



Representativeness of the European social partner organisations: Catering sector

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This report is available in electronic format only.

This study sets out to provide the necessary information for establishing sectoral social dialogue in the contract catering sector. It first sketches the sector's economic situation, then analyses the social partner organisations in all 27 EU Member States, focusing on membership levels, role in collective bargaining and public policy, and national and European affiliations. Finally, the study explores the representative associations at European level, particularly 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 and evaluate sectoral social dialogue.

Objectives of study

The aim of this **representativeness** study is to identify the relevant national and supranational associational actors – namely, the **trade unions** and **employer organisations** – in the field of industrial relations in the contract catering sector (that is, the provision of food services based on contractual arrangements with the customer), 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 industrial relations actors across the European Union Member States. Only European associations 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 contract catering 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 that 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 differentiate the social partner organisations from other associations.

As regards the national-level associations, classification as a sector-related social partner organisation implies fulfilling one of two criteria: the associations must be either a party to sector-related **collective bargaining** or a member of a sector-related European association of business or labour that is on the Commission's list of European social partner organisations consulted under **Article 138 of the EC Treaty**, and/or that 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, since these are the two constituent mechanisms that can systematically connect the national and European level. Following the criteria for national organisations, this study includes 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 of identifying the sector-related national and European social partner organisations applies both a 'top-down' and 'bottom-up' approach.

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Definitions

For the purpose of this study, the contract catering 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](#)) (revision 2), to ensure the cross-national comparability of the findings. More specifically, the contract catering sector is defined as encompassing NACE (Rev. 2) 56.29: ‘Other food service activities’.

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 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 sectoral social dialogue committee for the contract catering sector in 2007. The European Federation of Contract Catering Organisations ([Fédération Européenne de la Restauration Collective Concédée](#), [FERCO](#)) on the employer side as well as the [European Federation of Food, Agriculture and Tourism Trade Unions](#) ([EFFAT](#)) 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 particularly important in the case of EFFAT due to its multi-sectoral domain. Thus, the study will include only the organisations affiliated to EFFAT whose domain relates to the contract catering 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:

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

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

Structure of report

The study consists of three main parts, beginning with a brief summary of the contract catering sector's economic background. The report then analyses the relevant social partner organisations in all 27 EU Member States (EU27). 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

The EU contract catering sector, which consists of food service contractors for private and public companies and organisations, has been a thriving sector for many years. Currently, around one third of EU enterprises or collective organisations have a contract with a contract catering company. In 2008, turnover in the sector amounted to €24.6 billion, generated by about 600,000 employees. In the same year, EU contract caterers had a share of 33.5% of the total social foodservice market value. In the period 2000 to 2008, the contract catering sector increased its volume market share by around seven percentage points. The industry is characterised by strong and even tightening competition, which is reinforced by an extraordinarily high level of market concentration in the majority of the Member States. The degree of concentration has been growing over recent years as the largest operators in the market seek to strengthen their position through the acquisition of smaller competitors.

In 2008, the three leading contract caterers in the EU represented 59% of the total market share, and the contract catering market is dominated by two company groups – [Compass](#) and [Sodexo](#) – with a combined market share of about 50%. In contrast to this prevalent pattern of market concentration, two markets in western Europe – Italy and Spain – as well as the social foodservice markets in central and eastern Europe have remained relatively fragmented, with numerous family-operated catering businesses and local operators managing only a few contracts each in these countries. In terms of the contract catering market volume in total, France and the United Kingdom (UK) are the most outstanding countries in the EU. In recent years, the main growth areas for EU contract caterers have been in sectors other than business and industry, although this segment has remained dominant in terms of market value. Market development and

sales growth for contract catering have been higher than average in the health and social welfare sector as well as in the education sector (Gira Foodservice, 2009).

In recent years, the sectoral social dialogue committee in the contract catering sector has been working on issues related to training, food hygiene and safety, public procurement and social responsibility. For instance, in 2007, the sectoral social partners at European level signed an agreement on [corporate social responsibility](#) (CSR). In the work programme for 2009, both EFFAT and FERCO announced that they were focusing on [equal opportunities](#) for women and men in the sector, as well as on a European framework for social reporting of companies.

As all of the EU27 record sector-related business activities, this study covers all of the Member States. Tables 1 and 2 give an overview of developments from 1996 to 2007, presenting a few indicators which are important to industrial relations and social dialogue. In most Member States (11 out of 13) for which related data are available, the number of companies or employers more or less increased, reflecting the overall growth of the sector in the EU. By contrast, in two countries (Finland and Italy) the number of companies or employers significantly decreased – probably as a result of ongoing mergers and acquisitions in the sector rather than an actual decline in production or employment. Available data on total employment and the number of employees support the assumption of the growing significance of the sector in most EU Member States, including Finland and Italy. In the case of Sweden, the respective data of the time series on employers are not directly comparable and thus not interpretable, since the 1996 figure – in contrast to the 2007 figure – refers to the private sector only.

