



Representativeness of the European social partner organisations: Manufacture of sugar

Objectives of study

Economic background

National level of interest representation

European level of interest representation

Commentary

Annex: List of abbreviations

This report examines the operations of social partner organisations and collective bargaining in the sugar manufacture sector. The study first outlines the economic background of the sector. The second part analyses the social partner organisations in the Member States of the European Union (with the exception of Cyprus, Estonia, Ireland, Luxembourg and Malta, where the sector is not present), looking in particular at membership levels, the role of the organisations in collective bargaining and public policy, and their national and European affiliations. The third and final part of the report analyses the relevant European organisations, in particular their membership composition and capacity to negotiate. The aim of the EIRO representativeness studies 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 associations to be consulted under the EC Treaty provisions. Hence, this study seeks to provide basic information required to establish sectoral social dialogue.

Objectives of study

The goal of this **representativeness** study is to identify the relevant national and supranational associations – that is, the **trade unions** and **employer organisations** – in the field of industrial relations in the sugar manufacture 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 organisations to be consulted under the provisions of the EC Treaty. Hence, the study aims to provide the basic information needed to set up sectoral **social dialogue**. The effectiveness of European social dialogue depends on whether its participants are sufficiently representative in terms of the sector's relevant national actors across the Member States of the European Union (EU). Therefore, only European organisations which meet this precondition will be allowed to join the European social dialogue.

Against this background, the study will first identify the relevant national and European social partner organisations, 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 the national and European levels, a multiplicity of associations exists which are not considered to be social partner organisations in the sense that they essentially deal with industrial relations. Thus, there is a need for clear-cut criteria which will enable analysis to distinguish 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 organisations must either be 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 138 of the EC Treaty, and/or that 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 at all be involved 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 determine whether the national affiliates to the European social partner organisations are engaged in industrial relations in their respective country. Affiliation to a European social partner organisation and/or involvement in national collective bargaining are of the utmost importance to the European social dialogue, since they are the two constituent mechanisms that can systematically link the national and European levels.

In terms of the selection criteria for the European organisations, the study includes any other sector-related European association which has under its umbrella sector-related, national social partner organisations, as defined above, in addition to the European social partner organisations. Therefore, the objective to identify the sector-related national and European social partner organisations is both 'top-down' and 'bottom-up'.

Definitions

For the purpose of this study, the sugar manufacture sector is defined in terms of the classification of economic activities in the European Community (NACE), to ensure cross-national comparability of the research findings. More specifically, the sector is defined as NACE 15.83, that is, the manufacture of sugar. The domains of the trade unions and employer organisations, and similarly the scope of relevant **collective agreements**, are likely to vary from this precise NACE demarcation. Therefore, the study includes all trade unions, employer organisations and multi-employer collective agreements that are ‘sector-related’ in terms of any of the following four patterns:

- congruence – the domain of the organisation or scope of the collective agreement must be identical with the NACE demarcation, as specified above;
- 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;
- 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;
- sectional overlap – the domain or scope covers part of the sector as well as parts of one or more other sectors.

At European level, the European Commission established a European Social Dialogue Committee for the sugar sector in 1999, replacing the informal working group which had been founded in 1969. The [European Federation of Food, Agriculture and Tourism Trade Unions \(EFFAT\)](#) and the European Committee of Sugar Manufacturers ([Comité Européen des Fabricants de Sucre, CEFS](#)) 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. However, it should be noted that the constituent criterion is one of sector-related membership domain. This is important in the case of EFFAT due to its multi-sectoral domain. This study will include only those organisations affiliated to EFFAT whose domain relates to the sugar manufacture sector.

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 cited otherwise, this study draws on the country studies provided by the [EIRO national centres](#). It is often difficult to find precise quantitative data. In such cases, rough estimates are provided rather than leaving a question blank, given the practical and political relevance of this study. However, if any doubt arises over the reliability of an estimate, this will be noted.

Quantitative data, as documented in the country studies, may stem from three sources:

- 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 this report are generally statistics, the figures relating to 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 report.

Structure of report

The study consists of three main parts, beginning with a brief summary of the economic background of the sector. The report will then analyse the relevant social partner organisations in all EU Member States, with the exception of five countries (Cyprus, Estonia, Ireland, Luxembourg and Malta), in which the sector is not

© European Foundation for the Improvement of Living and Working Conditions, 2008

present. In other words, the study covers 22 European countries in total. The third part of the study looks at the representative social partner organisations at European level. Each section will contain a brief introduction, which explains the concept of representativeness in greater detail, followed by the study findings. As representativeness is a complex issue, it requires separate consideration of the national and European levels for two reasons. Firstly, account has to be taken of how national regulations and practices capture representativeness. Secondly, the national and European organisations differ in their tasks and scope of activities. The concept of representativeness must thus take into account these differences.

Finally, it is worth highlighting the difference between the research and political aspects of this study. While the report provides data on the representativeness of the organisations under consideration, it 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 sufficient representativeness is a matter for political decision rather than an issue for research analysis.

Economic background

With an annual production volume of over 16 million tonnes of white sugar obtained from beet grown in the EU, and about 1.7 million tonnes acquired from imported raw sugar cane, the EU is among the world's leading sugar producers (see European Commission report [Recent developments in the European sectoral social dialogue \(1.35Mb PDF\)](#), December 2005). Sugar was produced in the majority of Member States until 2007, with the exception of Cyprus, Estonia, Ireland, Luxembourg and Malta. In Latvia and Slovenia, sugar production ceased when the remaining companies in the sector were closed down in the spring of 2007. In the period 2004–2005, France, Germany and Poland were ranked as the largest producers of sugar, with the first two countries yielding over four million tonnes of sugar each and the latter country producing over two million tonnes (see European Commission report [The European sugar sector – A long-term competitive future \(584Kb PDF\)](#), September 2006).

In the 1990s, the sugar manufacture sector experienced extensive **restructuring** due to deregulation and liberalisation pressures, combined with takeovers by large multinational companies. European sugar producers faced increased competition in the late 1990s, in particular due to the [World Trade Organization \(WTO\)](#) trade liberalisation rounds, which aimed to achieve improved market access for sugar cane producers from developing countries. Responding to the rising competitive pressures, the European Commission announced market reforms in the European sugar manufacture sector, which were followed by a European Council agreement on the reform of the common market structure in the sugar sector – the so-called 'sugar regime'. Measures such as the reduction of guaranteed prices and production quotas, which were adopted for the first time in 2005–2006, contributed to the decrease in output and employment in Europe's sugar sector. From 2005 to 2007, the social partners expected a reduction of 25% in the number of companies, along with a decrease in direct employment by some 25,000 people.

The Member States that are expected to be most affected by these reforms are Greece, Ireland, Italy and Portugal, but also the Czech Republic, Denmark, Finland, Hungary, Latvia, Lithuania, Slovakia, Slovenia and Spain (see European Commission, September 2006). In fact, between 1994 and 2005, approximately 33,000 jobs were lost in the sugar manufacture sector, according to the 16 countries which reported data on sectoral employment (including self-employed and agency workers) or data on the number of employees (only those dependently employed) in the sector – namely, Austria, Belgium, the Czech Republic, Denmark, Finland, Germany, Greece, Hungary, Italy, Latvia, the Netherlands, Poland, Slovakia, Slovenia, Spain and the United Kingdom (see Table 1).

Tables 1 and 2 give an overview of economic development in the sector from the mid 1990s to the mid 2000s, presenting a few indicators which are important to industrial relations and social dialogue. As a result of market reforms and restructuring, the number of companies in the sector decreased or remained the same in all of the Member States in question, with the exception of Finland where the number of companies increased (Table 1). The consolidation process resulted in a further concentration of the sector. In 2006–2007, only one single sugar manufacturing company could be found in Austria, Denmark, Greece, the Netherlands and Slovenia. Employment levels also dropped significantly in the sector, with the heaviest losses in total employment being reported in the new Member States: more specifically, employment levels

dropped by about 75% in Slovakia, by over 60% in the Czech Republic and by around 50% in Latvia, Poland and Slovenia. The same trend can be observed in terms of the number of employees, which plummeted in all of the Member States under consideration in the period between 1994 and 2005, or later in some cases: the largest decline was observed in Slovakia where the number of employees fell by 78%, followed by Hungary and the Czech Republic where the number of employees dropped by 66% and 60% respectively (Table 2).

It should be emphasised that employment in the sugar manufacture sector is highly variable due to seasonal employment during harvest time. In most countries, the number of employees differs considerably from the total number in employment. The varying demand for workers in the sugar manufacture sector thus requires high flexibility in employment practices. Therefore, 'standard' employment is less frequent, whereas atypical employment – such as temporary employment and **temporary agency work** – is widespread. The results in Table 2 also show that the sector is extremely small, with its share of both total employment and the total number of employees being far below 1% in all of the countries.

Table 1: Total employment in sugar manufacture sector, 1994 and 2005

| | Number of companies | | Total employment* | | Male employment | | Female employment | |
|-------------------|---------------------|------|-------------------|--------|-----------------|-------|-------------------|-------|
| | 1994 | 2005 | 1994 | 2005 | 1994 | 2005 | 1994 | 2005 |
| AT ^a | 1 | 1 | 820 | 554 | n.a. | 494 | n.a. | 60 |
| BE ^a | 17 | 14 | 1,787 | 1,611 | n.a. | n.a. | n.a. | n.a. |
| BG ^b | n.a. | 5 | n.a. | 1,825 | n.a. | 1,079 | n.a. | 747 |
| CZ | 41 | 28 | 5,890 | 2,260 | 3,910 | 1,360 | 1,980 | 900 |
| DE ^{b,c} | n.a. | 30 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| DK ^a | 1 | 1 | ~1,353 | 769 | n.a. | n.a. | n.a. | n.a. |
| EL | 1 | 1 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| ES | ~75 | ~41 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| FI | 1 | 4 | 587 | 357 | 426 | 258 | 161 | 99 |
| FR | 55 | 35 | n.a. | 7,581 | n.a. | n.a. | n.a. | ~750 |
| HU | 11 | 5 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| IT ^{d,e} | 15 | 14 | 5,747 | 4,360 | 4,855 | 3,683 | 892 | 677 |
| LT ^a | n.a. | 3 | n.a. | 942 | n.a. | n.a. | n.a. | n.a. |
| LV ^{b,g} | 3 | 2 | 1,271 | 636 | 680 | 402 | 591 | 234 |
| NL ^a | 5 | 1 | n.a. | 842 | n.a. | 732 | n.a. | 110 |
| PL | n.a. | 5 | 24,164 | 10,943 | 18,832 | 8,657 | 5,341 | 2,286 |
| PT ^b | n.a. | 3 | n.a. | 677 | n.a. | 584 | n.a. | 93 |
| RO ^f | n.a. | 8 | n.a. | 1,267 | n.a. | 995 | n.a. | 272 |
| SE ^b | 10 | 4 | n.a. | 521 | n.a. | n.a. | n.a. | n.a. |
| SI ^b | 1 | 1 | 392 | 197 | 306 | 157 | 86 | 40 |
| SK | 15 | 3 | 2,859 | 701 | 2,067 | 530 | 792 | 171 |
| UK | 2 | 2 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |

Notes: n.a. = not available; ^a = 2007, ^b = 2006, ^c = 1999, ^d = 1991 ^e = 2001, ^f = 2007, ^g = 1997

