



Representativeness of the European social partner organisations: Paper industry

Objectives of study

Economic background

National level of interest representation

European level of interest representation

Commentary

References

List of abbreviations

This report is available in electronic format only.

This study aims to provide the necessary information for assisting the existing sectoral social dialogue in the paper sector. The study first sketches the economic and employment situation of the sector, then analyses the social partner organisations in all of the EU Member States (with the exception of Latvia), with special emphasis on membership, role in collective bargaining and public policy, and national and European affiliations. The study finally looks at the European organisations relevant to the sector, in particular their membership composition and their capacity to negotiate. The aim of the EIRO series of studies on representativeness is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. The impetus for these studies arises from the goal of the European Commission to recognise the representative social partner organisations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU). Hence, this study is designed to provide the basic information required to establish sectoral social dialogue.

Objectives of study

The aim of this **representativeness** study is to identify the relevant national and supranational associational actors – that is the **trade unions** and **employer** associations – in the field of industrial relations in the paper sector, and show how these actors relate to the sector’s European interest associations of labour and business. The impetus for this study, and for similar studies in other sectors, arises from the aim of the European Commission to identify the representative social partner associations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU). Hence, this study seeks to provide basic information needed to set up sectoral social dialogue. The effectiveness of the European social dialogue depends on whether its participants are sufficiently representative in terms of the sector’s relevant national actors across the EU Member States. Hence, only European associations which meet this precondition will be admitted to the European **social dialogue**.

Against this background, the study will first identify the relevant national social partner organisations in the paper sector, subsequently analysing the structure of the sector’s relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both the national and European level of interest representation. The study includes only organisations whose membership domain is ‘sector-related’ (see below). At both national and European levels, a multiplicity of associations exist which are not considered as social partner organisations as they do not essentially deal with industrial relations. Thus, there is a need for clear-cut criteria which will enable analysis to differentiate the social partner organisations from other associations.

As regards the national-level associations, classification as a sector-related social partner organisation implies fulfilling one of two criteria; the associations must be:

- either a party to ‘sector-related’ **collective bargaining** OR
- a member of a ‘sector-related’ European association of business or labour that is on the Commission’s list of European social partner organisations consulted under Article 154 of the TFEU, and/or which participates in the sector-related European social dialogue.

Taking affiliation to a European social partner organisation as a sufficient criterion for determining a national association as a social partner implies that such an association may not be involved at all in industrial relations in its own country. Hence, this selection criterion may seem odd at first glance. However, if a national association is a member of a European social partner organisation, it becomes involved in industrial relations matters through its membership in the European organisation.

Furthermore, it is important to assess whether the national affiliates to the European social partner organisations are engaged in industrial relations in their respective countries. Affiliation to a European social partner organisation and/or involvement in national collective bargaining are of utmost importance to the European social dialogue, as they are the two constituent mechanisms that can systematically connect the national and European levels.

In terms of the selection criteria for the European organisations, this report

- includes those sector-related European social partner organisations that are on the Commission’s list of consultation.
- also includes any other European association with sector-related national social partner organisations – as defined above – under its umbrella.

Thus, the aim to identify the sector-related national and European social partner organisations implies both a ‘top-down’ and ‘bottom-up’ approach.

Definitions

For the purpose of this study, the paper sector is defined in terms of the Statistical Classification of Economic Activities in the European Community (Nomenclature statistique des activités économiques dans la Communauté européenne, NACE), to ensure the cross-national comparability of the findings. More specifically, the paper sector is defined as embracing NACE (Rev. 2) 17.

This includes the following activities:

NACE Rev. 2	
17.1	Manufacture of pulp, paper and paperboard
17.11	Manufacture of pulp
17.12	Manufacture of paper and paperboard
17.2	Manufacture of articles of paper and paperboard
17.21	Manufacture of corrugated paper and paperboard and of containers of paper and paperboard
17.22	Manufacture of household and sanitary goods and of toilet requisites
17.23	Manufacture of paper stationery
17.24	Manufacture of wallpaper
17.29	Manufacture of other articles of paper and paperboard

The domains of the trade unions and employer organisations and scope of the relevant **collective agreements** are likely to vary from this precise NACE demarcation. The study therefore includes all trade unions, **employer organisations** and multi-employer collective agreements which are ‘sector-related’ in terms of any of the following four aspects or patterns:

1. congruence – the domain of the organisation or scope of the collective agreement must be identical to the NACE demarcation, as specified above;
2. sectionalism – the domain or scope covers only a certain part of the sector, as defined by the aforementioned NACE demarcation, while no group outside the sector is covered;

3. overlap – the domain or scope covers the entire sector along with parts of one or more other sectors. However, it is important to note that the study does not include general associations which do not deal with sector-specific matters;
4. sectional overlap – the domain or scope covers part of the sector plus (parts of) one or more other sectors.

Figure 1: Sector-relatedness of social partner organisations: Domain patterns

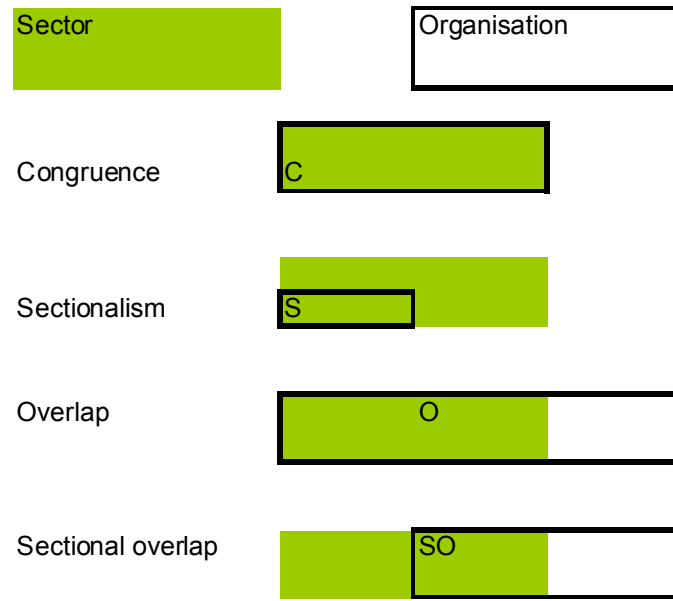


Table 1: Domain pattern and scope of the organisation’s domain

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the union’s/employer organisation’s domain embrace potentially all employees in the paper sector?	Does the union/ employer organisation also represent members outside the paper sector?
Congruence (C)	Yes	No
Sectionalism (S)	No	No
Overlap (O)	Yes	Yes
Sectional overlap (SO)	No	Yes

Note: The domain pattern results from the answers to the questions on the scope of the domain derived in Table 5

At European level, a Sectoral Social Dialogue Committee for the paper sector was established under the auspices of the European Commission in April 2010. The Confederation of European Paper Industries ([CEPI](#)) on the employer side as well as the European Mine, Chemical and Energy Workers’ Federation ([EMCEF](#)) on the [employees](#)’ side participate in the sector’s

European social dialogue. Thus, affiliation to one of these European organisations is a sufficient criterion for classifying a national association as a social partner organisation for the purpose of this study. However, it should be noted that the constituent criterion is one of sector-related membership. This is important in the case of EMCEF in particular, due to its multi-sectoral domain. Thus, the study will include only those EMCEF affiliates whose domain relates to the paper sector, as defined earlier.

Table 2: Determining the ‘sector relatedness’ of an organisation

Scope	Question in the standardised questionnaire to all correspondents	Possible answers	Notes and explanations
Domain of the organisation within the sector	Does the union’s /employer organisation’s domain embrace potentially all employees in the paper sector?	Yes/No	This question has not been asked directly in the questionnaire, but is considered to be ‘Yes’ if all of the five following sub-questions are ‘ yes ’. It is considered to be ‘No’ if at least one of the following sub-questions is answered with ‘ no ’.
	...cover ‘basically all’ groups of employees (min.: blue collar, white collar) in the paper sector?	Yes/No	This question refers to the organisation’s scope of the sector with regard to different types of employment contracts, etc. As the contractual forms are rather heterogeneous, the minimum requirement to answer this question with ‘yes’ would be the fact that both blue-collar and white-collar workers are potentially covered by the organisation’s domain.
	...cover the ‘whole’ paper sector in terms of economic activities (that is, including all sub-activities)	Yes/No	This question refers to the economic sub-activities of the NACE code chosen. In the spreadsheet part of the questionnaire, correspondents have been provided with a detailed breakdown of sub-activities down to the four-digit level.
	... cover employees in all types of companies (all types of ownership: private, public...) in the paper sector?	Yes/No	This question refers to ownership. Some organisations might limit for instance their domain to domestically owned, or to public sector companies/employees only.
	... cover employees in enterprises of all sizes in the paper sector?	Yes/No	Often, organisations limit their domain to enterprises by size class (e.g. SMEs only).
	...cover all occupations in the paper sector?	Yes/No	Some organisations (notably trade unions) delimit their domain to certain occupations only. This sub-question intends to identify these occupational organisations.
	Domain of the organisation	Does the union also represent members outside the paper	Yes/No

Scope	Question in the standardised questionnaire to all correspondents	Possible answers	Notes and explanations
outside the sector	sector?		

Source: Standardised Excel-based questionnaire, sent to EIRO National correspondents.

Collection of data

The collection of quantitative data, such as those on membership, is essential for investigating the representativeness of the social partner organisations. Unless otherwise stated, this study draws on the country studies provided by the EIRO national centres. The EIRO correspondents are provided with standardised questionnaires in both Word and Excel format by the European Foundation, which they complete through contacting the sector-related social partner organisations in their countries. The contact is generally made via telephone interviews in the first place, but might also be established via email in certain cases. In case of non-availability of any representative, the national correspondents are asked to fill out the relevant questionnaire based on secondary sources, such as information given on the social partners' website, or derived from previous research studies.

It is often difficult to find precise quantitative data. In such cases, the EIRO national centres are asked to provide rough estimates rather than leaving a question blank, given the practical and political relevance of this study. However, if there is any doubt over the reliability of an estimate, this will be noted.

In principle, quantitative data may stem from three sources, namely:

- official statistics and representative survey studies;
- administrative data, such as membership figures provided by the respective organisations, which are then used for calculating the density rate on the basis of available statistical figures on the potential membership of the organisation;
- personal estimates made by representatives of the respective organisations.

While the data sources of the economic figures cited in the report are generally statistics, the figures in respect of the organisations are usually either administrative data or estimates. Furthermore, it should be noted that several country studies also present data on trade unions and business associations that do not meet the above definition of a sector-related social partner organisation, in order to give a complete picture of the sector's associational 'landscape'. For the above substantive reasons, as well as for methodological reasons of cross-national comparability, such trade unions and business associations will not be considered in this overview report. However, these organisations can still be found in the national contributions which will be published together with the overview report.

Quality assurance

In order to assure the quality of the information gathered, several verification procedures and feedback loops have been included in the process of drawing up this study.

- First, staff of the European Foundation, together with the author of this report carried out consistency checks of the figures provided, and made sure that the organisations listed correspond to the definition relevant for the scope of this study (see above).
- Second, the European Foundation sent the national contributions to both the national members of the governing board and to the European-level sector-related social partners' organisations. The peak level organisations then asked their affiliates to verify the information. Feedback received from the sector-related organisations was then taken into account, if it is in line with the methodology of the study.
- Third, the complete study was finally evaluated by the European-level sectoral social partners and Eurofound's Advisory Committee on Industrial Relations, which consists of representatives from both sides of industry, governments and the European Commission.

Structure of the report

The study consists of three main parts, beginning with a brief summary of the sector's economic background. The report then analyses the relevant social partner organisations in all EU Member States, with the exception of Latvia which has not been part of the EIRO network (and thus has not provided any data) since March 2010. The study therefore covers 26 European countries in total. The third part of the analysis considers the representative associations at European level.

Each section contains a brief introduction explaining the concept of representativeness in greater detail, followed by the study findings. As representativeness is a complex issue, it requires separate consideration at national and European level for two reasons. Firstly, the method applied by national regulations and practices to capture representativeness has to be taken into account. Secondly, the national and European organisations differ in their tasks and scope of activities. The concept of representativeness must therefore be suited to this difference.

Finally, it is important to note the difference between the research and political aspects of this study. While providing data on the representativeness of the organisations under consideration, the report does not reach any definite conclusion on whether the representativeness of the European social partner organisations and their national affiliates is sufficient for admission to the European social dialogue. The reason for this is that defining criteria for adequate representativeness is a matter for political decision rather than an issue of research analysis.

Economic background

The paper industry consists of two relatively diverse subsectors: the highly concentrated, capital-intensive and highly internationalised pulp, paper and paperboard production industry, and the so-called 'converting industries' segment, specialising in the manufacture of articles of paper and paperboard. In the latter subsector, companies tend to be smaller than in the pulp and paper manufacturing industry and to operate more on a regional rather than worldwide market.

Generally, the overall paper industry in Europe has recorded a steady rise in production over the past decade, whilst employment fell by 15% between 2000 and 2008 ([European Commission](#)). At the same time, the sector as such has declined in a few countries, such as Denmark and Finland, due to closures of large paper mills, delocalisation processes – frequently the move of large companies to be geographically closer to their main consumers – and increasing energy prices. According to [Eurostat](#) Structural Business Statistics (SBS), in 2008 there were almost 20,700

companies in the sector. In the fourth quarter of 2010 almost 700,000 people were employed in the sector in the EU27, according to Eurostat's Labour Force Survey (LFS). It appears that the fall in employment accelerated with the beginning of the global economic crisis in 2007/8. After reaching a low in 2009 employment generally grew slightly in 2010. The countries hit particularly hard by the crisis, at least in terms of employment, were Denmark, Finland, France, Greece, the Netherlands, Poland, Portugal, Romania and Slovakia. Since the vast majority of the sector's employees are medium- or low-skilled workers, they appear to be more vulnerable in the case of job losses compared to workers in most other sectors which record lower numbers of medium- or low-skilled workers. In terms of company structure, it is important to differentiate between the pulp and paper producing sector, which is dominated by large enterprises that typically operate internationally, and the converting industries, which are generally much smaller firms that tend to operate more regionally. Whereas in 2002/3 companies in the former subsector had over 100 employees on average, the number stood at about 30 in the converting sector. In the overall paper industry, about half of the employees worked in SMEs, while the remainder worked in large companies with 250 employees or more (see: European Commission, 2006).