All countries, without exception, with available and directly comparable data of the time series record an increase in at least one of the two indicators of the sector's labour intensity – that is, overall employment and the number of employees. In several countries, such as Cyprus, the Czech Republic, Latvia, Luxembourg and Spain, the number of employers grew by at least 50% within a decade. In all countries but one (Slovakia) for which comparable data are available, the number of employees either largely corresponds or comes fairly close to the total employment in the sector. This indicates that the sector is characterised by a relatively high incidence of standard employment. The only exception to this pattern is Slovakia, with a very high proportion of self-employed persons in the contract catering sector.

Tables 1 and 2 also show that women represent the majority of workers in the sector in all countries for which related data are available except Cyprus. In several countries, such as Denmark, Finland, Greece, Italy, Slovakia, Spain and Sweden, female employment is at least twice as high as male employment in the contract catering sector. Higher male employment rates in relation to those of women are recorded only in Cyprus, where the sector has a very low overall employment level of a few dozens of people only. Table 2 also indicates that – despite its dynamic development during recent years, as already outlined – the contract catering sector is still not very large. Its share in aggregate employment and regarding the total number of employees is 0.5% or lower in all countries under examination except Finland, Hungary, Luxembourg, Spain and Sweden. In some countries, such as Cyprus and Latvia, employment in the sector is scarce, comprising only a few hundreds of employees.

Table 1: Total employment in contract catering sector, 1996 and 2007

| | Number of employers | | Total employment | | Male employment | | Female employment | |
|----|----------------------|---|----------------------|------------------------------|---------------------|-----------------------|---------------------|-----------------------|
| | 1996 | 2007 | 1996 | 2007 | 1996 | 2007 | 1996 | 2007 |
| AT | n.a. | 623 ^{a,b} | n.a. | 7,898 ^a | n.a. | 3,529 ^a | n.a. | 4,369 ^a |
| BE | n.a. | n.a. | n.a. | 8,000 ^c | n.a. | n.a. | n.a. | n.a. |
| BG | n.a. | 500 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| CY | 11 | 39 ^a | 10 | 135 ^a | 10 | 73 ^a | 0 | 62 ^a |
| CZ | 44 ^d | 87 ^e | 1,400 ^f | 5,400 ^{e,f} | 500 ^f | 2,600 ^{e,f} | 900 ^f | 2,800 ^{e,f} |
| DE | n.a. | 12,061 ^{a,g} | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| DK | 1,390 ^{b,i} | 1,540 ^{a,b} | 4,946 | 6,104 | 1,625 | 1,936 | 3,321 | 4,168 |
| EE | 1,020 ^{j,k} | 1,292 ^k | 8,610 ^{j,k} | 14,028 ^k | n.a. | n.a. | n.a. | n.a. |
| EL | n.a. | n.a. | n.a. | 8,537 ^e | n.a. | 2,705 ^e | n.a. | 5,832 ^e |
| ES | 1,106 ^{l,m} | 2,599 ^{e,m} | 35,627 ^l | 84,629 ^e | 14,608 ^l | 18,255 ^e | 21,019 ^l | 66,374 ^e |
| FI | 575 | 414 | 8,415 | 15,018 | 649 | 1,515 | 7,766 | 13,503 |
| FR | 11,175 ⁿ | 16,043 ⁿ (95 ^b) | 86,717 | 86,557 | n.a. | n.a. | n.a. | n.a. |
| HU | 279 ^{o,p} | 2,460 ^p | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| IE | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| IT | 2,017 | 1,206 ^e | 58,167 | 79,500 ^e | n.a. | 19,637 ^{d,e} | n.a. | 59,863 ^{d,e} |
| LT | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| LU | 3 ^q | 17 | n.a. | 2,500– 3,000 ^d | n.a. | n.a. | n.a. | n.a. |
| LV | 9 | 15 | 68 | 150 | n.a. | n.a. | n.a. | n.a. |
| MT | n.a. | n.a. | n.a. | 400 ^c | n.a. | n.a. | n.a. | n.a. |
| NL | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| PL | n.a. | 9,100 ^b | n.a. | 7,000– 9,000 ^d | n.a. | n.a. | n.a. | n.a. |
| PT | n.a. | 80 | n.a. | 20,500 | n.a. | n.a. | n.a. | n.a. |
| RO | n.a. | 617 | n.a. | 6174 | n.a. | n.a. | n.a. | n.a. |
| SE | 302 ^r | 1,009 | 3,970 ^r | 6,059 ^r | 1,407 ^r | 1,822 ^r | 2,563 ^r | 4,237 ^r |
| SI | 21 ^b | 117 | 1,912 | 2,261 | n.a. | 770 | n.a. | 1,491 |
| SK | 154 ^{s,t} | 1,096 ^{s,t} | 1,376 ^t | 1,721 ^t | n.a. | 335 ^t | n.a. | 1,386 ^t |
| UK | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |

