



Representativeness of the European social partner organisations: Tanning and leather sector

Objectives of study

Economic background

National level of interest representation

European level of interest representation

Commentary

References

Annex: List of abbreviations

This report is available in electronic format only.

This report sets out to provide the necessary information for establishing sectoral social dialogue in the tanning and leather sector. The report first identifies the relevant national organisations on both sides of industry and then goes on to analyse the sector's relevant European organisations. The report consists of three main parts: a summary of the sector's economic background; an analysis of the social partner organisations in all the EU Member States, with the exception of Ireland and Luxembourg, placing particular emphasis on their membership, their role in collective bargaining and public policy, and their national and European affiliations; and finally, an analysis of the relevant European organisations, in particular their membership composition and their 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 organisations to be consulted under the EC Treaty provisions. Hence, this study is designed to provide the basic information required to establish sectoral social dialogue.

Objectives of study

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

Against this background, the study will first identify the relevant national social partner organisations in the tanning and leather sector, subsequently analysing the structure of the sector's relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both the national and European level of interest representation. The study includes only organisations whose membership domain is 'sector-related' (see below). At both national and European levels, a multiplicity of associations exists, which are not considered as social partner organisations as they do not essentially deal with industrial relations. Thus, there is a need for clear-cut criteria that 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 associations must be either a party to 'sector-related' **collective bargaining** or a member of a 'sector-related' European association of business or labour that is on the Commission's list of European social partner organisations consulted under [Article 138 of the EC Treaty](#), and/or which participates in the sector-related European social dialogue. Affiliation to a European social partner organisation and involvement in national collective bargaining are of utmost importance to the European social dialogue. Following the criteria for national organisations, this study includes those sector-related European organisations that are on the Commission's list of consultation. In addition, the report considers any other sector-related European association with sector-related national social partner organisations under its umbrella. Thus, the aim to identify the sector-related national and European social partner organisations applies both a 'top-down' and 'bottom-up' approach.

Definitions

For the purpose of this study, the tanning and leather sector is defined in terms of the Statistical Classification of Economic Activities in the European Community (*Nomenclature statistique des activités économiques dans la Communauté européenne*, [NACE](#)), to ensure the cross-national comparability of the findings. More specifically, the tanning and leather sector is defined as embracing NACE 19.1 ([Rev.1.1](#)) – that is, the tanning and dressing of leather.

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

- congruence – the domain of the organisation or scope of the collective agreement must be identical to 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 that 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 tanning and leather sector in 2001. The internal rules of procedure were adopted by the sectoral European social partners in September 2004. The [European Confederation of National Associations of Tanners and Dressers \(COTANCE\)](#) on the employer side and the [European Trade Union Federation: Textiles, Clothing, Leather \(ETUF:TCL\)](#) on the employee side participate in the sector’s European social dialogue. Thus, affiliation to one of these European organisations is a sufficient criterion for classifying a national association as a social partner organisation for the purpose of this study. However, it should be noted that the constituent criterion is one of sector-related membership. This is important, in particular, in the case of ETUF:TCL due to its multi-sectoral domain. Thus, the study will include only the organisations affiliated to ETUF:TCL whose domain relates to the tanning and leather 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 there is any doubt over the reliability of an estimate, this will be noted.

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

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

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

Structure of report

The report consists of three main parts, beginning with a brief summary of the sector's economic background. The report then analyses the relevant social partner organisations in all EU Member States, with the exception of Ireland and Luxembourg where the tanning and leather sector is non-existent. The study therefore covers 25 European countries in total. The third part of the analysis considers the representative associations at European level. Each section will contain a brief introduction explaining the concept of representativeness in greater detail, followed by the study findings. As representativeness is a complex issue, it requires separate consideration at national and European level for two reasons. Firstly, the method applied by national regulations and practices to capture representativeness has to be taken into account. Secondly, the national and European organisations differ in their tasks and scope of activities. The concept of representativeness must therefore be suited to this difference.

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

Economic background

Over the past 15 years, the EU tanning and leather industry has lost between 30% and 40% of its companies. In this respect, the sector does not vary significantly from many other European manufacturing industries. According to COTANCE, only about 3,000 enterprises are still operating in the sector, employing around 50,000 workers in the 27 EU Member States (EU27) as a whole. Based on economic indicators such as turnover, production and employment, Italy is by far the sector's most important country in the EU, followed by Spain. Regional concentration is often significant, which means that the industry plays a key role in the local economy, while it accounts only for an insignificant proportion of the national economy. Although Europe has been the world's largest supplier of leather in the international marketplace, it is unclear whether it has maintained its number one position thus far. For some years, the EU tanning industry has had to face increased competition from Asia and the Americas. In order to address this competitive pressure, EU tanners are adjusting their production towards higher quality output and high fashion-content leathers. Moreover, in line with EU regulations, modernisation of the sector also concerns investments in environmental protection, waste reduction, recycling and recuperation of secondary raw materials (see European Commission, 2006). The sector structure is characterised by the prevalence of often family-owned, small and medium-sized enterprises (SMEs). Although this industry structure is considered an obstacle for research and development (R&D) driven technological innovation for cost reasons, R&D coordination within the Grouping of European Leather Research Institutes ([Groupement Européen pour la recherche dans l'industrie du cuir, GERIC](#)) under the umbrella of COTANCE has successfully paved the way for technological innovation in the tanning industry. This holds true, in particular, for technology projects in the

field of environmental protection, quality assurance and high-tech applications for the leather production process.

In recent years, the sectoral social dialogue committee in the tanning and leather sector has been working on improvements in [vocational training](#) systems and the sustainable development of the sector. A joint working group was set up in 2005 with the specific objective of improving the image of the sector to attract young people, as well as raising the level of qualification standards and enhancing the workers' mobility. Moreover, in 2000, the sectoral social partners at European level signed a code of conduct, which calls on both employers and workers to respect core labour standards in line with the conventions of the [International Labour Organization \(ILO\)](#), as well as fair wages.

All but two of the 27 Member States record sector-related business activities. Therefore, this study covers all Member States – with the noticeable exceptions of Ireland and Luxembourg, where the sector has become non-existent. Tables 1 and 2 give an overview of the sector's development from the mid 1990s to the mid 2000s, presenting a few indicators that are significant to industrial relations and the social dialogue. In most of the Member States (11 out of 17) for which related data are available, the number of companies has largely decreased, reflecting the generally shrinking trend of the sector. By contrast, in six countries, the number of companies remained the same or even increased. However, these increases at least partially appear to be attributable to a change in the sector's structure rather than to an actual growth in production and/or employment. Available data on total employment and the number of employees support the conjecture of the starkly declining significance of the sector in most EU Member States.

All of the countries with available data – with the exception of Austria and Bulgaria – record a decrease in overall employment and/or in the number of employees. In several countries, such as the Czech Republic, Denmark, Finland, Greece, Latvia, Malta, Poland, Slovakia and Spain, the majority of workplaces registered in the mid 1990s were lost within a decade. In all countries for which comparable data are available, except for Belgium and Italy, the number of employees largely corresponds to the total number in employment. This indicates that the sector is characterised by a high incidence of standard employment. Tables 1–2 also show that the sector is dominated by male workers in the majority of countries. In several countries for which data are available – such as Bulgaria, the Czech Republic, Finland, Germany, Greece, Italy, the Netherlands, Portugal, Spain and Sweden – the number of male employees is at least twice as high as the number of female employees. Higher female employment rates in relation to those of men are only recorded in Austria, Poland and the United Kingdom (UK). Table 2 also indicates that, as already outlined, the sector is very small and is continuing to shrink. Its share of total employment and the number of employees is 0.05% or lower in all of the countries under examination, excluding Austria and Italy. Only Italy records relatively 'high' rates by European standards, with a share of between 0.1% and 0.2% of the country's employees/employment. In contrast, regular employment in the sector is almost non-existent in Cyprus and Denmark.

Table 1: Total employment in tanning and leather sector, 1995 and 2006

	Number of companies		Total employment		Male employment		Female employment	
	1995	2006	1995	2006	1995	2006	1995	2006
AT	52 ^{a,b}	32 (39) ^c	2,008 ^a	2,139	n.a.	996	n.a.	1,143

	Number of companies		Total employment		Male employment		Female employment	
	1995	2006	1995	2006	1995	2006	1995	2006
BE	60 ^d	34 ^e	2,568 ^d	2,050 ^e	1,721 ^d	1,345 ^e	847 ^d	705 ^e
BG	n.a.	157 ^e	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CY	1	1 ^g	n.a.	8 ^{g,h}	n.a.	6 ^{g,h}	n.a.	2 ^{g,h}
CZ	276	239 ^e	2,500	400 ^e	1,600	300 ^e	900	100 ^e
DE	113 ⁱ	74 ^e	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DK	3 ⁱ	3	195	16	160	7	35	9
EE	5 ^f	10	224 ^f	n.a.	118 ^f	n.a.	106 ^f	n.a.
EL	150 ^j	80 ^e	n.a.	276 ^e	n.a.	276 ^e	n.a.	0 ^e
ES	293	144	8,760	4,060	n.a.	3,248	n.a.	1,812
FI	21	11	387	160	253	120	134	40
FR	127	62 ^e	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
HU	10 ^p	7 ^e	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
IT	2,204 ^k	3,316 ^e	30,294 ^k	28,313 ^e	22,468 ^{k,j}	20,999 ^{e,j}	7,826 ^{k,j}	7,314 ^{e,j}
LT	n.a.	>/=4	n.a.	>200	n.a.	n.a.	n.a.	n.a.
LV	8 ^l	3	275 ^l	55	n.a.	n.a.	n.a.	n.a.
MT	n.a.	2 ^{m,n}	n.a.	185 ^{m,n}	n.a.	n.a.	n.a.	n.a.
NL*	80	45 ^g	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
PL	n.a.	n.a.	8,170	1,924 ^o	2,916	592 ^o	5,254	1,332 ^o
PT	n.a.	101	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
RO	n.a.	72	n.a.	1,132	n.a.	n.a.	n.a.	n.a.
SE	19	19	483	470	362	354	121	116
SI	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
SK	10	19	2,607	391	n.a.	n.a.	n.a.	n.a.
UK*	n.a.	210	n.a.	4,488	n.a.	2,087	n.a.	2,401

Notes: ^a = 2001; ^b = figure refers to establishments; ^c = contradictory information due to different sources; ^d = 2002; ^e = 2007; ^f = 2000; ^g = 2005; ^h = blue-collar workers only; ⁱ = 1999; ^j = estimate; ^k = 1996; ^l = 1997; ^m = 2008, ⁿ = figure relates to NACE 19 rather than NACE 19.1; ^o = figure does not include enterprises employing less than nine persons; ^p = 2003

n.a. = not available

* It should be noted that COTANCE contests part of the figures for NL and UK provided by the respective national EIRO centres.