Employment characteristics

The share of employees with standard employment contracts among all sectoral workers is very high in almost all countries, while the incidence of self-employment appears to be low. No quantitative information is available on the incidence of [part-time work](#) and other forms of atypical employment. Male employees clearly prevail in the European paper industry, with a share of more than 70% among the sector's workforce in the EU27. There is only one country where the share of female employment/ employees comes close to that of men –the Czech Republic. As indicated earlier, overall qualification of the sector's workers tends to be relatively poor, with less than 20% of the employed workforce deemed to be highly qualified ([European Commission](#)).

Long-term trends

In recent decades the EU paper industry has undergone a process of increasing economic internationalisation. Growing demand for paper and paper products, in particular in the rapidly developing countries of Asia, as well as technological innovation, have raised the capital intensity of the industry and thus encouraged large-scale consolidation processes within the EU paper market. At the same time, international competition, in particular in the pulp and paper segment of the sector, has become fiercer, due to the fact that producers in the southern hemisphere can rely on lower material and labour costs. In addition, they often do not have to comply with stringent environmental regulations as in Europe, and they operate in an environment with less awareness of ecological issues. As a consequence, many large European companies have begun to shift their investments from Europe into new production facilities in South America and South-East Asia. Apart from the increasing need to cope with ecological goals and comply with national and international environmental regulations, the EU paper industry has also been faced with a rise in energy costs. This is especially critical to the sector as the demand for energy is particularly high in the paper industry. Rising energy prices are significantly reducing pulp and paper mill profitability and therefore constitute another reason for many EU companies to shift their operations abroad or even close down (part of) their sites (see: European Commission, 2006).

**Table 3: Total employers and employment in paper, 1998 and 2008
(approx.)**

Country	Year	Number of companies	Total employment	Female employment	Male employment	Total sectoral employment as % of total employment in economy
AT	1998	172	17,601	n.a.	n.a.	0.48
AT	2008	154	18,492	n.a.	n.a.	0.45
BE	1998	n.a.	n.a.	n.a.	n.a.	n.a.
BE	2008	459	14,325	3,030	11,295	n.a.
BG	1998	n.a.	n.a.	n.a.	n.a.	n.a.
BG	2008	317	11,095	4,438	6,657	0.29
CY	1998	n.a.	n.a.	n.a.	n.a.	n.a.
CY	2008	43	743	n.a.	n.a.	0.20
CZ	1998	682	25,200	11,400	13,800	0.52
CZ	2008	976	22,600	10,300	12,300	0.45
DE	1998	n.a.	145,000	42,000	103,000	0.38
DE	2007	2,534	146,000	43,000	103,000	0.36
DK	2000	202	10,063	2,665	7,398	n.a.
DK	2008	164	6,835	1,806	5,029	n.a.
EE	1998	n.a.	n.a.	n.a.	n.a.	n.a.
EE	2008	53	1,717	n.a.	n.a.	0.26
EL	2000	598	9,242	1,690	7,552	0.23
ES	1998	n.a.	n.a.	n.a.	n.a.	n.a.
ES	2008	2,186	44,000	7,100	37,000	0.22
FI	1998	40	35,743	8,736	27,007	1.6
FI	2008	200	24,435	5,681	18,754	1.0
FR	1998	n.a.	n.a.	n.a.	n.a.	n.a.
FR	2008	1,464	71,847	18,536	53,311	n.a.
GR	2008	1,100	8,064	1,131	6,933	0.18
HU	1998	n.a.	n.a.	n.a.	n.a.	n.a.
HU	2008	n.a.	n.a.	n.a.	n.a.	n.a.
IE	1998	n.a.	n.a.	n.a.	n.a.	n.a.
IE	2008	n.a.	2,000	n.a.	n.a.	0.09
IT	1996	4,809	85,627	19,892	65,735	0.39

IT	2008	4,062	76,705	17,819	58,886	0.3
LT	1998	n.a.	n.a.	n.a.	n.a.	n.a.
LT	2008	95	2,987	n.a.	n.a.	0.32
LU	1998	n.a.	n.a.	n.a.	n.a.	n.a.
LU	2009	2	n.a.	n.a.	n.a.	n.a.
MT	2001	21	304	n.a.	n.a.	0.20
MT	2008	25	255	n.a.	n.a.	0.15
NL	1998	1,285	n.a.	n.a.	n.a.	n.a.
NL	2008	1,210	n.a.	n.a.	n.a.	n.a.
PL	1998	286	39,000	n.a.	n.a.	0.30
PL	2008	341	45,914	15,040	30,874	0.33
PT	1998	366	12,942	n.a.	n.a.	0.55
PT	2008	381	11,343	n.a.	n.a.	0.35
RO	1998	387	22,174	n.a.	n.a.	0.25
RO	2008	802	15,389	n.a.	n.a.	0.18
SE	1998	399	n.a.	n.a.	n.a.	n.a.
SE	2008	433	n.a.	n.a.	n.a.	n.a.
SI	1999	249	6,695	2,205	4,490	0.90
SI	2008	206	4,803	1,564	3,239	0.57
SK	1999	108	13,400	5,600	7,800	0.7
SK	2008	165	9,900	3,100	6,800	0.4
UK	1998	n.a.	115,376	29,652	85,724	0.42
UK	2008	2,090	68,767	13,685	55,082	0.24

Source: EIRO national centres, national statistics. For detailed description of sources please refer to the national reports.

Table 4: Total employees in paper, 1998 and 2008 (approx.)

Country	Year	Total employees	Female employees	Male employees	Total sectoral employees as % of total employees in economy
AT	1998	17,601	n.a.	n.a.	0.56
AT	2008	18,450	n.a.	n.a.	0.52
BE	1998	n.a.	n.a.	n.a.	n.a.
BE	2008	13,621	2,820	10,801	0.41
BG	1998	n.a.	n.a.	n.a.	n.a.
BG	2008	11,095	4,438	6,657	0.45
CY	1998	n.a.	n.a.	n.a.	n.a.
CY	2008	n.a.	n.a.	n.a.	n.a.
CZ	1998	24,000	11,300	12,700	0.58
CZ	2008	21,400	10,100	11,300	0.51
DE	1998	n.a.	n.a.	n.a.	n.a.
DE	2008	131,016	30,709	100,307	0.48
DK	1998	9,998	2,944	7,394	n.a.
DK	2008	6,814	1,804	5,010	n.a.
EE	1998	n.a.	n.a.	n.a.	n.a.
EE	2008	1,709	n.a.	n.a.	0.28
EL	2000	8,420	1,650	6,770	0.30
EL	2008	8,064	1,131	6,933	0.26
ES	1998	n.a.	n.a.	n.a.	n.a.
ES	2008	42,700	7,000	35,700	0.26
FI	1998	35,729	8,732	24,997	n.a.
FI	2008	24,374	5,669	18,703	n.a.
FR	1998	n.a.	n.a.	n.a.	n.a.
FR	2008	71,847	18,536	53,311	n.a.
HU	2000	n.a.	n.a.	n.a.	n.a.
HU	2008	n.a.	n.a.	n.a.	n.a.
IE	1998	n.a.	n.a.	n.a.	n.a.
IE	2008	2,000	n.a.	n.a.	0.09

IT	1996	77,459	17,547	59,912	0.48
IT	2008	70,918	16,065	54,853	0.37
LT	1998	n.a.	n.a.	n.a.	n.a.
LT	2008	2,987	n.a.	n.a.	0.32
LU	1998	n.a.	n.a.	n.a.	n.a.
LU	2009	450	45	405	0.14
MT	2002	286	n.a.	n.a.	0.21
MT	2008	237	n.a.	n.a.	0.15
NL	1998	26,000	4,000	22,000	0.42
NL	2008	19,200	3,100	16,100	0.24
PL	1998	39,000	n.a.	n.a.	0.40
PL	2008	45,914	15,040	30,874	0.45
PT	1998	12,573	3,354	9,219	0.58
PT	2008	10,991	2,990	8,001	0.36
RO	1998	22,174	n.a.	n.a.	0.41
RO	2008	15,389	n.a.	n.a.	0.30
SE	1998	44,207	n.a.	n.a.	1.27
SE	2008	35,695	n.a.	n.a.	0.88
SI	1998	6,374	2,093	4,281	1.01
SI	2008	4,647	1,510	3,137	0.65
SK	1998	11,059	3,719	7,340	n.a.
SK	2008	7,649	2,585	5,064	n.a.
UK	1998	112,722	28,267	84,455	0.48
UK	2008	66,291	12,859	53,432	0.27

Source: EIRO national centres, national statistics. For a detailed description of sources please refer to the national reports.

Table 3 and Table 4 give an overview of the development from the late 1990s to the late 2000s (just before the economic crisis peaked in most countries), presenting figures on companies, employment and employees in the sector and in relation to the national economy. These figures stem mainly from national sources collected through the national centres. In most Member States (nine out of 14), for which related data are available, the number of companies more or less increased, partially reflecting an expansion of the sector in some countries. By contrast, in five countries the number of companies fell slightly. These decreases appear to be at least partially attributable to a general trend of market concentration, in particular in the paper manufacturing subsector, which can be observed in almost all EU Member States.

All countries with available data but three (Austria, Germany and Poland) recorded a fall in overall employment in the period from the late 1990s to the late 2000s. In terms of the number of

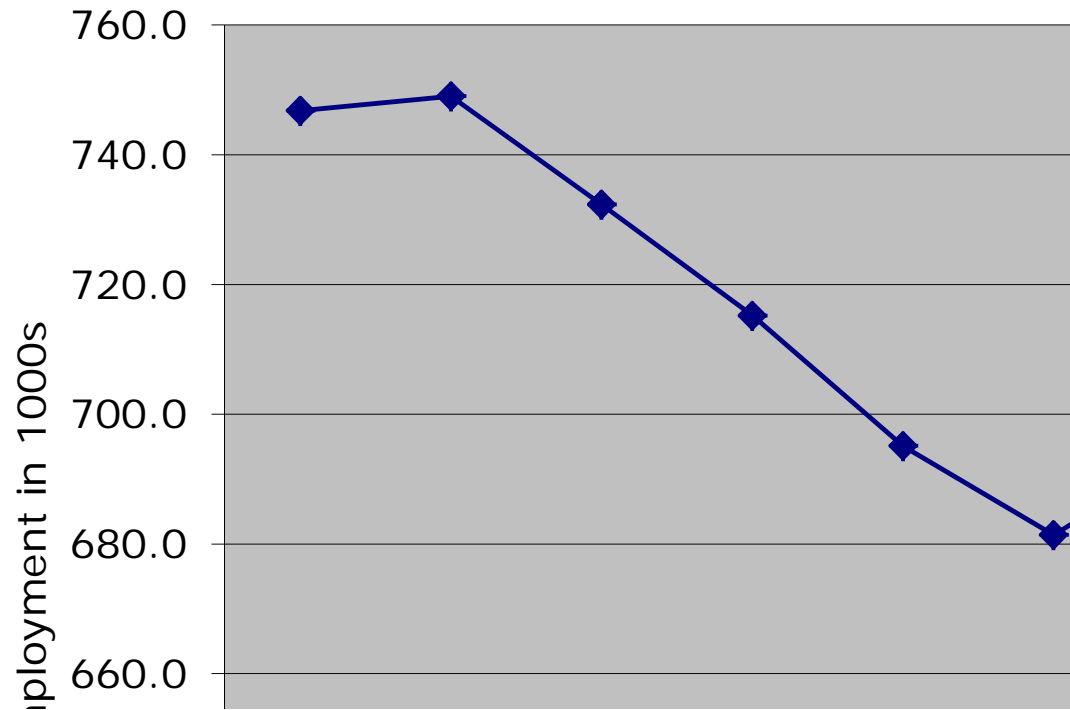
sectoral employees only Austria and Poland recorded increases during this period. In terms of absolute numbers, the UK holds an outstanding position with regard to this decline, with a loss of more than 46,000 jobs within a decade. In all countries for which comparable data are available, except for Germany, Italy and Slovakia the number of employees comes close to or even equals the total level of employment. This indicates that the sector is characterised by a high incidence of standard employment. Table 3 and Table 4 also show that women represent only a relatively small minority of sectoral workers in all countries with available data, with the exception of the Czech Republic. In most countries for which data are available, such as Belgium, Denmark, Finland, France, Germany, Greece, Italy, Luxembourg, the Netherlands, Poland, Portugal, Slovakia, Slovenia, Spain and the UK, the numbers of male employment/ employees exceed those of female employment/ employees many times over. The tables also indicate that the sector is not very large and – in terms of employment shares – continued to decline in all countries but Poland up to the late 2000s. Its share in aggregate employment is below 1% in all countries under examination apart from Finland. In a few countries, such as Cyprus and Malta, the sector employs only a few hundreds of workers.

Recent developments

For at least a decade before the global economic downturn many countries recorded notable business expansion within the paper sector. However, the impact of the economic crisis on the sector during the period 2008–10 varies from one country to the other, according to the country reports. In the EU27 overall, both production (according to CEPI statistics) and employment within the sector declined in the period 2008–9, while an upward trend in terms of paper and board production (up 8% on average in 2010 in those Member States covered by CEPI) and employment was observable in most countries for 2010 (or at least the second half of 2010). Stagnating or even shrinking turnover and sales have ensued from a drop in demand for paper, paperboard and paper packaging products of other business sectors.