Notes: n.a. = not available. ^a = 2006; ^b = figure refers to companies; ^c = rough estimate; ^d = estimate; ^e = 2008; ^f = approximate figure; ^g = figure includes companies and establishments; ^h = figure includes employees liable to social security contributions as well as marginal employees; ⁱ = 1999; ^j = 2000; ^k = figure refers to NACE (Rev. 1.1) 55.4 and 55.5 codes, including bars, canteens and catering; ^l = 2001; ^m = low reliability figure; ⁿ = figure refers to establishments; ^o = 2003; ^p = figure refers to companies with more than four employees only; ^q = 1997; ^r = private sector only; ^s = figure refers to companies without self-employed persons; ^t = figure refers to NACE (Rev. 1.1) 55.52, comprising catering.

Source: EIRO national centres, 2009

Table 2: Total employees in contract catering sector, 1996 and 2007

| | Total employees | | Male employees | | Female employees | | Total sectoral employment as % of total employment in economy | | Total sectoral employees as % of total employees in economy | |
|----|----------------------|------------------------|---------------------|-----------------------|---------------------|------------------------|---|-------------------|---|-------------------|
| | 1996 | 2007 | 1996 | 2007 | 1996 | 2007 | 1996 | 2007 | 1996 | 2007 |
| AT | n.a. | 7,393 ^a | n.a. | 3,264 ^a | n.a. | 4,129 ^a | n.a. | 0.20 ^a | n.a. | 0.20 ^a |
| BE | n.a. | 8,000 ^c | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| BG | n.a. | 7,037 | n.a. | 1,376 | n.a. | 5,666 | n.a. | n.a. | n.a. | 0.3 |
| CY | 0 | n.a. | 0 | n.a. | 0 | n.a. | <0.01 | 0.04 ^a | 0 | n.a. |
| CZ | 1,400 ^f | 5,000 ^{e,f} | 400 ^f | 2,200 ^{e,f} | 900 ^f | 2,700 ^{e,f} | 0.03 | 0.11 ^e | 0.03 | 0.12 ^e |
| DE | n.a. | 155,927 ^{a,h} | n.a. | 53,655 ^{a,h} | n.a. | 102,272 ^{a,h} | n.a. | n.a. | n.a. | n.a. |
| DK | 4,489 | 5,147 | 1,438 | 1,765 | 3,051 | 3382 | 0.19 | 0.2 | 0.19 | 0.2 |
| EE | 8,237 ^{j,k} | 13,762 ^k | n.a. | n.a. | n.a. | n.a. | 1.5 ^{j,k} | 2.1 ^k | 1.6 ^{j,k} | 2.3 ^k |
| EL | n.a. | 6,211 ^e | n.a. | 1,677 ^e | n.a. | 4,534 ^e | n.a. | 0.20 ^e | n.a. | 0.19 ^e |
| ES | 33,206 ^l | 78,432 ^e | 13,202 ^l | 14,919 ^e | 20,004 ^l | 63,513 ^e | 0.22 ^l | 0.47 ^e | 0.26 ^l | 0.53 ^e |
| FI | 8,097 | 14,702 | 627 | 1,465 | 7,470 | 13,237 | 0.4 | 0.6 | 0.4 | 0.6 |
| FR | 76,717 | 77,268 | n.a. | 33,568 | n.a. | 43,700 | n.a. | n.a. | 0.47 | 0.43 |
| HU | 19,943 ^o | 20,790 | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | 0.72 ^o | 0.75 |
| IE | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| IT | 55,003 | 78,023 ^e | n.a. | 19,272 ^{d,e} | n.a. | 58,751 ^{d,e} | 0.26 | 0.34 ^e | 0.34 | 0.45 ^e |
| LT | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| LU | n.a. | n.a. | n.a. | 900 ^d | n.a. | 1,800 ^d | n.a. | n.a. | n.a. | 0.82 ^d |
| LV | 53 | 150 | n.a. | n.a. | n.a. | n.a. | 0 | 0.01 | 0 | 0.01 |
| MT | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | 0.3 ^c | n.a. | n.a. |
| NL | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| PL | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |

| | Total employees | | Male employees | | Female employees | | Total sectoral employment as % of total employment in economy | | Total sectoral employees as % of total employees in economy | |
|-----------|--------------------|------------------|--------------------|-----------------|--------------------|------------------|---|-------------------|---|-------------------|
| | 1996 | 2007 | 1996 | 2007 | 1996 | 2007 | 1996 | 2007 | 1996 | 2007 |
| PT | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| RO | n.a. | 6,065 | n.a. | n.a. | n.a. | n.a. | n.a. | 0.07 | n.a. | 0.12 |
| SE | 3,803 ^f | 34,180 | 1,326 ^f | 3,481 | 2,477 ^f | 30,699 | 0.10 ^r | 0.14 ^r | 0.11 ^r | 0.85 |
| SI | 1,847 | 1,762 | n.a. | 545 | n.a. | 1,217 | 0.25 | 0.27 | 0.24 | 0.21 |
| SK | n.a. | 216 ^t | n.a. | 42 ^t | n.a. | 174 ^t | 0.07 ^t | 0.07 ^t | n.a. | 0.01 ^t |
| UK | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |

Notes: n.a. = not available. ^a = 2006; ^b = figure refers to companies; ^c = rough estimate; ^d = estimate; ^e = 2008; ^f = approximate figure; ^g = figure includes companies and establishments; ^h = figure includes employees liable to social security contributions as well as marginal employees; ⁱ = 1999; ^j = 2000; ^k = figure refers to NACE (Rev. 1.1) 55.4 and 55.5 codes, including bars, canteens and catering; ^l = 2001; ^m = low reliability figure; ⁿ = figure refers to establishments; ^o = 2003; ^p = figure refers to companies with more than four employees only; ^q = 1997; ^r = private sector only; ^s = figure refers to companies without self-employed persons; ^t = figure refers to NACE (Rev. 1.1) 55.52, comprising catering.

Source: EIRO national centres, 2009

National level of interest representation

In many Member States, statutory regulations explicitly refer to the concept of representativeness when assigning certain rights of interest representation and public governance to trade unions and/or employer organisations. The most important rights addressed by such regulations include: formal recognition as a party to collective bargaining; extension of the scope of a multi-employer collective agreement to employers not affiliated to the signatory employer organisation; and participation in public policy and tripartite bodies of social dialogue. Under these circumstances, representativeness is normally measured by 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 ([Institut des Sciences du Travail \(IST\)](#), 2001).

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

A cross-national comparative analysis shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy (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;
- 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 contract catering sector. However, there is insufficient room in this report to delineate the domain demarcations of all of the organisations in detail. 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 on this subject 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 sectoral 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 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 the trade union data on their domains and membership strength. The table lists all of the trade unions which meet at least one of the two criteria for classification of a sector-related social partner organisation, as defined earlier. Among the EU27, four Member States do not record any sector-related trade union: Estonia, Lithuania, Romania and Slovakia. In the

remaining 23 Member States, 63 sector-related trade unions could be identified. None of these 63 trade unions has demarcated its domain in a way which is congruent with the sector definition. This underlines the fact that statistical definitions of business activities, particularly 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 sector, 2007–2008

| Country and trade union name | Domain coverage | Membership | | | Density (%) | | Collective bargaining | Consultation | National and European affiliations ^a |
|------------------------------|-----------------|------------|------------------|---|-------------|--------------------------|-----------------------|--------------|---|
| | | Members | Sectoral members | Female membership (% of total membership) | Domain | Sector (sectoral domain) | | | |
| AT | | | | | | | | | |
| VIDA | SO | 155,712 | n.a. | 33 | n.a. | n.a. | Yes | Yes | ÖGB, ETF, EFFAT, UNI-Europa |
| GPA-DJP | SO | 244,623 | n.a. | 43.4 | 20 | n.a. | Yes | n.a. | ÖGB, UNI-Europa, Eurocadres, EFFAT, EMCEF, EPSU |
| BE | | | | | | | | | |
| ACV/CSC-FaS | SO* | 235,000 | 3,000–4,000 | 50 | 25–40 | 30 (30) | Yes | Yes | ACV/CSC, EFFAT |
| HORVAL | SO* | 108,211 | 2,000–3,000 | n.a. | n.a. | 25–30 (25–30) | Yes | Yes | ABVV/FGTB, EFFAT |
| BBTK/SETCa | SO* | 360,000 | n.a. | n.a. | n.a. | n.a. | Yes | Yes | ABVV/FGTB, EFFAT |
| ACLVB/CGSLB-LTU | O* | 220,000 | n.a. | 38 | 15 | n.a. | Yes | Yes | ACLVB/CGSLB, EFFAT |
| BG | | | | | | | | | |
| ITUFECCS | O* | 5,040 | n.a. | 68 | n.a. | n.a. | Yes | No | CITUB, UNI-Europa |
| TUTB | O* | 1,368 | n.a. | 68 | n.a. | n.a. | Yes | No | CITUB |
| NFTSCBT | O* | 1,200 | n.a. | 50 | n.a. | n.a. | Yes | No | CL Podkrepa |
| CY | | | | | | | | | |
| OEXEKA | O | 9,422 | 0 | 40 | n.a. | 0 | No | No | SEK, EFFAT |
| CZ | | | | | | | | | |