* Includes self-employed and agency workers

Source: EIRO national centres, 2006

Table 2: Total employees in sugar manufacture sector, 1994 and 2005

| | Total employees* | | Male employees | | Female employees | | Total sectoral employees as % of total employment in economy | | Total sectoral employees as % of total employees in economy | |
|-------------------|------------------|--------|----------------|--------|------------------|-------|--|--------|---|--------|
| | 1994 | 2005 | 1994 | 2005 | 1994 | 2005 | 1994 | 2005 | 1994 | 2005 |
| AT ^a | 568 | 295 | 534 | 270 | 34 | 25 | 0.02 | 0.01 | 0.03 | 0.02 |
| BE ^a | 1,390 | 1,210 | n.a. | ~1,053 | n.a. | ~157 | 0.046 | 0.4 | 0.044 | 0.035 |
| BG ^b | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| CZ | 5,840 | 2,260 | 3,850 | 1,360 | 1,980 | 900 | 0.12 | 0.047 | 0.14 | 0.06 |
| DE ^{b,c} | 6,789 | 5,683 | 5,483 | 4,521 | 1,306 | 1,162 | n.a. | n.a. | n.a. | 0.0002 |
| DK ^a | n.a. | 769 | n.a. | n.a. | n.a. | n.a. | n.a. | 0.03 | n.a. | 0.03 |
| EL | 2,246 | 1,592 | 1,786 | 1,342 | 460 | 250 | n.a. | 0.0004 | n.a. | 0.0006 |
| ES | ~4,500 | ~2,300 | n.a. | ~2,208 | n.a. | ~92 | 0.036 | 0.001 | 0.04 | 0.001 |
| FI | 587 | 357 | 426 | 258 | 161 | 99 | 0.03 | 0.02 | 0.04 | 0.02 |
| FR | n.a. | 7,079 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | 0.12 | 0.13 |
| HU | 4,134 | 1,393 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | 0.1 | 0.04 |
| IT ^{d,e} | 5,719 | 4,341 | 4,827 | 3,664 | 892 | 677 | 0.025 | 0.019 | 0.034 | 0.025 |
| LT ^a | n.a. | 924 | n.a. | n.a. | n.a. | n.a. | n.a. | 0.06 | n.a. | 0.08 |
| LV ^{b,g} | 1,271 | 632 | 680 | 400 | 591 | 232 | 0.17 | 0.07 | 0.17 | 0.07 |
| NL ^a | 10,300 | 824 | 7,300 | 717 | 3,000 | 107 | n.a. | n.a. | 0.2 | 0.01 |
| PL | n.a. | 10,939 | n.a. | 8,655 | n.a. | 2,284 | n.a. | 0.076 | n.a. | 0.085 |
| PT ^b | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| RO ^f | n.a. | 1,297 | n.a. | 995 | n.a. | 272 | n.a. | 0.014 | n.a. | 1.0027 |
| SE ^b | n.a. | 519 | n.a. | n.a. | n.a. | n.a. | n.a. | 0.011 | n.a. | 0.013 |
| SI ^b | 392 | 197 | 306 | 157 | 86 | 40 | 0.06 | 0.02 | 0.06 | 0.03 |
| SK | 2,850 | 613 | 2,060 | 443 | 790 | 170 | 0.135 | 0.032 | 0.104 | 0.029 |
| UK | 2,350 | 1,450 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | 0.01 | 0.005 |

Notes: n.a. = not available; ^a = 2007, ^b = 2006, ^c = 1999, ^d = 1991 ^e = 2001, ^f = 2007, ^g = 1997

*Only dependent employees

Source: EIRO national centres, 2006

National level of interest representation

In many of the EU Member States, statutory regulations explicitly refer 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

© European Foundation for the Improvement of Living and Working Conditions, 2008

6

This report is available in electronic format only.

the membership strength of the organisations. For instance, statutory extension provisions usually allow for a collective agreement to be extended to unaffiliated employers only when the signatory trade union and employer organisation represent 50% or more of the employees within the agreement's domain (see Institut des Sciences du Travail (IST), *Collective agreement extension mechanisms in EU member countries*, Catholic University of Louvain, Typescript, 2001).

As outlined above, the representativeness of the national social partner organisations is of interest in this study in terms of the capacity of their European umbrella organisations for participation in the 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 the European social dialogue tends to increase with the growing ability of the national affiliates of the European organisations to regulate the employment terms and to influence national public policies affecting the sector.

As cross-national comparative analysis shows, a generally positive correlation emerges between the bargaining role of the social partners and their involvement in public policy (see Traxler, F., 'The metamorphoses of corporatism', in *European Journal of Political Research*, Vol. 43, No. 4, 2004, pp. 571–598). Social partner organisations that are engaged in multi-employer bargaining play a significantly stronger role in state policies than their counterparts in countries where multi-employer bargaining is lacking. The explanation for this finding is that only multi-employer agreements matter in macroeconomic terms, setting an incentive for 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: 1) the membership domain and membership strength of the social partner organisations; 2) their role in collective bargaining; and 3) their role in public policymaking.

Membership domain and strength

The membership domain of an organisation, as formally established by its constitution, demarcates its potential members from other groups which the organisation does not claim to represent. As explained above, this study considers only organisations whose domain relates to the sugar manufacture sector. For reasons of space, it is impossible to outline in detail the domain demarcations of all of 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, a differentiation should be made between strength in terms of the absolute number of members and strength in relative terms. Research usually refers to relative membership strength as 'density' – that is, the ratio of actual to potential members.

Furthermore, a difference also arises between trade unions and employer organisations when measuring membership strength. Trade union membership simply means the number of persons who are unionised. 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 the sex of its members. However, the situation regarding employer organisations is more complex since they organise collective entities – that is, the companies that employ employees. Hence, in this instance, two possible measures of membership strength may be used – one referring to the companies themselves, and the other to the number of employees working in the member companies of an employer organisation.

For a sectoral study such as this, measures of membership strength of both the trade unions and employer organisations also have to take into account 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, density referring to its overall domain – may differ from sector-specific density – in other words, the density referring to the sector. This report will first present the data on the domains and membership strength of the trade unions, followed by the corresponding data for the employer organisations.

Trade unions

The trade union data on both the domains and membership strength are shown in Table 3. This table lists all of the trade unions meeting the two criteria for classification as a sector-related social partner organisation,

as outlined earlier. In the 22 countries under consideration, only one trade union – namely, the [Federation of Employees of the Greek Sugar Industry](#) (OEBZE) – out of a total of 59 unions (1.7 %) has demarcated its domain in a way that is congruent with the sectoral definition. However, OEBZE is a second-level trade union federation that comprises eight primary trade union organisations with distinct membership domains, such as those of factory workers, administrative employees and other specific categories of workers, like scientific staff or graduates of third-level technological institutions. The small number of trade unions with a membership domain congruent with the sectoral definition underlines the fact that statistical definitions of business activities differ somewhat from the lines along which employees identify common interests and come together in trade unions.

As regards trade union organisation in the sugar manufacture sector, domain demarcations resulting in overlap in relation to the sector are as frequent as sectional overlap, at a rate of 49% respectively. Overlap largely arises from two different modes of demarcation. The first relates to general, that is cross-sectoral, domains: such demarcations can be seen in the case of the Confederation of Labour [Подкрепа](#) ([Страница на КТ Подкрепа](#), [CL Подкрепа](#)) in Bulgaria, the General Workers' Confederation ([Unión General de Trabajadores](#), [UGT](#)) and the Trade Union Confederation of Workers' Commissions ([Confederación Sindical de Comisiones Obreras](#), [CC.OO](#)) in Spain, the Free Trade Union of Workers 'Together' ('Razem') and the Free Trade Union August 80 ([Wolny Związek Zawodowy Sierpień 80](#), [WZZ Sierpień 80](#)) in Poland, along with Britain's General Union [GMB](#) and the Transport and General Workers' Union (T&G) (which subsequently merged with Amicus to form [Unite](#) in May 2007) in the United Kingdom (UK). The second mode relates to various forms of multi-sectoral domains, covering contiguous sectors, mostly in the broader food (stuff) production segment of the economy, for example: as in the case of the [Federation of Independent Trade Unions in the Food Industry](#) (FITU) in Bulgaria; or in France in relation to the National Agriculture and Forestry Federation – General Confederation of Labour ([Fédération nationale agroalimentaire et forestière – Confédération générale du travail](#), [FNAF-CGT](#)), the Food and Agriculture Federation – *Force Ouvrière* ([Fédération générale des travailleurs de l'agriculture, de l'alimentation, des tabacs et des services annexes Force Ouvrière](#), [FGTA-FO](#)), the Christian Trade Union Federation for Agriculture Organisations and Professions – French Christian Workers' Confederation ([Fédération des syndicats chrétiens des organismes et professions de l'agriculture – Confédération française des travailleurs chrétiens](#), [FSCOPA-CFTC](#)), the General Federation of Agriculture – French Democratic Confederation of Labour ([Fédération générale de l'agriculture – Confédération française démocratique du travail](#), [FGA-CFDT](#)) and the agricultural division of the French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff ([Confédération française de l'encadrement – Confédération générale des cadres](#), [CFE-CGC](#)); or in Italy in the case of the Agro-industrial, Food and Environment Federation – Italian Confederation of Workers' Unions ([Federazione Agricola, Alimentare, Ambientale Industriale – Confederazione Italiana Sindacati Lavoratori](#), [FAI-Cisl](#)), the Italian Federation of Agro-industrial Workers – General Confederation of Italian Labour ([Federazione Lavoratori Agro Industria – Confederazione Generale Italiana del Lavoro](#), [Flai-Cgil](#)) and the Italian Union of Agro-alimentary Workers – Union of Italian Workers ([Unione Italiana Lavoratori Agroalimentari – Unione Italiana del Lavoro](#), [Uila-Uil](#)). Sectional overlap usually emanates from domain demarcations that focus on certain categories of employees, which are then organised across several or all sectors. Employee categories are specified according to various parameters, such as: distinct occupations – for example, electricians (see the Danish Union of Electricians ([Dansk El-Forbund](#), [DEF](#))), engineers (see the Swedish Association of Graduate Engineers ([Sveriges Ingenjörer](#))), or managerial and professional staff (see the Swedish Association for Managerial and Professional Staff ([Ledarna](#)) and Finland's Union of Salaried Employees ([Toimihenkilöunioni](#), [TU](#))); or employment status – for instance, blue-collar workers (see the United Federation of Danish Workers ([Fagligt Fælles Forbund](#), [3F](#))), or white-collar employees (see TU in Finland or the Union of Commercial and Clerical Employees in Denmark ([Handels- og Kontorfunktionærernes Forbund i Danmark](#), [HK](#))).

The fourth category for the classification of the organisational membership domain – sectionalism – does not correspond to any of the sector's trade unions. Due to the small size of the sugar manufacture sector, limiting the organisational domain only to certain categories of employees in the sector according to NACE 15.83 would not bring about viable organisations simply because of their marginal size.

As the trade unions' domains often overlap with the demarcation of the sector, so too do their domains with one another in most of the countries in question. The results in Table 3 also give an insight into these inter-union domain overlaps. The latter are endemic: in the vast majority of countries, the domain of any of their sector-related unions overlaps with the domain of all or most of the others. Depending on the scale of mutual overlap, this can result in competition for members. High degrees of inter-union competition are, for instance, recorded in Spain. However, in Portugal, a country which is typically characterised by a high degree of domain overlap, the enlargement of the domain of Union of Agriculture, Food and Forests ([Sindicato da Agricultura, Alimentação e Florestas, SETAA](#)) to the sugar manufacture sector did not result in actual overlaps with other organisations, since it was unable to organise workers in the sugar manufacture sector. In Italy, also a country where a considerable degree of domain overlap exists, trade unions even report having excellent relations with each other. In general, therefore, trade union rivalries are not very pronounced in the sugar manufacture sector.