Source: EIRO national centres, 2008

Table 2: Total employees in tanning and leather sector, 1995 and 2006

	Total employees		Male employees		Female employees		Total sectoral employment as % of total employment in economy		Total sectoral employees as % of total employees in economy	
	1995	2006	1995	2006	1995	2006	1995	2006	1995	2006
AT	1,957 ^a	2,113	n.a.	978	n.a.	1,135	0.05 ^a	0.05	0.06 ^a	0.06
BE	1,535 ^b	1,119 ^c	800 ^b	597 ^c	735 ^b	522 ^c	0.06 ^b	0.05 ^c	0.04 ^b	0.03 ^c
BG	949 ^d	1,030 ^c	554 ^d	793 ^c	395 ^d	237 ^c	n.a.	n.a.	0.05 ^d	0.045 ^c
CY	n.a.	8 ^{e,f}	n.a.	6 ^{e,f}	n.a.	2 ^{e,f}	n.a.	0.002 ^{e,f}	n.a.	0.002 ^{e,f}
CZ	2,300	400 ^c	1,500	300 ^c	800	100 ^c	0.05	0.01 ^c	0.05	0.01 ^c
DE	4,134 ^g	2,870 ^c	2,941 ^g	1,975 ^c	1,193 ^g	895 ^c	n.a.	n.a.	n.a.	0.01 ^c
DK	192	13	158	5	34	8	0.007	0.001	0.009	0.001
EE	n.a.	139	n.a.	n.a.	n.a.	n.a.	0.04 ^d	n.a.	n.a.	0.02
EL	2,000 ^h	276 ^c	n.a.	276 ^c	n.a.	0 ^c	n.a.	0.01 ^c	n.a.	0.01 ^c
ES	8,440	3,810	n.a.	n.a.	n.a.	n.a.	0.072	0.021	0.083	0.022
FI	380	154	247	116	133	38	0.02	0.006	0.03	0.007
FR	3,204	1,721 ^c	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.02	0.01 ^c
HU	267 ⁿ	149 ^c	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.01 ⁿ	0.006 ^c
IT	26,096 ⁱ	24,594 ^{c,h}	19,130 ^{i,h}	18,029 ^{c,h}	6,966 ^{i,h}	6,565 ^{c,h}	0.138 ⁱ	0.123 ^c	0.162 ⁱ	0.145 ^c
LT	n.a.	>200	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.02
LV	275	55	n.a.	n.a.	n.a.	n.a.	0.036 ^j	0.006	0.036 ^j	0.006
MT	776 ^{b,l}	183 ^{k,l}	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
NL*	3,500	1,800	2,400	1,200	1,100	600	n.a.	n.a.	0.06	0.03
PL	7,985	1,863 ^m	2,872	578 ^m	5,113	1,285 ^m	0.05	0.01 ^m	0.08	0.02 ^m
PT	n.a.	2,349	n.a.	1,616	n.a.	733	n.a.	n.a.	n.a.	0.06
RO	n.a.	1,123	n.a.	n.a.	n.a.	n.a.	n.a.	0.01	n.a.	0.02
SE	479	461	359	350	120	111	0.013	0.011	0.014	0.013

	Total employees		Male employees		Female employees		Total sectoral employment as % of total employment in economy		Total sectoral employees as % of total employees in economy	
	1995	2006	1995	2006	1995	2006	1995	2006	1995	2006
SI	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
SK	2,574	372	1,256	247	1,318	125	0.12	0.02	0.13	0.02
UK*	n.a.	4,488	n.a.	2,087	n.a.	2,401	n.a.	0.015	n.a.	0.018

Notes: ^a = 2001; ^b = 2002; ^c = 2007; ^d = 2000; ^e = 2005; ^f = blue-collar workers only; ^g = 1999; ^h = estimate; ⁱ = 1996; ^j = 1997; ^k = 2008, ^l = figure relates to NACE 19 rather than NACE 19.1; ^m = figure does not include enterprises employing less than nine persons; ⁿ = 2003

n.a. = not available

* It should be noted that COTANCE contests part of the figures for NL and UK provided by the respective national EIRO centres.

Source: EIRO national centres, 2008

National level of interest representation

In many of the 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 the following: formal recognition as a party to collective bargaining; extension of the scope of a multi-employer collective agreement to employers not affiliated to the signatory employer organisation; and participation in public policy and tripartite bodies of social dialogue. Under these circumstances, representativeness is normally measured by the membership strength of the organisations. For instance, statutory extension provisions usually allow for the extension of collective agreements to unaffiliated employers only when the signatory trade union and employer organisation represent 50% or more of the employees within the agreement's domain.

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

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

on the economy due to their limited scope. As a result, the basis for generalised tripartite policy concertation will be absent.

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

Membership domains and strength

The membership domain of an organisation, as formally established by its constitution or name, distinguishes its potential members from other groups that the organisation does not claim to represent. As already explained, this study considers only organisations whose domain relates to the tanning and leather sector. However, there is insufficient room in this report to delineate the domain demarcations of all the organisations. Instead, the report notes how they relate to the sector by classifying them according to the four patterns of 'sector relatedness', as specified earlier. Regarding membership strength, a differentiation exists between strength in terms of the absolute number of members and strength in relative terms. Research usually refers to relative membership strength as the density – in other words, the ratio of actual to potential members.

Furthermore, a difference also arises between trade unions and employer organisations in relation to measuring membership strength. Trade union membership simply means the number of unionised persons. 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 gender. However, measuring the membership strength of employer organisations is more complex since they organise collective entities, namely companies that employ employees. In this case, therefore, two possible measures of membership strength may be used – one referring to the companies themselves, and the other to the employees working in the member companies of an employer organisation.

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

Trade unions

Table 3 presents data on trade unions in terms of their domains and membership strength. The table lists all of the trade unions that meet at least one of the two criteria for classification of a sector-related social partner organisation, as defined earlier. Of the 25 countries under consideration, two do not record any sector-related trade union – the Czech Republic and Estonia. In the remaining 23 countries, a total of 52 sector-related trade unions could be identified. Only one of these 52 trade unions – the [All-Poland Trade Union of Leather Industry Workers \(OZZPPS\)](#) – has demarcated its domain in a way that is congruent with the sector definition. This underlines the fact that statistical definitions of business activities, in particular in smaller branches of the economy, differ somewhat from the lines along which employees identify common interests and group together in trade unions.

Table 3: Interest representation of trade unions in tanning and leather sector, 2006–2007

Country	Type of membership ^a	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations ^c
			Members	Members in sector	Female membership (% of total membership) ^b	Domain	Sector (sectoral domain)			
AT										
GMTN	Vol.	SO	223,280	262	17%	n.a.	12.4% (15%–16%)	Yes	No	ÖGB, EFFAT, EMF, ETUF: TCL, EMCEF
GPA-DJP	Vol.	SO	249,500	n.a.	43.2%	About 20%	n.a.	Yes	No	ÖGB, UNI-Europa, EFFAT, Euro-cadres, EMCEF, EPSU
BE										
ABVV/ FGTB Centrale générale/ Algemene centrale	Vol.	SO*	300,000	n.a.	n.a.	n.a.	n.a.	Yes	No	ABVV/ FGTB, ETUF: TCL
ACV/CSC Energie- chimie	Vol.	SO*	55,000	n.a.	32%	n.a.	n.a.	Yes	No	ACV/ CSC
ACLVB/ CGSLB	Vol.	O*	265,000	n.a.	n.a.	n.a.	n.a.	Yes	No	ETUF: TCL
SETCa- BBTK	Vol.	SO*	356,912	n.a.	n.a.	n.a.	n.a.	Yes	No	ABVV/ FGTB, UNI- Europa
CNE	Vol.	SO*	150,000	<40	64.5%	34%	n.a.	Yes	No	ACV/ CSC, UNI- Europa, EMF, EFFAT
LBC/NVK	Vol.	SO*	300,000	n.a.	n.a.	n.a.	n.a.	Yes	No	ACV/ CSC, UNI- Europa,

Country	Type of membership ^a	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations ^c
			Members	Members in sector	Female membership (% of total membership) ^b	Domain	Sector (sectoral domain)			
										Euro-cadres
BG										
FOSIL	Vol.	O*	13,162	n.a.	80%	n.a.	n.a.	Yes	No	<i>CITUB</i> , ETUF: TCL
FLI	Vol.	O*	5,000	n.a.	70%	n.a.	n.a.	Yes	No	<i>POD-KREPA</i> , ETUF: TCL
CY	–	–	–	–	–	–	–	–	–	–
OBIEK	Vol.	O*	8,875	7	30%	n.a.	87.5% (87.5%)	Yes	No	<i>SEK</i> , ETUF: TCL
SEVETTYK	Vol.	O*	6,038	5	41.8%	n.a.	62.5% (62.5%)	Yes	No	<i>PEO</i>
CZ	–	–	–	–	–	–	–	–	–	–
DE										
IGBCE	Vol.	O	701,053	<3,000	19.4%	About 25%	About 25% (25%)	Yes	No	ETUF: TCL
DK										
3F	Vol.	SO	341,672	13	33.2%	75%	100% (100%)	Yes ^d	No	<i>CO-Industri</i> , <i>LO</i> , ETUF: TCL, <i>EFBWW</i> , <i>EFFAT</i> , <i>UNI-Europa</i> , <i>EPSU</i>
EE	–	–	–	–	–	–	–	–	–	–
EL										
OEKIDE	Vol.	O	n.a.	193	n.a.	n.a.	70% (70%)	Yes	Yes	<i>GSEE</i> , ETUF: TCL
ES										
FIDEQA-CC.OO	Vol.	O*	n.a.	547	n.a.	n.a.	14% (14%)	Yes	Yes	<i>CC.OO</i> , <i>EMCEF</i> ,