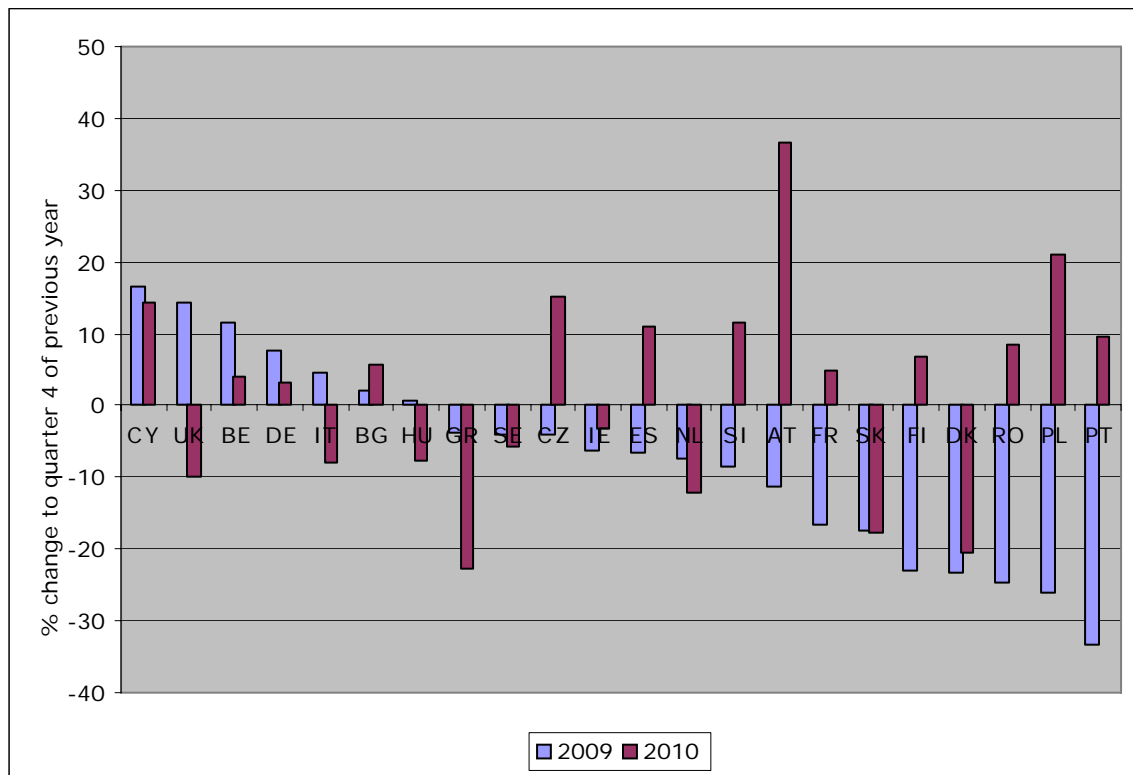
Figure 2 shows that overall the paper industry in the European Union has been severely hit by the crisis, even though, according to CEPI, slightly less hard than the European manufacturing industry taken as a whole. While total employment (for the age group 15–64) peaked at almost 750,000 in the second quarter of 2008, it stood at slightly more than 650,000 in the first half of 2010. Since then, however, for the last two quarters for which data are available, a strong upward trend again is indicated. Yet, the pre-crisis levels of employment were not reached in quarters three and four of 2010.

Figure 2: Overall development of employment (workforce aged 15–64) during the crisis in the EU27 paper sector, total numbers



Source: Eurostat, Labour Force Survey

Figure 3: Member States' development of employment (workforce aged 15–64) during the crisis in the paper sector, percentage change from quarter four of the previous year



Source: Eurostat, Labour Force Survey. No data available for EE, LT, LU, LV and Malta

Figure 3 indicates that in only a few countries, such as Belgium, Bulgaria, Cyprus and Germany, has the paper industry been relatively unshaken by the economic recession. In most EU Member States the sector has been severely affected by the crisis, in that sectoral employment declined significantly in at least one of the two consecutive years 2009–10. In a relative majority of countries, in particular Austria, the Czech Republic, Finland, France, Poland, Portugal, Romania, Slovenia and Spain, the majority of job losses in the sector took place during 2009, and there was an upward trend in employment in 2010. However, the crisis appears to have had a delayed effect on the sector's labour market in Hungary, Italy and the UK; in the latter countries significant redundancies came into effect during or after 2010. A fourth group of countries, which recorded job losses for each of the two consecutive years 2009–10, comprises Denmark, Greece, Ireland, the Netherlands, Slovakia and Sweden. This unfavourable economic situation has, at least in a few countries, also affected industrial relations within the sector. For instance, in December 2009 in Ireland the recession prompted the cross-sectoral IBEC, which represents the employers within the sector, to withdraw from the national pay agreement, with the consequence that most employers in the sector have refused to pay the terms of this agreement. Other disputes among the sectoral industrial relations actors which have evolved as a result of the global economic downturn have also been reported from other countries, such as Slovenia, where in 2010 sectoral collective bargaining was postponed to 2011, as well as Sweden, where the crisis triggered industrial action within the sector and challenged the usual temporal order of the 2010 sectoral bargaining process ([SE10040191](#)). By contrast, in some countries collective bargaining was used

to adopt or renew anti-crisis measures, such as short-time working schemes (in Austria and Luxembourg, for example) or a reduction in working hours and a crisis time credit system (in Belgium).

National level of interest representation

In many Member States, statutory regulations refer explicitly to the concept of representativeness when assigning certain rights of interest representation and public governance to trade unions and/ or employer organisations. The most important rights addressed by such regulations include: formal recognition as a party to collective bargaining; extension of the scope of a multi-employer collective agreement to employers not affiliated to the signatory employer organisation; and participation in public policy and tripartite bodies of social dialogue. Under these circumstances, representativeness is normally measured by the membership strength of the organisations. For instance, statutory extension provisions usually allow for [extension of collective agreements](#) to unaffiliated employers only when the signatory trade union and employer association represent 50% or more of the employees within the agreement's domain.

As outlined, the representativeness of the national social partner organisations is of interest to this study in terms of the capacity of their European umbrella organisations for participation in European social dialogue. Hence, the role of the national actors in collective bargaining and public policymaking constitutes another important component of representativeness. The effectiveness of European social dialogue tends to increase with the growing ability of the national affiliates of the European organisations to regulate the employment terms and influence national public policies affecting the sector.

A cross-national comparative analysis shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy (see Traxler, 2004). Social partner organisations that are engaged in multi-employer bargaining are incorporated in state policies to a significantly greater extent than their counterparts in countries where multi-employer bargaining is lacking. This can be attributed to the fact that only multi-employer agreements matter in macroeconomic terms, setting an incentive for the governments to persistently seek the cooperation of the social partner organisations. If single-employer bargaining prevails in a country, none of the collective agreements will have a noticeable effect on the economy due to their limited scope. As a result, the basis for generalised tripartite policy concertation will be absent.

In summary, representativeness is a multi-dimensional concept that embraces three basic elements: the membership domain and strength of the social partner organisations; their role in collective bargaining; and their role in public policymaking.

Membership domains and strength

The membership domain of an organisation, as formally established by its constitution or name, distinguishes its potential members from other groups which the organisation does not claim to represent. As already explained, this study considers only organisations whose domain relates to the paper sector. However, there is insufficient room in this report to delineate the domain demarcations of all the organisations. Instead, the report notes how they relate to the sector by classifying them according to the four patterns of 'sector-relatedness', as specified earlier.

Regarding membership strength, there is a difference between strength in terms of the absolute number of members and strength in relative terms. Research usually refers to relative membership strength as the density – in other words, the ratio of actual to potential members.

Furthermore, a difference also arises between trade unions and employer organisations in relation to measuring membership strength. Trade union membership simply means the number of unionised persons. However, in this context a clarification of the concept of ‘member’ should be made. Whereas in most countries recorded membership includes both employees in jobs and members who are not in active employment (i.e. unemployed persons, retired workers, etc.), some countries provide information on employed membership only. Hence, two measures of trade union density have to be differentiated: gross union density (including inactive members) on the one hand and net union density (employed union members only). In addition to taking the total membership of a trade union as an indicator of its strength, it is also reasonable to break down this membership total according to sex. However, measuring the membership strength of employer organisations is more complex since they organise collective entities, namely companies that employ employees. In this case, therefore, two possible measures of membership strength may be used – one referring to the companies themselves, and the other to the employees working in the member companies of an employer organisation.

For a sector study such as this, measures of membership strength of both the trade unions and employer organisations have also to consider how the membership domains relate to the sector. If a domain is not congruent with the sector demarcation, the organisation’s total density – that is, the density referring to its overall domain – may differ from sector-specific density, or the organisation’s density referring to the sector. This report will first present the data on the domains and membership strength of the trade unions and will then consider those of the employer organisations.

Summarising, this report basically distinguishes between three types of organisational densities, as defined in Table 5, which are – depending on data availability – also broken down into net and gross rates.

Table 5: Definition of organisational density figures

Type of density	Definition	Breakdown
Domain density	Total number of employees (companies) organised by the organisation divided by potential number of employees (companies) as demarcated by the organisation's domain	Net and gross; Employees (for trade unions) Companies and employees (for employer organisations)
Sectoral density	Number of employees (companies) organised by the organisation in the paper sector divided by total number of employees (companies) in the sector.	Net and gross; Employees (for trade unions) Companies and employees (for employer organisations)
Sectoral domain density	Number of employees (companies) organised by the organisation in the paper sector divided by potential number of employees (companies) in the commerce sector as demarcated by the organisation's domain	Net and gross; Employees (for trade unions) Companies and employees (for employer organisations)

Trade unions

Table 6 and Table 7 present the trade union data on their domains and membership strength. The tables list all trade unions which meet at least one of the two criteria for classification of a sector-related social partner organisation, as defined earlier. All of the 26 countries under consideration record at least one sector-related trade union. In total, 62 sector-related trade unions could be identified. None of these 62 unions has demarcated its domain in a way which is congruent with the sector definition. This underscores the fact that statistical definitions of business activities differ somewhat from the lines along which employees identify common interests and band together in trade unions. Domain demarcations resulting in overlap in relation to the sector occur in almost half (49.2%) of the cases and thus prevail in the sector. Overlap by and large arises from two different modes of demarcation. The first one refers to general (that is, cross-sectoral) domains (for example, ACLVB/CGSLB and CG/AC of Belgium, C-MOS of the Czech Republic, GWU of Malta, FNV Bondgenoten and CNV Vakmensen of the Netherlands, Pergam of Slovenia and GMB and Unite of the UK). The second and more frequent mode in the sector relates to various forms of multi-sector domains, covering contiguous sectors, frequently in the broader forestry and woodworking segment (for example, FSOGSDP of Bulgaria, OS DLV of the Czech Republic, EMT of Estonia, OGB-L Bois of Luxembourg and FLMCH of Romania) or in graphics, publishing and printing – often including communication services (in the case of Filpac CGT and FCA-CFTC of France, FSEPP of Greece, PDSZ of Hungary, FISTEL, SLC-CGIL, UILCOM and UGL Carta e Stampa of Italy as well as SINCELPAGRAFI, SITESE and

SINDETELCO of Portugal). In a few cases, overlap ensues from domains covering the chemical industry, including paper, such as FCE-CFDT of France and SINDEC of Portugal, while in other cases the domains may unspecifically cover all or part of the industry sector, which applies to FLI of Bulgaria and OVIEK/SEK and SEVETTYK/PEO of Cyprus. Sectional overlaps occur in exactly 45.9% of the cases. This is usually because of domain demarcations that focus on certain categories of employees which are organised across several or all sectors.

Employee categories are specified by various parameters, such as distinct occupations (for example, managers and technicians, see BBTK/SETCa and CNE/GNC of Belgium, Fiboa CFE-CGC of France and Ledarna of Sweden; or engineers, see Sveriges Ingenjörer of Sweden), employment status (for example white-collar workers, as is the case of GPA-djp of Austria, Belgium's LBC/NVK, Denmark's HK, Finland's TU and Sweden's Unionen, or blue-collar workers, as with PRO.GE of Austria, 3F of Denmark and LMPF of Lithuania), and geographic region (such as ELA HAINBAT and CIG of Spain, which are each active only in certain regions). Finally, sectionalism ensues from the existence of sector-specific trade unions that represent and organise only certain categories of employees in the sector (such as blue-collar workers, see Finland's Paperiliitto, or employees active only in particular parts of the sector, see Poland's NSZZ 'Solidarność' - Paper Workers Section and Sweden's Pappers). Sectional distribution accounts for 4.9% of the cases.

Table 6: Domain coverage and membership of trade unions in paper, 2008/9/10

	Trade union	Type of membership	Domain coverage	Membership				
				Members	Members active	Members sector	Members sector active	Female membership (% of total)
AT	GPA-djp	voluntary	sectional overlap	n.a.	180,000	n.a.	1,670	44
	PRO-GE	voluntary	sectional overlap	251,891	n.a.	n.a.	5,558	17
BE	BBTK/SETca*	voluntary	sectional overlap	382,291	n.a.	n.a.	n.a.	n.a.
	CNE/GNC*	voluntary	sectional overlap	157,190	n.a.	n.a.	n.a.	65
	LBC/NVK*	voluntary	sectional overlap	309,183	n.a.	n.a.	n.a.	60
	ACLVB/CGSL B*	voluntary	sectional overlap	265,123	n.a.	n.a.	n.a.	n.a.
	CG/AC*	voluntary	sectional overlap	376,768	n.a.	n.a.	n.a.	n.a.
	CSC/ACV-BIE*	voluntary	sectional overlap	285,169	n.a.	n.a.	n.a.	14
BG	FSOGSDP*	voluntary	overlap	7,033	7,033	837	837	40
	FLI*	voluntary	overlap	5,000	5,000	500	500	50
CY	OVIEK/SEK*	voluntary	overlap	n.a.	6,320	n.a.	190	35
	SEVETTYK/PEO*	voluntary	overlap	n.a.	13,885	n.a.	40	49
CZ	OS DLV*	voluntary	overlap	18,580	16,250	1,880	1,820	33
	C-MOS*	voluntary	overlap	2,000	1,500	1,500	1,125	30
DE	IGBCE*	voluntary	sectional overlap	687,711	n.a.	26,861	n.a.	19
	Verdi*	voluntary	sectional overlap	2,138,200	n.a.	19,500	n.a.	51
DK	3F	voluntary	sectional overlap	381,110	318,792	n.a.	2,400	29
	HK	voluntary	sectional overlap	31,1815	219,232	n.a.	200	75
EE	EMT	voluntary	overlap	1,000	1,000	100	100	40
EL	FSEPP	voluntary	overlap	5,400	5,400	1,200	1,200	30
ES	FSC-CCOO*	voluntary	sectional	262,000	262,000	2,500	2,500	n.a.

			overlap					
	FIA-UGT*	voluntary	sectional overlap	75,838	n.a.	2,026	n.a.	n.a.
	ELA HAINBAT*	voluntary	sectional overlap	22,937	n.a.	n.a.	n.a.	n.a.
	CIG*	voluntary	sectional overlap	n.a.	n.a.	n.a.	n.a.	n.a.
	LAB*	voluntary	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
FI	Paperiliitto	voluntary	sectionalism	41,000	15,000	21,000	15,000	18
	TU	voluntary	sectional overlap	120,000	100,000	5,000	4,200	49
	YTN	voluntary	sectional overlap	130,000	120,000	3,000	3,000	25
FR	FCE-CFDT*	voluntary	overlap	45,000	45,000	2,000	n.a.	30
	Filpac CGT*	voluntary	overlap	23,000	21,700	6,000	n.a.	6
	FG-FO*	voluntary	overlap	n.a.	n.a.	4,000	n.a.	n.a.
	FCA-CFTC*	voluntary	overlap	n.a.	n.a.	n.a.	n.a.	n.a.
	Fibopa CFE-CGC*	voluntary	sectional overlap	n.a.	n.a.	1769	1,326	10
HU	PDSZ	voluntary	overlap	2,385	1,280	900	445	30
IE	SIPTU	voluntary	sectional overlap	217,000	209,881	n.a.	1,000	n.a.
IT	FISTEL*	voluntary	overlap	50,000	50,000	9,000	9,000	30
	SLC-CGIL*	voluntary	overlap	93,000	93,000	15,000	15,000	35
	UILCOM*	voluntary	overlap	n.a.	n.a.	n.a.	n.a.	n.a.
	UGL Carta E Stampa*	voluntary	overlap	n.a.	n.a.	n.a.	n.a.	n.a.
LT	LMPF	voluntary	sectional overlap	2,180	2,180	120	120	23
LU	OGB-L Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastiques, Textiles et Verre	voluntary	overlap	3,300	3,300	300	300	n.a.
MT	GWU	voluntary	overlap	41,343	34,543	80	80	18
NL	FNV Bondgenoten*	voluntary	sectional overlap	n.a.	470,000	3,680	3,680	n.a.
	CNV Vakmensen*	voluntary	overlap	n.a.	140,000	1,836	1,836	n.a.