Turning to the membership data of the trade unions, it emerges that female employees constitute the minority in most of the trade unions for which membership data by gender are available. The presence of women is particularly low in the Netherlands, Poland and Spain – not only with respect to the proportion of female workers in the sector, but also in relation to the overall share of women as a percentage of the total trade union membership. Nevertheless, apart from trade unions that predominantly organise administrative and white-collar workers, which therefore usually report above-average female membership levels, the proportion of female trade union members reaches about 50% or higher in the Czech Republic, Hungary, Latvia, Lithuania, Portugal and Slovenia.

Membership of all of the trade unions in the sugar manufacture sector is voluntary. The absolute number of trade union members differs considerably, ranging from over one million members to fewer than 30 members. This considerable variation reflects the differences in the size of the economy and the comprehensiveness of the membership domain, rather than the trade unions' ability to attract members. Therefore, density is a measure of membership strength, which is more relevant for a comparative analysis. Domain density is 50% or higher in the case of 46.4% of the trade unions which document figures on density. Almost half of all the trade unions (42.9%) represent 70% or more of the employees covered by their domain, while 25% of the unions for which data are available organise fewer than 15% of the employees within their domain. A quarter of the sector's trade unions record a density of between 15% and 49% of potential members. Overall, therefore, domain density is rather high. Compared with the density ratio referring to the trade unions' total domain, the trade unions' density in the sugar manufacture sector tends to be even higher. Sectoral density is 70% or higher in the case of 34.4% of the trade unions for which data are available, while 43.8% of the unions document densities ranging from 50% or higher. Only 15.6% of the trade unions record a sectoral density which is lower than 15%, while 40.6% of them report density levels of between 15% and 49%.

The higher sectoral density relative to total density is also evident among those trade unions for which figures on both measures are recorded. In almost all of these cases, sectoral density is either equal to or more or less above the total density. The only exception is Slovakia, where the Trade Union of Food Workers of the Slovak Republic ([Odborový zväz potravinárov Slovenskej Republiky, OZP](#)) reports a relatively small proportion of sugar manufacture workers among their members, compared with the total membership domain which covers workers in various branches of the food industry.

Despite relatively high unionisation rates in the sugar manufacture sector, however, it should not necessarily be deduced that the trade unions are powerful in the sector. Rather, the high concentration in the sector, comprising only a limited number of sugar manufacture companies, facilitates trade union organisation. Besides the Nordic countries of Denmark, Finland and Sweden, and with the notable exception of Romania, only one sugar manufacture company per country is operating in those Member States that are characterised by medium levels of total trade union density – such as Austria, Greece and Slovenia – and that report sectoral densities of above 70%.

In general, taking the sector's small size into consideration, it can be inferred from these findings that the sugar manufacture sector does not represent a stronghold for trade union membership – neither in absolute nor relative terms.

Table 3: Interest representation of trade unions, 2006

| Country | Type of membership* | Domain coverage | Membership | | Density (%) | | Collective bargaining | Consultation | National and European affiliations** |
|--|---------------------|-----------------|------------|---|-------------|--------|-----------------------|-----------------|--|
| | | | Members | Female membership (% of total membership) | Domain | Sector | | | |
| AT | | | | | | | | | |
| GPA-DJP | v | SO | 267,000 | 42% | 22% | n.a. | Yes | n.a. | ÖGB, UNI Europa, Eurocadres, EFFAT, EMCEF, EPSU (planned for 2007) |
| GMTN | v | SO | 230,000 | 17.5% | n.a. | 97% | Yes | Yes | ÖGB, EFFAT, EMF, ETUF-TLC, EMCEF, ETUC |
| BE | | | | | | | | | |
| CSC alimentation et services/A CV voeding en diensten ^a | v | SO | 200,000 | 45% | 52.6% | n.a. | Yes | No ^b | CSC/ACV, EFFAT, ETUC |
| CNE/LBC ^a | v | SO | 380,000 | 33% | 42.2% | n.a. | Yes | No ^b | CSC/ACV, EFFAT, ETUC |
| HORVAL ^a | v | SO | 100,510 | n.a. | 41.5% | n.a. | Yes | No ^b | FGTB/ABV V, EFFAT, ETUC |
| SETCa-BBTK ^a | v | SO | 356,912 | n.a. | 28.3% | n.a. | Yes | No ^b | FGTB/ABV V, EFFAT, ETUC |
| CGSLB/ACLVB ^a | v | O | 220,000 | n.a. | 8.8% | n.a. | Yes | No ^b | CGSLB/ACLVB, EFFAT, ETUC |
| BG | | | | | | | | | |
| FITU Food ^a | v | O | 3,500 | 45.5% | n.a. | 40% | Yes | No | CITUB, EFFAT |
| FKP Podkrepa ^a | v | O | 3,400 | 38.5% | n.a. | 35% | Yes | No | CL Podkrepa, EFFAT |

| Country | Type of membership* | Domain coverage | Membership | | Density (%) | | Collective bargaining | Consultation | National and European affiliations** |
|--------------------------|---------------------|-----------------|------------|---|-------------------|-------------------|-----------------------|--------------|--|
| | | | Members | Female membership (% of total membership) | Domain | Sector | | | |
| CZ | | | | | | | | | |
| NOS PPP | v | O | 13,599 | 52.3% | n.a. | 16.7% | Yes | No | CMKOS, ETUC |
| DE | | | | | | | | | |
| GNGG | v | O | 211,573 | 39.7% | 55% | 55% | Yes | No | DGB, EFFAT |
| DK | | | | | | | | | |
| 3F ^a | v | SO | 352,451 | 34% | ~75% | 100% | Yes | No | LO, CO-Industri, EFBWW, EFFAT, ETF, UNI Europa, EPSU |
| HK | v | SO | 345,968 | 73% | 40%-45% | 50% | Yes | No | LO, CO-Industri, EFFAT, EUL, EMCEF, EFBWW, UNI-Europa, ETF, EPSU |
| DEF ^a | v | SO | 29,874 | 0.9% | 75% | 100% | Yes | No | LO, CO-Industri, EMCEF, EMF, EFBWW, UNI-Europa |
| Metal ^a | v | SO | 138,948 | 5% | 80% | 100% | Yes | No | LO, CO-Industri, ETF, EMF, EPSU |
| EL | | | | | | | | | |
| OEBZE | v | C | 1,592 | 16% | 100% ^c | 100% ^c | Yes | Yes | GSEE |
| ES | | | | | | | | | |
| FACOC-CC.OO ^a | v | SO | n.a. | 15% | n.a. | ~28% | Yes | Yes | CC.OO, EFFAT, ETUC |
| FTA-UGT ^a | v | SO | n.a. | ~5% | n.a. | ~22% | Yes | Yes | UGT, EFFAT, ETUC |

© European Foundation for the Improvement of Living and Working Conditions, 2008

This report is available in electronic format only.

| Country | Type of membership* | Domain coverage | Membership | | Density (%) | | Collective bargaining | Consultation | National and European affiliations** |
|---------------------------------|---------------------|-----------------|----------------------|---|-------------|--------|-----------------------|--------------|--|
| | | | Members | Female membership (% of total membership) | Domain | Sector | | | |
| FI | | | | | | | | | |
| SEL ^a | v | SO | 38,363 | 59% | 89% | 92% | Yes | Yes | SAK, EFFAT, Nordic Food Workers' Union |
| Metalliliitto ^a | v | SO | 165,506 | 20% | 88% | 95% | Yes | No | SAK, Nordic Industry Workers (IN), EMF |
| TU ^a | v | SO | 125,000 | 47% | 70% | 80% | Yes | No | STTK, EFFAT |
| FR | | | | | | | | | |
| FNAF-CGT ^a | v | O | n.a. | n.a. | n.a. | n.a. | Yes | Yes | CGT, EFFAT |
| FGTA-FO ^a | v | O | n.a. | n.a. | n.a. | n.a. | Yes | Yes | CGT-FO, EFFAT |
| FSCOPA-CFTC (AGRI) ^a | v | O | n.a. | n.a. | n.a. | n.a. | Yes | Yes | CFTC, EFFAT |
| FGA-CFDT ^a | v | O | ~60,000 ^c | n.a. | n.a. | n.a. | Yes | Yes | CFDT, EFFAT |
| CFE-CGC AGRO ^a | v | O | n.a. | n.a. | n.a. | n.a. | Yes | Yes | CGC, EFFAT |
| HU | | | | | | | | | |
| ÈDSZ | v | O | ~3,000 | ~50% | ~2.7% | ~36% | Yes | Yes | ÈDOSZ (sectoral), MSZOSZ, EFFAT (indirect affiliation via ÈDOSZ) |
| IT | | | | | | | | | |
| FAI-CISL ^a | v | O | 210,000 | 65% | 14.2% | 37% | Yes | Yes | CISL |
| FLAI-CGIL ^a | v | O | 290,000 | 20% | 19.5% | 33% | Yes | Yes | CGIL, EFFAT |
| UILA-UIL ^a | v | O | 147,000 | 30% | 9.93% | 18% | Yes | Yes | UIL, EFFAT |
| LT | | | | | | | | | |
| LMPS | v | O | 3,050 | 56% | ~6% | 20.3% | Yes | No | LPSK, |

| Country | Type of membership* | Domain coverage | Membership | | Density (%) | | Collective bargaining | Consultation | National and European affiliations** |
|---|---------------------|-----------------|------------|---|-------------|--------|-----------------------|--------------|---|
| | | | Members | Female membership (% of total membership) | Domain | Sector | | | |
| | | | | | | | | | EFFAT |
| LV | | | | | | | | | |
| LATU | v | O | 3,599 | 59% | 49.7% | n.a. | Yes | Yes | LBAS, EFFAT |
| NL | | | | | | | | | |
| FNV Bondgenoten ^a | v | O | 470,000 | ~5% | n.a. | ~50% | Yes | Yes | FNV, EFFAT |
| CNV Bedrijvenbond ^a | v | O | 90,000 | ~5% | n.a. | ~7% | Yes | Yes | CNV, EFFAT |
| De Unie ^a | v | SO | 85,000 | ~5% | n.a. | ~5% | Yes | Yes | MHP |
| PL | | | | | | | | | |
| Company committee NSZZ Solidarność of 'Polish sugar' ^a | v | O | 1,200 | ~10% | n.a. | n.a. | Yes | Yes | National Section of Sugar Production Section of NSZZ Solidarność, NSZZ Solidarność, EFFAT |
| FZZPPC ^a | v | O | 2,000 | ~10% | n.a. | n.a. | Yes | Yes | OPZZ |
| Free Trade Union of Workers 'Together' ('Razem') ^a | v | O | ~30 | n.a. | n.a. | ~3% | Yes | Yes | Unaffiliated |
| Trade union of Transport Workers of 'Polish Sugar' ZZPTKSC | v | SO | ~30 | ~10% | n.a. | n.a. | Yes | Yes | Unaffiliated |
| Trade union of Technical and Administration | v | SO | ~30 | ~10% | n.a. | n.a. | Yes | Yes | Unaffiliated |

| Country | Type of membership* | Domain coverage | Membership | | Density (%) | | Collective bargaining | Consultation | National and European affiliations** |
|--|---------------------|-----------------|------------|---|-------------|--------|-----------------------|--------------|---|
| | | | Members | Female membership (% of total membership) | Domain | Sector | | | |
| Workers of 'Polish Sugar' ZZPTA | | | | | | | | | |
| Free Trade Union of Workers 'August 80' ^a | v | O | ~60 | n.a. | n.a. | ~6% | No | Yes | Unaffiliated |
| PT | | | | | | | | | |
| FESAHT ^a | v | O | n.a. | n.a. | n.a. | n.a. | Yes | No | CGTP |
| STIANOR ^a | v | SO | n.a. | n.a. | n.a. | n.a. | No ^d | No | FESAHT (sectoral), CGTP |
| SINTAB ^a | v | O | ~5,365 | 60% | 2.9% | 40% | No ^d | No | FESAHT (sectoral), CGTP |
| SITIAC ^a | v | SO | n.a. | n.a. | n.a. | n.a. | No ^d | No | FESAHT (sectoral), CGTP |
| SIABAH-ORTA ^a | v | SO | n.a. | n.a. | n.a. | n.a. | No ^d | No | FESAHT (sectoral), CGTP |
| FETESE ^a | v | SO | n.a. | n.a. | n.a. | n.a. | Yes | No | Indirect affiliation through FETESE members' affiliation to UGT |
| SITESE ^a | v | SO | n.a. | n.a. | n.a. | n.a. | No ^d | No | FETESE, UGT, UNI Europa |
| SETAA ^a | v | O | 3,789 | ~50% | 1.9% | 0% | No | No | UGT, EFFAT |
| RO | | | | | | | | | |
| FSIA | v | SO | 1,056 | 20.9% | n.a. | 83% | Yes | Yes | CSDR, EFFAT |
| Zaharul Buzau | v | SO | n.a. | n.a. | n.a. | n.a. | Yes | Yes | CERES, EFFAT (indirect affiliation) |
| SE | | | | | | | | | |