Country	Type of membership ^a	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations ^c
			Members	Members in sector	Female membership (% of total membership) ^b	Domain	Sector (sectoral domain)			
										ETUF: TCL, FITTVC
FIA-UGT	Vol.	O*	n.a.	500	n.a.	n.a.	12% (12%)	Yes	Yes	UGT, EMCEF, ETUF: TCL
ELA-Hainbat	Vol.	SO*	109,318	n.a.	n.a.	n.a.	n.a.	No	n.a.	ETUF: TCL
FI										
Kemianliitto	Vol.	SO*	47,340	66	52%	88%	43% (75%)	Yes	Yes	SAK, ETUF: TCL, EMCEF
TU	Vol.	SO*	125,000	35	49%	79%	23% (60%)	Yes	Yes	STTK, ETUF: TCL, EMF, EMCEF, UNI-Europa, EFFAT, ETF, EFBWW
FR										
FS-CFDT	Vol.	S*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	CFDT, ETUF: TCL
THC-CGT	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	CGT, ETUF: TCL
CMTE-CFTC	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	CFTC, ETUF: TCL
FGCTH-CGT-FO	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	CGT-FO, ETUF: TCL
SNPECP-FNAA-CFE-CGC	Vol.	SO*	6,700	41	19%	n.a.	2.4% (n.a.)	Yes	n.a.	CFE-CGC, ETUF: TCL
HU	–	–	–	–	–	–	–	–	–	–

Country	Type of membership ^a	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations ^c
			Members	Members in sector	Female membership (% of total membership) ^b	Domain	Sector (sectoral domain)			
BDSZ	Vol.	O	833	0	70%–80%	6.3%	0% (0%)	Yes	Yes	ETUF: TCL
IT										
FILCEM-CGIL	Vol.	O*	164,000	3,600	n.a.	23.4%	14.6% (14.6%)	Yes	No	CGIL, EPSU, EMCEF
FEMCA-CISL	Vol.	O*	132,265	2,850	30%	8.8%	11.6% (11.6%)	Yes	No	CISL, ETUF: TCL, EMCEF
UILCEM	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	UIL, EMCEF
UGL CHIMICI	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	UGL
FESICA-CONFSAL	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	CONFSAL
LT										
LLPPS	Vol.	O*	3,200	8	75%	9%	n.a.	No	No	LPSK, ETUF: TCL
LV										
LIA	Vol.	O	6,002	0	62%	n.a.	0% (0%)	Yes	Yes	LBAS, ETUF: TCL
MT										
GWU	Vol.	O	45,993	n.a.	17.5%	30%	Almost 100% (100%)	Yes	Yes	ETF, EMF, UNI-Europa, EURO-WEA, FERPA, Euro-cadres, EPSU, EFFAT, ETUF: TCL, EMCEF, SCECBU
NL										

Country	Type of membership ^a	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations ^c
			Members	Members in sector	Female membership (% of total membership) ^b	Domain	Sector (sectoral domain)			
FNV Bondgenoten	Vol.	O*	470,000	65	20%	n.a.	24% (24%)	Yes	Yes	<i>FNV</i> , ETUF: TCL
CNV Bedrijvenbond	Vol.	O*	90,000	35	20%	n.a.	24% (24%)	Yes	Yes	<i>CNV</i> , ETUF: TCL
PL										
NSZZ Solidarność – Light Industry Secretariat	Vol.	O*	13,800	80	50%	9.1%	4.1% (4.1%)	No	Yes	<i>NSZZ Solidarność</i> , ETUF: TCL
OZZPPS-OPZZ	Vol.	C*	100	100	50%	11.4%	5.1% (5.1%)	Yes	Yes	<i>OPZZ</i> , ETUF: TCL
PT										
FESETE	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	<i>CGTP</i> , ETUF: TCL
SNOICOCDS	Vol.	S*	600	600	30%	31%	26% (31%)	Yes	Yes	<i>FESETE</i> , <i>CGTP</i> , ETUF: TCL ^e
SOICDB	Vol.	S*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	–
SINEQ	Vol.	O*	7,000	n.a.	13.7%	n.a.	n.a.	No	n.a.	<i>UGT</i> , <i>FETICEQE</i> MCEF, ETUF: TCL
RO	–	–	–	–	–	–	–	–	–	–
FS ‘Pielarul’	Vol.	O	8,000	650	n.a.	n.a.	57% (57%)	Yes	Yes	<i>Cartel Alfa</i> , ETUF: TCL
SE										
IF Metall	Vol.	SO	400,000	230	23%	85%–90%	49% (>90%)	Yes	Yes	<i>LO</i> , ETUF: TCL, EMF, EMCEF
Ledarna	Vol.	SO*	70,000	>15	19%	70%	3% (30%–	Yes	No	<i>PTK</i> , <i>OFR</i> ,

Country	Type of membership ^a	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations ^c
			Members	Members in sector	Female membership (% of total membership) ^b	Domain	Sector (sectoral domain)			
							40%)			CEC
Sveriges Ingenjörer (SI)	Vol.	SO*	117,000	n.a.	22%	60%	n.a.	Yes	No	SACO, NordIng, EMF, EMCEF, UNI-Europa, FEANI, Eurocadres
Unionen	Vol.	SO*	500,000	n.a.	45%	80%–85%	n.a.	Yes	No	TCO, PTK, NFS, Eurocadres
SI										
STUPIS	Vol.	O	9,100	2,200	70%	43.3%	48.9% (48.9%)	Yes	No	ZSSS, ETUF: TCL
SK										
SOZTOK	Vol.	O	5,485	0	88%	49%	0% (0%)	No	Yes	KOZ SR, ETUF: TCL
UK										
GMB	Vol.	O*	590,069	n.a.	44.8%	2.3%	n.a.	n.a.	Yes	TUC, STUC, ICTU, ETUF: TCL, EPSU, EMF, EFFAT, ETF, EMCEF, UNI-Europa, EFBWW
Unite	Vol.	O*	1,892,491	500	22.6%	7.5%	11.1% (11.1%)	n.a.	Yes	TUC, ETUF: TCL, ETF, EPSU, EMCEF, EMF, EFFAT, EFBWW
Community	Vol.	O*	31,886	n.a.	17%	n.a.	n.a.	Yes	Yes	TUC,

Country	Type of membership ^a	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations ^c
			Members	Members in sector	Female membership (% of total membership) ^b	Domain	Sector (sectoral domain)			
										<i>STUC, WTUC, ETUF, TCL</i>

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

^a Vol. = voluntary

^b = as a percentage of total union membership

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

^d = collective bargaining involvement via higher-order unit

^e = affiliation via higher-order unit

* = Domain overlap

O = Overlap, SO = Sectional overlap, S = Sectionalism

n.a. = not available

Source: EIRO national centres, 2008

Domain demarcations resulting in overlap in relation to the sector by far prevail in the sector, totalling 61.5%. Overlap generally arises from two different modes of demarcation. The first one refers to general, that is cross-sectoral, domains – as seen, for example, in the cases of the [General Workers' Union \(GWU\)](#) in Malta, the [Allied Unions \(FNV Bondgenoten\)](#) and the [Industry, Food and Transport Workers' Union \(CNV Bedrijvenbond\)](#) in the Netherlands, and the [General, Municipal, Boilermakers and Allied Trade Union \(GMB\)](#), [Unite](#) and [Community](#) trade unions in the UK. The second and more frequent mode in the sector relates to various forms of multi-sector domains, covering contiguous sectors, mostly in the broader clothing and textiles segment of the economy. This trend is evident, for example, in the cases of: the [Federation of the Independent Trade Union Organisations in Light Industry \(FOSIL\)](#) and the [Federation of Light Industry \(FLI\)](#) in Bulgaria; the [Federation of Textiles, Leather, Chemical and Allied Industries](#) affiliated to the [Trade Union Confederation of Workers' Commissions \(Federación de Industrias Textil, Piel, Químicas y Afines – Confederación Sindical de Comisiones Obreras, FIDEQA-CC.OO\)](#) in Spain; the [Textile, Clothing and Leather Federation of the General Confederation of Labour \(THC-CGT\)](#) and the [General Federation of Leather, Textiles and Clothing \(FGCTH\)](#) in France; the [Federation of Workers in the Textile, Clothing and Leather Industry \(OEKIDE\)](#) in Greece; the [Trade Union of Leather Industry \(BDSZ\)](#) in Hungary; the [Federation of Unions of Workers and Technicians in Services \(Federação dos Sindicatos dos Trabalhadores Texteis, Lanifícios, Vestuário e Calçado e Peles de Portugal, FESETE\)](#) in Portugal; the [Textiles and Leather Processing Industry Trade Union of Slovenia \(Sindikat tekstilne in usnjarsko-predelovalne industrije Slovenije, STUPIS\)](#); and the [Slovak Trade Union Association of the Textile, Clothing and Leather Industry \(SOZTOK\)](#) in Slovakia.