	De Unie/MHP*	voluntary	overlap	n.a.	64,500	500	500	n.a.
	FNV Kiem*	voluntary	sectional overlap	n.a.	36,000	n.a.	1,800	n.a.
PL	FZZPChSziC*	voluntary	sectional overlap	n.a.	n.a.	225	225	46
	NSZZ 'Solidarność' – Paper Workers Section *	voluntary	sectionalism	2,100	2,100	2,200	2,200	25
PT	SINCELPAGR AFI*	voluntary	overlap	5,000	5,000	2,500	2,500	n.a.
	SITese*	voluntary	overlap	10,000	8,000	150	100	n.a.
	SINDETELCO *	voluntary	overlap	8,000	8,000	200	200	n.a.
	SINDEQ*	voluntary	overlap	7,000	7,000	100	100	n.a.
RO	FLMCH	voluntary	overlap	8,000	8,000	2,000	2,000	n.a.
SE	GS	voluntary	sectional overlap	60,000	55,000	n.a.	2,500	20
	Pappers	voluntary	sectionalism	21,000	15,000	21,000	15,000	12
	Unionen*	voluntary	sectional overlap	490,000	410,000	n.a.	3,800	45
	Sveriges Ingenjörer*	voluntary	sectional overlap	120,000	95,000	n.a.	2,800	25
	Ledarna*	voluntary	sectional overlap	95,000	81,000	2,350	2,300	20
SI	Pergam	voluntary	overlap	87,000	87,000	3,280	3,060	26
SK	OZ DLV	voluntary	overlap	18,218	16,225	3,374	2,200	23
UK	GMB*	voluntary	overlap	601,730	601,730	n.a.	n.a.	47
	Unite*	voluntary	overlap	1,500,000	1,200,000	25,000	20,000	24

* = Domain overlap with other sector-related trade unions

n.a. = not available

Table 7: Density, collective bargaining, consultation and affiliations of trade unions in paper, 2008/9/10

	Trade unions	Union densities (%)						Domain coverage ^a	CB ^b / Consultation	National and European affiliations ^c
		Domain total	Domain active	Sector	Sector active	Sectoral domain	Sectoral domain active			
AT	GPA-djp	n.a.	16	n.a.	9	n.a.	70	SO	yes/ yes	ÖGB; EFFAT, EPSU, EMCEF, EFJ, UNI Europa
	PRO-GE	n.a.	n.a.	n.a.	30	n.a.	n.a.	SO	yes/ yes	ÖGB; EMF, EMCEF, EFFAT, ETUF-TCL
BE	BBTK/SETca	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	SO	yes/ n.a.	FGTB/ABVV; EMCEF, (UNI Europa)
	CNE/GNC	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	SO	yes/ n.a.	CSC/ACV; EMCEF, (UNI Europa)
	LBC/NVK	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	SO	yes/ n.a.	CSC/ACV; EMCEF, (UNI Europa)
	ACLVB/CGSL B	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	SO	yes/ n.a.	EMCEF, UNI Europa
	CG/AC	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	SO	yes/ n.a.	FGTB/ABVV; EMCEF, (UNI Europa)
	CSC/ACV-BIE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	SO	yes/ n.a.	CSC/ACV; EMCEF, (UNI Europa)
BG	FSOGSDP	n.a.	n.a.	8	8	8	8	O	yes/ yes	CITUB; EMCEF, EFBWW
	FLI	n.a.	n.a.	5	5	5	5	O	yes/ yes	CL Podkrepa; EMCEF, ETUF-TCL
CY	OVIEK/SEK	n.a.	n.a.	n.a.	26	n.a.	26	O	yes/ no	SEK
	SEVETTYK/PEO	n.a.	n.a.	n.a.	5	n.a.	5	O	yes/ no	PEO
CZ	OS DLV	n.a.	n.a.	9	9	9	9	O	yes/ yes	CMKOS; EFBWW
	C-MOS	n.a.	n.a.	7	5	7	5	O	yes/ no	–

DE	IGBCE	n.a.	n.a.	20	n.a.	46	n.a.	SO	yes/ yes	DGB; EMCEF
	verdi	22	n.a.	15	n.a.	22	n.a.	SO	yes/ yes	DGB; UNI Europa
DK	3F	84	70	n.a.	35	n.a.	92	SO	yes/ yes	LO; EMCEF, UNI Europa
	HK	64	45	n.a.	3	n.a.	26-50	SO	yes/ yes	LO; EMCEF, UNI Europa
EE	EMT	3	3	6	6	6	6	O	yes/ yes	EAKL
EL	FSEPP	26-50	26-50	15	15	15	15	O	yes/ yes	GSEE
ES	FSC-CCOO	n.a.	n.a.	6	5	n.a.	6	SO	yes/ yes	CCOO; EMCEF, UNI Europa
	FIA-UGT	n.a.	n.a.	5	4	5	n.a.	SO	yes/ yes	UGT; EMCEF
	ELA HAINBAT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	SO	no/ no	ELA; EMCEF, UNI Europa
	CIG	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	SO	yes/n o	–
	LAB	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes/ no	–
FI	Paperiliitto	164 ^d	60	86	61	164 ^d	60	S	yes/ yes	SAK; EMCEF
	TU	75	63	17	13	n.a.	84	SO	yes/ no	STTK; EMCEF
	YTN	n.a.	75	12	12	n.a.	n.a.	SO	yes/ no	AKAVA
FR	FCE-CFDT	5	5	3	3	3	3	O	yes/ yes	CFDT; EMCEF
	Filpac CGT	n.a.	n.a.	8	8	8	8	O	yes/ yes	CGT; EMCEF, UNI Europa
	FG-FO	n.a.	n.a.	6	n.a.	6	n.a.	O	yes/ n.a.	CGT-FO; EMCEF
	FCA-CFTC	n.a.	n.a.	n.a.	0-9	n.a.	0-9	O	yes/ n.a.	CFTC
	Fibopa CFE- CGC	n.a.	n.a.	2	2	n.a.	7	SO	yes/ n.a.	CFE-CGC
HU	PDSZ	n.a.	10-25	n.a.	0-9	n.a.	0-9	O	yes/ no	ASZSZ, VDSZ; (EMCEF)
IE	SIPTU	n.a.	n.a.	n.a.	50	n.a.	n.a.	SO	yes/ yes	–
IT	FISTEL	8	8	13	13	13	13	O	yes/ yes	C/SL; UNI Europa

									no	
	SLC–CGIL	30	30	21	21	21	21	O	yes/ yes	CGIL; UNI Europa
	UILCOM	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	O	yes/ yes	UIL; UNI Europa
	UGL Carta e Stampa	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	O	yes/ n.a.	UGL
LT	LMPF	4	4	4	4	5	5	SO	yes/ yes	LPSK; EFBWW
LU	OGB-L Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastiques, Textiles et Verre	38	38	67	67	67	67	O	yes/ no	OGB-L; EMCEF
MT	GWU	26	22	34	34	34	34	O	yes/ n.a.	EPSU, UNI Europa, EURO WEA, Eurocadres, ETF, EFBWW, EMF, EFFAT
NL	FNV Bondgenoten	n.a.	n.a.	19–30	19–30	n.a.	n.a.	SO	yes/ yes	FNV; EMCEF
	CNV Vakmensen	n.a.	91–100	10–15	10–15	10–15	10–15	O	yes/ yes	CNV; EMCEF
	De Unie/MHP	n.a.	n.a.	3–4	3–4	3–4	3–4	O	yes/ yes	CMHP; EMCEF
	FNV Kiem	n.a.	n.a.	9–15	9–15	n.a.	n.a.	SO	yes/ yes	FNV; UNI Europa
PL	FZZPChSziC	0–9	0–9	0	0	0–9	0–9	SO	no/ no	OPZZ; EMCEF
	NSZZ 'Solidarność' – Paper Workers Section	10	10	5	5	10	10	S	no/ no	NSZZ 'Solidarność'; EMCEF
PT	SINCELPAGR AFI	17	17	23	23	23	23	O	yes/ no	CGTP; UNI Europa
	SITese	1	1	1	1	1	1	O	yes/ n.a.	FETese, UGT; UNI Europa
	SINDETELCO	19	19	2	2	2	2	O	yes/ n.a.	UGT; UNI Europa
	SINDEQ	1	1	1	1	1	1	O	yes/ n.a.	FETICEQ, UGT; EMCEF, ETUF-

										TCL
RO	FLMCH	5	5	13	13	13	13	O	yes/ yes	Cartel Alfa
SE	GS	71	56	n.a.	7	n.a.	70	SO	yes/ yes	LO
	Pappers	105 ^b	98	n.a.	41	n.a.	98	S	yes/ yes	<i>LO</i> ; EMCEF
	Unionen	35	29	n.a.	10	n.a.	35	SO	yes/ yes	SACO; Eurocadres, EMF, ETF, EFBWW, EMCEF, UNI Europa, EFFAT
	Sveriges Ingenjörer	70	56	n.a.	8	n.a.	80	SO	yes/ yes	SACO; Eurocadres, EMF, EMCEF, UNI Europa, FEANI
	Ledarna	19	16	7	6	n.a.	42	SO	yes/ no	<i>PTK, OFR</i> ; CEC
SI	Pergam	43	43	71	66	71	66	O	yes/ yes	UNI Europa, EMCEF
SK	OZ DLV	62	55	44	29	44	29	O	yes/ yes	<i>KOZ SR</i> ; UNI Europa
UK	GMB	3	n.a.	n.a.	n.a.	n.a.	n.a.	O	yes/ yes	<i>TUC</i> ; EMCEF
	Unite	6	5	38	30	38	30	O	yes/ yes	<i>TUC</i> ; EMCEF

^a = domain coverage: O = Overlap; SO = Sectional Overlap; S = Sectionalism

^b = collective bargaining involvement

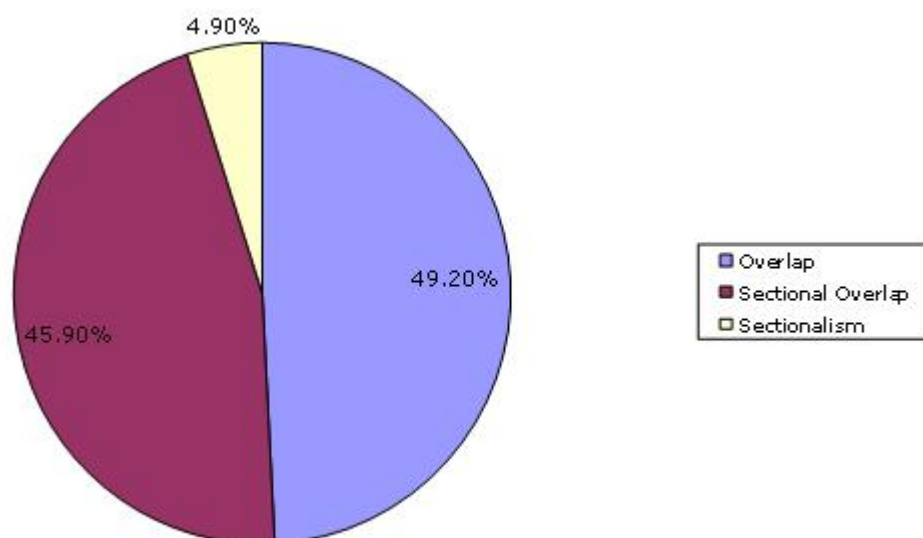
^c = National affiliations put in italics; for the national level, only cross-sectoral (i.e. peak-level) associations are listed; for the European level sectoral associations only; affiliation put in parenthesis means indirect affiliation via higher-order unit.

^d = including retirees and unemployed people

Note: The figures have been rounded in all cases. Densities reported as 0% hence refer to a figure lower than 0.5%.

n.a. = not available

Figure 4: Distribution of membership domain patterns of sector-related trade unions with regard to the paper sector (N=61)



Source: EIRO country reports

As the domains of the trade unions often overlap with the demarcation of the sector, so do their domains with one another in the case of those countries with a pluralist trade union ‘landscape’ in the paper sector. Table 6 shows these inter-union domain overlaps. Inter-union overlaps of domains are endemic. In all countries but three (Austria, Denmark and Finland) with more than one sector-related trade union, the domain of any of them overlaps with the domain of all or most of the others. Depending on the scale of mutual overlap, this results in competition for members. Noticeable inter-union competition within the sector is recorded from only two countries: France and Portugal.

