Number of members working in the sector			European affiliations***		Other affiliations****
					Member of EFBWW?	Others	
Federation of Trade Union Organisations in Forestry and Woodworking Industry	7,680	869	4%	Yes	No	No	BWI

Source: 1) Federation of Trade Union Organisations in Forestry and Wood Processing Industries (April 2006); 2) NSI regarding data for calculation base of density (recent data available as of 1 April 2006)

*Density: number of employees who are affiliated to the organisation concerned divided: - by total number of employees working in the sector within the country, if the activities of the organisation concern the whole sector studied; - by total number of employees working in this sub-sector within the country, if the activities of the organisation only concern a sub-sector. **Collective Bargaining: Does the organisation negotiate and have the power to sign collective agreements at sector level for the sector? ***European affiliations: List of European organisations to which the organisation is affiliated. ****Other affiliations: List of others organisations (group of countries, international) to which the organisation is affiliated.

Employers' organisations

There is one employers' organisation active in the sector: The **Branch Chamber of Woodworking and Furniture Industry** (Браншова камара на дървообработващата и мебелната промишленост). This organisation was established in 1991 but has been much more active since 2000. It covers both the woodworking (NACE DD 20) and the furniture (NACE DN 36.1) sectors. It is funded by membership subscriptions, services for members and projects and employs four people.

220 companies are members of this organisation, of which 67 are active in the woodworking sector, 113 in the furniture sector and 40 carry out activities close to woodworking and furniture, but belonging to other NACE codes (like machine building and trade related to sector). The latter are not involved in collective bargaining for woodworking and furniture.

The member companies account for about 75% of the gross sector product (woodworking and furniture), mainly due to 7 companies with more than 250 employees (respectively three in woodworking and four in furniture). All member companies are private and the majority of them are SMEs.

According to the Labour Legislation in Bulgaria, the organisations eligible, at sector level, are only those organisations which are members of national employers' organisations recognised as representative at national level. This chamber is a member of three national associations: The Bulgarian Industrial Association (BIA), The Bulgarian Chamber of Commerce and Industry (BCCI), The Employers Association in Bulgaria (EABG).

The organisation takes part in collective bargaining at sector level for the sector of woodworking and furniture. In this framework, it has signed one collective agreement in 2004 and 2005. It is also entitled to take part in tripartite concertation for the sector and to sign collective agreements at this level. However, there is no signed tripartite collective agreement for the furniture sector. At company level, the chamber does not take part in collective bargaining as according to regulations in the country, it is the individual employers who negotiate directly at this level.

Employers' organisations

Organisation (English name)	Members		Estimate of density*	Collective Bargaining** (Yes/No)	Affiliations		
	Total number of member companies in this organisation	Total number of workers employed by member companies			European affiliations***		Other affiliations****
					Member of UEA or EFIC?	Others	
Branch Chamber of Woodworking and Furniture Industry	220 in total (113 in the furniture)	More than 14,313 in the woodworking and the furniture (8,409 in the furniture)	7.4% of companies in the furniture	Yes	UEA	CEI-Bois (forthcoming member)	No

Source: 1) Branch Chamber of Woodworking and Furniture Industry (April 2006); 2) NSI regarding data for calculation base of density (recent data available as of 1 April 2006)

*Density: number of companies that are affiliated to the organisation concerned divided: - by total number of companies with activities in the sector within the country, if the activities of the organisation concern the whole sector studied; - by total number of companies with activities in this sub-sector within the country if the activities of the organisation only concern a sub-sector. **Collective Bargaining: Does the organisation negotiate and have the power to sign collective agreements at sector level for the sector? ***European affiliations: List of European organisations to which the organisation is affiliated. ****Other affiliations: List of other organisations (group of countries, international) to which the organisation is affiliated.

3. Industrial relations in the sector

Tripartite concertation

In Bulgaria, tripartite social concertation covering the woodworking sector, the furniture sector and the pulp, paper and paper products sector (NACE DE 21) is organised by the Ministry of Economics and Power Supply. The players are the Federation of Trade Union Organisations in Forestry and Woodworking Industry and the Federation of Light Industry, Podkrepa, on the employees' side and the Branch Chamber of Woodworking and Furniture Industry¹⁶ on the employers' side. The main issues addressed in tripartite concertation exercises are: Fostering the social dialogue at different levels; Discussing draft Acts and regulations; Reviewing the Harmonisation of Bulgarian legislation concerning the sector.

This tripartite concertation takes place irregularly and on an ad hoc basis. No collective agreements are signed at this level because, in general, they do not have strong legal power and they are rarely useful. Due to its lack of sufficient legal power, the council is not effective. Some decisions are taken but are not implemented.

Bipartite social dialogue

Bipartite collective bargaining for the furniture sector takes place *at the sector level*. This bargaining process covers not only the furniture sector but also the woodworking sector. Dialogue at this level functions quite efficiently as it has not been interrupted since 1990 (all the time there has been signed collective agreement).

One collective agreement is in force for the moment in the sector¹⁷. It focuses on wages, employment, working conditions, working time etc., and is concerned mainly with blue-collar workers. Its duration is two years. The signatory parties of this agreement are the Federation of Trade Union Organisations in Forestry and Woodworking Industry and the Federation of Light Industry

¹⁶ In the council takes part also a chamber covering NACE DE 21 (pulp, paper and paper products), but it does not negotiate for the woodworking and furniture sectors.

¹⁷ The legislation allows only one agreement in force for any particular sector.

Podkrepa on the employees' side and the Branch Chamber of Woodworking and Furniture Industry on the employers' side. There is no obligation to participate in collective bargaining at sector level and there are no conflicts between players regarding recognition issues.

There is no official data regarding the coverage rate of this agreement in comparison with the total number of workers. The Branch Chamber of Woodworking and Furniture Industry estimates that 7.4% of companies in the furniture sector are covered by this agreement.

On the basis of official request submitted by the social partners, the Minister of labour and social policy has the power to activate procedures for extending collective agreements to parties that are not signatories. The social partners in the woodworking and furniture have asked many times for such an extension but this procedure has not yet been used at all in the country to date.

At company level, all trade union sections¹⁸ (even those of non-recognised unions) are allowed to negotiate directly with the individual employer (principal, executive). There is no official quantitative data about collective agreements concluded at the company level. Yet, the branch chamber of Woodworking and Furniture Industry and the Federation of CITUB estimate that amongst the chamber members, 25 furniture companies (1.6%) have signed company collective agreements. We can't say anything about the thousands of companies outside the chamber, but it is unlikely that they have a company agreement.

These company agreements focus on wages, employment, working conditions, working time... and concerns mainly blue-collar workers. Their duration is between one and two years. According to the Labour code, only better or at least equal conditions can be negotiated at company level in comparison with the sector level.

There are no procedures for extending these collective agreements to parties that are not signatories to the agreement. However, individual workers can join the signed agreement¹⁹. This procedure for personal joining is used widely.

Acronyms

BWI:	Building and Wood Workers' International
CEI-Bois:	European confederation of woodworking industries
CITUB:	Confederation of Independent Trade Unions in Bulgaria
CL PODKPEPA:	Confederation of Labour PODKPEPA
NSI:	National Statistical Institute
UEA:	European Federation of Furniture Manufacturers

¹⁸ If there is more than one union section willing to participate in collective bargaining, they have to submit a common collective agreement draft to the employer. This is because the regulation allows for only one agreement in force for each establishment. Most often the dominant players at company level are sections of the two biggest trade union confederations (CITUB and Podkrepa) as they have largest organisational structures throughout the country.

¹⁹ Individuals can join the agreement by submitting a simple application to either employer or trade union that is a signatory party.

ROMANIA

1. Description of the sector

Delimitation and activities of the sector

Since 1997, Romania has adopted the NACE system corresponding to the international classifications. As a result, in the official statistics, the activities of the furniture sector correspond to group 36.1 of the NACE code.