Sectional overlap can be found in 30.8% of the cases and is thus the second most frequent domain demarcation in relation to the sector. This mode usually emanates from domain demarcations that

focus on certain categories of employees who are then organised across several or all sectors. Employee categories are specified by various parameters, such as: distinct occupations, for example managers and technicians, as is the case with regard to the Belgian Union of White-Collar Staff, Technicians and Managers ([Syndicat des employés, techniciens et cadres de Belgique/Vakbond voor bedienden, technici en kaderleden, SETCa/BBTK](#)) and the [National Agriculture and Food Federation \(FNAA\)](#) in France; employment status, such as white-collar workers, as observed in the case of the Union of Salaried Employees, Graphical Workers and Journalists ([Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier, GPA-DJP](#)) in Austria, the National Federation of White-Collar Workers ([Landelijke Bedienden Centrale/Nationaal Verbond Kaderpersoneel, LBC/NVK](#)) in Belgium and the Union of Salaried Employees ([Toimihenkilöunioni, TU](#)) in Finland, or blue-collar employees, as is the case regarding the [United Federation of Danish Workers \(Fagligt Fælles Forbund, 3F\)](#) in Denmark and the [Union of Metalworkers \(IF Metall\)](#) in Sweden; and geographic region, as seen for instance in relation to the [Federation of Solidarity Services of Basque Workers \(ELA-Hainbat\)](#), which is only active in Spain's Basque region.

Finally, sectionalism representing only three cases (5.8%) ensues from the existence of sector-specific trade unions that represent and organise only certain categories of employees in the sector, while they do not organise employees outside the tanning and leather sector. In this sector, such employee categories are specified by distinct occupations, such as service-related activities in the case of the [Services Federation of the French Democratic Confederation of Labour \(FdS-CFDT\)](#), and by geographic region, such as central and southern Portugal in the case of the [National Union of Workers in the Tanning Industry and Related Occupations of the District of Santarém \(SNOICOCDS\)](#) and the Braga region in the case of Portugal's [Union of Workers of the Tanning Industry of the District of Braga \(SOICDB\)](#).

As the domains of the trade unions often overlap with the demarcation of the sector, so too do their domains with one another in the case of those countries with a pluralist trade union landscape in the sector. Table 3 also gives an insight into these inter-union domain overlaps. Inter-union overlaps of domains are widespread. In all of the countries with more than one sector-related trade union, excluding Austria and Sweden, the domain of any of these unions overlaps with the domain of all or most of the other unions. Depending on the scale of mutual overlap, this results in competition for members. However, noticeable inter-union competition is recorded only in Italy.

Looking at the trade union membership data, it becomes apparent that male employees comprise the majority in most of the trade unions for which membership figures by gender are available. Nevertheless, in some trade unions, the proportion of female members is close to or even above 50%. At a first glance, this finding is quite remarkable, since the sector's employment is dominated by men. However, this tendency does not hold true for all of the countries under consideration (see Tables 1–2). Moreover, closer consideration shows that the domain of most trade unions recording a majority of female members overlaps or sectionally overlaps in relation to the sector. Hence, the predominance of female members in these unions is likely to originate in areas of their domains other than the tanning and leather sector.

Membership of the sector-related trade unions is voluntary in all cases of the 25 Member States under consideration.

The absolute numbers of trade union members differ widely, ranging from almost 1.9 million to about 100 members. This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the unions' ability to attract members. Therefore, density as a measure of membership strength is more appropriate for a comparative analysis. Domain density is over 50% in the case of almost one third (31.8%) of the trade unions which document figures on density. Some 27.3% of the unions organise 70% or

more of the employees covered by their domain. A further 31.8% of the trade unions for which data are available organise fewer than 15% of the employees within their domain. The remaining trade unions (36.4%) record a density of between 15% and 50% of their potential members. These results indicate that overall domain density of the sector-related unions is relatively high. However, it should be noted that domain density data are recorded for only 22 out of the 52 sector-related trade unions. Therefore, these figures should be treated with caution.

In general, these findings correspond with the trade unions' density in the tanning and leather sector. When looking at sectoral density, it is important to differentiate between the trade unions' sectoral density on the one hand and their sectoral domain density on the other. Sectoral density measures the ratio of the total number of members of a trade union in the sector to the number of employees in the sector, as demarcated by the NACE classification. By contrast, sectoral domain density indicates the total number of members of a trade union in the sector in relation to the number of employees working in that part of the sector as covered by the union domain. This means that the sectoral domain density must be higher than the sectoral density if a trade union organises only a particular part of the sector – that is, where the trade union's membership domain is either sectionalist or sectionally overlapping in relation to the sector. When taking into account the trade unions' sectoral domain density – which tends to be higher than unions' sectoral density for the reasons outlined above – the density in the tanning and leather sector generally corresponds with the density ratio referring to their domain on aggregate. Sectoral domain density is over 50% in the case of 34.6% of the trade unions for which data are available. Some 38.5% of the trade unions record a sectoral domain density below 15%, while 26.9% of them record a sectoral domain density of between 15% and 50%. Again, it should be noted that for half of the sector-related unions, no data on sectoral domain density are available. With regard to those trade unions for which figures on both measures are recorded – that is, for sectoral domain density and domain density on aggregate – no clear picture in terms of tendencies can be drawn. There are as many trade unions with a sectoral domain density lower than the aggregate density as there are unions showing the reverse relationship between the two densities.

Relatively high unionisation rates in the tanning and leather sector may come as a surprise, given the small size of most of the establishments in the industry, which as a result often do not meet the criteria for setting up workplace representation. However, both the prevalence of standard employment relationships and – unlike the textiles industry – the predominance of male employees (who are often more inclined to unionise than women) may be identified as factors for unionisation. Moreover, in most countries, tanning and leather has been a traditional industry, where an effective trade union movement emerged quite early on. Thus, the current relatively high unionisation rates may be in part regarded as a legacy of the 'early' period of industrialisation.

Employer organisations

Tables 4 and 5 present the membership data for the employer organisations in the tanning and leather sector. For 18 out of the 25 countries under consideration, sector-related employer organisations are documented. In six of these countries, at least a proportion of the employer organisations listed are not a party to collective bargaining. They are classified here as social partner organisations only because of their European-level affiliation to COTANCE. Some 16 of the 18 countries have one or more employer organisations engaged in collective bargaining. In several countries – Cyprus, the Czech Republic, Estonia, Latvia, Malta, Poland and Slovakia – none of the employer organisations meets the definition of a social partner organisation, as outlined earlier. However, this does not mean that business has remained unorganised. Generally, business interest organisations may also deal with interests other than those related to industrial relations. Organisations specialised in matters other than industrial relations are commonly

defined as ‘trade associations’ (see [TN0311101S](#)). Such sector-related trade associations also exist in the tanning and leather sector.

In terms of their national scope of activities, all the associations not involved in collective bargaining (according to Table 5) either primarily or exclusively act as trade associations in their country. It is only the conceptual decision to include all associational affiliates of COTANCE, regardless of whether they have a role in national bargaining, that gives them the status of a social partner organisation within the framework of this study. Of the 25 employer organisations listed in Tables 4–5, six organisations belong to this group. In 11 of the 18 countries where employer organisations exist, only one employer organisation – in the meaning of a social partner organisation as defined before – has been established. In contrast to the trade union side, where pluralist associational systems are prevailing, on the employer side the sector is dominated by single organisation systems.

Moreover, the employer organisations’ domains tend to be narrower than those of the trade unions. Overall, 40% and 12% of these organisations rest on overlapping and sectionally overlapping domains, respectively. Only the domain of the Confederation of Danish Industries ([Dansk Industri, DI](#)) is cross-sectoral. Alternatively, most cases of domain overlaps ensue from coverage of the broader leather (including leather production and leather processing) and/or textiles/clothing sector. Overlaps of this kind can be found, in particular, in Austria, Bulgaria, Finland, Germany, Portugal, Romania, Slovenia and Spain. In the case of Italy’s [Unionchimica](#), overlap results from a domain covering the whole chemicals industry, including leather. Sectionalism or sectionalist overlaps in the case of broader domain demarcation in terms of sector are exclusively caused by domain demarcations that focus on either SMEs – as is the case regarding the [Federal Association of Furriers, Glovers, Tanners, Taxidermists and Leather Wear Producers \(BIK\)](#) in Austria, [Unionchimica](#) in Italy, and both the [Swedish Industrial and Chemical Employers’ Association \(IKG\)](#) and the [Tannery Traders’ Association \(SG\)](#) in Sweden – or ‘industrial’ leather manufacturing – as is the case with Austria’s [Association of the Leather Manufacturing Industry \(FLI\)](#). Only two associations (8%) are sectionalist with regard to their domain – that is, Austria’s FLI, whose membership domain comprises all companies that mainly operate in ‘industrial’ tanning, and Sweden’s SG, which organises only SMEs. Some 40% of the cases have a domain that is largely congruent with the sector definition. This means that the domain of these organisations largely focuses on the tanning and dressing of leather sector as defined earlier, while it is possible that one or another of these associations may also organise companies of contiguous sectors – such as leather processing or fur manufacturing. The relative predominance of membership domains congruent in relation to the sector indicates that many sector-related employer organisations were set up earlier on to exclusively represent the tanning and leather industry, which tends to favour the attractiveness of an employer organisation for potential members. The two existing sector-related employer organisations of Austria – FLI and BIK – can rely on obligatory membership. This is due to their public-law status as chamber units.

In those countries with a pluralist structure in relation to employer organisations, these associations have usually managed to develop non-competing relationships. Their activities are complementary to each other as a result of inter-associational differentiation by either membership demarcation, as is the case in Austria, or functions and tasks, as is the case in the UK in particular. However, some inter-associational rivalry and competition for members is recorded in Italy.