© European Foundation for the Improvement of Living and Working Conditions, 2008

This report is available in electronic format only.

| Country | Type of membership* | Domain coverage | Membership | | Density (%) | | Collective bargaining | Consultation | National and European affiliations** |
|----------------------------------|---------------------|-----------------|------------|---|--------------|--------|-----------------------|--------------|--|
| | | | Members | Female membership (% of total membership) | Domain | Sector | | | |
| IF Metall ^a | v | SO | ~440,000 | ~25% | n.a. | ~95% | Yes | No | LO, EMF, EMCEF |
| SIF ^a | v | SO | ~355,000 | ~38% | ~80% -82% | n.a. | Yes | No | TCO, EFFAT, ETUC |
| Ledarna ^a | v | SO | ~72,000 | ~20% | ~70% | n.a. | Yes | No | OFR |
| Sveriges Ingenjörer ^a | v | SO | ~120,000 | ~29% | ~75% | ~70% | Yes | No | NordIng, UNI Europa, IT, EMF, EMCEF |
| SI | | | | | | | | | |
| KZI | v | O | ~12,920 | ~50% | ~70% | 93% | Yes | Yes | ZSSS, EFFAT |
| SK | | | | | | | | | |
| OZP SR | v | O | 7,900 | 50% | 70% | 45.6% | Yes | No | KOZ SR, EFFAT |
| UK | | | | | | | | | |
| GMB ^a | v | O | 600,106 | 42% | n.a. | n.a. | Yes | No | TUC, EFFAT, FERPA, EFBWW, EPSU, ETUC-TCL, EMF, EMCEF, UNI-Europa |
| T&G ^{a, c} | v | O | 835,351 | 21% | n.a. | n.a. | Yes | No | TUC, EMCEF, ETWF, EFFAT, EFPSU, EMF, EFBWW |
| Amicus ^{a, c} | v | SO | 1,200,000 | 22% | n.a. | n.a. | Yes | No | TUC, EMCEF, ETWF, EFFAT, EPSU, EMF, EFBWW, UNI-Europa |

Notes: See Annex for list of abbreviations and full names of organisations.

* v = voluntary; ** National affiliations are in italics. For the national level, only cross-sectoral (i.e. peak-level) organisations are listed; for the European level, only sector-related organisations are listed.

^a = Inter-union domain overlap, ^b = Indirect consultation via peak organisation, ^c = figure probably inflated, ^d = Indirect collective bargaining involvement via peak organisation, ^e = reported membership data before T&G and Amicus merged to form Unite in May 2007.

O = Overlap, SO = Sectional overlap, C = Congruence

Source: EIRO national centres, 2007

Employer organisations

Tables 4 and 5 present the membership data on the employer organisations. For 18 out of the 22 countries under consideration, sector-related employer organisations are documented. Interestingly, in six of these countries, the listed employer organisations are not a party to collective bargaining (Table 5). In France, two of the three listed employer organisations do not participate in collective bargaining. These organisations are classified as social partner organisations in this report only due to their European-level affiliation to CEFS. This means that just 12 of the 22 countries in question have employer organisations engaged in collective bargaining. In four countries – Greece, Latvia, the Netherlands and the UK – no association exists that meets the definition of a social partner organisation, as previously outlined. This does not mean that employers remained unorganised. Generally, business interest organisations may also deal with interests other than those relating to industrial relations. Organisations which specialise in matters other than industrial relations are commonly designated as trade associations (see [TN0311101S](#)). Such sector-related trade associations also exist in the sugar manufacture sector. In terms of their national scope of activities, all of the associations which are not involved in collective bargaining, according to Table 5, either primarily or exclusively act as trade associations in their respective country. It is only the conceptual decision to include all affiliates of CEFS, 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 21 employer organisations listed in Tables 4 and 5, seven belong to this group; for instance, the Belgian sector-related employer organisation participates in collective bargaining indirectly through its membership in the more encompassing Food Industry Federation ([Fédération de l'Industrie Alimentaire/Federatie Voedingsindustrie](#), [FEVIA](#)) which organises the entire food sector.

With the exceptions of Finland and France, in all of the 18 countries where employer organisations exist, only one such organisation has been established. Pluralist organisational systems are thus far less frequent on the employer than the trade union side. Nevertheless, their domains tend to be narrower than those of the trade unions. In 13 of the 21 employer organisations (61.9%) listed, the organisational scope is congruent with the sector defined by NACE 15.83. Only 23.8% and 9.5% of the organisations reflect overlapping or sectionally overlapping domains, respectively (Table 4). The domain of one of the French employer organisations which organises sugar producers in the French Overseas Department (French-administered territories outside of Europe) of Réunion (an island located in the Indian Ocean, east of Madagascar) is classified as sectional, while the domains of the Confederation of Danish Industries ([Dansk Industri](#), [DI](#)) and the Swedish Industrial and Chemical Employers' Association ([Industri- och KemiGruppen](#)) are cross-sectoral. Otherwise, most of the domain overlaps ensue from coverage of the smaller sugar manufacture sector in the broader food sector. Overlaps of this kind can be found in Austria, Romania and Slovenia. With the exception of the sugar trade association which only organises members in the French Overseas Department Réunion, none of the employer organisations in the sugar manufacture sector is characterised by sectionalist domains due to the small size of the sector. Sectionalist overlaps can only be found in the case of the two Finnish organisations whose domain demarcations focus on certain categories of employers in the sugar manufacture sector. Employer categories are specified by sectoral parameters – such as whether the company's main activity is dominated by the production of food and foodstuffs or by the maintenance of food production machines, as is the case of the Finnish Food and Drink Industries' Federation ([Elintarviketeollisuusliitto](#), [ETL](#)) and the Technology Industries of Finland ([Teknologiategollisuus](#)). Only one employer organisation has obligatory membership, namely the [Sectional Group Food and Foodstuff in the Chamber of the Economy](#) (FNG) in Austria; this is due to its public-law status as a chamber. In Slovenia,

© European Foundation for the Improvement of Living and Working Conditions, 2008

16

This report is available in electronic format only.

where employer membership was obligatory from 1990 onwards, the parliament adopted the new Law on Chambers of Commerce and Industry in May 2006. Since then, membership of the Chamber of Commerce and Industry of Slovenia ([Gospodarska zbornica Slovenije, GZS](#)) has been voluntary.

Table 4: Domain coverage, membership and density of employer organisations, 2006

| Country | Domain coverage | Membership | | | Density | | | |
|----------------------|-----------------|------------|-----------|-----------|-----------|--------|-----------|--------|
| | | Type | Companies | Employees | Companies | | Employees | |
| | | | | | Domain | Sector | Domain | Sector |
| AT | | | | | | | | |
| FNG | O | o | 224 | 27,143 | 100% | 100% | 100% | 100% |
| BE | | | | | | | | |
| SUBEL | C | v | 8 | 1,335 | 57% | 57% | 83% | 83% |
| BG | | | | | | | | |
| USSPMP | C | v | 6 | 2,832 | n.a. | 100% | n.a. | 100% |
| CZ | | | | | | | | |
| CMCS | C | v | 5 | 1,100 | 18% | 18% | 48% | 48% |
| DE | | | | | | | | |
| VdZ | C | v | 5 | ~6,000 | n.a. | n.a. | n.a. | n.a. |
| DK | | | | | | | | |
| DI | O | v | 7,000 | 370,000 | n.a. | n.a. | 100% | 100% |
| EL | n.e. | | | | | | | |
| ES | | | | | | | | |
| AGFAE | C | v | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| FI | | | | | | | | |
| ETL | SO | v | 300 | 37,000 | 97% | 100% | 95% | 100% |
| Teknologiateollisuus | SO | v | 1,400 | 190,000 | 13% | 100% | 82% | 100% |
| FR | | | | | | | | |
| SNFS | C | v | 30 | 52,500 | ~100% | 86% | n.a. | n.a. |
| CSRCSF | C | v | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| SFSRUN | S | v | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| HU | | | | | | | | |
| CIE | C | v | 5 | 1,393 | 100% | 100% | 100% | 100% |
| IT | | | | | | | | |
| UNION ZUCCHERO | C | v | 4 | 2,500 | 80% | 80% | 95% | 95% |
| LT | | | | | | | | |
| Cukrus | C | v | 3 | 605 | 75% | 66% | 64% | 64% |

© European Foundation for the Improvement of Living and Working Conditions, 2008

This report is available in electronic format only.

| Country | Domain coverage | Membership | | | Density | | | |
|---------------------------|-----------------|------------|-----------|-----------|-----------|--------|-----------|--------|
| | | Type | Companies | Employees | Companies | | Employees | |
| | | | | | Domain | Sector | Domain | Sector |
| LV | | | | | | | | |
| n.e. | | | | | | | | |
| NL | | | | | | | | |
| n.e. | | | | | | | | |
| PL | | | | | | | | |
| ZPC | C | v | 5 | 6,500 | 100% | 100% | 100% | 100% |
| PT | | | | | | | | |
| ARAP | C | v | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| RO | | | | | | | | |
| ROMALIE-MENTA | O | v | 6 | 1,120 | n.a. | 75% | n.a. | 90% |
| SE | | | | | | | | |
| Industri-och Kemi Gruppen | O | v | 1,200 | 90,000 | 50% | 100% | 80% | 100% |
| SI | | | | | | | | |
| ZKZP | O | v | 816 | 18,458 | 100% | 100% | 100% | 100% |
| SK | | | | | | | | |
| SCS | C | v | 3 | 680 | 100% | 100% | 100% | 100% |
| UK | | | | | | | | |
| n.e. | | | | | | | | |

Notes: See Annex for list of abbreviations and full names of organisations.