As far as social partners are concerned, trade unions in the sector (FSLIL and FSFMR) represent both the furniture and the woodworking sectors. On the employers' side, the APMR represents especially the furniture industry (mostly the activities included in the NACE code 36.1).

Collective bargaining for the sector covers both the furniture and the woodworking sectors.

Socio-economic features of the sector

The furniture sector is an important industry in the national economy. In 2004, the share of this sector in the GDP was of 2%²⁰ and its contribution to the country's total exports represented 5.30%²¹.

Summary table: Companies (December 31, 2004)

Sub-sectors	Number of companies	% companies without employees	% companies with < 10 employees	% companies with 10 to 49 employees	% companies with 50 to 249 employees	% companies with > than 249 employees
NACE 36.11	212	12.7	48.6	20.8	12.3	5.6
NACE 36.12	728	10.7	70.1	14.7	4.4	0.1
NACE 36.13	191	8.9	77.5	9.4	3.1	1.1
NACE 36.14	2,277	8.7	56.6	21.8	10.1	2.8
NACE 36.15	49	10.2	55.1	28.6	6.1	0
Total NACE 36.1	3,457	9.4	60.1	19.6	8.6	2.3

Source: National Institute for Statistics, March 02, 2006.

Following the process of restructuring the old economic structure according to the requirements of a market economy, there have been important changes in the sector, in terms of the size of enterprises, changes in the ownership structure, reduction of the number of employees, the modification of the range of products for export and so on. As such, if in 1991, the furniture industry included 104 companies with 140,222 employees, and at the end of 2004, there were around 3,500 companies with over 101,000 employees. While in 1991, the average number of employees

²⁰ Ministry of Economy and Trade Documentary, March 23, 2006

²¹ Romanian Statistical Yearbook, 2005, pag.679

per company was 206 employees, the average was only 18 in 2004. In 1990, all companies in the sector were owned by the state and in 2004, almost all of them belonged to the private sector (the companies owned by the state represented below one percent).

In terms of geographical spread, the companies active in the sector can be found all over the country, even if most are centred on Bucharest. There are no data available about the underground economy in the sector but it is estimated that it could be 20-30%.

Summary table: Workers (December 31, 2004)

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/total number of employees in the country (%)	Number of employees in companies < 10 workers/Number of employees in the sector (%)	Number of employees in companies with 10-49 workers/ Number of employees in the sector (%)	Number of employees in companies with 50-249 workers/ Number of employees in the sector (%)	Number of employees in companies with > 249 workers/ Number of employees in the sector (%)
NACE 36.11	40	11,755	0.26	3.0	9.1	21.2	66.7
NACE 36.12	103	7,024	0.16	23.4	30.9	40.6	5.1
NACE 36.13	30	2,096	0.05	20.2	17.5	34.3	28.0
NACE 36.14	525	79,562	1.78	5.12	14.8	31.7	48.4
NACE 36.15	20	593	0.01	13.3	43.3	43.3	0
Total NACE 36.1	718	101,030	2.26	6.5	15.4	31.2	46.8

Source: National Institute for Statistics, March 02, 2006

At the end of 2004, the total number of employees in the sector was 101,030²² (58.5% were women²³). All social and professional categories (qualified and non-qualified workers, specialists with average and higher training) are included in the sector. It is estimated that over 80% of the labour force is qualified, with a large number having higher qualifications.

The average monthly salary was 4,393,865 ROL²⁴ (108.4 euros²⁵) in 2004, lower than the average monthly salary in industry in general (148 euros) and than the average in the processing industry (134.1 euros). However, there are companies where the salary is well above the average of the sector.

Productivity in the furniture industry has registered significant growth, going from 5,925 USD/salaried workers in 2000, to 13,575 USD/salaried workers in 2004. This trend is the result investments in high productivity manufacturing lines, which include a large range of manufactured items where jobs are electronically supervised, so that over 85% of the production capacity has become highly efficient²⁶.

²² National Institute for Statistics, March 02, 2006

²³ Romanian Statistical Yearbook, 2005, page 128

²⁴ Romanian Statistical Yearbook, 2005, page 225

²⁵ Using an average currency exchange of 40.532,11 lei / euro (cf. www.bnr.ro – annual statistic series)

²⁶ Ministry of Economy and Trade Documentary, March 23, 2006, page 10

There are two factors driving these trends: Romania's accession to the European Union and the competition triggered by globalisation. The social partners consider that there will be important changes: (1) An large number of companies will disappear from the market (first those which will not meet the European conditions regarding environment protection and those which do not have the capacity to invest in efficient technology to face the competition); (2) The resizing of enterprises (there will be a growing number of larger enterprises, as they prove to be more efficient); (3) The reduction of the labour force following the introduction of advanced technology; (4) There will be greater specialisation for a large part of the labour force, which could cope with the requirements with new technology; (5) The growth of foreign investment in the sector; (6) A crisis for the qualified labour force (the liberalisation of the labour force market in the EU, together with the extremely low salaries in Romania will incite a large part of the labour force (the qualified ones) to migrate to EU countries where they could earn salaries ten times more than in Romania).

2. Organisations active in the sector

Workers' organisations

The Federation of Free Trade Unions in the Woodworking and Furniture Industry (Federatia Sindicatelor Libere din Industria Lemnului, FSLIL) was established in April 1990 based on the Law 21/1924. It changed its status later, based on Law 54/1991 and then Law 54/2003²⁷. FSLIL represents the employees in the woodworking and furniture sectors (NACE 20 and 36.1). When it was established, the organisation represented 215 trade unions with 245,000 members, out of around 360,000 employees in the woodworking and furniture industry²⁸. Following the transformation and restructuring of the economy, the number of employees has decreased, so that now, the number of members in the federation is of around 72,000.

The FSLIL is mainly funded by subscriptions, sponsorships, space-leasing incomes... Nine employees work for the organisation.

The FSLIL meets the representative conditions for legal recognition in the woodworking and the furniture industry. This gives it the right and capacity to negotiate and sign collective agreements at branch level. Since 1991, the FSLIL has signed branch collective agreements regularly²⁹. The last was signed for 2004-2007. The FSLIL also signs an additional act to this contract on an annual basis, which modifies certain provisions, especially those referring to salary rights (the minimum salary at branch level). Provisions negotiated at branch level constitute the minimal point of reference for the negotiations at company level.

Generally, the federation does not negotiate and sign collective agreements at company level, as this is the duty of the trade union organisation in each company or of the elected representatives of employees if there is no trade union organisation. Nevertheless, up to 2005, the FSLIL negotiated and signed four collective agreements within a large company employing over 5,000 employees and several subsidiaries.

At national level, the FSLIL is a member of CNSLR-Fratia. At European level, it is a member of the EFBWW, and of the BWI at international level.

²⁷ The first post communist trade union law was adopted in 1991 and was modified and completed in 2003.

²⁸ Interview, Vasile Badica, FSLIL President.

²⁹ In 1991, FSLIL was the first trade union federation, which negotiated and signed a collective agreement at branch level.

The Woodworking and Furniture Trade Unions Federation (Federatia Sindicatelor Forestiere si de Mobila din Romania, FSFMR) was established in September 1998. It represents both the woodworking and the furniture sub-sectors. Today, the federation includes around 12,000 members from both sub-sectors in approximately equal shares. FSFMR is mainly funded by subscriptions, entrance fees, sponsorships etc. The federation has one employee working for it.

The organisation is legally recognised at branch level and consequently, it negotiates and signs collective agreements at this level³⁰. The last agreement signed was concluded for the period 2004-2007. Moreover, the additional act is signed each year by the organisation. FSFMR does not negotiate collective agreements at company level.