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|-----------------|-----|---------|--------|------|-----------|-----------|-----|-----|--|
| ČMOS PHCR | O | 819 | 0 | n.a. | n.a. | 0 | Yes | Yes | ČMKOS, EFFAT |
| DE | | | | | | | | | |
| NGG | O | 205,795 | 3,600 | 40.1 | 3 | 3 (3) | Yes | Yes | DGB, EFFAT |
| DK | | | | | | | | | |
| 3F | SO | 381,000 | n.a. | 33 | 70– 75 | n.a. | Yes | No | LO, EFFAT, EFBWW, ETF, UNI- Europa, EPSU |
| EE | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| EL | | | | | | | | | |
| POEYTE | O | 60,000 | n.a. | 20 | 31.5 | 10 (10) | Yes | Yes | GSEE, EFFAT |
| ES | | | | | | | | | |
| FECOHT- CCOO | O* | 116,879 | 5,788 | 71 | 5.8 | 7.4 (7.4) | Yes | No | CCOO, EFFAT |
| FETCHTJ- UGT | O* | 80,000 | n.a. | 65 | n.a. | n.a. | Yes | No | UGT, EFFAT |
| USO | O* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | No | -- |
| ELA | SO* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | No | -- |
| LAB | SO* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | No | -- |
| FI | | | | | | | | | |
| PAM | O | 217,000 | 10,000 | 80 | 65 | 67 (67) | Yes | Yes | SAK, EFFAT, UNI-Europa |
| FR | | | | | | | | | |
| FGTA-FO | O* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | Yes | CGT-FO, EFFAT |
| FS-CFDT | O* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | Yes | CFDT, EFFAT |
| FPCDS | O* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | Yes | CGT, EFFAT |
| HCRBC | O* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | Yes | CFTC, EFFAT |
| SNPE | SO* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | Yes | CFE-CGC, EFFAT |
| HU | | | | | | | | | |
| VISZ | O | 35,000- | 8,000– | 70 | 18– | 38.4 | Yes | No | ASZSZ, |

| | | | | | | | | | |
|--------------------|-----|---------|--------|------|------|----------------|-----|------|--|
| | | 40,000 | 10,000 | | 21 | (38.4) | | | EFFAT |
| IE | | | | | | | | | |
| SIPTU | O | 225,000 | n.a. | n.a. | n.a. | 8–12 (8–12) | Yes | Yes | EFFAT |
| IT | | | | | | | | | |
| FILCAMS | O* | 350,000 | n.a. | 62 | 20.9 | n.a. | Yes | Yes | <i>CGIL</i> , EFFAT, ETLC, UNI- Europa |
| FISASCAT | O* | 200,000 | n.a. | n.a. | 12 | n.a. | Yes | Yes | <i>CISL</i> , EFFAT, UNI-Europa |
| UILTuCS | O* | 100,141 | n.a. | n.a. | 6 | n.a. | Yes | Yes | <i>UIL</i> , EFFAT, UNI-Europa |
| UGL CT | O* | 127,589 | 7,589 | 35 | n.a. | 9.7 (9.7) | Yes | Yes | <i>UGL</i> |
| FENASALC | O* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | Yes | <i>CISAL</i> |
| SALTAE | SO* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | Yes | <i>CISAL</i> |
| CONFLAV ORATORI | O* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | Yes | -- |
| CONFESAL | O* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | Yes | CESI |
| FILC | O* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | Yes | <i>FISMIC</i> |
| CIU | SO* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | Yes | <i>CGIE</i> |
| FILT | SO* | 147,279 | n.a. | 12.5 | 13.6 | n.a. | Yes | Yes | <i>CGIL</i> , ETF |
| FIT | SO* | 112,500 | 370 | 15 | 10.4 | 0.5 (n.a.) | Yes | Yes | <i>CISL</i> , ETF |
| Uiltrasporti | SO* | 103,312 | n.a. | 20 | 8.6 | n.a. | Yes | Yes | <i>UIL</i> , ETF |
| UGL TA | SO* | 7,742 | 3,472 | 45 | n.a. | 4.4 (n.a.) | Yes | Yes | <i>UGL</i> |
| LT | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| LU | | | | | | | | | |
| OGB-L | O* | 60,000 | 900 | 33 | n.a. | 33 (33) | No | Yes | <i>CGT-L</i> , EFFAT, UNI-Europa, Eurocadres, EPSU |
| LCGB | O* | n.a. | n.a. | n.a. | n.a. | n.a. | No | n.a. | EFFAT |
| LV | | | | | | | | | |
| LAKRS | O | n.a. | n.a. | n.a. | n.a. | n.a. | No | No | EFFAT |
| MT | | | | | | | | | |