O = Overlap, S = Sectionalism, SO = Sectional Overlap, C = Congruence; v = voluntary, o = obligatory; n.e. = non-existent

Source: EIRO national centres, 2007

Table 5: Collective bargaining, consultation and national/European affiliations of employer organisations, 2006

| Country | Collective bargaining | Consultation | National and European affiliations* |
|-----------|-----------------------|-----------------|---|
| AT | | | |
| FNG | yes | yes | WKÖ |
| BE | | | |
| SUBEL | no ^a | no ^b | (FEVIA sectoral) FEB/VBO, CEFS, Business Europe |
| BG | | | |
| USSPMP | yes | no | BIA |
| CZ | | | |

| Country | Collective bargaining | Consultation | National and European affiliations* |
|-----------------------|-----------------------|--------------|---|
| CMCS | no | n.a. | <i>AK ČR, PK ČR, CEFS</i> |
| DE | | | |
| VdZ | yes | no | <i>BDI, CEFS</i> |
| DK | | | |
| DI | yes | no | <i>DA, Business Europe</i> |
| EL | n.e. | | |
| ES | | | |
| AGFAE | yes | yes | <i>FIAB, CEFS</i> |
| FI | | | |
| ETL | yes | yes | <i>EK, CIAA</i> |
| Teknologiategollisuus | yes | no | <i>EK, SVAPU (inter-regional) CEEMET, EICTA</i> |
| FR | | | |
| SNFS | yes | yes | <i>ANIA, CEFS</i> |
| CSRCSF | no | n.a. | - |
| SFSRUN | no | n.a. | CEFS ^c |
| HU | | | |
| CIE | yes | yes | <i>ÈFOSZ, MGYOSZ, CEFS, ASSUC</i> |
| IT | | | |
| UNION ZUCCHERO | yes | yes | <i>FEDERALIMENTARE, CONFINDUSTRIA, CIAA</i> |
| LT | | | |
| Cukrus | no | yes | <i>LPK, CEFS</i> |
| LV | n.e. | | |
| NL | n.e. | | |
| PL | | | |
| ZPC | no | no | CEFS |
| PT | | | |
| ARAP | no | n.a. | CEFS ^c |
| RO | | | |
| ROMALIEMENTA | yes | yes | <i>UGIR 1903, CIAA</i> |
| SE | | | |

© European Foundation for the Improvement of Living and Working Conditions, 2008

This report is available in electronic format only.

| Country | Collective bargaining | Consultation | National and European affiliations* |
|---------------------------|-----------------------|--------------|-------------------------------------|
| Industri- och KemiGruppen | yes | no | <i>Svenskt näringsliv</i> |
| SI | | | |
| ZKZP | yes | no | GZS, CIAA |
| SK | | | |
| SCS | yes | no | <i>AZZZ SR, CEFS</i> |
| UK | n.e. | | |

Notes: See Annex for list of abbreviations and full names of organisations.

* National affiliations are in italics.

^a = Indirect collective bargaining involvement via peak organisation, ^b = Indirect consultation via peak organisation, ^c = Not a full member but associate member status; only affiliations to sectoral European organisations, n.e. = non-existent

Source: EIRO national centres, 2007

Employer densities are generally high in the sugar manufacture sector. In five countries – Austria, Hungary, Poland, Slovakia and Slovenia – both density with regard to the domain and the sector are 100% (Table 4). With respect to FNG in Austria, sectoral and total density of both companies and employees is 100% by law. Sectoral density is particularly high (100%) in terms of both companies and employees among organisations in Bulgaria, Finland and Sweden. Density also tends to be quite high, at over 60%, in terms of both companies and employees in the case almost all voluntary organisations. Of the associations for which related data are available, all of them cover at least 60% of the employees relative to their domain and to the sector. In relation to density levels in terms of companies, only 17.6% and 5.9% of the organisations report densities below 60% in terms of companies and employees respectively. In the majority of these cases, density is 80% or higher. Only three associations can be found at the lower end of the scale. Firstly, the domain density of [Teknologiateollisuus](#) in terms of companies is only 13% due to the sectionalist overlap of the organisation's domain in relation to the sugar manufacture sector. Secondly, the domain density of the Swedish inter-industry organisation [Industri- och KemiGruppen](#) in terms of companies is only 50%, whereas its sectoral density in terms of companies is approximately 100%. Thirdly, both the domain and sectoral density in terms of companies of the Employers' Association in the Belgian Sugar Industry ([Association des producteurs de sucre Belges/Vereniging van Belgische suikerproducenten, SUBEL](#)) is just 57%.

In general, sectoral density in terms of employees is slightly higher than domain density. The marginal difference between domain and sectoral densities reflects the fact that the domain of the employer organisations is generally well tailored to the sector. Among the relatively few associations which overlap with the sector, most of the domains only do so with respect to branches which are also related to the broader food production sector. The fact that the sectoral and overall densities in terms of companies, on the one hand, and employees on the other do not differ widely – with the exception of SUBEL in Belgium, [Teknologiateollisuus](#) in Finland and [Industri- och KemiGruppen](#) in Sweden in terms of domain density – discounts any correlation between company size and the companies' propensity to associate.

Collective bargaining and its actors

Table 3 lists all of the trade unions engaged in sector-related collective bargaining. Despite numerous cases of inter-union domain overlap and unclear domain demarcation, only a few cases of inter-union rivalry and competition for bargaining rights can be observed. As mentioned, such competition for members and bargaining rights is reported in Spain and, to a more limited extent, in Portugal. In Spain, a historical inter-union rivalry has existed between the two peak trade union federations CC.OO and UGT over the terrain of industrial relations in general. Rivalries also exist between trade unions regarding the right to conclude collective agreements and consultation in public policy formation and implementation. For instance, the two

© European Foundation for the Improvement of Living and Working Conditions, 2008

trade union confederations CGT in France and the Workers' Trade Union Confederation ([Confederación Unión Sindical Obrera, USO](#)) in Spain have been excluded from their right to collective bargaining and public policy consultation due to their lack of representativeness. In Portugal, such competition is manifested by the existence of two parallel collective agreements – one signed by the Federation of Unions in Agriculture, Food and Beverages Industries, Hotels and Tourism of Portugal ([Federação dos Sindicatos da Agricultura, Alimentação, Bebidas, Hotelaria e Turismo de Portugal, FESAHT](#)), and the other one by the Federation of Commerce and Service Workers' Unions ([Federação dos Sindicatos dos Trabalhadores de Comércio e Serviços, FETESE](#)). In addition, other Portuguese trade union federations are signing collective agreements in the sector, such as the Federation of Metalworking, Mining, Chemical, Pharmaceutical, Petroleum and Gas Workers' Unions ([Federação Intersindical das Indústrias Metalúrgicas, Química, Farmacêutica, Eléctrica, Energia e Minas, Fiequimetal](#)) and the Road Transport Workers' Federation ([Federação dos Sindicatos de Transportes Rodoviários e Urbanos, FESTRU](#)). However, as regards rivalries in recruiting members, the extension of SETAA's membership domain from agriculture to the manufacturing of food and beverages did not result in competitive relations between the Union of Workers in Agriculture, Food, Beverages and Tobacco Industries of Portugal ([Sindicato dos Trabalhadores da Agricultura e das Indústrias de Alimentação, Bebidas e Tabacos de Portugal, SINTAB](#)), since SETAA was not yet able to organise workers in the sugar manufacture sector. In general, inter-union competition is not very pronounced in the sugar manufacture sector. In countries such as Italy, Sweden and the UK, the sector's trade unions either have a peace agreement in place or work closely together.

With regard to the employer organisations, no case of competition over collective bargaining is documented. However, this situation may change in Slovenia, since GZS has to change from obligatory to voluntary membership within three years, in accordance with the new Law on the Chambers of Commerce and Industry; as a result, this may lead to competition for members and representational rights. Overall, nevertheless, the sugar manufacture sector's bargaining system is not beset with problems concerning inter-associational rivalries between employer organisations.

Table 6 gives an overview of the system of sector-related collective bargaining in the 22 countries under consideration. The standard measure of the importance of collective bargaining as a means of employment regulation is obtained by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain sector of the economy (see Traxler, F., Blaschke, S. and Kittel, B., *National labour relations in internationalised markets*, Oxford, Oxford University Press, 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. To delineate the bargaining system, two further indicators are employed: that is, 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, it is the company or its subunit(s) which is 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, thus indicates the impact of the employer organisations on the overall process of collective bargaining.

Table 6: System of sectoral collective bargaining, 2005

| Country | Collective bargaining coverage (CBC) | Proportion of multi-employer bargaining (MEB) as % of total CBC | Extension practices |
|---------|--------------------------------------|---|---------------------|
| AT | 100% | 100% | (none) |
| BE | 100% | 100% | pervasive |
| BG | 74.7% | 100% | none |
| CZ | 38% | 0% | none |

© European Foundation for the Improvement of Living and Working Conditions, 2008

21

This report is available in electronic format only.

| Country | Collective bargaining coverage (CBC) | Proportion of multi-employer bargaining (MEB) as % of total CBC | Extension practices |
|---------|--------------------------------------|---|---------------------|
| DE | ~100% | 100% | none |
| DK | 100% | 100% | none |
| EL | ~100% | 0% | none |
| ES | ~100% | 100% | pervasive |
| FI | ~100% | 100% | pervasive |
| FR | 100% | 100% | pervasive |
| HU | 100% | 0% | none |
| IT | 100% | 100% | none |
| LT | ~64% | 0% | none |
| LV | 100% | 0% | none |
| NL | 100% | 0% | none |
| PL | 41.5% | 0% | none |
| PT | 100% | 0% | none |
| RO | 75% | 100% | pervasive |
| SE | ~100% | 100% | none |
| SI | 100% | ~ > 50% | none |
| SK | 100% | 100% | none |
| UK | n.a. | 0% | none |

Notes: Collective bargaining coverage (CBC) means employees covered as a percentage of the total number of employees in the sector. Multi-employer bargaining (MEB) is noted relative to single-employer bargaining (SEB). Extension practices include functional equivalents to extension provisions, that is, obligatory membership and labour court rulings; cases of functional equivalents appear in parentheses.

Source: EIRO national centres, 2006

The results in Table 6 also indicate whether statutory extension schemes are applied to the sector. For reasons of brevity, this analysis is limited to extension schemes which are designed to extend the scope of a collective agreement to the employers not affiliated to the signatory employer organisation; it does not deal with extension regulations targeting employees. The latter are not relevant to this particular analysis for two reasons. On the one hand, extending a collective agreement to the employees who are not unionised in the company covered by the particular agreement is a standard of the [International Labour Organization \(ILO\)](#), aside from any national legislation. On the other hand, there is good reason for employers to extend a collective agreement concluded by them, even when they are formally not obliged to do so; otherwise, they would create an incentive for their workforce to unionise. Compared with employee-related extension procedures, schemes that target employers are thus far more important to the strength of collective bargaining in general and to 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 pervasive, such practices encourage employers to join their employer organisation, since membership enables them to participate in the bargaining process and

to benefit from the organisation's related services in a situation when the respective collective agreement will bind them in any case (see Traxler et al, 2001).

Since extension schemes can only be applied to multi-employer settlements, the widespread practice of single-employer bargaining limits their use, even in cases where labour law provides for such schemes. Pervasive extension practices are reported in Belgium, Finland, France, Romania and Spain, while they are quite limited in Bulgaria, the Czech Republic, Denmark, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, the Netherlands, Poland, Portugal, Slovakia and Slovenia and Sweden. In Austria, due to the obligatory membership of the sugar manufacture sector's companies in the Austrian Federal Chamber for the Economy ([Wirtschaftskammer Österreich, WKÖ](#)), and the encompassing scope of the sector's collective agreements, the practice of extending multi-employer agreements to employers that are not affiliated to the signatory employer organisation is obsolete. The same scenario emerges in Slovenia, although the country abandoned the system of obligatory membership in GZS in 2006. Obligatory employer membership creates an extension effect, since the chambers are party to multi-employer bargaining. Another functional equivalent to statutory extension schemes can be found in Italy. In accordance with the country's constitution, minimum conditions of employment must apply to all employees. The labour court rulings relate this principle to the multi-employer agreements, such that they are seen to be generally binding (see IST, 2001).