Trade union membership data make it clear that male employees comprise the majority group in most of the unions (87.2%) for which membership figures by sex are available. This finding does not come as a surprise, as the sector’s employment is clearly dominated by male employees (see Table 3 and Table 4). In those few sector-related trade unions where female membership prevails, this predominance – due to the fact that the domain of all these unions (sectionalistically) overlaps with regard to the sector – is likely to originate in areas of their domains other than the paper sector. For instance, Denmark’s white-collar HK which organises commercial and clerical employees, records a female membership ratio (as a percentage of total union membership) of about 75% on aggregate, while the share of female union members in the paper sector is supposed to be significantly lower.

Membership of the sector-related trade unions is voluntary in all of the 26 Member States under consideration. The absolute numbers of trade union members differ widely, ranging from far more than two million (in the case of Germany’s Ver.di) to only around 1,000 (in the case of Estonia’s EMT). This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the ability to attract members. Therefore, density is the measure of membership strength which is more appropriate to a comparative analysis. In this context it should be noted that density figures in this section refer to net ratios, which means that they are calculated on the basis of active employees only, rather than

taking all union members (those in work and those who are not) into account. This is mainly because research usually considers net union densities as more informative compared to gross densities, because the former measure tends to reflect unionisation trends among the active workforce more quickly and accurately (only the active workforce is capable of taking industrial action) than the latter.

However, in the context of this study, some methodological caveats have to be invoked when calculating and comparing associational densities. Density figures are very sensitive as they unveil an interest organisation's relative strength vis-à-vis its counterpart on the employer/employee side. For this reason the state and social partner organisations usually tend to be hesitant in providing these data. Therefore the density data set for the purpose of this study is far from complete and thus has to be treated cautiously. Moreover, one cannot rule out the possibility that trade unions and employer organisations may give inflated figures in order to exaggerate their organisational strength.

Domain density is over 50% in a 30% of the trade unions which document figures on density. (It is important to note that, for a few unions, densities cannot be indicated by discrete figures but have to be estimated by a range (where the density is estimated to lie in between a value 'x' and a value 'y'). In the event that this range overlaps with two or more intervals used for describing the distribution of trade union densities, the lowest value of this range (in other words, 'x' rather than 'y') is used, in order to clearly assign this estimate to one of the intervals. This method applies to the entire section examining union densities.)

About 13% of the unions organise 70% or more of the active employees covered by their domain. More than one-third of the trade unions for which data are available organise fewer than 15% of the active employees within their domain, and the same share of trade unions record a density of between 15% and 50% of their potential active members. These results indicate that overall domain density of the sector-related trade unions is not very high. However, it should also be noted that domain density data are recorded for less than half of the 62 sector-related trade unions. Therefore these figures should be treated cautiously, as indicated earlier.

Comparing the trade unions' overall domain densities with their sector density figures provides an indication of whether or not the paper sector tends to be a stronghold of those sector-related trade unions which also organise employees in sectors other than the paper industry. In this respect, though, only contradictory results can be found. When looking at sector density (again referring only to active members), it is important to differentiate between the trade unions' *sectoral* density on the one hand and their *sectoral domain* density on the other. Whereas the former measures the ratio of the total number of members of a trade union in the sector to the number of employees in the sector (as demarcated by the NACE classification), the latter indicates the total number of members of a trade union in the sector in relation to the number of employees that work in that part of the sector as covered by the union domain (see Table 4). This means that the *sectoral domain* density must be higher than the *sectoral* density if a trade union organises only a particular part of the sector – that is, where the trade union's membership domain is either sectionalist or sectionally overlapping in relation to the sector.

As a first result, it can be seen that, even when taking the trade unions' *sectoral domain* density into account (which must be higher than their *sectoral* density in the case of unions with a membership domain which is either sectionalist or sectionally overlapping with regard to the sector), the trade unions' density in the paper sector tends to be lower compared with the density ratio referring to their domain on aggregate. Sectoral domain density is over 50% in the case of 22.0% of the trade unions for which data are available. About 15% of the unions organise 70% or more of the active employees covered by their sectoral domain. Slightly more than half of the trade unions record a sectoral domain density lower than 15%, and a quarter of them record a sectoral domain density between 15% and 50%.

In this context it should be noted that a more appropriate measure of the relationship between the trade unions' overall domain density and their sectoral domain density would also relate to the union membership domain patterns (see Figure 4). For unions with a membership domain congruent or sectional with regard to the sector, domain density and sectoral domain density must be equal. This means that only for unions with a domain which overlaps or sectionally overlaps with regard to the paper sector is a comparison of the domain density and the sectoral domain density reasonable for assessing whether the sector under examination is a stronghold of the relevant unions or not. However, since only three unions have a membership domain which is sectional with regard to the sector and none of them have a domain congruent with regard to the sector, a measure adjusted for domain patterns relative to the sector produces only minor deferrals and does not challenge the finding that the trade unions' density in the paper sector tends to be lower compared with their overall domain density. Taking another very tentative measure – the median – into account reveals the same result: The median of the trade unions' overall domain densities clearly exceeds that of their sectoral domain densities (with a relationship of 22% to 13%). Please note, however, the methodological caveats related to these findings, as outlined below in the text.

A second observation may be made with regard to those trade unions for which figures on both measures (sectoral domain density and domain density on aggregate) are recorded: there are about twice as many trade unions with a sectoral domain density higher compared with aggregate density than there are unions showing the reverse relationship between the two densities. This result clearly contrasts with the above finding according to which the trade unions' sectoral densities tend to fall short of their overall domain densities. Again, in this context it is important to note that for a considerable percentage of the unions no density data are available, which applies more particularly to overall domain density figures. With regard to sectoral domain density figures, it appears from Table 7 that the trade unions which record particularly low rates (in France and the New Member States) are overrepresented. Therefore it is likely that the trade unions' sectoral domain density on average tends to be underestimated in this report. Taking this presumable bias into account it seems to be doubtful that the trade unions' sectoral domain densities (not the sectoral densities) actually tend to fall short of the overall domain densities (according to the first finding). In this regard, the second finding as outlined above appears to be more reliable.

Despite all these uncertainties over the sector-related unions' densities, it seems safe to assume that the unionisation rates in the paper sector are not particularly high. This is – albeit very tentatively as this value seems to be biased – indicated by a very low median of the trade unions' sectoral domain densities of 13%. Such a finding may be somewhat surprising, given that the sector is a traditional, male-dominated manufacturing industry with a high incidence of standard employment – a situation usually favourable for high unionisation rates. However, as indicated earlier in this report, about half of the sector's workers are employed in SMEs which often do not meet the criteria for setting up workplace representation. Moreover, the traditionally well-unionised pulp and paper manufacturing subsector with its large paper mills has – at least in terms of employment – been declining more dramatically over many years than the more diversified paper converting industries, which are characterised by a vast majority of small enterprises and thus generally lower unionisation rates.

Employer organisations

Table 8 and Table 9 show the membership data for the employer organisations in the paper sector. In contrast with the trade union side, for only 21 of the 26 countries under consideration at least one sector-related employer organisation is documented. In five of these countries, one employer/ business organisation each can be identified which is not a party to collective

bargaining (see Table 9). They are classified here as social partner organisations only because of their European-level affiliation to CEPI. In 19 of the 21 countries which record at least one sector-related employer/ business organisation at least one of them is engaged in sector-related collective bargaining. Business interest organisations may deal with interests other than those related to industrial relations. Organisations specialised in matters other than industrial relations are commonly defined as ‘trade associations’ (see [TN0311101S](#)). Such sector-related trade associations also exist in the paper sector. In terms of their *national* scope of activities, all of the associations which are not involved in collective bargaining according to Table 9 either primarily or exclusively act as trade associations in their country. It is only the conceptual decision to include all associational affiliates to CEPI, regardless of whether they have a role in national bargaining, which gives them the status of a social partner organisation within the framework of this study. Of the 38 employer/ business organisations listed in Table 8 and Table 9, five organisations belong to this group. In 11 of the 21 countries where sector-related employer/ business organisations exist, only a single organisation (in the meaning of a social partner organisation as defined before) has been established. Thus, in contrast to the trade union side, where pluralist associational systems prevail, on the employer side in slightly more than half of the countries with at least one relevant industrial relations actor only a single employer/ business organisation exists. This is in line with the fact that the number of sector-related employer/ business organisations clearly falls short of the number of sector-related trade unions.

Moreover, the employer organisations’ domains tend to be narrower than those of the trade unions. About one-fifth and about a quarter of the associations for which related information is available rest on overlapping and sectionalistically overlapping domains with regard to the sector, respectively. Only relatively few of these organisations, such as Ireland’s IBEC and Slovenia’s ZDS and GZS, have a domain which is cross-sectoral. Alternatively, most cases of domain overlaps ensue from coverage of the broader forestry and woodworking sector or the printing industry. Overlaps of this kind can be found, in particular, in Austria (WKO FVBKE), the Czech Republic (ACPP), Finland (FFI), France (UNIPAS), Hungary (NYPSZ), Italy (UNIGEC CONFAPI and ASSOGRAFICI) and Sweden (Skogsindustrierna and GFF). Sectionalism is mainly caused by domain demarcations which focus on the manufacture of paper (that is, paper mills) or special converted products. For instance, in Austria and France there are several distinct employer organisations each specialising in narrowly defined business activities, such as bookbinding, cardboard packaging, basic paper manufacturing, the manufacture of sanitary goods and so on. However, apart from these two countries, the fragmentation of the associational ‘landscape’ within the sector on the employer side is rather limited. Nevertheless, a relatively high number of associations (about 43%) have a membership domain which is sectional with regard to the sector. Around one-tenth of the associations have a domain which is more or less congruent with the sector definition. This means that the domain of these organisations focuses largely on the paper sector as defined for the purpose of this study, while one cannot rule out the possibility that these associations may also organise companies of contiguous sectors or do not really organise the entire pulp, paper and paper products industry. The clear predominance of membership domains which are sectional with regard to the sector indicates that the technocratic definition of the sector is broader than the lines along which most sector-related employers identify their common interests and band together in associations.

Table 8: Domain coverage and membership of employer/ business organisations in paper, 2008/9/10

	Employer organisation	Domain coverage	Membership				
			Type	Companies	Companies in sector	Employees	Employees in sector

AT	Austropapier*	sectionalism	voluntary	22	22	8,309	8,309
	WKO FVBKE	sectional overlap	compulsory	95	35	1,464	860
	WKO FVPVI	sectionalism	compulsory	85	85	9,090	9,090
	WKO FVPI*	sectionalism	compulsory	22	22	8,309	8,309
BE	COBELPA	sectionalism	voluntary	10	10	4,200	4,200
	FETRA	sectionalism	voluntary	80	80	6,500	6,500
BG	PPIBC	sectionalism	voluntary	18	18	n.a.	n.a.
CY	–						
CZ	AČPP	overlap	voluntary	20	10	2,500	2,400
DE	VAP*	sectionalism	voluntary	183	n.a.	45,414	n.a.
	HPV*	sectional overlap	voluntary	n.a.	n.a.	n.a.	n.a.
	VDP	sectionalism	voluntary	104	104	n.a.	n.a.
DK	EAB	sectionalism	voluntary	60	60	3,000	3,000
EE	–						
EL	UPI	congruence	voluntary	14	14	4,000	4,000
ES	ASPAPEL*	congruence	voluntary	95	95	17,400	17,400
	ADEGI*	sectional overlap	voluntary	n.a.	n.a.	n.a.	n.a.
FI	FFI	overlap	voluntary	92	29	35,000	20,000
FR	UNIPAS	overlap	voluntary	n.a.	n.a.	n.a.	n.a.
	AFDPE	sectionalism	voluntary	12	12	1,700	1,700
	FEDARPA	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
	FFC	sectionalism	voluntary	190	190	21,000	21,000
	COPACEL	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
HU	NYPSZ	sectional overlap	voluntary	8	4	1,700	750
IE	IBEC	overlap	voluntary	7,500	n.a.	n.a.	n.a.
IT	ASSOCARTA*	sectionalism	voluntary	84	84	16,000	16,000
	UNIGEC CONFAPI*	sectional overlap	voluntary	n.a.	n.a.	n.a.	n.a.
	ASSOGRAFICI*	sectional overlap	voluntary	1,000	270	41,000	15,000
LT	–						
LU	–						
MT	–						
NL	Royal VNP	sectionalism	voluntary	14	14	4,200	4,200

	Kartoflex	sectionalism	voluntary	100	100	3,071	3,071
PL	SPP	sectional overlap	voluntary	41	41	n.a.	n.a.
PT	ANIPC	overlap	voluntary	116	41	2,128	1,490
	CELPA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
RO	ROMPAP	congruence	voluntary	24	24	4,000	4,000
SE	Skogsindustrierna	sectional overlap	voluntary	281	40	32,500	22,500
	GFF	sectional overlap	voluntary	580	95	16,500	6,500
SI	ZDS*	overlap	voluntary	1,450	15	250,000	3,800
	GZS*	overlap	voluntary	65,000	30	350,000	3,000
SK	ZCPP SR	overlap	voluntary	11	8	3,589	3,200
UK	CPI	congruence	voluntary	90	22	n.a.	n.a.