As the figures on density in Table 4 show, membership strength in terms of companies varies widely with regard to both the membership domain in general and the sector-related densities. The same holds true for the densities in terms of employees. The densities of companies tend to be equal to or – where they differ – lower than the densities of employees. This indicates a greater propensity on the part of larger companies to associate, as compared with their smaller

counterparts. In general, overall densities in the sector are relatively high. A large proportion of the associations for which related data are available register a sectoral domain density above 50% in terms of both companies and employees. Some of them record employee densities higher than 90%. This is despite the sector's company structure, which is characterised by a high proportion of SMEs. Traditionally, small companies appear to be less willing to gather in associations. Overall, there is little difference between the density of domains and the sector-related densities. This is because the membership domain of many associations tends to be congruent with the sector under consideration. In general, the findings suggest that the employers in the tanning and leather sector are quite well organised. In particular, this applies to most of the 'older' 15 Member States (EU15), but also to some of the 'new' Member States (NMS) that joined the EU in 2004, such as Lithuania and Romania.

Table 4: Domain coverage, membership and density of employer organisations in tanning and leather sector, 2006–2007

Country	Domain coverage	Membership					Density (%)			
		Type ^a	Comp-anies	Comp-anies in sector	Employ-ees	Employ-ees in sector	Companies		Employees	
							Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
AT										
FLI	S	oblig.	7	7	2,176	2,176	100%	18% (100%)	100%	>95% (100%)
BIK	SO	oblig.	99	32	298	n.a.	100%	82% (100%)	100%	<5% (100%)
BE										
UNITAN	C	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
BG										
BULFFLGI	O	vol.	117	17	6,000	400	n.a.	11% (n.a.)	n.a.	39% (n.a.)
CY	–	–	–	–	–	–	–	–	–	–
CZ	–	–	–	–	–	–	–	–	–	–
DE										
ADL	O*	vol.	22	n.a.	1,206	n.a.	n.a.	n.a.	n.a.	n.a.
VDL	O*	vol.	60	n.a.	3,000	n.a.	90%	80% (80%)	95%	95% (95%)
DK										
DI	O	vol.	11,000	1	5,00,000	n.a.	n.a.	33.3% (33.3%)	n.a.	n.a.
EE	–	–	–	–	–	–	–	–	–	–
EL										
HTA	C*	vol.	80	80	276	276	100%	100% (100%)	100%	100% (100%)

Country	Domain coverage	Membership					Density (%)			
		Type ^a	Companies	Companies in sector	Employees	Employees in sector	Companies		Employees	
							Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
HUT	C*	vol.	80	80	276	276	100%	100% (100%)	100%	100% (100%)
ES										
CEC-FECUR	C	vol.	128	128	3,720	3,720	89%	89% (89%)	92%	92% (92%)
FI										
FLIA	O	vol.	38	4	1,658	115	16%	36% (36%)	87%	75% (75%)
FR										
FFTM	C	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
HU										
BCE	O	vol.	24	n.a.	1,635	n.a.	10.4%	0%	63.1%	0%
IT										
UNIC	C*	vol.	200	200	8,000	8,000	8.6%	8.6% (8.6%)	32.5%	32.5% (32.5%)
Union Chimica	SO*	vol.	3,700	n.a.	94,500	n.a.	n.a.	n.a.	n.a.	7.7% (n.a.)
LT										
LOGVA	C	vol.	3	3	<200	<200	75%	75% (75%)	90%	90% (90%)
LV	–	–	–	–	–	–	–	–	–	–
MT	–	–	–	–	–	–	–	–	–	–
NL										
FNL	C	vol.	14	14	400	400	93.3%	93.3% (93.3%)	95%	95% (95%)
PL	–	–	–	–	–	–	–	–	–	–
PT										
APIC	O	vol.	45	40	n.a.	n.a.	n.a.	39.6% (39.6%)	n.a.	n.a.
RO	–	–	–	–	–	–	–	–	–	–
PINC	O	vol.	1,000	52	55,000	550	62%	72.2% (72.2%)	56%	50% (50%)
SE										
SG	S*	vol.	5	5	325	325	100%	26.3% (100%)	100%	70% (100%)

Country	Domain coverage	Membership					Density (%)			
		Type ^a	Companies	Companies in sector	Employees	Employees in sector	Companies		Employees	
							Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
IKG	SO*	vol.	1,200	3	95,000	n.a.	80%	15.8% (n.a.)	n.a.	n.a.
SI										
ZTOUPI	O*	vol.	59	13	n.a.	1,260	11%	11% (11%)	n.a.	28% (28%)
STU	O*	vol.	n.a.	n.a.	n.a.	n.a.	70%	n.a.	n.a.	n.a.
SK	–	–	–	–	–	–	–	–	–	–
UK										
UKLF	C*	vol.	25	25	1,350	1,350	11.9%	11.9% (11.9%)	n.a.	29% (29%)
LPA	C*	vol.	18	18	800	800	8.6%	8.6% (8.6%)	n.a.	17.8% (17.8%)

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

^a vol. = voluntary, oblig. = obligatory

* Domain overlap

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

n.a. = not available

Source: EIRO national centres, 2008

Table 5: Collective bargaining, consultation and national/European affiliations of employer organisations in tanning and leather sector, 2006–2007

Country	Collective bargaining	Consultation	National and European affiliations [*]
AT			
FLI	yes	yes	WKÖ
BIK	yes	n.a.	WKÖ
BE			
UNITAN	yes	no	FEB/VBO, COTANCE
BG			
BULFFLGI	yes	no	BIA, COTANCE
CY	–	–	–

Country	Collective bargaining	Consultation	National and European affiliations
CZ	–	–	–
DE			
ADL	yes	yes	<i>VBU</i>
VDL	no	yes	<i>BDI, COTANCE</i>
DK			
DI	yes	no	<i>DA</i>
EE	–	–	–
EL			
HTA	yes	yes	
HUT	no	yes	COTANCE
ES			
CEC-FECUR	yes	yes	<i>CEOE, COTANCE</i>
FI			
FLIA	yes	yes	<i>EK, COTANCE</i>
FR			
FFTM	yes	n.a.	COTANCE
HU			
BCE	no	yes	COTANCE
IT			
UNIC	yes	no	<i>Confindustria, COTANCE</i>
Union Chimica	yes	no	<i>Confapi</i>
LT	–	–	–
LOGVA	no	yes	<i>LPK, COTANCE</i>
LV	–	–	–
MT	–	–	–
NL			
FNL	yes	yes	<i>VNO-NCW, COTANCE</i>
PL	–	–	–
PT			
APIC	yes	n.a.	COTANCE

Country	Collective bargaining	Consultation	<i>National and European affiliations</i> *
RO	–	–	–
PINC	yes	yes	<i>UGIR 1903</i>
SE			
SG	no	yes	COTANCE
IKG	yes	yes	<i>SN</i>
SI			
ZTOUPI	yes	no	<i>GZS, Euratex, CEC</i>
STU	yes	no	<i>ZDS</i>
SK	–	–	–
UK			
UKLF	no	yes	<i>CBI, COTANCE</i>
LPA	yes	yes	–

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

* National affiliations appear in italics; only affiliations to sectoral European associations are listed

Source: EIRO national centres, 2008

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, Italy is the only country where inter-union rivalry and competition for bargaining capacities has been identified (see above). The same holds true for the sector-related employer organisations, where competition over collective bargaining is similarly limited to Italy. In the latter country, the two sector-related employer organisations – the [National Union of the Tanning Industry](#) (UNIC) and Unionchimica – are seeking to play a more prominent role in the sector-related, national bargaining process. It should be noted, however, that COTANCE has raised questions over the alleged inter-organisational rivalry on the employer side in Italy.

The data presented in Table 6 provide an overview of the system of sector-related collective bargaining in the 25 countries under consideration. The importance of collective bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees in a certain segment of the economy (see Traxler, Blaschke and Kittel, 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 used. The first indicator refers to the relevance of multi-employer bargaining, compared with single-employer bargaining. Multi-employer bargaining is defined as being conducted by an employer organisation on behalf of the employer side. In the case of single-employer bargaining, the company or its divisions is the party

to the agreement. This includes instances where two or more companies jointly negotiate an agreement. The relative importance of multi-employer bargaining, measured as a percentage of the total number of employees covered by a collective agreement, therefore provides an indication of the impact of the employer organisations on the overall collective bargaining process.

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

Compared with employee-related extension procedures, schemes that target the employers are far more significant for the strength of collective bargaining in general and multi-employer bargaining in particular. This is because the employers are capable of refraining from both joining an employer organisation and entering single-employer bargaining in the context of a purely voluntaristic system. Therefore, employer-related extension practices increase the coverage of multi-employer bargaining. Moreover, when it is pervasive, an extension agreement may encourage more employers to join the controlling employer organisation; such a move then enables them to participate in the bargaining process and to benefit from the organisation's related services in a situation where the respective collective agreement will bind them in any case (see Traxler, Blaschke and Kittel, 2001).