In terms of collective bargaining coverage in the sugar manufacture sector, 16 of the 22 countries for which related data are available record extremely high coverage rates of approximately 100%. In two countries – the Czech Republic and Poland – the coverage rate is below 50%. Depending on national circumstances, several factors, some of which interact with each other, account for the high coverage rates of up to 100% in the majority (72.3%) of countries. For instance, multi-employer bargaining coincides with a high density of trade unions and/or employer organisations in countries such as Denmark, Finland, Greece, Slovenia and Sweden. Romania is an example of a country where high coverage is buttressed both by high sectoral density rates and pervasive extension practices. In the case of Austria, obligatory membership in the employer organisation works as a functional equivalent to pervasive extension practices. Conversely, while coverage in countries with prevalent multi-employer bargaining is generally very high, much greater variance emerges across countries operating under single-employer bargaining. In such circumstances, coverage ranges from 38% in the Czech Republic or even lower, as in the UK for example, to about 100% as seen in Hungary, Latvia, the Netherlands and Portugal.

Overall, therefore, multi-employer bargaining seems to dominate in over half of the countries under consideration. The latter prevails in 13 of the 22 countries for which data are available, whereas eight of the countries are characterised by exclusive single-employer bargaining. In Slovenia, where multi-employer bargaining reaches over 50%, a mixed system of both single-employer and multi-employer bargaining is found. On average, the collective bargaining coverage in the countries where single-employer arrangements prevail is lower – particularly in the Czech Republic and Lithuania – compared with the countries where multi-employer bargaining prevails. Nonetheless, single-employer bargaining does not seem to be less effective than multi-employer bargaining in relation to regulating employment terms in the sugar manufacture sector, since coverage rates are above 60% in the majority of countries whose collective bargaining systems are dominated by single-employer bargaining – such as Hungary, Latvia, the Netherlands and Portugal. The sugar manufacture sector is therefore quite unique, all the more since only in Hungary is the absence of multi-employer bargaining (and extension practices) offset by high employer density rates. It should also be noted that multi-employer bargaining does not mean sector-level bargaining in all of these cases. In Denmark, for instance, national-level multi-employer wage agreements cover workers in various sectors, such as manufacturing (including the manufacture of sugar), the services industry and telecommunications.

A word of caution must also be noted regarding the findings outlined in this section: in an indefinite number of countries, the reported data only refer to 'standard' employment and do not take into account the various categories of atypical workers and most foreign workers – who represent a considerable proportion of the workforce in the sugar manufacture sector during the harvest season.

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’, that is tripartite, committees and boards of policy concertation. This study only considers cases of consultation and corporatist participation which are suited to sector-specific matters. Consultation processes are not necessarily institutionalised, meaning that the organisations consulted by the authorities may vary according to the issues being addressed and 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 volatility, Tables 3–5 designate only those sector-related trade unions and employer organisations that are usually consulted.

Trade unions

In relation to the trade unions, 12 of the 22 countries for which data are available report regular consultation processes with the trade unions. Since a multi-union system has been established in almost all of the countries, the possibility that the authorities may favour certain trade unions or that the unions compete for participation rights cannot be ruled out. However, in the majority of countries where a noticeable practice of consultation is observed, any of the existing trade unions can take part in the consultation processes. Finland is the only exception in this respect, since only the Finnish Food Workers’ Union ([Suomen Elintarviketyöläisten Liitto](#), [SEL](#)) is consulted on sector-specific matters. As a consequence, inter-union conflicts over participation in public policy do not figure prominently among trade unions in the sector.

Employer organisations

Due to their monopoly-like position in many of the countries in question, conflict over participation rights does not appear to be a problem among the sector-related employer organisations. In nine of the 18 countries for which data are available, employer organisations have regular access to consultation in sector-related matters. However, in Finland’s multi-organisational system, not all of the associations are consulted, such as Teknologiateollisuus.

Asymmetrical consultation

Interestingly, consultation rights are not symmetrically divided between the two sides of industry. In only seven of the 18 countries with organised interests, both the trade unions and employer organisations are consulted on a regular basis – namely, in Austria, Finland, France, Hungary, Italy, Romania and Spain. In contrast, neither side of the labour market is consulted in five countries – namely, Belgium, Bulgaria, Denmark, Germany and Sweden. Asymmetrical consultation practices are observed in Slovakia, where only the employer organisation is consulted, and in Poland where only the trade union side is consulted on sector-specific matters. However, in the countries where employer organisations – in the sense of the aforementioned definition of a social partner organisation – do not exist, employers are not necessarily excluded from consultation procedures: under such circumstances, sectoral trade associations may be consulted. In Lithuania, only the employer organisation and not the sector-related trade union is consulted. Due to its lack of collective bargaining competency, this organisation qualifies as a social partner organisation only due to its affiliation to CEFS, whereas it would normally be categorised as a trade association. The same could apply to the Association of Sugar Manufacturers ([Cukoripari Egyesülés](#), [CIE](#)) in Hungary, which is currently not participating in collective bargaining, although a wage agreement existed in the sector between 1993 and 2005. This finding suggests that consultation efforts in the sugar manufacture sector deal with product market rather than labour market interests. In addition to the various business associations, large companies may also be directly involved in consultation procedures, in particular when policymaking follows the pattern of a ‘company state’ rather than that of an ‘associative state’ (see Grant, W., *Business and politics in Britain*, London, Macmillan, 1993).

Tripartite/bipartite participation

Turning from consultation to tripartite participation, the research finds that genuinely sector-specific tripartite bodies are very rare. Sector-specific bodies based on bipartite participation have been established in only four countries – Denmark, Hungary, Italy and Romania (Table 7). Whereas the Romanian and

Hungarian bodies are based on statutes, the bipartite public policy boards in Denmark and Italy rest on a bipartite agreement between the social partners. Most of these boards focus on product market regulation, reflecting efforts to open the sugar manufacture market to international competition. Only the bipartite board in Denmark seems to focus on labour market issues, more specifically on vocational training. In terms of the boards' composition, cross-sectoral peak trade union organisations are sometimes represented, as in the case of Denmark and Italy, along with employer organisations as in the case of Hungary, Italy and Romania, or individual companies within the sugar manufacture sector as in the case of Denmark. Although product market-related issues play a major role in such public policy boards, the far-reaching restructuring processes which have resulted in considerable job losses in the sector have underlined the importance of social partner consultations in coping with the social effects of structural change.

Table 7: Sector-specific boards of public policy

| Country | Name of body and scope of activity | Bipartite/tripartite | Origin | Participants | |
|---------|---|----------------------|---|---|---------------------------------------|
| | | | | Trade unions | Business associations |
| DK | Training in sugar manufacture (local-level body) | Bipartite | Agreement | 3F DEF Metal | Danisco (1) |
| | Ledelse i fællesskab – joint management (local-level body) | Bipartite | Agreement | 3F DEF Metal | Danisco (1) |
| HU | Subsectoral social dialogue committee | Formally bipartite | National agreement and Constitution of the Commission, Committee of Participation Permission (Részvételt Megállapító Bizottság) | ÉDSZ | CIE |
| IT | Observatory of the sugar manufacture sector | Bipartite | Agreement | Three representatives of Fai-Cisl, Flai and Uila | Two representatives of Union Zucchero |
| RO | Trade union/employer organisation – joint commissions at sectoral and company level | Bipartite | Statutory | FSIA (representatives appointed at company level) | Romalimenta |

Notes: See Annex for list of abbreviations and full names of organisations.

Source: EIRO national centres, 2007

European level of interest representation

At European level, eligibility for consultation and participation in social dialogue is related 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 an integral and recognised part of Member States' social partner structures, which have a capacity to negotiate agreements and which are representative of all Member States, as far as possible;
- have adequate structures to ensure effective participation in the consultation process.

In terms of social dialogue, the constituent property of these structures is the ability of an organisation to negotiate on behalf of its members and to conclude binding agreements. Against this background, the following section on the European organisations of the sugar manufacture sector will analyse the organisations' membership domain, the composition of their membership and their ability to negotiate.

Membership domain

As already outlined, this study focuses on EFFAT and CEFS as part of its 'top-down' review of the European-level social partner organisations in the sugar manufacture sector. 'Bottom-up' information on other European associations is derived from the European affiliations of the sector's national industrial relations actors.

According to its constitution, the membership domain of EFFAT comprises workers in the food, agriculture and tourism sectors. Thus, EFFAT's domain is overlapping relative to the sector. The domain of CEFS largely coincides with the sector defined by NACE code 15.83, as this association represents sugar manufacturers. CEFS has a dual membership structure, in the sense that it organises both business associations and companies.

Membership composition

In relation to the membership composition of EFFAT and CEFS, it should be noted that these organisations cover other countries besides the 22 countries examined in this study. However, this report only considers the membership of the 22 countries in question. Furthermore, the overview is limited to those affiliates of EFFAT whose domain is sector-related insofar as they assemble employees of the sugar manufacture sector as members. Table 8 lists the membership of EFFAT. As the findings show, EFFAT affiliations are absent in only two cases – that is, in the Czech Republic and Greece. In many countries, on the other hand, multiple memberships are evident. In the 22 countries under consideration, EFFAT counts a total of 36 direct affiliations and one indirect affiliation, the latter referring to the Hungarian [Trade Union of Food Workers](#) (ÉDSZ), which is affiliated through its membership of the Hungarian Federation of Foodworkers' Trade Unions ([Élelmészipari Dolgozók Szakszervezeteinek Szövetsége, ÉDOSZ](#)). About 63% of the trade unions listed in Table 3 are affiliated to EFFAT. As far as available data on membership of the national trade unions provide sufficient information on their relative strength, it can be concluded that EFFAT covers the most important labour representatives of the sector. Exceptional cases of major trade union organisations not being covered by EFFAT can be found in the Netherlands, Poland and Portugal. However, even in these countries, other important trade unions are covered. All members of EFFAT which organise workers in the sugar manufacture sector are involved in collective bargaining.

Table 8: Members of EFFAT, 2007⁺

| Country | Members |
|---------|-----------------|
| AT | GPA-DJP*, GMTN* |

| Country | Members |
|---------|---|
| BE | CSC alimentation et services/ACV voeding en diensten*, CNE/LBC*, HORVAL*, SETca-BBTK*, CGSLB/ACLVB* |
| BG | FITU Food*, FKP-Podkrepa* |
| CZ | – |
| DE | GNGG* |
| DK | 3F*, HK* |
| EL | – |
| ES | FACOC-CC.OO*, FTA-UGT* |
| FI | SEL*, TU* |
| FR | FNAF-CGT*, FGTA-FO*, FSCOPA-CFTC (AGRI)*, FGA-CFDT*, CFE-CGC AGRO* |
| HU | ÈDOSZ* |
| IT | FAI-CISL*, FLAI-CGIL*, UILA-UIL* |
| LT | LMPS* |
| LV | LATU* |
| NL | FNV Bondgenoten*, CNV Bedrijvenbond* |
| PL | NSZZ Solidarność (Sugar Manufacture Section)* |
| PT | SETAA |
| RO | FSIA*, CERES* |
| SE | SIF* |
| SI | KZI* |
| SK | OZP SR* |
| UK | GMB*, T&G* ^a , Amicus* ^a |

Notes: *List is confined to sector-related trade union organisations of the countries under consideration. See Annex for list of abbreviations and full names of organisations.