* = Domain overlap

n.a. = not available

Table 9: Density, collective bargaining, consultation and affiliations of employer/ business organisations in paper, 2008/9/10

	Employer organisation	Density (%)						Collective bargaining	Consultation	National and European affiliations ^a
		Companies			Employees					
		Domain	Sector	Sectoral domain	Domain	Sector	Sectoral domain			
AT	Austropapier	100	14	100	100	45	100	no	yes	CEPI
	WKO FVBKE	100	23	100	100	5	100	yes	yes	WKO
AT	WKO FVPVI	100	55	100	100	49	100	yes	yes	WKO
AT	WKO FVPI	100	14	100	100	45	100	yes	yes	WKO
	COBELPA	n.a.	2	n.a.	n.a.	31	n.a.	yes	yes	FEB/VBO, UWE, VOKA; CEPI
	FETRA	n.a.	17	n.a.	n.a.	48	n.a.	yes	yes	FEB/VBO, UWE, VOKA, BECI
BG	PPIBC	n.a.	6	n.a.	n.a.	n.a.	n.a.	yes	yes	BIA
CY	–									

CZ	AČPP	n.a.	1	1	n.a.	11	11	yes	yes	<i>SP ČR</i> ; CEPI
DE	VAP	91–100	n.a.	n.a.	91–100	n.a.	n.a.	yes	yes	<i>BDA</i>
	HPV	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	<i>BDA</i>
	VDP	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	<i>BDI</i> ; CEPI
DK	EAB	66	36	66	75	44	75	yes	yes	<i>DI</i> ; ECMA, FEFCO
EE	–									
EL	UPI	1	1	1	50	50	50	yes	yes	SEV
ES	ASPAPPEL	4	4	4	41	41	41	yes	yes	<i>CEOE</i> ; CEPI, UTIPULP, CEPIFINE
	ADEGI	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	no	–
FI	FFI	2	15	15	70	82	80	yes	yes	<i>EK</i> ; CEPI, CEI-Bois
FR	UNIPAS	91–100	76–90	76–90	91–100	76–90	76–90	yes	yes	MEDEF
	AFDPE	n.a.	1	n.a.	n.a.	2	n.a.	yes	yes	<i>UNIPAS</i>
	FEDARPA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	–
	FFC	38	13	38	75	29	75	yes	n.a.	<i>MEDEF</i> ; <i>CGPME</i> ; ECMA
	COPACEL	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	no ^b	n.a.	<i>UNIPAS</i> ; <i>MEDEF</i> ; CEPI
HU	NYPSZ	10–25	0–9	10–25	26–50	0–9	10–25	no	yes	<i>MGYOSZ</i> ; CEPI
IE	IBEC	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	–
IT	ASSOCARTA	63	2	63	77	23	77	yes	yes	<i>CONFINDU STRIA</i> ; CEPI
	UNIGEC CONFAPI	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	CONFAPI
	ASSOGRAFI CI	17	7	7	50	21	24	yes	yes	<i>CONFINDU STRIA</i> ; CITPA, INTERGRAF
LT	–									
LU	–									
MT	–									

NL	Royal VNP	76–90	1–6	76–90	76–90	22–34	76–90	yes	yes	VNO-NCW; CEPI
	Kartoflex	80	8–40	80	91– 100	16–25	91– 100	yes	yes	VNO-NCW
PL	SPP	n.a.	12	n.a.	n.a.	n.a.	n.a.	no	no	KIG; CEPI, FEFCO
PT	ANIPC	n.a.	11	n.a.	n.a.	14	n.a.	yes	yes	RECIPAC
	CELPA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	no ^b	n.a.	CIP; CEPI
RO	ROMPAP	3	3	3	26	26	26	yes	yes	CONPIRON; CEPI
SE	Skogsindustri erna	94	10	95	92	62	95	yes	yes	<i>Svenskt Näringsliv, SKGS, Industrikom mittén, LRF;</i> CEPI, CEI- Bois, FTP
	GFF	40	22	70	82	18	85	yes	yes	<i>Svenskt Näringsliv;</i> INTERGRAF
SI	ZDS	1	7	7	53	82	82	yes	no	–
	GZS	46	15	15	64	65	65	yes	yes	CEPI, Eurochambr es, CEI-Bois
SK	ZCPP SR	6	5	5	45	42	42	yes	yes	AZZZ SR; CEPI
UK	CPI	4	4	4	n.a.	n.a.	n.a.	yes	yes	CBI; CEPI, FEFCO

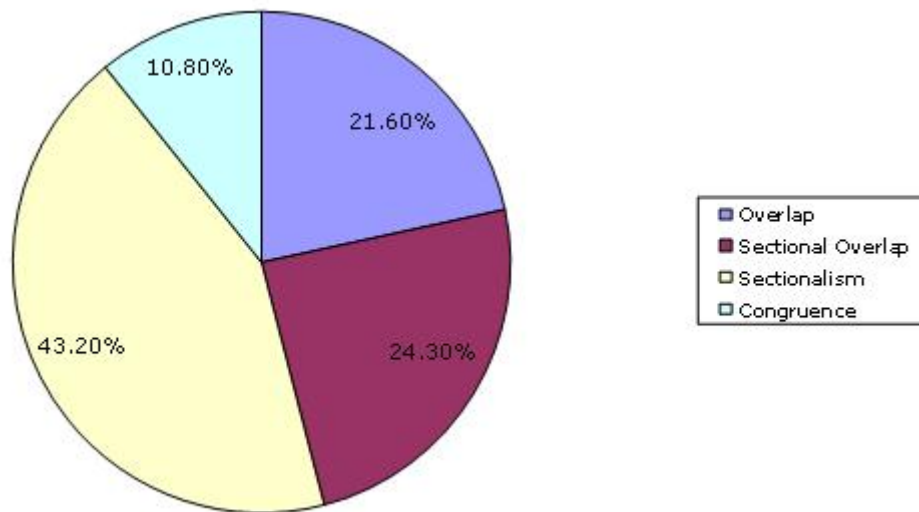
^a = National affiliations put in italics; for the national level, only cross-sectoral (i.e. peak-level) associations are listed; for the European level sectoral associations only.

^b = indirect collective bargaining involvement via higher- or lower-level unit.

Note: The figures have been rounded in all cases. Densities reported as 0% hence refer to a figure lower than 0.5%.

n.a. = not available

Figure 5: Distribution of membership domain patterns of sector-related employer organisations with regard to the paper sector (N=37)



Source: EIRO country reports

Three of the four existing sector-related employer organisations in Austria can rely on obligatory membership. This is due to their public-law status as chamber units.

In those countries with a pluralist structure in relation to employer organisations, these associations have usually managed to arrive at non-competing relationships. Their activities are complementary to each other as a result of inter-associational differentiation by either membership demarcation (in the case of Austria (partly), Belgium, Germany, France (partly), Italy, the Netherlands and Sweden) or functions and tasks (as in Austria (partly), France (partly), Portugal and Slovenia).

As the figures on density show (Table 9), membership strength in terms of companies varies widely with regard to both the membership domain in general and the sector-related densities. The same holds true of the densities in terms of employees. Generally, both the domain and the sectoral domain densities of companies tend to be lower than the densities of employees. This indicates a clearly higher propensity of the larger companies to associate, as compared to their smaller counterparts. In general, overall densities of the employer/ business organisations in the sector tend to be higher compared to trade union densities (see above). Of the associations for which relevant data are available, 47.8% and 68.2%, respectively, register a sectoral domain density higher than 50% in terms of companies and employees. In general, the findings suggest that in the paper sector the employers are quite well organised, in particular in terms of employees represented. However, it should be noted that for many of the employer/ business associations density data are incomplete or lacking altogether. Therefore the data set should again be treated cautiously.

Collective bargaining and its actors

Table 7 lists all of the trade unions engaged in sector-related collective bargaining. Despite numerous cases of inter-union domain overlap and of unclear domain demarcation, inter-union rivalry and competition for bargaining capacities has been identified in only two countries

(France and Portugal). In the case of the sector-related employer organisations, competition over collective bargaining capacities has been reported only from France. In this case, UNIPAS, which is composed of several employer organisations, seeks to centralise collective bargaining on behalf of all of its members, but some of them oppose this move as they wish to maintain their independence from the umbrella organisation.

The data presented in Table 10 provide an overview of the system of sector-related collective bargaining in the 26 countries under consideration. The importance of collective bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (see Traxler et al, 2001). Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

Table 10: The system of sectoral collective bargaining (2009/10)

Country	CBC (%) (estimates)	Share of MEB in total CBC (%) (estimates)	Extension practices ^a
AT	100	100	(2)
BE	100	100	2
BG	100	100 ^b	2
CY	37	0	0
CZ	100	100 ^b	1
DE	80–90	MEB prevailing	0
DK	44	100	0
EE	n.a.	0	0
EL	100	100	2
ES	100	>75	2
FI	100	100	2
FR	70–100	MEB prevailing	2
HU	~30	0	0
IE	~50 ^c	MEB prevailing ^c	0
IT	100	100 ^b	(2)
LT	24	0	0
LU	~100	0	0
MT	~60	0	0
NL	~80	~35	2
PL	~15	0	0
PT	~40	~66	2

RO	100	100	2
SE	80	MEB prevailing	1
SI	>85	MEB prevailing	0
SK	70–100	MEB prevailing	1
UK	100	MEB prevailing	0

CBC = collective bargaining coverage: employees covered as a percentage of the total number of employees in the sector

MEB = multi-employer bargaining relative to single-employer bargaining

Extension practices (including functional equivalents to extension provisions, i.e. obligatory membership and labour court rulings):

^a = 0 = no practice, 1 = limited/exceptional, 2 = pervasive. Cases of functional equivalents are put in parentheses.

^b = supplemented/ complemented by single-employer bargaining

^c = up to 2009

n.a. = not available

To delineate the bargaining system, two further indicators are used: The first indicator refers to the relevance of multi-employer bargaining, compared with single-employer bargaining. Multi-employer bargaining is defined as being conducted by an employer organisation on behalf of the employer side. In the case of single-employer bargaining, the company or its divisions is the party to the agreement. This includes cases where two or more companies jointly negotiate an agreement. The relative importance of multi-employer bargaining, measured as a percentage of the total number of employees covered by a collective agreement, therefore provides an indication of the impact of the employer organisations on the overall collective bargaining process.

The second indicator considers whether statutory extension schemes have been applied to the sector. For reasons of brevity, this analysis is confined to extension schemes which widen the scope of a collective agreement to employers not affiliated with the signatory employer organisation; extension regulations targeting the employees are therefore not included in the research. Regulations concerning the employees are not significant to this analysis for two reasons. First, extending a collective agreement to the employees who are not unionised in the company covered by the collective agreement is a standard of the ILO, aside from any national legislation. Second, employers have good reason to extend a collective agreement concluded by them, even when they are not formally obliged to do so; otherwise, they would set an incentive for their workforce to unionise.

In comparison with employee-related extension procedures, schemes that target employers are far more significant for the strength of collective bargaining in general and multi-employer bargaining in particular. This is because the employers are capable of refraining from both joining an employer organisation and entering single-employer bargaining in the context of a purely voluntaristic system. Therefore, employer-related extension practices increase the coverage of multi-employer bargaining. Moreover, when it is pervasive, an extension agreement may encourage more employers to join the controlling employer organisation; such a move then enables them to participate in the bargaining process and to benefit from the organisation's

related services in a situation where the respective collective agreement will bind them in any case (see Traxler et al, 2001).

Collective bargaining coverage

In terms of the sector's collective bargaining coverage, 11 of the 25 countries for which relevant data are available record an almost complete coverage rate of around 100%. However, there are six countries with low or medium to low collective bargaining coverage rates of less than 50%, while no country has extremely low coverage rates of below 15%. A third group of countries records sector-related collective bargaining at a rather high or medium to high level, with bargaining coverage rates of around 50% (Ireland) to close to full coverage. One can infer from these findings that in about three-quarters of the 26 countries under consideration the sector's industrial relations structures are well established, while they appear to be underdeveloped in about one-quarter of the countries. Closer examination of the figures reveals that collective bargaining coverage rates tend to be (very) high in the 'old' EU15 (with the notable exception of Denmark, Ireland and Portugal), while sectoral bargaining standards widely vary from one of the 2004/7 accession countries to the other. In Cyprus, Hungary, Lithuania and Poland sector-related bargaining is rarely conducted, although sector-related representative social partner organisations on the two sides of industry can be found in Hungary and Poland (see Table 7 and Table 9). By contrast, collective bargaining arrangements cover (almost) the entire sector in Bulgaria, the Czech Republic, Romania, Slovakia and Slovenia, while a significant part of the sector is covered in Malta.

In most of the countries with available information, several factors which sometimes interact with one another account for the high coverage rates. These include: the predominance of multi-employer bargaining (see Table 10); high density rates of the trade unions and/ or employer organisations (for example in Austria, Finland, France, the Netherlands and Sweden); and the existence of pervasive extension practices, as in Belgium, Bulgaria, Finland, France, Greece, the Netherlands, Portugal, Romania and Spain. While (with the exceptions of Denmark, Ireland and Portugal) coverage in countries with prevalent multi-employer bargaining is generally high, single-employer bargaining arrangements in the sector are the exclusive type of bargaining in Cyprus, Estonia, Hungary, Lithuania, Luxembourg, Malta and Poland. In the latter group of countries (with the notable exceptions of Luxembourg and Malta), collective bargaining coverage tends to be rather low. In the UK, the paper sector is notable for the existence of an encompassing multi-employer sectoral agreement concluded between CPI on the employer side and Unite on the employee side and thus the prevalence of multi-employer bargaining over single-employer bargaining. Such multi-employer agreements are very unusual in most sectors in the UK.

Due to the prevalence of multi-employer settlements in the sector, the use of extension practices is significant. Pervasive extension practices in the paper sector are reported for several countries (see Table 10). Referring to the aim of extension provisions; that is, making multi-employer agreements generally binding, the provisions for obligatory membership in the chamber system of Austria should also be noted. Obligatory membership creates an extension effect, as the Austrian Federal Economic Chamber ([Wirtschaftskammer Österreich](#), [WKO](#)) and its subunits are parties to multi-employer bargaining. Another functional equivalent to statutory extension schemes can be found in Italy. According to the country's constitution, minimum conditions of employment must apply to all employees. Italy's labour court rulings relate this principle to the multi-employer agreements, to the extent that they are regarded as generally binding.

Participation in public policymaking

Interest associations may partake in public policy in two basic ways. They may be consulted by the authorities on matters affecting their members, or they may be represented on ‘corporatist’, in other words tripartite, committees and boards of policy concertation. This study considers only cases of consultation and corporatist participation which relate explicitly to sector-specific matters. Consultation processes are not necessarily institutionalised and, therefore, the organisations consulted by the authorities may vary according to the issues to be addressed and also over time, depending on changes in government. Moreover, the authorities may initiate a consultation process on an occasional rather than a regular basis. Given this variability, in Table 7 and Table 9 only those sector-related trade unions and employer organisations that are *usually* consulted are flagged.