Table 6: System of sectoral collective bargaining in tanning and leather sector, 2006–2007

Country	Collective bargaining coverage (CBC)	Proportion of multi-employer bargaining (MEB) as % of total CBC	Extension practices*
AT	100%	100%	(Pervasive)
BE	100%	MEB prevailing	Pervasive
BG	100%	100%	Pervasive
CY	100%	0%	none
CZ	n.a.	n.a.	n.a.
DE	80%	MEB prevailing	No practice
DK	100%	100%	No practice
EE	0%	n/a	n/a
EL	100%	100%	No practice
ES	100%	100%	Pervasive
FI	Almost 100%	100%	Pervasive

Country	Collective bargaining coverage (CBC)	Proportion of multi-employer bargaining (MEB) as % of total CBC	Extension practices*
FR	100%	100%	Pervasive
HU	60%	n.a.	No practice
IT	100%	90%	(Pervasive)
LT	n.a.	0%	No practice
LV	0%	n/a	n/a
MT	n.a.	0%	No practice
NL	95%	100%	No practice
PL	25%	0%	No practice
PT	100%	100%	Pervasive
RO	100%	100%	Pervasive
SE	Almost 100%	Almost 100%	No practice
SI	55%–70%	MEB prevailing	Limited/exceptional
SK	0%	n/a	n/a
UK	50%	<40%	No practice

Notes: Collective bargaining coverage = employees covered as a percentage of the total number of employees in the sector

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

** Extension practices include functional equivalents to extension provisions, i.e. obligatory membership and labour court rulings; cases of functional equivalents appear in parentheses.*

n.a. = not available

n/a = not applicable

Source: EIRO national centres, 2008

Collective bargaining coverage

In terms of the sector's collective bargaining coverage, 15 of the 22 countries for which related data are available record a very high coverage rate of 80% or more (Table 6). In contrast, collective bargaining is completely absent in only three of the countries – Estonia, Latvia and Slovakia. Generally, in those countries where sector-related collective bargaining takes place, bargaining coverage tends to be very high, except in the case of Poland, with rates of at least 50% and often coming close to 100%. One can infer from these findings that in at least two thirds of the EU Member States, the sector's industrial relations structures are well-established, while they appear to be underdeveloped in only a minority of the countries, which represent just a small part of the sector in Europe. Closer consideration regarding the different countries reveals that collective bargaining coverage rates tend to be high in the 'old' EU15, with the notable exception of the UK where about half of the employees are covered. However, sectoral bargaining standards

vary widely between the 2004 accession countries. In Estonia, Latvia and Slovakia, sector-related bargaining is completely lacking, due to the absence of sector-related representative social partner organisations in at least one of the two sides of industry (see Tables 3 to 5). In contrast, collective bargaining settlements cover the entire sector in Bulgaria, Cyprus and Romania, and most of the sector in Hungary and Slovenia.

In the majority of countries for which data are available, several factors that sometimes interact with each other account for the high coverage rates: firstly, the predominance of multi-employer bargaining; secondly, the high density rates of the trade unions and/or employer organisations, as seen for example in Denmark, Finland, Greece and Sweden; and thirdly, the existence of pervasive extension practices, as observed in countries such as Belgium, Bulgaria, Finland, France, Portugal, Romania and Spain. In the case of Austria, obligatory membership in the sector-related employer organisations works as a functional equivalent to pervasive extension. While coverage in countries with prevalent multi-employer bargaining is generally high, single-employer bargaining arrangements in the sector prevail in the UK and are the exclusive type of bargaining in Cyprus, Lithuania, Malta and Poland. In the latter group of countries, with the exception of Cyprus where the sector comprises only one single company, collective bargaining coverage is deemed to be low.

The fact that multi-employer bargaining is the dominant – if not exclusive – form of bargaining in most countries where sector-related collective agreements are concluded does not imply sectoral-level bargaining in a narrow sense – that is, sector-specific bargaining – in all of these cases. For instance, in Denmark, all employees of the sector are covered by an unspecific industry collective agreement concluded by cross-sectoral associations on the two sides of industry.

Due to the prevalence of multi-employer settlements in the sector, the use of extension practices is significant. Pervasive extension practices in the tanning and leather sector are reported for Belgium, Bulgaria, Finland, France, Portugal, Romania and Spain. In Slovenia, new legislation on extending collective agreements has recently been introduced, but its effectiveness in practice has not yet been experienced, at least not in the tanning and leather sector. Referring to the aim of extension provisions – that is, making multi-employer agreements generally binding – the provisions for obligatory membership in the chamber system of Austria should also be noted. Obligatory membership creates an extension effect, since the Austrian Federal Economic Chamber ([Wirtschaftskammer Österreich, WKÖ](#)) and its subunits are parties to multi-employer bargaining. Another functional equivalent to statutory extension schemes can be found in Italy. Under the country's constitution, minimum conditions of employment must apply to all employees. The country's labour court rulings relate this principle to the multi-employer agreements, to the extent that they are regarded as generally binding.

Participation in public policymaking

Interest associations may partake in public policy in two basic ways: firstly, they may be consulted by the authorities on matters affecting their members; or secondly, they may be represented on 'corporatist', in other words tripartite, committees and boards of policy concertation. This study considers only cases of consultation and corporatist participation that explicitly relate to sector-specific matters. Consultation processes are not necessarily institutionalised and, therefore, the organisations consulted by the authorities may vary according to the issues to be addressed and also over time, depending on changes in government. Moreover, the authorities may initiate a consultation process on an occasional rather than a regular basis. Given this variability, Tables 3 and 5 list only those sector-related trade unions and employer organisations that are usually consulted.

Trade unions

At least a proportion of the trade unions are regularly consulted by the authorities in 13 of the 23 countries where sector-related trade unions are recorded. Nine countries cite a lack of regular consultation of any of the trade unions, whereas no information on consultation practices is available for any of the trade unions in France. Since a multi-union system has been established in 13 out of the 23 countries with sector-related trade unions, one cannot rule out the possibility that the authorities favour certain trade unions over others or that the unions compete for participation rights. In four countries with a multi-union system – Finland, the Netherlands, Poland and the UK – where a noticeable practice of consultation is observed, any of the existing trade unions may take part in the consultation process. By contrast, in Portugal, Spain and Sweden, only some of the sector-related trade unions are consulted. Nevertheless, there is no evidence of inter-union conflicts over participation in public policy matters in the tanning and leather sector.

Employer organisations

More than half – that is, 15 out of 25 – of the sector-related employer organisations in those countries where they exist are involved in consultation procedures. In countries with multi-organisation systems, no cases of conflicts over participation rights of employer organisations are reported. In the multi-organisation systems of Germany, Greece, Sweden and the UK, where related data on all employer organisations are available, all of the sector's organisations are consulted. Conversely, in the pluralist systems of Italy and Slovenia, none of the employer organisations are regularly consulted. None of the countries records the coexistence of an organisation that is consulted and one that is not. However, it should be noted that for a few employer organisations in three of the countries, no information on consultation practices is available. In eight of the 16 countries with available information on each side, where employer organisations coexist with trade unions – Finland, Greece, Hungary, the Netherlands, Romania, Spain, Sweden and the UK – consultation rights are symmetrically attributed to the two sides of industry, in that at least one organisation on each side is consulted. In contrast, in three of these 16 countries for which information on consultation is reported for organised business and labour, representatives of only one side are consulted – in Austria, Germany and Lithuania. In those countries where an employer organisation in the context of the aforementioned definition of a social partner organisation does not exist – Cyprus, the Czech Republic, Estonia, Latvia, Malta, Poland and Slovakia – business is not necessarily excluded from consultation procedures. Under these circumstances, sectoral trade associations may be consulted.

Tripartite participation

Turning from consultation to tripartite participation, the findings reveal that genuinely sector-specific tripartite bodies have been established in only three of the 25 countries under consideration – that is, Germany, Italy and the UK. This is mainly due to the small size of the tanning and leather sector. Table 7 lists a total of only three bodies of this kind. Two of them are based on statutes, while no related information is available for the third body. The UK-based [Textiles Industry Advisory Committee \(TEXIAC\)](#) primarily deals with health and safety issues. In Italy, a regional tripartite observatory for the tanning industry has been set up in the district of Vicenza in the northeast of the country – representing the most important tanning industry area of the country; however, the tasks and functions of this body are not quite clear. The same holds true for a special committee on homeworkers in the leather industry, which has been established in Germany. Other tripartite bodies listed in some country reports are not taken into account in this study, since they all cover broader industry segments, such as the chemicals or textiles sector, and thus do not specifically target the tanning and leather sector.

Table 7: Tripartite sector-specific boards of public policy in tanning and leather sector, 2006–2007

Country	Name of body and scope of activity	Origin	Participants	
			Trade unions	Business associations
DE	Committee on Homeworkers in the Leather Industry	Statutory	n.a.	n.a.
IT	Observatory of the Tanning Industry in the District of Vicenza	Statutory	FILCEM, FEMCA, UILCEM territoriali	Associazione Industriali di Vicenza
UK	TEXIAC – health and safety issues	n.a.	GMB, Unite, Community	UKLF

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

n.a. = not available

Source: EIRO national centres, 2008

European level of interest representation

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

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

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

As outlined in greater detail below, one sector-related European association on the employee side – ETUF:TCL – and one on the employer side – COTANCE – are particularly significant in the tanning and leather sector: both of them are listed by the European Commission as a social partner organisation consulted under Article 138 of the EC Treaty. Hence, the following analysis will concentrate on these two organisations, while providing supplementary information on other associations that are linked to the sector's national industrial relations actors.

Membership domain

As indicated by its name, ETUF:TCL – which is affiliated to the [European Trade Union Confederation \(ETUC\)](#) and the [International Textile, Garment and Leather Workers' Federation \(ITGLWF\)](#) – organises the entire textile, clothing and footwear segment of the economy,

including the tanning and dressing of leather. Therefore, its membership domain overlaps in relation to the tanning and leather sector. By contrast, COTANCE represents only the tanning and dressing companies; hence, its domain largely coincides with the sector under consideration. Nevertheless, some of its members also cover business areas outside the tanning and leather sector (see Table 5). COTANCE organises only business/employer organisations rather than individual companies.

Membership composition

In terms of membership composition, it should be noted that the countries covered by ETUF:TCL and COTANCE extend beyond the 25 countries examined in this study. However, the report will only consider the members of these 25 countries. Table 8 lists ETUF:TCL's membership of sector-related trade unions drawn from the country reports. Thus, this list has still to be confirmed by ETUF:TCL. Accordingly, at least one affiliation in each country under consideration – except for the Czech Republic and Estonia – is recorded. Multiple memberships occur in some countries – such as Belgium, Bulgaria, Finland, France, Lithuania, the Netherlands, Poland, Portugal, Spain and the UK. Altogether, ETUF:TCL counts 38 direct and one indirect affiliations from the countries under examination. Three quarters of the trade unions listed in Table 3 are directly or indirectly (via higher-order units) affiliated to ETUF:TCL. As far as available data on sectoral membership of the national trade unions provide sufficient information on their relative strength, one can conclude that ETUF:TCL covers the most important labour representatives in the sector – perhaps with the exception of the Italian Chemicals, Energy and Manufacturing Workers' Federation ([Federazione Italiana Lavoratori Chimica, Energia, Manifatture, Filcem-Cgil](#)). Apart from this, exceptional cases of uncovered major trade unions do not occur. Some 30 of the direct and indirect members of ETUF:TCL, for which relevant information is available, are involved in collective bargaining related to the tanning and leather sector. A further seven of its affiliates from countries such as Latvia, Lithuania, Poland, Portugal, Slovakia and Spain are not involved in collective bargaining, while for two UK-based trade unions no information on sector-related collective bargaining involvement is available.