At national level, FSFMR is member of the National Confederation of Democratic Trade Unions in Romania (Confederatia Nationala a Sindicatelor Democratice din Romania, CSDR). At international level, it is member of BWI.

Workers' organisations

Organisation (English name)	Members		Estimate of density*	Collective Bargaining** (Yes/No)	Affiliations		
	Total number of members	Number of members working in the sector			European affiliations***		Other affiliations****
					Member of EFBWW?	Others	
FSLIL	72,000 in the woodworking and furniture sectors (1)	72,000 in the woodworking and furniture sectors	38% of the woodworking and furniture sectors	Yes	EFBWW	No	BWI
FSFMR	12,000 in the woodworking and furniture sectors (2)	(Estimate) Around 6,000 in the furniture sector	6.3% of the woodworking and furniture sectors	Yes	No	No	BWI

Source: (1) Vasile Badica, FSLIL, President, March 23, 2006; (2) Doru Gherghina, FSFMR, President Executive, March 29, 2006.

*Density: number of employees who are affiliated to the organisation concerned divided: - by total number of employees working in the sector within the country, if the activities of the organisation concern the whole sector studied; - by total number of employees working in this sub-sector within the country, if the activities of the organisation only concern a sub-sector. **Collective Bargaining: Does the organisation negotiate and have the power to sign collective agreements at sector level for the sector? ***European affiliations: List of European organisations to which the organisation is affiliated. ****Other affiliations: List of others organisations (group of countries, international) to which the organisation is affiliated.

Employers' organisations

The Association of Furniture Manufacturers in Romania (Asociatia Producatorilor de Mobila din Romania, APMR) was established on October 10, 1992 based on the provisions of Law no. 21/1994 (the Law related to foundations). Then it complied with the law for employers' organisations³¹. APMR represents furniture producers and economic agents, which cooperate directly in the manufacturing and commercialisation of furniture (producers and suppliers of raw material, products of wood, windows, mirrors, auxiliary materials for furniture, accessories, polishes, dyes, binders, weavings and other fabrics, producers and suppliers of machines and equipment, tools and other pieces for the furniture industry, research, design and training units, advertising, consulting³²). This means that the affiliated members are also from other sectors than those defined by the NACE code 36 (chemistry, machines constructions, textiles, research) whose products and services contribute to furniture manufacture. APMR members account for over 70% of the total production of furniture in the country, out of which 75% is exported.

³⁰ Interview, Doru Gherghina, FSFMR Executive President, March 29, 2006.

³¹ Law no. 356/2001

³² APMR presentation brochure

The organisation is funded by subscriptions, entrance fees and sponsorships. It employs 11 people.

APMR is legally recognised at sector level for the furniture sector and it participates in the collective bargaining at this level. The last agreement signed covers the period 2004-2007. APMR also signs the additional act to this agreement. The organisation does not participate in the collective bargaining at company level. This is the duty of each company board and trade union.

At national level, APMR is member of the Confederation of Employers Organisation in Romanian Industry (Confederatia Patronatelor din Industria Romaniei, CONPIROM) and of the Convention of Employers Organisation in the Forestry Industry (Conventia Patronatelor din Industria Forestiera, CPEF). At European level, it is member of the European Furniture Manufacturers Federation (UEA).

Employers' organisations

Organisation (English name)	Members		Estimate of density*	Collective Bargaining** (Yes/No)	Affiliations		
	Total number of member companies in this organisation	Total number of workers employed by member companies			European affiliations***		Other affiliations****
					Member of UEA or EFIC?	Others	
APMR	500	75,000	14.5	Yes	UEA	No	No

Source: Aurel Rizea APMR Executive President, C. Ionescu APMR, Technical Issues Advisor, March 21, 2006

*Density: number of companies that are affiliated to the organisation concerned divided: - by total number of companies with activities in the sector within the country, if the activities of the organisation concern the whole sector studied; - by total number of companies with activities in this sub-sector within the country if the activities of the organisation only concern a sub-sector. **Collective Bargaining: Does the organisation negotiate and have the power to sign collective agreements at sector level for the sector? ***European affiliations: List of European organisations to which the organisation is affiliated. ****Other affiliations: List of other organisations (group of countries, international) to which the organisation is affiliated.

3. Industrial relations in the sector

Tripartite concertation

From a legal point of view, tripartite concertation at sector level is possible in Romania. It usually takes place within the formal social dialogue commissions, which are organised by the various ministries and the prefects' offices. As far as the furniture sector is concerned, no commission specific to this sector has been created. It is included within the tripartite dialogue structures organised by the Ministry of Economy and Trade (which include a multitude of other sectors).

The two trade union federations, FSLIL and FSFMR, the employers' organisation active in the sector (APMR) as well as the representatives of the employers and union confederations to which the federations are affiliated, take part in this concertation. The main issues addressed focus on policies and strategies for the protection and development of the industry; legislation with regard to the sector and its updating in the light of the community legislation; fiscal pressure, taxes, customs tariffs and transport costs as a result of accession to the union, which could stimulate the internal and external trade; the environmental tax; unfair competition and the fight against monopoly tendencies. Generally, no tripartite agreements are signed within this framework³³.

³³ The authorities do not approve of the idea of signing agreements with social partners because they should respect them.

According to the Romanian expert, the current form of organisation of tripartite social dialogue at sector level does not function well and is very in-efficient. Indeed, the Ministry of Economics and Trade includes almost all important branches of the economy. As there is only one commission covering a multitude of sectors, the dialogue is quite formal and fails to produce conclusions. The law should stipulate the creation of several sub-commissions in certain ministries, which should include representatives from related domains of activity³⁴.

Besides formal structures, informal procedures of tripartite dialogue can take place in case of special problems which affect the activity of the entire sector and which could trigger social or/and production crises. These informal discussions are generated by the social partners, who request meetings with the state authorities, including the head of the government, for consultations and to find solutions. . An agreement may result from this. There are two agreements of this type that can be given as examples, one concerning the interdiction against exporting logs (which was only applied for a very short period) and another one, which refers to the reduction of the environment tax for the sector.

Bipartite social dialogue

At sector level

Collective bargaining for the furniture sector takes place at the sector level. There is a legal obligation to participate at collective bargaining at this level.

Only one collective agreement is in force for the moment in the sector. The signatory parties are FSLIL and FSFMR on the employees' side and the Association of Furniture Manufacturers in Romania (APMR) and the Romanian Woodworkers Association (ASFOR) on the employers' side. There are no conflicts between the players regarding recognition issues.

The agreement is valid for the period 2004-2007 and it covers both the woodworking and the furniture industry (woodworking, manufacture of plywood and furniture, wood products and other industrial activities)³⁵. Its content focuses on salary and other rights, working and rest time, social protection measures for employees, professional, social and union training, other provisions regarding the rights and obligations of parties as well as those of employees. Moreover, an additional act is negotiated and signed annually, in order to modify certain provisions in the agreement, especially the salary rights.

According to the collective agreement law, the sector-level collective agreement is mandatory only in companies with at least 21 employees. Therefore, only a few companies apply the provisions of the collective agreement at sector level. The social partners consider that the coverage rate of this agreement is 20% of the companies that are under obligation to sign a collective agreement and 40% of employees in the sector.

Besides the collective bargaining at sector level, there is also the possibility of having a dialogue concerning specific problems in the sector. In this case, there is no obligation to participate in the dialogue.

The social partners consider that the social dialogue at sector level works well. Both the trade unions and the employers are interested in a constructive dialogue in order to develop the sector and find the best solutions to the problems in the sector.

³⁴ Interview, Vasile Badica, FSLIL President.

³⁵ The collective agreement for the woodworking and furniture industry 2004-2007, Romania's Official Gazette, Part V, nr.5 / April 2004

At company level

In Romania, there is a legal obligation to negotiate and sign a collective agreement in companies with 21 employees or more³⁶. In order to strengthen the mandatory character, the law provides for penalties for owners who refuse the collective bargaining. The players involved in negotiations at company level are the trade union(s) within the company or the elected representatives of the employees if there is no trade union organisation, and the company's administration board.