Trade unions

At least some of the trade unions are regularly consulted by the authorities in at least 20 of the 26 countries where sector-related trade unions are recorded. Four countries cite a lack of regular consultation of any of the trade unions (Cyprus, Hungary, Luxembourg and Poland). No information is available for any of the sector-related trade unions of Belgium and Malta. Since a multi-union system has been established in 16 out of the 26 countries with sector-related trade unions, one cannot rule out the possibility that the authorities may favour certain trade unions over others or that the unions compete for participation rights. In most countries with a multi-union system where a noticeable practice of consultation is observed, any of the existing trade unions may take part in the consultation process. By contrast, in the Czech Republic, Finland, Italy, Spain and Sweden only some of the sector-related trade unions are usually consulted. Nevertheless, evidence of major inter-union conflicts over participation in public policy matters in the paper sector cannot be found in any of the countries under consideration.

Employer organisations

Almost all of the sector-related employer/ business organisations for which relevant data are available are involved in consultation procedures. In countries with multi-organisation systems, no cases of conflicts over participation rights of employer organisations are reported. In the multi-organisation systems of Austria, Belgium, the Netherlands and Sweden, where related data of all employer organisations are available, all of the sector’s organisations are consulted. By contrast, in the pluralist systems of France, Germany, Italy, Portugal and Slovenia at least one of the employer organisations is regularly consulted, while others are not (or no information is available for others). In at least 17 of the 21 countries with relevant sector-related social partner organisations on both sides of industry, consultation rights are symmetrically attributed to the two sides of industry, in that at least one organisation on each side is consulted. There is no case of a country where representatives of only one side are consulted. For several countries (Belgium, France, Germany, Italy, Malta and Portugal), however, no related data are available for at least some of the interest organisations on at least one side of industry.

Tripartite participation

Turning from consultation to tripartite participation, the findings reveal that a genuinely sector-specific tripartite body has been established in five of the 26 countries under consideration – Bulgaria, Estonia, France, Spain and the UK. Table 11 lists a total of five bodies – one each in the countries listed above. In Bulgaria, a Tripartite Council for Social Partnership of the Pulp and Paper Industry has been set up, which deals with health and safety and social security issues as well as ecological problems of the sector. The Forestry Professional Council of the Estonian

Qualifications Authority ([Kutsekoda](#)) deals with issues related to education, such as vocational profiles and qualification awarding schemes. Likewise, Proskills in the UK addresses the issue of skills and lifelong learning of the workforce in the UK paper sector. In Spain, a National Industrial Observatory of the Paper Sector has been established, which appears to address industrial relations issues of any kind. No further information is available regarding the Technical Centre of Paper of France. The origin of all tripartite bodies but the latter (for which no information is available) is based on statutory provisions. Other bodies listed in some country reports are not taken into account in this study, since they are either bipartite rather than tripartite in terms of composition or cover broader industry segments than just the paper sector and thus do not specifically target the sector under consideration.

Table 11: Tripartite sector-specific boards of public policy (2009/10)

Country	Name of body and scope of activity	Origin	Trade unions participating	Business associations participating
BG	Tripartite Council for Social Partnership of the Pulp and Paper Industry – deals with issues such as health and safety, social security and pensions, employment relations as well as ecological problems of the sector	Statutory	F SOGSDP, FLI	PPIBC
EE	Forestry Professional Council of Estonian Qualifications Authority (Kutsekoda) – deals with education issues of the sector (vocational profile, awarding of professional qualifications, etc.)	Statutory	EMT	EMTL
ES	National Industrial Observatory of the Paper Sector – deals with industrial relations issues of any kind	Statutory	FSC-CCOO, FIA-UGT	ASPAPPEL, FEDIT
FR	Technical Centre of Paper	n.a.	n.a.	n.a.
UK	Proskills – addresses the issue of skills and lifelong learning within the paper sector	Statutory	Unite	n.a.

European level of interest representation

At European level, eligibility for consultation and participation in the social dialogue is linked to three criteria, as defined by the European Commission. Accordingly, a social partner organisation must have the following attributes:

- be cross-industry or relate to specific sectors or categories, and be organised at European level;
- consist of organisations which are themselves an integral and recognised part of Member States' social partner structures and which have the capacity to negotiate agreements, as well as being representative of all Member States, as far as possible;
- have adequate structures to ensure their effective participation in the consultation process.

Regarding social dialogue, the constituent feature is the ability of such organisations to negotiate on behalf of their members and to conclude binding agreements. Accordingly, this section on European associations of the paper sector will analyse these organisations' membership domain, the composition of their membership and their ability to negotiate.

As outlined in greater detail below, one sector-related European association on the employee side (EMCEF) and one on the employer side (CEPI) are particularly significant in the paper sector; both of them are listed by the European Commission as a social partner organisation consulted under Article 154 of the TFEU. Hence, the following analysis will concentrate on these two organisations, while providing supplementary information on others which are linked to the sector's national industrial relations actors.

Membership domain

According to its constitution, the membership domain of EMCEF, which is affiliated to the European Trade Union Confederation ([ETUC](#)), comprises workers in sectors such as: mining, mineral oil, gas, energy, chemicals, pharmaceuticals, rubber, plastics, glass, ceramics, cement, quarries, pulp, paper, waste disposal, environmental and other related industries. Therefore its membership domain overlaps relative to the paper sector. CEPI represents the pulp, paper and board industry, but it does not claim to organise the paper-converting industry. As a result, its domain is sectionalist relative to the sector under consideration. CEPI organises only employer organisations rather than individual companies.

Membership composition

In terms of membership composition, it should be noted that EMCEF and CEPI cover more than the 26 countries examined in this study. However, this report only considers the members of these 26 countries. For EMCEF Table 12 documents a list of membership of sector-related trade unions drawn from the country reports. Accordingly, at least one affiliation in each country under consideration except for Cyprus, the Czech Republic, Estonia, Greece, Ireland, Italy, Lithuania, Malta, Romania and Slovakia is recorded. In some countries (such as Austria, Belgium, Denmark, Finland, France, the Netherlands, Poland, Spain, Sweden and the UK) multiple memberships occur. On aggregate, EMCEF counts 35 direct and indirect sector-related affiliations from the countries under examination. It should be noted that the number of sector-related affiliates to EMCEF listed in this study clearly exceeds the number of sector-related members as provided by EMCEF itself. This is partially because in some cases EMCEF lists higher-level units (that is, trade union confederations) rather than their sector-related affiliates. Secondly, EMCEF seems to

have a more restricted conception of whether an affiliate's domain is related to the paper sector compared to some of the EIRO national centres.

More than half of the trade unions listed in Table 6 and Table 7 are directly or indirectly affiliated to EMCEF. As far as available data on sectoral membership of the national trade unions provide sufficient information on their relative strength, one can conclude that EMCEF covers the sector's most important labour representatives in most countries. Exceptional cases of uncovered major trade unions in the sector can be found in all those countries which do not record any sector-related affiliation to EMCEF (see above), as well as Portugal (i.e. SINCELPARAGRAFI). Thirty-two of the 35 direct and indirect members of EMCEF are directly involved in collective bargaining related to the paper sector; only three affiliates from countries such as Poland and Spain are not.

Table 12: EMCEF membership (2009/10)[†]

Country	Members
AT	GPA-djp*, PRO.GE*
BE	BBTK/SETCa*, CNE/GNC*, LBC/NVK*, ACLVB/CGSLB*, CG/AC*, CSC/ACV-BIE*
BG	FSOGSDP*, FLI*
CY	–
CZ	–
DE	IGBCE*
DK	3F*, HK*
EE	–
EL	–
ES	FSC-CCOO*, FIA-UGT*, ELA HAINBAT
FI	Paperiliitto*, TU*
FR	FCE-CFDT*, Filpac-CGT*, FG-FO*
HU	(PDSZ*)
IE	–
IT	–
LT	–
LU	OGB-L Bois*
MT	–
NL	FNV Bondgenoten*, CNV Vakmensen*, De Unie/MHP*
PL	FZZPChSziC, NSZZ Solidarność –Paper Workers Section
PT	SINDEQ*
RO	–

SE	Pappers*, Unionen*, Sveriges Ingenjörer*
SI	Pergam*
SK	–
UK	GMB*, Unite*

+ Membership list confined to the sector-related associations of the countries under consideration; affiliation in parenthesis means indirect affiliation via higher-order unit.

* = Involved in sector-related collective bargaining

Table 13 lists the members of CEPI. Of the 26 countries under consideration, CEPI has 17 under its umbrella through associational members from these countries. Multiple memberships do not occur. Table 9 indicates that affiliated and unaffiliated associations co-exist in a series of countries, such as Austria, Belgium, France, Germany, Italy, the Netherlands, Portugal, Slovenia, Spain and Sweden. Sectoral membership data of the relevant organisations in these countries do not provide a clear indication of whether the most important associations are affiliated. In several countries, such as Austria, Belgium, Bulgaria, Denmark, France, Germany, Greece, Ireland, Italy, the Netherlands, Portugal, Slovenia, Spain and Sweden, some important or even all employer organisations that conduct bargaining are not affiliated to CEPI. There are also several countries (Austria, France, Hungary, Poland and Portugal) where the affiliate of CEPI is not engaged in bargaining. Employer/ business organisations which are not involved in collective bargaining may regard themselves as trade associations rather than industrial relations actors. Of the 17 direct affiliates of CEPI, 12 are directly involved in sector-related collective bargaining. This means that, in comparison with EMCEF, CEPI's proportion of member organisations which are involved in sector-related collective bargaining is slightly lower. CEPI members cover collective bargaining in 12 of the 17 countries which record affiliations to this European-level employer organisation, a slightly lower number than the 15 countries where sector-related collective bargaining is conducted by affiliates of its European-level counterpart (that is, EMCEF). As can be seen from Table 9, a number of sector-related employer organisations across the EU are not affiliated to CEPI but are involved in sector-related collective bargaining.

Table 13: CEPI membership (2009/10)⁺

Country	Members
AT	Austropapier
BE	COBELPA*
BG	–
CY	–
CZ	ACPP*
DE	VDP*
DK	–
EE	–
GR	–
ES	ASPAPEL*

FI	FFI*
FR	COPACEL**
HU	NYPSZ
IE	–
IT	ASSOCARTA*
LT	–
LU	–
MT	–
NL	Royal VNP*
PL	SPP
PT	CELPA**
RO	ROMPAP*
SE	Skogsindustrierna*
SI	GZS*
SK	ZCPP SR*
UK	CPI*

+ *Membership list confined to the sector-related associations of the countries under consideration.*

* *Involved in sector-related collective bargaining*

** *Collective bargaining involvement via higher- or lower-level unit(s)*

Capacity to negotiate

The third criterion of representativeness at the European level refers to the organisations' capacity to negotiate on behalf of their own members. EMCEF, according to its Mandate Procedures as approved of by the General Assembly on 1 July 2010, has established a sophisticated procedure for its members' involvement in the sectoral social dialogue in that all affiliates are entitled to nominate delegates to the relevant working groups and plenary. This ensures that the affiliates are immediately involved in all processes regarding the European sectoral social dialogue.

On the employer side, CEPI has obtained for its members a special mandate to negotiate with its European-level counterpart on the employee side in matters of the European social dialogue. According to the CEPI Social Affairs Director, CEPI is thereby entitled to discuss and negotiate on issues that are listed in the annual work programme as agreed between the European social partners. In conclusion, both EMCEF and CEPI are capable of negotiating and acting on behalf of their members, albeit that CEPI faces some limitations in this respect.

As a final proof of the weight of both EMCEF and CEPI, it is useful to look at other European organisations which may be important representatives of the sector. This can be done by reviewing the other European organisations to which the sector-related trade unions and employer associations are affiliated.

For the trade unions, these affiliations are listed in Table 7. Accordingly, European organisations other than EMCEF represent a relatively large proportion of both sector-related trade unions and countries. For reasons of brevity, only those European organisations that cover at least three countries are mentioned. This involves the Union Network International – Europa (UNI Europa), with 25 direct and indirect affiliations covering 13 countries; the European Federation of Building and Woodworkers (EFBWW), with five affiliations and five countries; the European Federation of Trade Unions in the Food, Agriculture and Tourism Sectors and Allied Branches (EFFAT) and the European Metalworkers’ Federation (EMF), with four affiliations covering three countries each; the European Trade Union Federation – Textiles, Clothing, Leather (ETUF – TCL), with three affiliations and three countries; and the Council of European Professional and Managerial Staff (Eurocadres), with three affiliations and two countries. Moreover, it should be noted that the affiliations listed in Table 7 are likely not to be exhaustive. Nevertheless, and despite the relatively large number of affiliations to European organisations (in particular UNI Europa) other than EMCEF, this overview yet underlines the principal status of the latter association as the sector’s labour representative. This is mainly because many of the aforementioned affiliations to other European organisations reflect the overlapping domains of the affiliates (see Table 6) rather than a real reference of the affiliations as such to the paper sector.

An analogous review of the membership of the national employer/ business associations can be derived from Table 9. Few of them have affiliations to European associations other than CEPI. There are only two European associations which cover three countries each: the European Federation of Corrugated Board Manufacturers (FEFCO) and the European Confederation of Woodworking Industries (CEI-Bois), with three affiliations covering three countries each. In terms of both the number of affiliations as well as territorial coverage, however, both FEFCO and CEI-Bois are far behind CEPI.

In conclusion, EMCEF and CEPI are obviously by far the most important sector-related European organisations.

Commentary

Despite ongoing restructuring of the European paper industry during the past decade, in particular its pulp and paper manufacturing segment, industrial relations still tend to be quite well organised in the sector. This is demonstrated by a relatively strong presence of employer associations and a high level of collective bargaining coverage in most countries. However, unionisation rates within the paper sector tend to be lower compared to the employer organisations’ densities, even though the data set, in particular regarding the trade unions, is quite vague because of several data gaps. Usually, a traditional, male-dominated manufacturing industry with a clear prevalence of standard employment such as the paper industry tends to record relatively high unionisation rates. On the other hand, about half of the sector’s workers are employed by a growing number of SMEs which often do not meet the criteria for setting up workplace representation – which is often a prerequisite for unions to reach and gather employees. On the employer side, a monopolistic structure of interest representation within the paper sector has been established in more than half of the Member States which do record associational interest representation on behalf of the sector’s employers. Moreover, many of the employer/ business organisations have a membership domain which is sectionalist in relation to the sector. This indicates that the domain of these employer/ business organisations is tailored to particular segments of the paper sector, which thus enables them to pursue a more particularistic interest representation compared to more general associations, while they do not claim to represent all businesses of the entire paper sector.