| | | | | | | | | | |
|--------------------------|------|---------|-------|------|-----------|--------------------------|-----|-----|---|
| GWU | O | 41,343 | 160 | 17.9 | 26 | 30–40 (30–40) | Yes | No | EFFAT, UNI-Europa, EUROWEA, Eurocadres, EPSU, EMF, ETUF-TCL, EMCEF, SCECBU, ETF |
| NL | | | | | | | | | |
| Horecabond FNV | O* | 25,000 | 2,930 | n.a. | n.a. | n.a. | Yes | Yes | <i>FNV</i> , EFFAT |
| CNV Bedrijven bond | O* | 90,000 | 400 | n.a. | n.a. | n.a. | Yes | Yes | <i>CNV</i> , EFFAT |
| De Unie | n.a. | 85,000 | 100 | n.a. | n.a. | n.a. | Yes | Yes | <i>MHP</i> |
| PL | | | | | | | | | |
| NSZZ Solidarność | O | 722,000 | 160 | n.a. | n.a. | 1.8–2.3 (1.8– 2.3) | No | No | EFFAT |
| PT | | | | | | | | | |
| STIHTRSS | SO* | 9,000 | n.a. | n.a. | n.a. | n.a. | Yes | No | <i>FESAHT</i> , <i>CGTP</i> |
| STIHTRSA | SO* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | No | <i>FESAHT</i> , <i>CGTP</i> |
| STIHTRSC | SO* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | No | <i>FESAHT</i> , <i>CGTP</i> |
| STIHTRSN | SO* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | No | <i>FESAHT</i> , <i>CGTP</i> |
| STHTASSM | SO* | n.a. | n.a. | n.a. | n.a. | n.a. | Yes | No | <i>FESAHT</i> , <i>CGTP</i> |
| SITese | O* | 10,000 | n.a. | 68 | 0.4 | n.a. | Yes | No | <i>FETese</i> , <i>UGT</i> |
| RO | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| SE | | | | | | | | | |
| HRF | SO | 40,000 | 1,000 | 65 | 65 | 3 (75) | Yes | Yes | <i>LO</i> , EFFAT, |
| Kommunal | SO | 512,000 | n.a. | 80 | 70– 75 | n.a. (70–75) | Yes | Yes | <i>LO</i> , EFFAT, EPSU, |
| Unionen | SO | 500,000 | 5,000 | 50 | 75 | 14 (85) | Yes | Yes | EFFAT |
| SI | | | | | | | | | |
| GIT | O* | 9,000 | 400 | 50 | n.a. | 22.7 | Yes | Yes | <i>ZSSS</i> , |

| | | | | | | | | | |
|----------------|-----|-----------|------|------|------|---------------|-----|-----|---|
| | | | | | | (22.7) | | | EFFAT |
| SDGiTS KS90 | SO* | 4,000 | 50 | 70 | n.a. | 2.8 (n.a.) | Yes | Yes | <i>KS90</i> |
| SK | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| UK | | | | | | | | | |
| GMB | O* | 590,069 | n.a. | 44.8 | 2.3 | n.a. | Yes | Yes | <i>TUC, STUC, ICTU, CSEU, EPSU, EMF, EFFAT, EFBWW, ETF, EMCEF, UNI-Europa, ETUF-TCL</i> |
| Unite | O* | 1,892,491 | n.a. | 22.6 | 7.5 | n.a. | Yes | Yes | <i>TUC, ETF, EPSU, EMCEF, EMF, EFBWW, EFFAT, ETUF-TCL</i> |
| USDAW | O* | 377,156 | n.a. | 57.4 | 1.4 | n.a. | Yes | Yes | <i>TUC, STUC, ICTU, UNI-Europa, EFFAT, ECF-IUF</i> |

*Notes: Membership is voluntary in all cases, although no information is available to confirm this in the case of Latvia. ^a National affiliations appear in italics; for the national level, only cross-sectoral (peak-level) associations are listed; for the European level, only sectoral associations are listed. * Domain overlap. O = Overlap, SO = Sectional overlap. n.a. = not available. See Annex for list of abbreviations and full names of organisations.*

Source: EIRO national centres, 2009

In the contract catering sector, only trade unions recording domain demarcations that are (sectionalistically) overlapping in relation to the sector could be identified. Domain demarcations resulting in overlap in relation to the sector prevail in the contract catering sector, at 62.9%. Overlap largely arises from two different modes of demarcation. The first one refers to general – that is, cross-sectoral – domains; examples include the Federation of Liberal Trade Unions of Belgium ([Algemene Centrale der Liberale Vakbonden van België/Centrale Générale des Syndicats Libéraux de Belgique, ACLVB/CGSLB](#)), the [Services, Industrial, Professional and Technical Union \(SIPTU\)](#) in Ireland, the Luxembourg Confederation of Independent Trade Unions ([Onofhängege Gewerkschaftsbond Lëtzebuerg, OGB-L](#)), the [General Workers Union \(GWU\)](#) in Malta, the Industry, Food and Transport Workers' Union ([CNV Bedrijvenbond](#)) in the Netherlands, the Workers' Trade Union Confederation ([Confederación Unión Sindical Obrera, USO](#)) in Spain and [Unite](#) in the UK.