122 enterprise level agreements are currently in force in the woodworking and furniture sectors. Broadly, their content is similar to that of the collective agreement at branch level, taking into consideration that the provisions of the collective agreement at branch level are minimal and mandatory for the "company" level. More particularly, while sector-level agreements focus on general issues, development strategy, solutions to certain problems affecting the whole sector, enterprise-level agreements focus on specific company issues.

Usually, the duration of the collective agreement at company level is one year. There are companies, however, which sign collective agreements for longer periods (two or three years). According to the social partners, over 40% of the employees in the sector are covered by an enterprise level agreement. Within a company, all social and professional categories, from non-qualified workers to specialists with higher education, are concerned by the agreement.

Acronyms

APMR:	The Association of Furniture Manufacturers in Romania (Asociatia Producatorilor de Mobila din Romania)
ASFOR:	The Romanian Woodworkers Association (Asociatia Forestierilor din Romania)
BWI:	Building and Wood Workers' International
EFBWW:	European Federation of Building and Woodworkers
FSFMR:	The Woodworking and Furniture Trade Unions Federation (Federatia Sindicatelor Forestiere si de Mobila din Romania)
FSLIL:	The Federation of Free Trade Unions in the Woodworking and Furniture Industry (Federatia Sindicatelor Libere din Industria Lemnului)
UEA:	European Federation of Furniture Manufacturers

³⁶ Law 130/1996 modified and amended by law 143/1997, art. 3, al 1

TURKEY³⁷

1. Description of the sector

Delimitation and activities of the sector

Several organisations provide information on industrial activities at sector level in Turkey:

- The TUIK (Statistics Establishment of Turkey)³⁸ is the main organisation providing data on production, employment and trade. The TUIK uses both ISIC Rev 2 (Statistical Year Book of Turkey) and ISIC Rev 3 (General Industrial and Workplace Survey).
- The DPT (State Planning Organisation) uses ISIC Rev 3 based on 4 digits in the 9th Five Year Development Plans Special Committee Report. This report considers the furniture industry as a part of “the wood products and furniture industry”. The DPT obtains information mainly from the TUIK.
- The CSGB (Ministry of Labour and Social Security) uses a system of sector classification established in 1983. The system has 28 industrial sectors³⁹ and was developed on the basis of the ISIC Rev 2. This system is the basis for collective bargaining and industrial relations in Turkey. Within this system, “the woodworking and furniture industry” is the 8th sector and is called the “Wood industry”. The “Wood industry” consists of three sub-sectors: sawing-milling and woodworking industry; manufacture of containers made-up of wood, reed and cork industry; and the furniture industry. The following activities are considered as the part of the wood industry: manufacture of articles and furniture made-up-of wood and cork, joinery, the saw-milling industry, timber factories and the production of all kinds of wood and fibre panels. The CGSB provides information on firms, workers, unionisation, collective bargaining and industrial actions at sector level in line with this classification system via the Labour Statistics (LS). No information is given at sub-sector level. Thus, the information on employment and industrial relations for the woodworking and furniture industries are mixed at this point.
- The Treasury and its sub-organisations such as Export Unions, Export Promotion Centres also provide information and publishes reports on various industries. These organisations generally use the STIC Rev 3, Harmonised System and Custom Tariff Statistical Positions (CTSP) as the basis for their classification system. The Treasury names the woodworking and furniture industry as “wood and forest products industry”. The wood and forest products industry includes the woodworking, furniture and paper industries.

As can be noticed, each of these organisations tends to use different industrial classification systems. Their descriptions and the name given to the furniture industry vary widely. As none of these organisations provides full information on all aspects of the furniture industry, a combination of this information will be used in this report.

³⁷ According to EFIC, Ms. Cinar, secretary general of MOSDER, reported that the part on Turkey was wrong.

³⁸ The State Statistics Institute (DIE) has recently been converted into the Statistics Establishment of Turkey (TUIK)

³⁹ It is claimed that some of these sectors within this system were determined arbitrarily to prevent the creation of strong trade unions.

Socio-economic features of the sector

The Turkish furniture industry is the largest in the Middle East and Balkans. It is usually accepted that the birth of the Turkish furniture industry dates back to the 19th century when production mainly took place in small artisan shops. A century later, small shops and artisan tradition still characterise this industry. With the rapid urbanisation and construction boom, the large-scale furniture production was launched from the 1980s onwards.

Table 1: The Value Turkish Furniture Production and Foreign Trade (\$)

Years	Production	Exports	Import	Consumption
1999	1,032			1,071
2000	1,293	232	285	1,348
2001	1,066	246	172	1,021
2002	1,225	360	181	1,109
2003	939	634	250	889
2004	1,100	856	398	ND
2005	1,460	953	527	ND

Source: S. Salman, (2005) Mobilya Endüstrisi Değerleme Raporu.

The furniture industry is a significant source of employment and production within the Turkish economy. It has about 1.8% share in the GDP. It was the fastest growing sector in 2005⁴⁰. In 2000, the value of the total furniture production was \$1.22 Billion. Later, due to the country's ever-worsening recession and financial crisis, it declined to its lowest level with \$939 Millions in 2003. It began to rise and reached \$1.46 Billion in 2005. The furniture industry is also one of the important sources of export earnings in Turkey. It has great potential to export to Europe, the Middle East and Russia due to its geographical position. In 2005, it accounted for about 1.2% of Turkey's total export.

Table 2: Number of Firms and Employment in the Turkish Furniture Industry in 2002

Sub-Sectors	Number of Firms	%	Employment	%
Chair and Stool production	5,604	19	16,619	17.9
Office and Store furniture	2,002	6.8	9,254	9.9
Kitchen Furniture	2,745	9.35	6,666	7.2
Other Furniture	18,685	63.6	59,145	63.8
Total	29,036	100	91,684	100

Source: TUIK (2003) Genel Sanayi ve İşyerler Sayımı, (ISIC Rev 3)

Table 3: Number of Firms and Employment in the Wood working and furniture Industry in 2005

Size of Firms	Firms	(%)	Employment	(%)
1-9	19,595	94.2	41,804	52.8
10-24	824	4.0	12,343	15.6
25-49	217	1.04	7,282	9.2

⁴⁰ Although there is no official data, it is argued that the total production value could be about \$6 billion in the furniture industry when the number of producers, amount of production, current prices, the size of the construction industry, the total export revenue and the informal economy in the industry are taken into consideration altogether.

50-99	103	0.5	6,778	8.56
100-249	49	0.24	7,164	9.0
250-499	4	0.02	1,494	1.9
500-999	3	0.01	2,236	2.8
1,000-4,999	0	0	0	0
TOTAL	20,795	100	79,101	100

Source: CSGB, Labour Statistics, Ankara, 2005 p.125

According to the TUIK, there were 29,036 firms in the Turkish furniture industry in 2002. Most of them are small (98%). Nearly 80% of the firms are family businesses. As can be seen from Table 3, the Labour Statistics present similar figures on the structure of the Turkish furniture industry. TUIK's 2002 data also show that the industry employed 91,684 workers. However according to the Labour Statistics, employment in 2005 was about 79,101 in the Turkish wood sector (including both the woodworking and furniture industries). Yet, both these figures are disputed and therefore, should be treated with caution. The Labour Statistics provide information only on the officially registered firms and employment. The TUIK survey, on the other hand, reflects the actual number of firms, which answered its questionnaire for the survey⁴¹. This does not mean that the TUIK's survey covers all firms and workers. To find out the exact employment figure, we need to take informal employment into consideration. According to the latest figure, the informal economy accounts for about 51% in Turkey⁴² (The informal employment is remarkably widespread in the Turkish furniture industry). Thus, we take the LS's figure as a basis the employment could be around 158,202⁴³. The penetration of industry by MNC is limited. There are currently 16 MNCs operating in the furniture industry.