Table 8: Members of ETUF:TCL, 2008

Country	Members
AT	GMTN*
BE	ABVV/FGTB centrale générale*, ACLVB/CGSLB*
BG	FOSIL*, FLI-Podkrepa*
CY	OBIEK/SEK*
CZ	–
DE	IGBCE*
DK	3F**
EE	–
EL	OEKIDE*
ES	FITEQA-CC.OO*, FIA-UGT*, ELA-Hainbat
FI	Kemiantliitto*, TU*

Country	Members
FR	FdS-CFDT*, THC-CGT*, CMTE-CFTC*, FGCTH-CGT-FO*, SNPECP-FNAA-CFE-CGC*
HU	BDSZ*
IT	FEMCA-CISL*
LT	LLPPS, LTUTW
LV	LIA
MT	GWU*
NL	FNV BG*, CNV Bedrijvenbond*
PL	NSZZ Solidarność – Light Industry Secretariat, OZZPPS – OPZZ*
PT	FESETE* (SNOICOCDS*), SINDEQ
RO	Pielarul*
SE	IF Metall*
SI	STUPIS*
SK	SOZTOK
UK	GMB***, Unite***, Community*

Notes: Membership list is confined to the sector-related associations of the countries under consideration.

** Involved in collective bargaining*

*** Collective bargaining involvement via higher-order unit*

**** No information available on collective bargaining involvement in the sector*

Source: EIRO national centres, 2008

Table 9 lists the members of COTANCE. Of the 25 countries under consideration, COTANCE has 14 under its umbrella through associational members from these countries. According to COTANCE, these countries cover the vast majority of the sector in the EU27, in terms of both companies and employees. Multiple memberships do not exist in any of these countries. Table 5 indicates that affiliated and unaffiliated associations co-exist in Germany, Greece, Italy, Sweden and the UK. As far as they are available, one can infer from the sectoral membership data of the respective organisations of these countries that the most important associations are affiliated to COTANCE. However, taking into account also the role in collective bargaining as an indicator of an association's significance does not show a clear trend in this respect. In several countries, some important or even all employer organisations that conduct bargaining are outside the association. Moreover, in six countries – Germany, Greece, Hungary, Lithuania, Sweden and the UK – the affiliates of COTANCE are not engaged in bargaining. In all countries where sectoral multi-employer bargaining is absent, excluding Lithuania, employer organisations do not exist at all. Employer organisations that are not involved in collective bargaining may regard themselves as trade associations rather than as industrial relations actors.

Of the 14 direct affiliates of COTANCE, eight are involved in sector-related collective bargaining. This means that, in comparison with ETUF:TCL, no significant difference in terms of

COTANCE's proportion of member organisations that are involved in bargaining can be found. COTANCE members cover collective bargaining in eight of the 25 countries under consideration, which accounts for almost half of the number of countries (20) where sector-related collective bargaining is conducted by affiliates of its European-level counterpart ETUF:TCL. This indicates a certain division of labour between the trade unions with regard to national bargaining and underlines the role of single-employer bargaining conducted by trade unions in some countries.

Table 9: Members of COTANCE, 2008

Country	Members
AT	–
BE	UNITAN*
BG	BULFFLGI*
CY	–
CZ	–
DE	VDL
DK	–
EE	–
EL	HUT
ES	CEC-FECUR*
FI	FLIA*
FR	FFTM*
HU	BCE
IT	UNIC*
LT	LOGVA
LV	–
MT	–
NL	FNL*
PL	–
PT	APIC*
RO	–
SE	SG
SI	–
SK	–
UK	UKLF

Notes: Membership list is confined to the sector-related associations of the countries under consideration.

** Involved in sector-related collective bargaining*

Source: EIRO national centres, 2008

Capacity to negotiate

The third criterion of representativeness at the European level refers to the organisations' capacity to negotiate on behalf of their own members. According to the respective general secretaries of both ETUF:TCL and COTANCE, both associations have not obtained a general negotiating mandate by their members in matters of the European social dialogue. Rather, they have a general mandate to represent their members at European level, including in all matters of the sectoral social dialogue. In line with these associations' respective statutes, the executive committee in the case of ETUF:TCL and other executive bodies within the COTANCE structure decide on a case by case basis on whether the respective associations engage in negotiations at European level and on the scope of the respective negotiating mandate. The affiliates of both associations eventually sign and endorse the agreements, joint statements or other documents concluded by the European social partners.

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

For the trade unions, these affiliations are listed in Table 3. European organisations other than ETUF:TCL represent a relatively large proportion of both sector-related trade unions and countries. Among the organisations listed are the following:

- the [European Mine, Chemical and Energy Workers' Federation \(EMCEF\)](#), with 15 affiliations covering eight countries;
- [UNI-Europa](#), with nine affiliations covering seven countries;
- the [European Metalworkers' Federation \(EMF\)](#), with eight affiliations covering seven countries;
- the [European Federation of Food, Agriculture and Tourism Trade Unions \(EFFAT\)](#), with eight affiliations covering six countries;
- the [European Federation of Public Service Unions \(EPSU\)](#), with six affiliations covering five countries;
- the [Council of European Professional and Managerial Staff \(Eurocadres\)](#) and the [European Transport Workers' Federation \(ETF\)](#), with five affiliations and four countries each;
- the [European Federation of Building and Woodworkers \(EFBWW\)](#), with four affiliations covering three countries;
- and the [European Federation of Retired and Old Persons \(FERPA\)](#), the [European Workers' Education Associations \(EURO-WEA\)](#), the [Standing Committee of European Central Bank Unions \(SCECBU\)](#), the [European Confederation of Executives and Managerial Staff \(CEC\)](#), the [European Federation of National Associations of Engineers \(Fédération Européenne d'Associations Nationales d'Ingénieurs, FEANI\)](#), the [Council of Nordic Trade Unions \(Nordens Fackliga Samorganisation, NFS\)](#) and [NordIng](#), with one affiliation each.

Moreover, it should be noted that the affiliations listed in Table 3 may not necessarily be exhaustive. Nevertheless, and in spite of the large number of affiliations to European organisations other than ETUF:TCL, this overview underlines the principal status of the latter association as the sector's labour representative. This is mainly because many of the aforementioned affiliations to other European organisations reflect the overlapping domains of the affiliates rather than indicating a real reference of the affiliations as such to the tanning and leather sector.

Table 5 provides a similar overview of the European associations to which employer organisations are affiliated. The results indicate that organisational links of the sector-related employer organisations with European federations other than COTANCE only rarely exist – as in the case of the [European Apparel and Textile Organisation \(EURATEX\)](#) and the [European Confederation of the Footwear Industry \(CEC\)](#), which have only one affiliation each. The extraordinarily low incidence of affiliations to European organisations other than COTANCE highlights the relevance of the latter as the unmatched European voice of business in the sector, even though this association only has a proportion of the EU Member States under its umbrella through affiliations from these countries.

Commentary

Despite the small and even decreasing size of the European tanning and leather sector, industrial relations tend to be well organised in this industry. This characteristic is manifested in the relatively high unionisation rates and densities in terms of employer representation. These findings may come as a surprise, given the small size of most of the establishments in this industry, which often do not meet the criteria for setting up workplace representation and which generally tend to be less inclined to gather in associations compared with larger companies. However, in terms of workers' representation, a long tradition of leather manufacturing in combination with the prevalence of standard (male) employment may account for the levels of unionisation.

In general, the findings reveal that both employees and employers tend to be organised to a larger extent in the 'older' EU15 Member States compared with the 2004 accession countries. Moreover, the sector's collective bargaining coverage tends to be rather high, with 15 of the 22 countries for which related data are available recording coverage rates of 80% or more. In contrast, only three countries could be identified where sector-related collective bargaining is completely absent; these countries represent only a marginal proportion of the sector in Europe. Once again, closer examination shows that collective bargaining coverage rates tend to be high in the EU15 – with the exception of the UK, where about half of the employees are covered – while sectoral bargaining standards vary widely among the 'new' Member States. In Estonia, Latvia and Slovakia, sectoral bargaining is completely absent, due to the lack of sector-related representative social partner organisations in at least one of the two sides of industry. Conversely, collective bargaining settlements cover the entire sector in Bulgaria, Cyprus and Romania. Generally, high collective bargaining coverage rates in the sector are buttressed by the predominance of multi-employer arrangements and a significant use of extension practices.

However, despite the sector's relatively advanced position in terms of industrial relations standards, the tanning industry has encountered a series of major problems, including increased competition from low-wage countries in Asia and tightened regulations regarding environmental protection. Moreover, the sectoral social partners have long considered the need for uniform European vocational training standards.

In order to tackle these problems and cope with such challenges (particularly with regard to training standards and sustainable development of the industry) the sector's social partners at

European level – COTANCE on the employers' side and ETUF:TCL on the employees' side – have launched some joint initiatives in the framework of social dialogue. In this context, a series of joint declarations, programmes and guidelines, including a code of conduct, have been drawn up and presented since 1999. Undeniably, COTANCE and ETUF:TCL have to be regarded as by far the most important, if not the only, EU-wide representatives of the sector's employers and employees.

References

European Commission, *Recent developments in the European sectoral social dialogue*, Luxembourg, Office for Official Publications of the European Communities, 2006.

Traxler, F., 'The metamorphoses of corporatism', in *European Journal of Political Research*, Vol. 43, No. 4, 2004, pp. 571–598.