* Involved in collective bargaining; ^a = reported affiliations before T&G and Amicus merged to form Unite in May 2007.

Organisations in parentheses are sector-related trade unions listed in Table 3 which are indirectly affiliated through national higher-order organisations.

Source: EIRO national centres, 2007

Table 9 lists the members of CEFS. At present, CEFS has 19 affiliations either through associational members or company members in the 22 countries under consideration. In five countries – Bulgaria, Denmark, Finland, Slovenia and Sweden – the national sector-related employer organisations which are party to collective bargaining are not affiliated to CEFS. As regards the membership composition by type of membership, 10 countries were covered exclusively through affiliated companies by the beginning of 2007 – namely, Bulgaria, Denmark, Finland, Greece, Italy, Latvia, the Netherlands, Slovenia, Sweden and the UK. In two of these countries – that is, Latvia and Slovenia – the sole sugar manufacturing companies were closed down in 2007. Thus, these two countries are no longer covered by CEFS's organisational domain. In addition, Romania is not represented by CEFS. A total of nine countries are linked to CEFS only through associations – namely, Belgium, the Czech Republic, France, Germany, Hungary, Lithuania, Poland,

Slovakia and Spain. Both companies and associations are covered by CEFS in two of the countries – that is, Austria and Portugal. In five countries – Belgium, the Czech Republic, Hungary, Lithuania and Poland – the member associations covered do not participate in collective bargaining.

Table 9: Members of CEFS, 2007⁺

| Country | Members | |
|---------|----------------------------------|---|
| | Associations | Companies |
| AT | FNG* | Agrana Zucker GmbH |
| BE | SUBEL | – |
| BG | – | Zaharni Zavodi |
| CZ | Czech-Moravian Sugar Association | – |
| DE | VdZ* | – |
| DK | – | Danisco Sugar |
| EL | – | Hellenic Sugar Industry SA |
| ES | AGFAE* | – |
| FI | – | Finnsugar Ltd |
| FR | SNFSF* CSRCSF SFSRUN | – |
| HU | CIE* | |
| IT | – | Coprob SCA Italia Zuccheri SpA Eridania Sadam SpA SFIR SpA Zuccherificio del Molise SpA |
| LT | Cukrus | – |
| LV | – | <i>(Jelgavas Cukurfabrica closed down in April 2007)</i> |
| NL | | CSM Suiker bv ** Suiker Unie ** |
| PL | ZPC | – |
| PT | ARAP | DAI – Sociedade de Desenvolvimento Agro-Industrials SA |
| RO | – | – |
| SE | – | Danisco Sugar AB |

| Country | Members | |
|---------|--------------|---|
| | Associations | Companies |
| SI | – | <i>(Tovarna Sladkorja Ormož DD closed down in March 2007)</i> |
| SK | SCS* | – |
| UK | | British Sugar Plc Tate & Lyle Sugar, Europe (associated member) |

Notes: ⁺ Membership list is confined to the sector-related employer organisations and companies of the countries under consideration. See Annex for list of abbreviations and full names of organisations.

* Involved in collective bargaining.

** CSM Suiker and Suiker Unie merged in 2007.

Source: EIRO national centres, 2007

The membership structure of CEFS raises the question of the aforementioned European Commission criterion of representativeness, which requires European associations to cover organisations that are themselves an integral and recognised part of Member States' social partner structures and to possess the capacity to negotiate agreements. A problem of representativeness arises in countries where no employer organisation with a bargaining mandate is affiliated to CEFS, while collective bargaining occurs predominantly or exclusively at multi-employer level. In these circumstances, CEFS members may have a role in industrial relations only when signing supplementary company agreements or when they are affiliated to the national employer organisations, such that the organisations' goal formation and bargaining strategies can be influenced. This situation can be observed in Belgium, where SUBEL is represented in collective bargaining through its affiliation to FEVIA, the more encompassing employer organisation which covers the entire food industry.

If single-employer bargaining prevails, it raises the question of whether the bargaining companies are members of CEFS. Leaving aside those countries that are not covered by CEFS, such a scenario emerges in four countries. In Greece and the Netherlands, the key bargaining parties are under the umbrella of CEFS. Due to the merger of the two remaining companies in the Dutch sugar manufacture sector in 2007 – that is, [CSM Suiker](#) and [Suiker Unie](#) – the country is represented in CEFS by the one company. In the UK, one of the country's sugar manufacturing companies is covered. However, in Latvia, the remaining sugar manufacturing company that was affiliated to CEFS closed down in the spring of 2007. The same holds true for the Slovenian employer organisation which organises companies in the entire food production sector and which is no longer representative of the sugar manufacture sector since the closure of the single remaining sugar manufacturing company in early 2007.

Capacity to negotiate

The third criterion of representativeness at European level refers to the capacity of an organisation to negotiate on behalf of its own members. EFFAT has a mandate to negotiate on matters of the European social dialogue, in accordance with its constitution. Since CEFS is party to the European social dialogue at sectoral level – and is recognised as the European social partner organisation for the employers' side, represented in the sectoral dialogue committee that was established in 1999 – CEFS has a capacity to negotiate collective agreements through its member organisations.

As a proof of the weight of EFFAT and CEFS, it is worthwhile making a comparison with the other European organisations that may be important representatives of the sector. On the basis of a 'bottom-up' approach, this can be achieved by reviewing the European organisations to which the sector-related unions and employer organisations are affiliated.

Regarding the trade unions, these affiliations are listed in Table 3. Evidently, European organisations other than EFFAT represent only a small number of both sector-related trade unions and countries. Such

© European Foundation for the Improvement of Living and Working Conditions, 2008

organisations include: the [European Metalworkers' Federation \(EMF\)](#) and the [European Mine, Chemical and Energy Workers' Federation \(EMCEF\)](#), each of which has nine affiliations covering five and four countries, respectively; [UNI-Europa](#) and the [European Federation of Building and Woodworkers \(EFBWW\)](#), with six affiliations each covering five and two countries, respectively; the [European Federation of Public Service Unions \(EPSU\)](#), which has five affiliations covering two countries (the newly applying Union of Salaried Private Sector Employees – Printers, Journalists and Paper Workers ([Gewerkschaft der Privatangestellten – Druck, Journalismus, Papier, GPA-DJP](#)) in Austria is not included here); the [European Transport Workers' Federation \(ETF\)](#), with three affiliations covering two countries; along with other European organisations such as the [European Trade Union Committee Textiles, Clothing and Leather \(ETUF-TCL\)](#) and the [Council of European Professional and Managerial Staff \(Eurocadres\)](#), which have one affiliation each. Even though the list of affiliations in Table 3 may be incomplete, this review underlines the principal status of EFFAT in organising the sector's most important labour representatives – all the more since many of the affiliations to other European organisations reflect the overlapping domains of the affiliates, rather than reflecting a true affiliation to sectors such as sugar manufacture.

A similar overview of the employer organisations' membership can be derived from Table 5. The findings show that the sector-related employer organisations' links with European federations other than CEFS are quite rare and highly diversified. Such affiliations involve five European federations: [BusinessEurope](#), the [Council of European Employers of the Metal, Engineering and Technology-based Industries \(CEEMET\)](#), the [Confederation of the Food and Drink Industries of the European Union \(CIAA\)](#), the [European Information and Communications Technology Industry Association \(EICTA\)](#) and the [Professional Association of Sugar Traders of the European Union \(ASSUC\)](#); the latter three are pure trade organisations. Only two of these federations record more than one affiliation: namely, CIAA, a trade organisation that covers associational and company members from Europe and beyond, and [BusinessEurope](#) as an inter-sectoral European employer organisation. CIAA has four affiliations in four countries, while [BusinessEurope](#) has two affiliations in two countries. Hence, CEFS is evidently the most important voice of business in the sugar manufacture sector.

Commentary

In the past 10 years, the sugar manufacture sector has experienced major changes and restructuring. The first wave of restructuring resulted from the opening of the European sugar beet industry to global competition through the WTO trade liberalisation rounds and from other initiatives which sought to guarantee advantageous market access to producers from developing countries. The second phase of restructuring relates to the reform of the common market structure in the sugar sector – referred to as the so-called 'sugar regime' reform, which dates back to a Council of Ministers agreement in November 2005 that was subsequently adopted by the Council of Ministers in February 2006. The previous regulatory system for the sugar industry, which was in force until June 2006, had provided for measures such as quotas for domestic consumption and export, subsidised prices for sugar beet and multi-lateral trade agreements that regulate sugar imports from non-EU sugar producers. The new regime aims to make the European sugar sector more competitive on a global scale through measures such as significant price reductions for sugar beet, preferential access to the EU market for sugar producers from African, Caribbean and Pacific (ACP) countries and less developed countries, along with considerable quota reductions. However, market liberalisation and deregulation have resulted in major losses in sectoral employment and the closure of sugar manufacturing companies throughout Europe. In Latvia and Slovenia, for instance, the manufacture of sugar ceased in early 2007.

Despite the profound economic changes in the sugar manufacture sector, industrial relations structures appear to be well established. The persistence of collective bargaining institutions is reflected in the importance of multi-employer bargaining and the comparably high collective bargaining coverage rates, which exceed 70% in the vast majority of countries for which data are available. A comparison of cross-sectoral collective bargaining coverage in the 25 Member States of the EU prior to the entry of Bulgaria and Romania in 2007 (EU25) indicates that the sector's bargaining coverage is higher in 20 of the EU25 countries for which comparable data are available (see Marginson, P. and Traxler, F., 'After enlargement: Preconditions and prospects for bargaining coordination', *Transfer*, 11, Brussels, ETUI-REHS, 2005, pp. 423–438). The exceptional organisational strength of sectoral interest organisations dealing with labour

© European Foundation for the Improvement of Living and Working Conditions, 2008

market issues is underlined by the strikingly high employer density rates, which exceed 80% in all of the countries for which data are available. By contrast, the sector's unionisation rates are more in line with overall trade union density levels in most of the countries, with the exception of two of the Dutch sector-related trade unions, which report significantly lower densities for the sugar manufacture sector.

Overall, almost two-thirds of the 22 countries in question predominantly operate under a multi-employer bargaining system, whereas countries with prevalent single-employer bargaining are clearly a minority in the sugar manufacture sector. This relatively homogenous structure of the sector makes it easier to form a coherent structure for representing the sector's employers at European level. The well-established European social dialogue in the sugar manufacture sector, which dates back to 1969 when an informal social dialogue forum was established, emphasises the organisational strength of the sector's social partner organisations throughout Europe. According to the findings of this study, both EFFAT and CEFS remain unchallenged in their position as representative European social partner organisations in the sugar manufacture sector.