Turkish furniture production is mainly located in the large cities. There are several well-known furniture manufacturing districts, which are Istanbul, Ankara, Bursa (İnegöl), Kayseri, Izmir and Adana. Istanbul is the most important production site. It had 22.5% of the firms in the Turkish furniture industry and employed 25.5% of the Turkish furniture workforce in 2004⁴⁴. It was followed by Ankara, which accommodated 18.5% of the firms and 15.8% of the workforce of the furniture industry. Bursa, with its large forest areas and woodworking industry, has recently become an important production and export centre for furniture. It is the most dynamic region in terms of furniture production.

No information is provided by the Labour statistics on the gender aspects of the workforce at sub-sector level. Yet According to the Labour statistics, in the "wood sector", which include the woodworking and furniture industries, women made up 10.5% of the workforce in 2005. The small furniture firms do not employ female workers at all, yet the large furniture firms are reported to have employed women only in their upholstery divisions where the work is more suitable for female labour. It is also a tradition that no women work in such dirty and heavy industries in Turkey. The LS do not also provide information about the skill composition of the workforce. However, according to the Union of Chambers and Commodity Exchanges of Turkey, 72% of the workforce in the woodworking and furniture industry is unskilled, 11.9% skilled, 2.2% technicians, 2.4% engineers and 11.2% managerial staff (Information based on the ISIC Rev2)⁴⁵.

The wages in the Turkish furniture industry are not very high. Average wages for unskilled workers working in non-unionised firms are slightly above the minimum wage, which is about \$ 280. Unionised workers, on the other hand, receive wages between 60-100% higher than the average wages. Skilled workers generally receive about \$ 750. There is a very high-level demand for

⁴¹ TUIK collect information via a questionnaire for the firms employing more than 10 workers.

⁴² TİSK, (2005). Sosyal Güvenlik Yasa Tasarılarının Değerlendirilmesi Semineri, İstanbul: No. 256.

⁴³ We prefer taking the Labour Statistics as basis as they do certainly reflect those workers who are officially registered.

⁴⁴ TUIK, (2004) Mobilya Sektörü İşyeri Sayımı, İstihdam ve İllere Göre Dağılımı, Bilgişlem Merkezi Veritabanı.

⁴⁵ TOBB (2006), Sanayi Veritabanı, http://sanayi.tobb.org.tr/personel_liste2.php?kod=33

skilled labour, but the supply is insufficient. Even though the Labour Code stipulates that a working week is 45 hours, working 10 hours in a day and 55-60 hours in a week is an entrenched norm in the small woodworking and furniture shops.

Regarding the health and safety, the furniture industry is considered as the first risk group regarding industrial accidents⁴⁶. Health and safety precautions are mostly neglected in the small firms. The workers work without gloves, glasses and protective masks. Nevertheless, it is possible to say that health and safety measures are observed at minimum levels in the unionised workplaces. The findings of a study carried out over the industrial accidents in the SME and furniture manufacturers support this observation⁴⁷.

2. Organisations active in the sector

. As noted above the CSGB sector classification system constitutes the basis for industrial relations and collective bargaining issues in Turkey. Within this system, the woodworking industry is a part of the 8th sector called the “wood sector”, which embraces both woodworking and furniture industries. Four trade unions and one employer organisation currently operate in the sector. Only two of the trade unions are authorised social partners and can negotiate and sign collective agreements.

Workers’ organisations

The Union of Wood Industry Workers of Turkey (Ağaç-İş) is one of the oldest unions in Turkey. It was established to operate in the forestry and wood industry in a small town in the North Black Sea in 1949. Its original name was Union of Technical and Wood Industry Workers of Ayancık (Ayancık Teknik ve Ağaç Sanayi İşçileri Sendikası). The union started operating nation-wide and setting up its branch offices in various parts of the country, including Istanbul in the early 1950s. During its congress in 1963, the union adopted its current name.

Traditionally, the public sector has been the stronghold of this union. However, from 1996 onwards, the privatisation of the state-owned enterprises started to weaken Ağaç-İş’s power base. Consequently, from 1998 onwards, Ağaç-İş intensified its activities in the private sector in order to expand the power-base that it had lost in the public sector. Ağaç-İş controlled about 20% of the workforce in the wood sector throughout 1990s. After a sharp decline due to the privatisations, it now organises only 15.78% of the workforce. According to the Labour Statistics, Ağaç-İş has 13,060 members both in the wood and furniture industry in 2006⁴⁸.

Ağaç-İş used to have more than 20 branch offices. Because it has lost nearly a quarter of its members due to privatisations, it has had to close down some of its branch offices. Currently, it maintains a head office in Ankara and eight other branch offices in various parts of the country. In the branch offices, no professional and permanent staffs are employed. A few members perform routine tasks on a part-time and voluntary basis. Nevertheless, apart from three high-ranking officials, four members and a secretary are employed in the head office. There is no professional research or training staff. Ağaç-İş is currently organising the workforce in 18 firms. It has competency and signed collective agreements in 17 firms. Of these agreements, 13 are

⁴⁶ Özkılıç, Ö. (2005), İşçi Sağlığı ve İş Güvenliği Yönetim Sistemleri ve Risk Değerlendirme Metodolojileri, p. 211. http://www.tisk.org.tr/download/yayinlar/is_sagligi_veguvenligi_metodolojileri.pdf

⁴⁷ A study, carried out on the SMEs in the woodworking and furniture industry in Turkey, reports that 49% of workers and 82.1% of employers in the sample claimed to have had industrial accidents. The situation is even worse in small lacquered and paint shops where chemicals and paints are used for coating furniture. In these shops, workers are working under heavy dust and inhale chemicals. They do their jobs with bare faces, heads and hands; some not even use simple masks for not inhaling the smell of paint and thinner. Some of these workers are reported to have respiratory problems and skin-disease associated with their works. Uysal, B. and et. all. (2005), “Analysis of Industrial Accidents Occurred in Small and Medium Furniture Manufacturing Firms in Turkey”, G.Ü. Journal of Science, 18 (3), p. 440. [http://www.fbe.gazi.edu.tr/dergi/tr/dergi/tam/18\(3\)/12.pdf](http://www.fbe.gazi.edu.tr/dergi/tr/dergi/tam/18(3)/12.pdf)

⁴⁸ The figure covers only the 6 months of 2006.

“workplace” while 4 are enterprise (multi-plant) collective agreements. Today, Ağaç-İş affiliated to Turk-İş (Trade Union Confederation of Turkey⁴⁹) at national level and to the BWI at international level.

Ağaç-İş has organised a large number of educational programmes and seminars for its members. The funds for financing these activities have been obtained mainly from its own resources. In 1989, it launched an extensive educational programme with the participation of 1,078 workers. It was funded by Turk-İş and BWI⁵⁰.

The Genuine Union of Wood, Chipboard and Cork Industry Workers of Turkey (Öz-Ağaç-İş) was established by a group of Muslim trade unionist in 1980. It was immediately affiliated to Hak-İş (the Conservative Trade Union Confederation). Seven months after its establishment, the military seized the power. Öz-Ağaç-İş's all activities were suspended, its officials were arrested and its assets were blocked. In 1981, no charge was made against Öz-Ağaç-İş by the court of martial and Öz-Ağaç-İş was allowed to operate. Before the adoption of new legislation for trade unions and collective bargaining, Öz-Ağaç-İş was trying to organise workers in the Marmara, Central Anatolia and Black Sea regions under extreme conditions (trade unionist were often kept in custody for three months and taken before courts martial following complaints by employers). After the enactment of the new Trade Union Act No 28821, Öz-Ağaç-İş united with an independent union (Independent Wood Industry Workers) and recruited 10% of the workers in the wood sector. Consequently, it received the competency certificate at sector level in 1984. However, its rival union, Ağaç-İş, went to court for the re-determination of its sector level competency and also sued it for the false declaration of the number of its members. The court acquitted Öz-Ağaç-İş on all charges. Yet before signing its first collective agreement, Öz-Ağaç-İş lost its sector competency in 1985. After its third general congress in 1986, Öz-Ağaç-İş decided to accelerate its organising activities. It soon managed to recruit workers in 105 firms and re-achieved the sector competency.