The second and more frequent mode of demarcation resulting in overlap in relation to the sector relates to various forms of multi-sector domains, covering contiguous sectors, mostly in the

broader hotel, restaurant and tourism segment of the economy. This is the case, for instance, in relation to the following trade union organisations: the [Trade Unions of Tourism in Bulgaria \(TUTB\)](#), the Czech-Moravian Trade Union of Catering, Hotels and Tourism ([Českomoravský odborový svaz pohostinství, hotelů a cestovního ruchu, ČMOS PHCR](#)), the Trade Union for Food, Beverages, Tobacco, Hotel and Catering and Allied Workers ([Gewerkschaft Nahrung-Genuß-Gaststaetten, NGG](#)) in Germany, the National Union of Hotel and Restaurant Staff ([Syndicat National CFTC du Personnel des Hôtels, Cafés, Restaurants, Bars et Collectivités, HCRBC](#)) – affiliated to the French Christian Workers’ Confederation ([Confédération française des travailleurs chrétiens, CFTC](#)) – the Panhellenic Federation of Catering Workers and Tourist Profession Employees ([Πανελλήνια Ομοσπονδία Εργατών Επισιτισμού & Υπαλλήλων Τουριστικών Επαγγελματιών, ΠΟΕΕΥΤΕ](#)), the Hungarian Trade Union of Catering and Tourism ([Vendéglátó és Idegenforgalmi Szakszervezet, VISZ](#)), the Italian Federation of Workers in the Commerce, Tourism and Services Sector ([Federazione Italiana Lavoratori Commercio Turismo e Servizi, FILCAMS](#)), the Italian Federation of Commercial Services and Tourism ([Federazione Italiana Sindacati Addetti Servizi Commerciali Affini e del Turismo, FISASCAT](#)), the Italian Union of Workers in the Commerce, Tourism and Services Sector ([Unione Italiana Lavoratori Turismo Commercio e Servizi, UILTuCS](#)) and the General Union of Work, Commerce and Tourism ([Unione Generale del Lavoro Commercio e Turismo, UGL CT](#)) in Italy, the Catering and Tourism Workers’ Union of Slovenia ([Sindikat delavcev gostinstva in turizma Slovenije, GIT](#)), the National Federation of Commerce, Hotel and Catering and Tourism Workers ([Federación Estatal de Comercio Hostelería y Turismo de CCOO, FECOHT-CCOO](#)) in Spain – affiliated to the Trade Union Confederation of Workers’ Commissions ([Confederación Sindical de Comisiones Obreras, CCOO](#)) – and the National Federation of Commerce, Hotel and Lottery Workers ([Federación Estatal de Trabajadores de Comercio Hostelería y Juego de UGT, FETCHTJ-UGT](#)) in Spain – affiliated to the General Workers’ Confederation ([Unión General de Trabajadores, UGT](#)).

Sectional overlap can be found in exactly 37.1% of the cases and is thus the second mode of domain demarcation that occurs in the contract catering sector. This mode usually emanates from domain demarcations which 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 in the case of the Belgian Union of White-Collar, Technical and Executive Employees ([Bond der Bedienden, Technici en Kaders/Syndicat des Employés, Techniciens et Cadres, BBTK/SETCa](#)) or the National Union of Managerial Staff ([Syndicat national du personnel de l’encadrement CFE-CGC INOVA, SNPE](#)), affiliated to the French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff ([Confédération française de l’encadrement – Confédération générale des cadres, CFE-CGC](#));
- specific business activities – for instance, airline catering, as in the case of the Italian Federation of Transport Workers ([Federazione Italiana Lavoratori Trasporti, FILT](#)), the Italian Transport Federation ([Federazione Italiana Trasporti, FIT](#)), the Italian Union of Transport Workers ([Unione Italiana dei Lavoratori dei Trasporti, Uiltrasporti](#)) and the Italian General Union of Work – Air Transport ([Unione Generale del Lavoro – Trasporto Aereo, UGL-TA](#));
- employment status – such as white-collar employees, as in the case of the Union of Salaried Employees, Graphical Workers and Journalists ([Gewerkschaft der Privatangestellten – Druck, Journalismus, Papier, GPA-DJP](#)) in Austria and [Unionen](#) the trade union for professionals in Sweden’s private sector; or blue-collar workers, as in the case of [VIDA](#) in Austria, the Federation of Food, Horeca and Services ([Centrale Voeding, Horeca, Diensten/Centrale](#)

[Alimentations, Horeca, Services, Horval](#)) in Belgium and the United Federation of Danish Workers ([Fagligt Fælles Forbund, 3F](#)) in Denmark;

- geographic region – for example, the Autonomous Trade Union of Tertiary and Related Industry Workers in Euganeo ([Sindacato Autonomo Lavoratori Terziario e Affini Euganeo, SALTAE](#)) in the Veneto region of Italy, a number of regional affiliates of the Federation of Unions in Food, Beverages, Hotels and Tourism of Portugal ([Federação dos Sindicatos de Alimentação, Bebidas, Hotelaria e Turismo de Portugal, FESAHT](#)), the Catering and Tourism Workers' Union of Slovenia at Confederation 90 ([Sindikat delavcev gostinstva in turizma Slovenije pri Konfederaciji 90, SDGitS KS90](#)), and the Basque Workers Solidarity ([Euskal Langileen Alkartasuna-Solidaridad de los Trabajadores Vascos, ELA](#)) and the Basque Country Union ([Langile Abertzaleen Batzordeak-Comisiones de Obreros Patriotas, LAB](#)), which are active only in the Basque Region of Spain.