Traxler, F., Blaschke, S. and Kittel, B., *National labour relations in internationalised markets*, Oxford University Press, 2001.

Annex: List of abbreviations

Country	Abbreviation	Full name of organisation
Austria (AT)	BIK	Federal Association of Furriers, Glovers, Tanners, Taxidermists and Leather Wear Producers
	FLI	Association of the Leather Manufacturing Industry
	GMTN	Metalworking, Textiles, Agriculture and Food-processing Union
	GPA-DJP	Union of Salaried Employees, Graphical Workers and Journalists
	ÖGB	Austrian Trade Union Federation
	WKÖ	Austrian Federal Economic Chamber
Belgium (BE)	ABVV/FGTB	Belgian General Federation of Labour
	ACV/CSC	Confederation of Christian Trade Unions
	ACLVB/CGSLB	Federation of Liberal Trade Unions of Belgium
	CNE	National Federation of White-collar Workers
	FEB/VBO	Belgian Federation of Employers
	LBC/NVK	Federation of White-collar Workers and Managers
	SETCa/BBTK	Belgian Union of White-collar, Technical and Executive Employees
	UNITAN	Union of Belgian Tanners
Bulgaria (BG)	BIA	Bulgarian Industrial Association
	BULFFLGI	Branch Union of Leather, Fur, Footwear and Leather Goods Industry
	CITUB	Confederation of Independent Trade Unions in Bulgaria
	FLI	Federation of Light Industry
	FOSIL	Federation of Independent Trade Union Organisations in Light Industry
	Podkrepa	Confederation of Labour 'Podkrepa'
Cyprus (CY)	OBIEK	Federation of Industrial Workers of Cyprus
	SEK	Cyprus Workers' Confederation
	SEVETTYK	Cyprus Union of Workers in Industry, Trade, Press, Printing and General Services
Czech Republic (CZ)	–	–

Country	Abbreviation	Full name of organisation
Denmark (DK)	3F	United Federation of Danish Workers
	CO-Industri	Central Organisation of Industrial Employees in Denmark
	DA	Confederation of Danish Employers
	DI	Confederation of Danish Industries
	LO	Danish Confederation of Trade Unions
Estonia (EE)	–	–
Finland (FI)	EK	Confederation of Finnish Industries
	FLIA	Finnish Leather Industry Association
	Kemianliitto	Chemical Workers' Union
	SAK	Central Organisation of Finnish Trade Unions
	STTK	Finnish Confederation of Professionals
	TU	Union of Salaried Employees
France (FR)	CFDT	French Democratic Confederation of Labour
	CFE-CGC	French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	CFTC	French Christian Workers' Confederation
	CGT	General Confederation of Labour
	CGT-FO	General Confederation of Labour – <i>Force ouvrière</i>
	CMTE-CFTC	Chemicals, Mining, Textiles and Energy Federation of the French Christian Workers' Confederation
	FFTM	French Leather Federation
	FGCTH-CGT-FO	General Federation of Leather, Textiles and Clothing of the General Confederation of Labour – <i>Force ouvrière</i>
	FNAACFE-CGC	National Agriculture and Food Federation of the French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	FdS-CFDT	Services Federation of the French Democratic Confederation of Labour
	SNPECP	National Union of Leather and Hide Managerial Staff
	THC	Textile, Clothing and Leather Federation of the General Confederation of Labour
Germany (DE)	ADL	Employer Association of the German Leather Industry

Country	Abbreviation	Full name of organisation
	BDI	Federation of German Industries
	IGBCE	Mining, Chemicals and Energy Industrial Union
	VBU	Union of Bergisch Trade Associations
	VDL	German Leather Federation
Greece (EL)	GSEE	Greek General Confederation of Labour
	HTA	Hellenic Tanners' Association
	HUT	Hellenic Union of Tanners
	OEKIDE	Federation of Workers in the Textile, Clothing and Leather Industry
	SEV	Hellenic Federation of Enterprises
Hungary (HU)	BCE	Association of the Leather and Shoe Industry
	BDSZ	Trade Union of Leather Industry
Italy (IT)	CGIL	General Confederation of Italian Workers
	CISL	Italian Confederation of Workers' Unions
	CONFAPI	Italian Confederation of Small and Medium-sized Enterprises (SMEs)
	Confindustria	General Confederation of the Italian Industry
	FEMCA-CISL	Federation of Energy, Fashion, Chemical and Related Sector Workers of the Italian Confederation of Workers' Unions
	FESICA-CONFSAI	Trade Union Federation for Industry, Commerce and Artisan Sectors
	FILCEM-CGIL	Italian Federation of Chemical, Energy and Manufacturing Workers of the General Confederation of Italian Workers
	UGL-CHIMICI	General Union of Work – Chemical Sector
	UGL	General Union of Work
	UIL	Union of Italian Workers
	UILCEM	Italian Union of Chemical, Energy and Manufacturing Workers
	UNIC	National Union of the Tanning Industry
	UNIONCHIMICA	National Union of Small and Medium-sized Enterprises in the Chemical, Plastics, Rubber and Related Products Sector
Latvia (LV)	LBAS	Free Trade Union Confederation of Latvia

Country	Abbreviation	Full name of organisation
	LIA	Industrial Workers' Trade Union
Lithuania (LT)	LLPPS	Lithuanian Trade Union of Light Industry
	LOGVA	Association of Leather Producers and Consumers of Lithuania
	LPK	Lithuanian Confederation of Industrialists
	LPSK	Lithuanian Trade Union Confederation
Malta (MT)	GWU	General Workers' Union
Netherlands (NL)	CNV	Christian Trade Union Federation
	CNV Bedrijvenbond	Industry, Food and Transport Workers' Union
	FNL	Association of Leather Manufacturers of the Netherlands
	FNV	Federation of Dutch Trade Unions
	FNV Bondgenoten	Allied Unions
	VNO-NCW	Confederation of Netherlands Industries and Employers
Poland (PL)	NSZZ Solidarność	Independent and Self-Governing Trade Union 'Solidarity'
	OPZZ	All-Poland Alliance of Trade Unions
	OZZPS	All-Poland Trade Union of Leather Industry Workers
Portugal (PT)	APIC	Portuguese Association of Industrialists in Tanning
	CGTP	General Confederation of Portuguese Workers
	FETESE	Trade Union Federation of Workers and Technicians in Services
	SINDEQ	Democratic Union in Energy, Chemical, Textile and Other Industries
	SNOICOCDS	National Union of Workers in the Tanning Industry and Related Occupations of the District of Santarém
	SOICDB	Union of Workers of the Tanning Industry of the District of Braga
	UGT	General Workers' Confederation
Romania (RO)	Cartel Alfa	National Trade Union Confederation
	FS 'Pielarul'	Trade Union Federation 'Pielarul'
	PINC	Leather and Footwear Employer Association
	UGIR 1903	General Union of Romanian Industrialists 1903
Slovakia (SK)	KOZ SR	Confederation of Trade Unions

Country	Abbreviation	Full name of organisation
	SOZTOK	Slovak Trade Union Association of the Textile, Clothing and Leather Industry
Slovenia (SI)	GZS	Chamber of Commerce and Industry of Slovenia
	STU	Section for the Textile and Leather Industry
	STUPIS	Textile and Leather Processing Industries Trade Union of Slovenia
	ZDS	Slovenian Employers' Association
	ZSSS	Association of Free Trade Unions of Slovenia
	ZTOUPI	Textiles, Clothing and Leather Processing Association
Spain (ES)	CC.OO	Trade Union Confederation of Workers' Commissions
	CEC-FECUR	Spanish Tanners' Confederation
	CEOE	Spanish Federation of Employer Organisations
	ELA-Hainbat	Federation of Solidarity Services of Basque Workers
	FIA	Federation of Allied Industries
	FIDEQA	Federation of Textiles, Leather, Chemical and Allied Industries
	UGT	General Workers' Confederation
Sweden (SE)	IF Metall	Union of Metalworkers
	IKG	Swedish Industrial and Chemical Employers' Association
	Ledarna	Swedish Organisation for Managers
	LO	Swedish Trade Union Confederation
	SACO	Tannery Traders' Association
	SG	Swedish Trade Union Confederation
	SI	Swedish Association of Graduate Engineers
	SN	Confederation of Swedish Enterprises
	TCO	Swedish Confederation of Professional Employees
	Unionen	Union of White-collar Workers
United Kingdom (UK)	CBI	Confederation of British Industry
	Community	General Trade Union
	GMB	General, Municipal, Boilermakers and Allied Trade Union
	ICTU	Irish Congress of Trade Unions

Country	Abbreviation	Full name of organisation
	LPA	Leather Producers' Association
	STUC	Scottish Trades Union Congress
	TUC	Trades Union Congress
	UKLF	UK Leather Federation
	Unite	Unite the Union
	WTUC	Wales Trades Union Congress
Europe	CEC	European Confederation of Executives and Managerial Staff
	CEC (footwear)	European Confederation of the Footwear Industry
	COTANCE	European Confederation of National Associations of Tanners and Dressers
	EFBWW	European Federation of Building and Woodworkers
	EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions
	EMCEF	European Mine, Chemical and Energy Workers' Federation
	EMF	European Metalworkers' Federation
	EPSU	European Federation of Public Service Unions
	ETF	European Transport Workers' Federation
	ETUF:TCL	European Trade Union Federation: Textiles, Clothing and Leather
	Euratex	European Textile and Apparel Organisation
	Eurocadres	Council of European Professional and Managerial Staff
	EURO-WEA	European Workers' Educational Association
	FEANI	European Federation of National Associations of Engineers
	FERPA	European Federation of Retired and Older Persons
	NFS	Council of Nordic Trade Unions
	NordIng	Collaboration between 11 engineering societies in the Nordic countries
	SCECBU	Standing Committee of European Central Bank Unions
	UNI-Europa	Union Network International – Europe

Georg Adam, Department of Industrial Sociology, University of Vienna
EF/09/50/EN