Öz-Ağaç-İş encountered serious resistance by some employers during its organising activities. In one of the cases, it received competency in a furniture-manufacturing firm in Ankara in 1987. Nevertheless, the management refused to initiate collective negotiations and forced the workers to either resign from Öz-Ağaç-İş or face dismissals. Consequently, Öz-Ağaç-İş held its first strike. The court suspended the strike. After the re-determination of competency, Öz-Ağaç-İş signed its first collective agreement.

In the following years, Öz-Ağaç-İş intensified the organising activities and launched a series of strikes in 1989. A strike was initiated in Kocaeli Furniture Plant. It was Ağaç-İş's longest strike, lasting about 435 days. In 1990, another strike, involving 1,800 workers, was launched in the Tepe furniture plant in Ankara. The management responded aggressively by importing workers from its other plants, subcontracting many of its main activities and threatening workers by letters with dismissals as well as not providing legal document for their health insurance. According to the union official, it was the first time they come across such tactics and realised the adverse impact that subcontracting could have on unionisation. However, the union managed to recruit the workers from the subcontracting firms as well. Seven months later, the government postponed the strike for two months due to the breakout of the First Gulf War. The management either gradually dismissed or forced the striking workers to resign; making Öz-Ağaç-İş lost its competency in this firm. Following this pre-empted strike, Öz-Ağaç-İş went on strike in Orsaş (a private sector woodworking company). In Orsaş, most of the workers worked for subcontractors, thus management called off the subcontractors' contracts. The subcontractors then dismissed these workers. However, this time Öz-Ağaç-İş was successful as it convinced the court to reinstate all the dismissed workers at least. During the early 1990s, Öz-Ağaç-İş succeeded in organising

⁴⁹ Turk-İş is the largest trade union confederation and is famous for its wage unionism.

⁵⁰ Some of its recent education programmes and seminars have included the following topics: the Current Problems of Unionisation; Health and Safety at Work; Social Security; the Impact of Globalisation on the Woodworking and Furniture Sector; The New Labour Code No 4857; The Problems of Union Organising Activities in the World and in Turkey". The last education programmes in which 471 officials, shop stewards and workers participated took place in 2005. The themes of this programme were “occupational diseases”, “industrial accidents, their prevention and first aid”. The new Labour Code No 4857, the Trade Union Code 2821 and Collective Bargaining Act 2822.

workers in a public sector company, ETAG and signed collective agreements with public employer unions (TUHİS). At the end of the decade, Öz-Ağaç-İş succeeded in organising workers over 130 firms.

The new millennium was heralding a new area for trade unions in Turkey. In contrast to the early 1990s, which was characterised by the surge of unionisation and prolonged wave of strikes, trade unions lost many members as well as power in the early 2000s. Öz-Ağaç-İş, was by no means an exception. It opened the new millennium by losing its strongholds in the public sector due to the successive waves of privatisation of the public companies. The economic crisis of the 2001 resulting in the closedown of many private sector firms deteriorated the situation for Öz-Ağaç-İş. Some employers took advantage of the economic crisis and threatened the workers with closing down their firms unless they resigned from Öz-Ağaç-İş. Consequently Öz-Ağaç-İş was, once again, on the verge of losing its sector competency. However, it managed to organise the two large furniture-manufacturing plants in Kayseri, narrowly averting the loss of its sector competency.

Öz-Ağaç-İş currently organises the workers in 16 firms and controls 13.55% of the workforce in the woodworking and furniture industry. It has signed collective agreements in 14 firms in 2006. Öz-Ağaç-İş's head office is in Ankara and has only one branch office in Kayseri (It used to have 9 branch offices). In its head office, there are four employees, three high ranking union officials and a secretary. In its branch office, two officials and a secretary are employed. The only source of the Ağaç-İş's finance is the membership subscriptions. Öz-Ağaç-İş is still affiliated to Hak-İş, but has neither European nor international connections.

The Wood Industry Workers Union (ASİS) was set-up in 1973 in Ankara to operate in the wood sector. It was affiliated straightaway to DİSK (Revolutionary Workers Trade Union Confederation). ASİS adopted a left-wing revolutionary and militant strategy. Yet it was also well-known for its highly democratic decision making procedure: all decisions were voted by all members, including the rank-and-file members before being implemented. Accordingly, ASİS defended “the principles that members should be allowed to participate in collective negotiation, that each article of collective agreements should be voted, and that the union leaders should be elected for just one term”⁵¹.

ASİS initially organised Tepe Furniture Company in Ankara and Elka Veneer factory in Istanbul. In 1975, ASİS launched its first strike within the Elka factory involving 850 workers. After 100 days of strike, DİSK invited and encouraged Maden-İş's (Metal Industry Trade Union) official to takeover the responsibility and continue the negotiations with the Elka employer. However, ASİS conducts negotiations with the participation of workers and DİSK's officials' anti-democratic methods of handling the crisis were several criticised by all unions within the Confederation.

In 1980, after the military takeover, ASİS's activities were suspended and its leadership was jailed. It was acquitted on all charges in 1991. ASİS re-started its activities in 1992. However, it never managed to receive either sector or firm level competency in the post-military junta period. According to the LS, ASİS has 463 members. It has currently neither a head nor branch office. All its activities have recently been suspended. The interviewed DİSK official said that a decision would be taken over the fate of ASİS as soon as new trade union and collective bargaining codes are enacted.

⁵¹ FES, Trade Unions in Turkey, Istanbul, 1998, p.103.

Workers' organisations

Organisation (English name)	Members		Estimate of density*	Collective Bargaining** (Yes/No)	Affiliations		
	Total number of members	Number of members working in the sector			European affiliations***		Other affiliations****
					Member of EFBWW?	Others	
Ağaç-İş	13,060 in woodworking and furniture	13,060 in woodworking and furniture	16.5% of woodworking and furniture industries	No (it only negotiates at enterprise and workplace levels)	No	No	BWI
Öz-Ağaç-İş	11,219 in woodworking and furniture	11,219 in woodworking and furniture	14.1% of woodworking and furniture industries	No (it only negotiates at enterprise and workplace levels)	No	No	No

*Density: number of employees who are affiliated to the organisation concerned divided: - by total number of employees working in the sector within the country, if the activities of the organisation concern the whole sector studied; - by total number of employees working in this sub-sector within the country, if the activities of the organisation only concern a sub-sector. **Collective Bargaining: Does the organisation negotiate and have the power to sign collective agreements at sector level for the sector? ***European affiliations: List of European organisations to which the organisation is affiliated. ****Other affiliations: List of others organisations (group of countries, international) to which the organisation is affiliated.

Employers' organisations

The Wood Industry Employer Association of Turkey (TASİS) was established in 1961 under the name of Union of Wood Industry Employer Association of Istanbul (İstanbul Tahta İşverenler Sanayi Sendikası). It is one of the founding members of TİSK (Confederation of Employer Association of Turkey). It spent its first decade as a local employer organisation and converted into a national employer organisation in 1971.