Annex: List of abbreviations

| Country | Abbreviation | Full name of organisation |
|----------------------------|----------------------|---|
| Austria (AT) | GPA-DJP | Union of Salaried Private Sector Employees – Printers, Journalists and Paper Workers |
| | GMTN | Metalworking, Textiles, Agriculture and Food-processing Union |
| | ÖGB | Austrian Trade Union Federation |
| | FNG | Sectional Food and Foodstuff Group in the Chamber for the Economy |
| | WKÖ | Austrian Federal Chamber for the Economy |
| Belgium (BE) | ABVV/FGTB | Belgian General Federation of Labour – Central Food, Horeca and Services |
| | ACLVB/CGSLB | Federation of Liberal Trade Unions of Belgium |
| | ACV/CSC | Confederation of Christian Trade Unions – Food and Services Centre |
| | CNE/LBC | National Federation of White-collar Workers |
| | FEVIA | Food Industries’ Federation |
| | HORVAL | Food–Horeca (hotels, restaurants, cafés)–Services Trade Union |
| | SETCa-BBTK | Belgian Union of White-collar Staff, Technicians and Managers |
| | SUBEL | Employers’ Association in the Belgian Sugar Industry |
| | VBO/FEB | Belgian Federation of Employers |
| | Bulgaria (BG) | BIA |
| CITUB | | Confederation of Independent Trade Unions in Bulgaria |
| CL ‘Podkrepa’ | | Confederation of Labour ‘Podkrepa’ |
| FITU Food | | Federation of Independent Trade Unions in the Food Industry |
| USSPMP | | Union of the Sugar and Sugar Products Manufacturers in Bulgaria |
| Vuzrazdane | | Union of Private Bulgarian Entrepreneurs –Bulgarian Shipmasters’ Association |
| Czech Republic (CZ) | AK ČR | Agrarian Chamber of the Czech Republic |
| | CMCS | Czech-Moravian Sugar Association |
| | ČMKOS | Czech-Moravian Confederation of Trade Unions |
| | NOS PPP | Independent Trade Union of Workers in the Food Industry and Allied Trade of Bohemia and Moravia |
| | PK ČR | Federation of the Food and Drink Industries of the Czech Republic |
| Denmark (DK) | 3F | United Federation of Danish Workers |

| Country | Abbreviation | Full name of organisation |
|---------------------|-----------------------|--|
| | CO-Industri | Central Organisation of Industrial Employees in Denmark |
| | DA | Confederation of Danish Employers |
| | Dansk Metal | Danish Metalworkers' Union |
| | DEF | Danish Union of Electricians |
| | DI | Confederation of Danish Industries |
| | HK | Union of Commercial and Clerical Employees in Denmark |
| | LO | Danish Confederation of Trade Unions |
| Finland (FI) | EK | Confederation of Finnish Industries |
| | ETL | Finnish Food and Drink Industries' Federation |
| | Metalliliitto | Metalworkers' Union |
| | SAK | Central Organisation of Finnish Trade Unions |
| | STTK | Finnish Confederation of Salaried Employees |
| | Teknologiategollisuus | Federation of Finnish Technology Industries |
| | TU | Union of Salaried Employees |
| | SEL | Finnish Food Workers' Union |
| France (FR) | ANIA | National Food Industry Association |
| | CFDT | French Democratic Confederation of Labour |
| | CFE-CGC | French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff |
| | CFE-CGC AGRO | National Federation of Workers in Agro-Alimentary – General Confederation of Professional and Managerial Staff |
| | CFTC | French Christian Workers' Confederation |
| | CGC | General Confederation of Professional and Managerial Staff |
| | CGT | General Confederation of Labour |
| | CGT-FO | General Confederation of Labour – <i>Force Ouvrière</i> |
| | CSRCSF | National Union of Sugar Industrialists |
| | FGA-CFDT | General Federation of Workers in Agro-Alimentary – French Democratic Confederation of Labour |
| | FGTA-FO | General Federation of Workers in Agriculture, Food, Tobacco and Allied Services – <i>Force Ouvrière</i> |
| | FNAF-CGT | National Federation of Workers in Agro-Alimentary and Forests – General Confederation of Labour |
| | FSCOPA-CFTC (AGRI) | General Federation of Workers in Agriculture – French Christian Workers' Confederation |
| | SFSRUN | Local Union of Sugar Industrialists of Réunion's Department |

| Country | Abbreviation | Full name of organisation |
|-------------------------|---------------------|---|
| | SNFS | National Union of French Sugar Manufacturers |
| Germany (DE) | BDI | German Industry Federation |
| | DGB | Confederation of German Trade Unions |
| | GNGG | Trade Union of Food, Beverages, Tobacco, Hotel and Catering and Allied Workers |
| | VdZ | Sugar Industry Association |
| Greece (EL) | GSEE | Greek General Confederation of Labour |
| | OEBZE | Federation of Employees of the Sugar Industry Greece |
| Hungary (HU) | CIE | Association of Sugar Manufacturers |
| | ÈDOSZ | Hungarian Federation of Foodworkers' Trade Unions |
| | ÈDSZ | Trade Union of Food Workers |
| | ÈFOSZ | Federation of Hungarian Food Industries |
| | MGYOSZ | Confederation of Hungarian Employers and Industrialists |
| | MSZOSZ | National Association of Hungarian Trade Unions |
| Italy (IT) | CGIL | General Confederation of Italian Workers |
| | CISL | Italian Confederation of Workers' Unions |
| | Confindustria | General Confederation of Italian Industry |
| | FAI-CISL | Agro-industrial, Food and Environment Federation – Italian Confederation of Workers' Unions |
| | Federalimentare | Italian Food Industry Federation |
| | FLAI-CGIL | Italian Federation of Agro-industrial Workers – General Confederation of Italian Labour |
| | UIL | Union of Italian Workers |
| | UILA-UIL | Italian Federation of Agro-alimentary Workers – Union of Italian Workers |
| | Union Zucchero | National Union of Sugar Industrialists |
| Latvia (LV) | LATU | Latvian Agriculture and Food Trade Union |
| | LBAS | Free Trade Union Confederation of Latvia |
| Lithuania (LT) | Cukrus | Lithuanian Association of Sugar Industry Enterprises 'Cukrus' |
| | LMPS | Lithuanian Trade Union of Food Producers |
| | LPK | Lithuanian Confederation of Industrialists |
| | LPSK | Lithuanian Trade Union Confederation |
| Netherlands (NL) | CNV | Christian Trade Union Federation |
| | CNV Bedrijvenbond | Sectoral Affiliate of the Christian Trade Union Federation |
| | De Unie | General Independent Union |
| | FNV | Federation of Dutch Trade Unions |

| Country | Abbreviation | Full name of organisation |
|----------------------|---------------------|--|
| | FNV Bondgenoten | Dutch Trade Union Federation 'Bondgenoten' |
| | MHP | Federal Union for Intermediate and Higher Personnel |
| | VNO-NCW | Confederation of Netherlands Industry and Employers |
| Poland (PL) | 'August 80' | Free Trade Union of Workers 'August 80' |
| | FZZPPC | Trade Union Federation of the Sugar Production Sector Workers |
| | NSZZ Solidarność | Independent and Self-Governing Trade Union 'Solidarity' (NSZZ Solidarity) |
| | OPZZ | All-Poland Alliance of Trade Unions |
| | 'Razem' | Free Trade Union of Workers 'Together' – 'Razem' |
| | ZPC | Association of Sugar Producers in Poland |
| | ZZPTA | Trade Union of Technical and Administration Workers of the National Sugar Company 'Polish Sugar' |
| | ZZPTKSC | Trade Union of Transport Workers of the National Sugar Company 'Polish Sugar' |
| Portugal (PT) | ARAP | Association of Sugar Refineries |
| | CGTP | General Confederation of Portuguese Workers |
| | DAI | Society for Agro-industrial Development |
| | FESAHT-CGTP | Federation of Unions in Agriculture, Food and Beverages Industries, Hotels and Tourism of Portugal – General Confederation of Portuguese Workers |
| | FETESE-UGT | Federation of Service Workers' and Technicians' Unions – General Workers' Confederation |
| | SETAA | Union of Agriculture, Food and Forests |
| | SIABAHORTA | Union of Professionals in Food, Beverages and Similar Industries of the Azores |
| | SINTAB | Union of Workers in Agriculture, Food, Beverages and Tobacco Industries of Portugal |
| | SITese | Union of Service Workers and Technicians |
| | SITIAC | Union of Workers in the Food Industries of Central and Southern Portugal and Islands |
| | STIANOR | Union of Workers in the Food Industries of Northern Portugal |
| | UGT | General Workers' Confederation |
| Romania (RO) | CERES | National Trade Union Confederation in Agriculture, Food Industry, Tourism and Related Activities |
| | CSDR | Democratic Trade Union Confederation in Romania |
| | FSIA | National Federation of Trade Unions in the Food Industry |
| | Romaliementa | Food Industry Employers' Federation |
| | UGIR 1903 | Romanian Industry Employers' Confederation |

| Country | Abbreviation | Full name of organisation |
|----------------------------|---------------------------|--|
| | Zaharul Buzau | Free Trade Union Zaharul Buzau |
| Slovakia (SK) | AZZZ SR | Federation of Employers' Associations of the Slovak Republic |
| | KOZ SR | Central Confederation of Trade Unions |
| | OZP SR | Trade Union of Food Workers of the Slovak Republic |
| | SCS | Slovak Sugar Producers' Association |
| Slovenia (SI) | GZS | Chamber of Commerce and Industry of Slovenia |
| | KZI | Agriculture and Food Industry Trade Union of Slovenia |
| | ZKZP | Chamber of Agriculture and Food Companies |
| | ZSSS | Association of Free Trade Unions of Slovenia |
| Spain (ES) | AGFAE | General Association of Sugar Manufacturers |
| | CC.OO | Trade Union Confederation of Workers' Commissions |
| | FACOC-CC.OO | Federation of Food and Agriculture – Trade Union Confederation of Workers' Commissions |
| | FIAB | Spanish Food and Drink Industry Federation |
| | FTA-UGT | Federation of Food and Agriculture – General Workers' Union |
| | UGT | General Workers' Union |
| Sweden (SE) | IF Metall | Swedish Metalworkers' Union |
| | Industri- och KemiGruppen | Swedish Industrial and Chemical Employers' Association |
| | Ledarna | Swedish Association for Managerial and Professional Staff |
| | LO | Swedish Trade Union Confederation |
| | NordIng | Collaboration between 11 engineering societies in the Nordic countries |
| | OFR | Public Employees' Negotiation Council |
| | SIF | Swedish Union of Technical and Clerical Employees |
| | Svenskt Näringsliv | Confederation of Swedish Enterprise |
| | Svenskt Ingenjörer | Swedish Association of Graduate Engineers |
| | TCO | Swedish Confederation for Professional Employees |
| United Kingdom (UK) | Amicus | Amicus the Union |
| | GMB | Britain's General Union |
| | T&G | Transport and General Workers' Union |
| | TUC | Trades Union Congress |
| | Unite | Trade union formed following merger between Amicus and T&G in May 2007 |
| | | |

| Country | Abbreviation | Full name of organisation |
|----------------|---------------------|--|
| Europe | ASSUC | Professional Association of Sugar Traders of the European Union |
| | BusinessEurope | European Business Confederation |
| | CEC | European Confederation of Executives and Managerial Staff |
| | CEEMET | Employers' Organisation of Metal Trades in Europe |
| | CEFS | European Committee of Sugar Manufacturers |
| | CIAA | Confederation of the Food and Drink Industries of the European Union |
| | EFBWW | European Federation of Building and Wood Workers |
| | EFFAT | European Federation of Trade Unions in the Food, Agriculture and Tourism Sectors and Allied Branches |
| | EICTA | European Information and Communications Technology Industry Association |
| | EMCEF | European Mine, Chemical and Energy Workers' Federation |
| | EMF | European Metalworkers' Federation |
| | EPSU | European Federation of Public Service Unions |
| | ETF | European Transport Workers' Federation |
| | ETUC | European Trade Union Confederation |
| | ETUF-TCL | European Trade Union Federation – Textiles, Clothing and Leather |
| | Eurocadres | Council of European Professional and Managerial Staff |
| | FERPA | European Federation for Retired Personnel |
| | IN | Nordic Industry Workers |
| | SVAPU | Council of Scandinavian Employers of the Engineering Industries |
| | UNI-Europa | Union Network International – Europa |
| | UNI-IT | Global Union for Skills and Services |

Vera Glassner, Department of Industrial Sociology, University of Vienna

EF/08/51