Examining the figures on cross-sectoral collective bargaining coverage in the EU27, as presented in the EIRO industrial relations profiles for each Member State, indicates that the paper industry’s

bargaining coverage is clearly higher than the national overall collective bargaining coverage rates in 15 out of 23 countries for which comparable data are available. Closer consideration shows that collective bargaining coverage within the paper sector tends to be high in the 'old' EU15, with the exception of Denmark, Ireland and Portugal, while sectoral bargaining standards vary widely among the new Member States. In Cyprus, Hungary, Lithuania and Poland sector-related bargaining is barely conducted. By contrast, collective bargaining arrangements cover at least major part of the sector's workforce in Bulgaria, the Czech Republic, Malta, Romania, Slovakia and Slovenia. Generally, high collective bargaining coverage rates in the sector are strengthened by the predominance of multi-employer arrangements and a significant use of extension practices.

Although the paper sector – like most other 'industrial' sectors – has not been spared from the negative effects of the global economic downturn since 2007/8, which have been manifested in large-scale redundancies and a decline in productivity, no major impacts have been observed on the national industrial relations systems within the sector (perhaps with the exception of Ireland and Sweden). At European level, in order to cope with the current challenges for the sector, the sector's social partners – EMCEF on the employees' side and CEPI on the employers' side – formally set up a joint social dialogue committee in April 2010. In October 2010, these two European actors launched a first joint initiative to improve health and safety practices within the sector. Compared with all other European social partner organisations, according to the study findings, both EMCEF and CEPI remain unchallenged in their position as EU-wide representatives of the sector's employees and employers.

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List of abbreviations

Country	Abbreviation	Full name
AT	Austropapier	Association of Austrian Paper Industry
	GPA-djp	Union of Salaried Employees, Graphical Workers and Journalists
	ÖGB	Austrian Trade Union Federation
	PRO.GE	Produktionsgewerkschaft
	WKO	Austrian Federal Economic Chamber
	WKO FVBKE	Sectoral WKO Association of Bookbinders, Manufacturers of Cardboard Packaging Products and Cases
	WKO FVPI	Sectoral WKO Association of the Paper Industry
	WKO FVPVI	Sectoral WKO Association of the Paper Processing Industry
BE	ACLVB/CGSLB	Federation of Liberal Trade Unions of Belgium
	BBTK/SETca	Belgian Union of White-Collar Staff, Technicians and Managers
	BECI	Brussels Enterprises Commerce and Industry
	CG/AC	General Federation
	CNE/GNC	National Employee Federation
	COBELPA	Association of the Belgian Pulp, Paper and Board Industries
	CSC/ACV-BIE	Confederation of Christian Trade Unions – Building Industry and Energy
	FEB/VBO	Belgian Federation of Employers
	FETRA	Federation of Paper and Paperboard Converting Industries
	FGTB/ABVV	Belgian General Federation
	LBC/NVK	National Federation of White-collar Workers
	UWE	Union Wallone des Entreprises
	VOKA	Vlaams Netwerk van Ondernemingen
BG	BIA	Bulgarian Industrial Association
	CITUB	Confederation of Independent Trade Unions of Bulgaria
	CL Podkrepa	‘Podkrepa’ Labour Confederation
	FLI	Federation Light Industry
	FSOGSDP	Federation of Trade Union Organisations in Forestry and Woodworking of Bulgaria

	PPIBC	Pulp and Paper Industry Branch Chamber
CY	OVIEK	Federation of Industrial Workers of Cyprus
	PEO	Pancyprian Federation of Labour
	SEK	Cyprus Workers' Federation
	SEVETTYK	Cyprus Union of Workers in Industry, Trade, Press and Printing and General Services
CZ	ACPP	Association of the Pulp and Paper Industry
	CMKOS	Czech-Moravian Confederation of Trade Unions
	C-MOS	Bohemian-Moravian Trade Union Federation
	OS DLV	Trade Union of Workers in Woodworking Industry, Forestry and Management of Water
	SP CR	Confederation of Industry of the Czech Republic
DE	BDA	German Confederation of Employers' Associations
	BDI	Federation of German Industries
	DGB	German Trade Union Federation
	HPV	Hauptverband Papier und Kunststoff
	IGBCE	Industriegewerkschaft Bergbau, Chemie, Energie
	VAP	Vereinigung der Arbeitgeberverbände der deutschen Papierindustrie
	VDP	Verband Deutscher Papierfabriken
	ver.di	Vereinte Dienstleistungsgewerkschaft
DK	3F	United Federation of Danish Workers
	DI	Confederation of Danish Industry
	EAB	Emballageindustriens Arbejdsgiver- og Brancheforening
	HK	Union of Commercial and Clerical Employees in Denmark
	LO	Danish Confederation of Trade Unions
EE	EAKL	Estonian Trade Union Federation
	EMT	Trade Union of Estonian Forest Industry Workers
GR	FSEPP	Federation of Salaried Employees of Press and Paper
	GSEE	Greek General Confederation of Labour
	SEV	Hellenic Federation of Enterprises
	UPI	Union of Paper Industries
ES	ADEGI	Association of Enterprises of Gipuzkoa
	ASPAPEL	Spanish Association of Manufacturers of Pulp, Paper and Cardboard

	CCOO	Trade Union Confederation of Workers' Commissions
	CEOE	Spanish Confederation of Employers' Organisations
	CIG	Chemistry and Energy Federation of Galician Inter-union Confederation
	ELA	Basque Workers' Solidarity
	ELA HAINBAT	Basque Workers' Solidarity – HAINBAT
	FIA-UGT	Industry Federation of the General Workers Confederation
	FSC-CCOO	Federation of Citizen Services of the Trade Union Confederation of Workers' Commissions
	LAB	Construction and Chemical Workers' Union
	UGT	General Workers' Confederation
FI	AKAVA	Confederation of Unions for Professional and Managerial Staff in Finland
	EK	Confederation of Finnish Industries
	FFI	Finnish Forest Industries
	Paperiliitto	Paperworkers' Union
	SAK	Central Organisation of Finnish Trade Unions
	STTK	Finnish Confederation of Professionals
	TU	Union of Salaried Employees
	YTN	Federation of Professional and Managerial Staff
FR	AFDPE	Association Française des Distributeurs de Papiers et d'Emballage
	CFDT	French Democratic Confederation of Labour
	CFE-CGC	Confédération Française de l'Encadrement – Confédération Générale des Cadres
	CFTC	French Christian Workers' Confederation
	CGPME	Confederation of Small and Medium-Sized Enterprises
	CGT	General Confederation of Labour
	CGT-FO	General Confederation of Labour – Force ouvrière
	COPACEL	Confédération Française de l'Industrie des Papiers, Cartons et Celluloses
	FCA	Fédération Française des Syndicats de la Communication Ecrite, Graphique, de l'Audiovisuel et du Spectacle
	FCE	Fédération de la Chimie et de l'Energie
	FEDARPA	Fédération des Syndicats de Fabricants d'Articles de Papeterie
	FFC	Fédération Française du Cartonnage

	FG-FO	Fédération Générale – Force ouvrière
	FIBOPA	Filière Bois-Papier de la CFE-CGC
	FILPAC	Fédération des Travailleurs des Industries du Livre, du Papier et de la Communication
	MEDEF	Movement of French Enterprises
	UNIPAS	Union des Industries Papetières pour les Affaires Sociales
HU	ASZSZ	Federation of Autonomous Trade Unions
	MGYOSZ	Confederation of Hungarian Employers and Industrialists
	NYPSZ	Federation of Hungarian Printers and Papermakers
	PDSZ	Trade Union of Paper Workers
	VDSZ	Federation of Chemical Workers of Hungary
IE	IBEC	Irish Business and Employers Confederation
	SIPTU	Services, Industrial, Professional and Technical Union
IT	ASSOCARTA	Associazione Italiana fra gli Industriali della Carta, Cartoni e Paste per Carta
	ASSOGRAFICI	Associazione Nazionale Italiana Industrie Grafiche Cartotecniche e Trasformatrici
	CGIL	General Confederation of Italian Workers
	CISL	Italian Confederation of Workers' Unions
	CONFAPI	Confederazione Italiana della Piccole e Media Industria Privata
	CONFINDUSTRIA	Confederazione Generale dell'Industria Italiana
	FISTEL	Federazione Informazione Spettacolo e Telecomunicazioni
	SLC	Sindacato Lavoratori Comunicazione
	UGL	General Labour Union
	UGL Carta e Stampa	General Labour Union – paper and printing
	UIL	Union of Italian Workers
	UILCOM	Unione Italiana Lavoratori della Comunicazione
	UNIGEC CONFAPI	Unione Nazionale della Piccole e Media Industria Grafica, Editoriale, Cartotecnica ed affine
LT	LMPF	Lithuanian Federation of Forest and Woodworkers Trade Unions
	LPSK	Lithuanian Trade Union Confederation
LU	OGB-L	Independent Luxembourg Union Federation
	OGB-L Bois, Caoutchouc,	Independent Luxembourg Union Federation – Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastiques,

	C�ramique, Chimie, Ciment, Papier, Plastiques, Textiles et Verres	Textiles et Verres
MT	GWU	General Workers' Union
NL	CMHP	Confederation of Middle and Higher Personnel Unions
	CNV	Christian Trade Union Federation
	CNV Vakmensen	Christian Trade Union Federation – Vakmensen
	De Unie/MHP	De Unie – Trade Union for Industry and Services
	FNV	Federation of Dutch Trade Unions
	FNV Bondgenoten	Federation of Dutch Trade Unions – Bondgenoten
	FNV Kiem	Federation of Dutch Trade Unions – Kunsten, Informatie en Media
	Kartoflex	Kartoflex
	Royal VNP	Royal United Paper Mills of the Netherlands
	VNO-NCW	Confederation of Netherlands Industry and Employers
PL	FZZPChSziC	Trade Union Federation of Chemical, Glass and Ceramic Industries
	KIG	Krajowa Izba Gospodarcza
	NSZZ ‘Solidarno�c’	‘Solidarno�c’ Independent and Self-Governing Trade Union
	OPZZ	All-Poland Alliance of Trade Unions
	SPP	Association of Polish Papermakers
PT	ANIPC	National Association of Paper and Board Manufacturers
	CELPA	Association of Paper Industry
	CGTP	Portuguese General Workers' Confederation
	FETESE	Technical and Services Workers' Trade Union
	FETICEQ	Federation of Workers in the Ceramics, Glass, Extractive, Energy and Chemical Industries
	RECIPAC	National Association for Recovery and Recycling of Paper and Board
	SINCELPAGRAFI	Union of Workers in the Cellulose, Paper, Graphics and Printing Industries
	SINDEQ	Democratic Union of Energy, Chemical, Textile and other Industries
	SINDETELCO	Democratic Union of Communication and Media Workers
	SITese	Union of Workers in Administration, Commerce, Hotels and Services

	UGT	General Workers' Confederation
RO	Cartel Alfa	National Trade Union Confederation
	CONPIRON	Industry, Agriculture, Construction and Services Employer Confederation of Romania
	FLMCH	Wood, Furniture, Cellulose and Paper Federation
	ROMPAP	Cellulose and Paper Industry Employer Federation
SE	GFF	Swedish Graphic Companies' Federation
	GS	Union for Forestry, Woodworking and Graphic Industries
	Industrikommittén	Industrial Committee
	Ledarna	Confederation of Executives and Managerial Staff
	LO	Swedish Trade Union Confederation
	LRF	Federation of Swedish Farmers
	OFR	Public Employees' Negotiation Council
	Pappers	Swedish Paper Workers Union
	PTK	Council for Negotiation and Co-operation
	SACO	Swedish Confederation of Professional Associations
	SKGS	Skogen, Kemin, Gruvorna och Stalet
	Skogsindustrierna	Swedish Forest Industries Federation
	Svenskt Näringsliv	Confederation of Swedish Enterprises
	Sveriges Ingenjörer	Swedish Association of Graduate Engineers
	Unionen	Trade Union for Professionals in the Private Sector
SI	GZS	Chamber of Commerce and Industry of Slovenia
	Pergam	Confederation of Trade Unions of Slovenia Pergam, Trade Union of Paper Industry of Slovenia
	ZDS	Association of Employers of Slovenia
SK	AZZZ SR	Asociácia zamestnávateľských zväzov a združení Slovenskej republiky
	KOZ SR	Confederation of Trade Unions
	OZ DLV	Odborový zväz drevo, lesy voda
	ZCPP SR	Union of Pulp and Paper Industry of the Slovak Republic
UK	CBI	Confederation of British Industry
	CPI	Confederation of Paper Industries
	GMB	General, Municipal, Boilermakers and Allied Trade Union
	TUC	Trades Union Congress

	UNITE	Unite the Union
EUROPE	CEI-Bois	European Confederation of Woodworking Industries
	CEPI	Confederation of European Paper Industries
	CEPIFINE	European Association of Fine Paper Manufacturers
	CITPA	International Confederation of Paper and Board Converters in Europe
	ECMA	European Carton Makers Association
	EFBWW	European Federation of Building and Woodworkers
	EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions
	EFJ	European Federation of Journalists
	EMCEF	European Mine, Chemical and Energy Workers' Federation
	EMF	European Metalworkers' Federation
	EPSU	European Federation of Public Service Unions
	ETF	European Transport Workers' Federation
	ETUF-TCL	European Trade Union Federation: Textile, Clothing and Leather
	EUROCADRES	Council of European Professional and Managerial Staff
	EUROCHAMBRES	Association of European Chambers of Commerce and Industry
	EURO WEA	European Workers' Education Association
	FEANI	European Federation of National Engineering Associations
	FEFCO	European Federation of Corrugated Board Manufacturers
	FTP	Forest-based sector Technology Platform
	INTERGRAF	International Confederation for Printing and Allied Industries
	UNI Europa	Union Network International – Europe
	UTIPULP	Group of European Market Wood Pulp Users

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