The largest firms in the woodworking and furniture industry established TASİS. It had 43 members in its heyday in the 1970s. Currently, it has 10 members. These 10 firms employ roughly 1,500-1,750 workers. Its operations are financed by the largest member firms. TASİS conducts collective bargaining and signs collective agreements on behalf of its members. It provides technical assistance and logistics support for the implementation of collective agreements and the new Labour Code No 4857. TASİS does not have any education programmes. It has neither European nor international affiliations. Its head office is in Istanbul and it has no branch office and no publications. In its head-office, a general secretary and a secretary are employed. Its executive committee meets every two months and seeks to set down the members' expectations and demands. Then it presents them to TİSK.

The Furniture Industrialist Associations (Mobilya Sanayicileri Derneği, MOSDER) was established in 2003 by the 15 largest furniture firms in Ankara. Not all furniture firms are allowed to join this association. Membership is conditional. Those firms with at least 100 sales-outlets or dealers and with ISO 9001 certificate are accepted as members. The indispensable aim of the association is to discipline the sector by improving the quality and enhancing the technological structure in all stages of the production process. It is intended to strengthen the image of the Turkish furniture industry in world markets and to organise all the related promotional activities. It aims to lobby in order to convince the government to reduce the rate of VAT and other taxes in order to restrain the informal economy within the furniture industry. It also seeks to defend and enhance the interests of its members.

MOSDER is not an employers' representative organisation, but an ordinary association and is not currently authorised to deal with industrial relations and collective bargaining issues⁵². Currently, it has 22 members.

The Furniture Exporters and Importers Social Solidarity Association (Mobilya Sanayicileri İthalat ve İhracatçıları Sosyal Yardımlaşma Derneği, MOBDER) was established by a group of high quality furniture importers and exporters in 2004 with the aim of lobbying and encouraging solidarity among its members in the face of intensifying competition. It is intended to provide information to its members about business opportunities in the global furniture markets. It affiliated to the UEA (European Furniture Manufacturers Federation) in 2005. MOBDER has currently 28 members. MOBDER has sought to organise national and international fairs and assist its member in the international fairs. It has provided scholarships for furniture design students and organised some the best furniture design competitions. It has neither a formal nor an informal role in the collective bargaining for the sector.

Employers' organisations

Organisation (English name)	Members		Estimate of density*	Collective Bargaining** (Yes/No)	Affiliations		
	Total number of member companies in this organisation	Total number of workers employed by member companies			European affiliations***		Other affiliations****
					Member of UEA or EFIC?	Others	
TASİS	10 in the woodworking and furniture industry	1,500 – 1,750	0.05% of the woodworking and furniture industry	Yes	No	No	No
MOSDER	22 in the furniture industry	/	/	No	EFIC	No	No
MOBDER	28	/	/	No	UEA	No	No

*Density: number of companies that are affiliated to the organisation concerned divided: - by total number of companies with activities in the sector within the country, if the activities of the organisation concern the whole sector studied; - by total number of companies with activities in this sub-sector within the country if the activities of the organisation only concern a sub-sector. **Collective Bargaining: Does the organisation negotiate and have the power to sign collective agreements at sector level for the sector? ***European affiliations: List of European organisations to which the organisation is affiliated. ****Other affiliations: List of other organisations (group of countries, international) to which the organisation is affiliated.

3. Industrial relations in the sector

In Turkey, neither tripartite nor bipartite social dialogue exists at sector level. Thus, collective bargaining essentially takes place at an establishment (a workplace/plant) or at an enterprise (multi-plant belonging the same employer) level. It could be instructive to have a brief sketch on the collective bargaining procedure in Turkey, before looking at the social dialogue in the woodworking and furniture industry called “wood sector” by the CSGB.

The Collective Bargaining Act (CBA) No 2822, enacted by the military rule in 1983, regulates the collective bargaining procedure. The article 23 of the Act stipulates that workers and employers trade unions can only be established at sector level while collective bargaining negotiations and agreements have to take place at a workplace/plant or enterprise (multi-plant) levels⁵³. To acquire a competency to negotiate and sign a collective agreement, a trade union must cross a double-threshold. Nevertheless, no threshold is set for employer organisations. Indeed, being-established with an aim to represent its members in industrial relations and operate at a sector level is sufficient for employer association to have a competency. The first threshold, for the trade

⁵² According to the Trade Union Act No 2221, an employers' association has to declare its intention to the authorities if it is going to act as employers' representative organisation when applying for registration.

⁵³ The enterprise level bargaining is a concept brought by the CBA No 2882. It indicates an undertaking belonging to a corporate body, corporation, or a public organisation or institution, having more than one workplace/plant/establishment in the same sector (Dereli, 1997).

union, is at sector level: A trade union has to recruit at least 10% of the workforce in the sector where it operates. The second threshold is at enterprise/establishment level. The union must recruit at least 50%+ 1 worker to be able to negotiate and sign a collective agreement. After crossing both of these thresholds, the trade union can apply to the CSGB to receive competency certificate. This certificate is necessary to invite the management of an establishment/enterprise to negotiate a collective agreement⁵⁴.

The recognition issue is the most significant problem in the process of collective bargaining in the Turkish wood sector. Both trade union officers reported that employers' initial reaction to the unionisation and achievement of the competency criteria by a trade union in their establishment/enterprises is to apply to a court for the re-determination of the union's competency in almost all cases. This process may last up to 2 years, during which employers usually dismiss unionised workers⁵⁵ or workers resign from the union in order not to risk their jobs. Thus, the unions lose their competency in most of the cases.

The expansion of subcontracting relations is, on the other hand, one of the other significant obstacles in the process of unionisation and collective bargaining. It is reported that companies increasingly use sub-contracting firms in order to avoid the unionisation of their workforce (According to union officials, this phenomenon is very extensive in the Turkish woodworking and furniture sector)⁵⁶. Moreover, membership registration to a union must be carried out via a notary within a working day. Not many employers would allow their employees to go to a notary to register a union during a working day. Hence, this also constitutes a significant impediment for the process of unionisation and collective bargaining.

The Article 11 of the CBA No 2882 regulates the extension procedure of a collective agreement to non-unionised firms or workplaces. The article stipulates that a collective agreement can be extended to non-unionised firms /workplaces by the decision of the cabinet on the basis of a demand by an employer or a trade union or the Ministry of Labour and Social Security. The extension of a collective agreement to other workplaces is not very common in Turkish industrial relations⁵⁷.

The content of the collective agreements includes provisions on wage levels, wage increases, fringe and social benefits, collection of union subscriptions, election and duties of shop stewards, discipline committees, dismissals, redundancies, compensations, severance payments, promotions, employment of temporary workers, overtime work, overtime payment, shift working, holidays and holiday pays, health and safety, handling of grievances. Most collective agreements also incorporate an appendix about the disciplinary codes and procedures. The Labour Code regulates most of these provisions at minimum levels. Yet the collective agreements usually make available much higher standards and provisions. Some matters, which are not regulated by the Labour Code, are acquired benefits: free commuting service, bonus for religious festivals and the provisions of food aid, work clothes, fabrics and privileges for workers to purchase company products.

Before looking at the coverage of collective agreements, it must be pointed out that the figures on the rate of unionisation supplied by the LS should be treated with caution in the woodworking and the furniture industries. This is because the LS's figures on the union membership have some distortions. Indeed, according to the Trade Union Act, if a union member wishes to put an end to his union affiliation, he or she has to do it in front of a notary and the CSGB must be informed about this resignation or refusal of membership. A notary charge for this process is about USD

⁵⁴ It should be noted that the competency of a trade union is determined by the CSGB in line with the Labour Statistics. The Labour Statistics are issued twice a year. Thus, a trade union may lose or even achieve the competency within six months. But, even if it loses its competency the collective agreements signed by such a union is valid until their terms end.

⁵⁵ If these workers apply to a court and prove that they have been dismissed because of their union membership, the court generally reinstates them to their jobs. Nevertheless, in such cases, most employers prefer not to re-employ such workers and dismiss them by paying their union compensation and severance payment.

⁵⁶ A union official argued that when they try to organise the workforce in an establishment, soon realise that most workers belong to different sub-contractors. If they continue to organise this workforce, the employer simply cancels the sub-contractor's contract.

⁵⁷ It is not surprising that it took place once in the Turkish wood sector. The collective agreement, signed by Ağaç-İş and ORSAN, one of the largest private sector wood products manufacturers, was extended to other 48 workplaces by the government in 1995 (Resmi Gazete, 14.08.1995)

50. Neither workers nor trade unions are likely to pay that much money. What is more is the unions tend to take the advantage of this situation in order to cross the sector level threshold. Thus, the trade union membership records certainly have major distortions. Some scholars argue that the rate of this distortion could be as high as 50% (Çelik and Lordoğlu, 2006).

The rate of the unionisation has increased slightly since 2003. It is currently about 30.2%. However, if we take the rate of distortion (50%) into account, then it is possible to argue that the real rate of unionisation figure could be around 15% in the Turkish woodworking and furniture industry.

Collective Agreements signed in Turkish Wood Working and Furniture Industry between 2003 and 2004⁵⁸

	Number of CA			Number of Establishment			Number of workers			Those Paying Union Due			Those Paying Solidarity Due		
	PB	PR	T	PB	PR	T	PB	PR	T	PB	PR	T	PB	PR	T
2003	8	35	43	17	42	59	695	7,444	8,139	492	4,796	5,288	77	1,706	1,783
2004	8	45	53	17	57	74	690	8,282	8,972	492	5,372	5,854	22	1,468	1,490

Source: CSGB, Labour Statistics for 2003, 2004
PB: Public; PR: Private T: Total

It could be directly inferred from this table that the collective agreements cover 7,444 and 8,972 workers in the woodworking and the furniture private sector between 2003 and 2004⁵⁹. If we take the official data only, we could easily say that the rate of coverage of collective agreements is about 10% in the industry. However, these figures should be treated with caution for at least two reasons. Firstly, they do not include managerial and technical staff and civil servants in both the private and public sectors. Although they have a right to become trade union member, they are not covered by the collective agreements. They are called “exempted personnel” and their size is usually confined to 10% of the workforce⁶⁰. Secondly, informal employment has to be taken into account when calculating the coverage of collective agreements in Turkey. If we accept that the rate of informal employment is about 50%, then the employment would be around 158,202 in the wood sector. Consequently, it could be suggested that only 5.67% of the total workforce is covered by collective agreements in the Turkish woodworking and furniture sectors in 2005.

It should be pointed out that 1,490 workers are not trade union members but are covered by the collective agreements. This is due to the CBA No 2822, which mentions that workers, who are not members of the trade union signing the collective agreements in their place of work, can be covered by paying solitary subscriptions⁶¹. Moreover, there are about 1,648 workers who are union members but who have not paid their union subscriptions⁶².

⁵⁸ Information on the coverage of the collective agreements has been given in the LS since 2002. No detail information is available in the LS preceding 2002. Although there are some inconsistencies, the issue of the coverage of collective agreements in the LS is one of its less controversial areas. The figures come directly from the collective agreements signed. Thus, they are, to a large extent, based on reliable information on the coverage of collective agreements.

⁵⁹ The LS are published twice in a year in January and June. Thus, the collective agreements signed after June, appear in the next year’s LS. The terms of collective agreements are generally two years. Some firms sign collective agreements in odd number years and the others in even number years, therefore it is argue that to find out the exact number of the collective agreements for per year, an average of consecutive two years should be taken into considerations (Çelik and Lordoğlu, 2006).

⁶⁰ It is often a significant source of conflict in regarding the implementation of collective agreements in unionised workplaces. If these employees were covered by the collective agreements, their coverage would have been 10% more.

⁶¹ For this neither the employer’s nor the trade union’s consent is required.

⁶² According to the CSGB, 79,101 workers are employed in the industry in 2004. The rate of unionisation was about 30.36% (CSGB, 2005). However, neither the number of workers nor the rate of unionisation is correct. Both figures need to be carefully assessed. The LS have some exaggerations and distortions by the unions to achieve sectoral level competency.

According to the CBA, the term of a collective agreement can be between 1 and 3 years. Yet, the terms of all collective agreements, signed in the Turkish woodworking and furniture sectors, are traditionally two years.

Acronyms

Ağaç-İş:	Union of Wood Industry Workers of Turkey (Türkiye Ağaç Sanayi İşçileri Sendikası)
ASİS:	Wood Industry Workers Union (Ağaç Sanayi İşçileri Sendikası)
BWI:	Building and Wood Workers' International
CEI-Bois:	European confederation of woodworking industries
CGSB:	Ministry of Labour and Social Security (Çalışma ve Sosyal güvenlik Bakanlığı)
DiE:	State Statistics Institute (Devlet İstatistik Enstitüsü)
DiSK:	Revolutionary Workers Trade Union Confederation (Devrimci İşçi Sendikaları Konfederasyonu)
DPT:	State Planning Organisation (Devlet Planlama Teşkilatı)
Hak-İş:	HakTrade Unions Confederation (Hak İşçi Sendikaları Konfederasyonu)
HDM:	Treasury and International trade Under Secretary (Hazine Dış Ticaret Müsteşarlığı)
Öz-Ağaç-İş:	Genuine Union of Wood, Chipboard, Furniture and Cork Industry Workers of Turkey (Türkiye Ağaç, Sunta, Mobilya ve Mantar İşçileri Sendikası)
TASİS:	Wood Industry Employers Association of Turkey (Türkiye Ağaç Sanayi İşverenler Sendikası)
TİSK:	Confederation of Employer Unions of Turkey (Türkiye İşveren Sendikaları Konfederasyonu)
TUIK:	Statistics Establishment of Turkey (Türkiye İstatistik Kurumu)
Türk-İş:	Workers Trade Unions Confederation of Turkey (Türkiye İşçi Sendikaları Konfederasyonu)
UAB:	Turkish Timber Association (Ulusal Ahşap Birliği)
Yapsan-İş:	Wood and Prefabricated Industry Workers Union (Türkiye Yapım, Ağaç ve Prefabrik Sanayi İşçileri Sendikası)

ANNEX

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B. Consultation

Bulgaria

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Branch Chamber of Woodworking and Furniture Industry	Mrs. Genoveva Christova Mrs. Mariana Kostova	Executive director Organisational secretary
Federation of Trade Union Organizations in Forestry and Wood Processing Industries	Mr. Petar Abrashev Mrs. Lyubka Zacharieva	President Federation secretary
Federation of Light Industry Podkrepa	Mrs. Rositza Marinova Mr. Simeon Manov	Deputy chairman Federation secretary

Romania

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
The Federation of Free Trade Unions in the Woodworking and Furniture Industry, FSLIL	Vasile Badica,	President
The Woodworking and Furniture Trade Unions Federation, FSFMR	Doru Gherghina	Executive President
The Association of Furniture Manufacturers in Romania, APMR	Aurel Rizea C. Ionescu	Executive President Technical Issues Advisor
The Romanian Woodworkers Association, ASFOR	Corneliu Colev	Executive Director

Turkey

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Ağaç-İş	Kemal Esin	G. Secretary
Öz-Ağaç-İş	Eyüp Karederili	President
TASİS	Cengiz Coşkun	G. Secretary
OAİB (Central Anatolia Exporters Unions)	Sevil Salman	Researcher
MOBDER	Fatih Kiran	Director
DPT (SPO) State Planning Organisation	Cengizhan Akyan	Researcher

European Organisations consulted

Name of the organisation consulted	Date of the sending of the report
EFBWW	October 6, 2006
UEA	October 6, 2006
EFIC	October 6, 2006