Sectionalism – which 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 sector – does not occur in the food service industry. This is presumably because of the small size of the sector, thus preventing a merely sectional representation.

As the domains of the trade unions frequently overlap with the demarcation of the sector, so too do their domains with one another in the case of countries with a pluralist trade union landscape in the sector. Table 3 also gives an insight into these inter-union domain overlaps, which appear to be endemic. In all of the countries with more than one sector-related trade union, with the exception of Austria and Sweden, the domain of any of them overlaps with the domain of all or most of the others. Depending on the scale of mutual overlap, this may result in competition for members. However, noticeable inter-union competition is recorded only in Portugal, Sweden and – at regional level – also in Slovenia.

Looking at the trade union membership data, it emerges that male employees comprise the majority group in about half of the trade unions for which membership figures according to gender are available. At first glance, this finding is surprising, since the sector's employment is clearly dominated by female employees (see Table 2). However, as outlined earlier, the domain of all trade unions (including those recording a majority of male members) overlaps or sectionally overlaps in relation to the sector. Hence, the predominance of male members in these trade unions is likely to originate in areas of their domains other than the contract catering sector.

Membership of the sector-related trade unions is voluntary in all countries of the EU27 for which data are available.

The absolute numbers of trade union members differ widely, ranging from almost 1.9 million to only a few hundred members. This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the ability to attract members. Therefore, density as a measure of membership strength is more appropriate to a comparative analysis. Domain density is over 50% in the case of 21.7% of the trade unions that document figures on density. Some 13% of the trade unions gather 70% or more of the employees covered by their domain, while 47.8% and 17.4% of the trade unions for which data are available organise fewer than 15% and fewer than 5%, respectively, of the employees within their domain. The remaining trade unions (30.4%) record a density of between 15% and 50% of their potential members. These results indicate that overall domain density of the sector-related trade unions is relatively low. However, it should be noted that domain density data are recorded for only 23 out of the 63 sector-related trade unions. Therefore, these figures should be treated with caution.

In general, the sector-related trade unions' density in the contract catering sector largely corresponds with their relatively low overall domain densities. Looking at sector density, it is

important to differentiate between the trade unions' sectoral density, on the one hand, and their sectoral domain density, on the other. Whereas the former measures the ratio of the total number of members of a trade union in the sector to the number of employees in the sector, as demarcated by the NACE classification, the latter indicates the total number of trade union members in the sector in relation to the number of employees working in that part of the sector as covered by the trade 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.

Taking the trade unions' sectoral domain density into account – which tends to be higher than their sectoral density for the reasons outlined above – the trade unions' density in the contract catering sector tends to be largely equal to the density ratio referring to their domain on aggregate. Sectoral domain density is over 50% in the case of 22.2% of the trade unions for which data are available. Some 44.4% of the trade unions record a sectoral domain density lower than 15%, while 33.3% of them record a sectoral domain density of between 15% and 50%. Again, it should be noted that no data on sectoral domain density are available for the majority of the sector-related trade unions. With regard to those trade unions for which figures on both measures are recorded – that is, sectoral domain density and domain density on aggregate – a clear trend seems to emerge: more trade unions have a higher sectoral domain density than their aggregate density.

Relatively low unionisation rates in the contract catering sector do not come as a surprise, given – despite notable market centralisation processes – the small size of the vast majority of establishments in the sector, which often do not meet the criteria for setting up workplace representation. Moreover, the predominance of female employees, who tend to be less inclined to unionise compared with men, may serve as an explanation for the low unionisation rates – despite the fact that standard employment relationships prevail in the sector.

Employer organisations

Tables 4 and 5 present the membership data for the employer organisations in the contract catering sector. For 18 of the EU27, sector-related employer organisations are documented. In at least two of these countries, at least a proportion of the listed employer organisations are not party to sector-related collective bargaining. They are classified here as social partner organisations only due to their European-level affiliation to FERCO. All of the 18 countries except the UK record one or more employer organisations engaged in collective bargaining. In nine countries – Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Malta, Poland, Romania and Slovakia – no employer organisation 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 contract catering sector. In terms of their national scope of activities, all of the associations that are 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 to FERCO, 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 37 employer organisations listed in Table 4, at least two organisations belong to this group.

In eight of the 18 countries where employer organisations exist, only one employer organisation (in the meaning of a social partner organisation as defined earlier) has been established. In line

with the trade union side, pluralist associational systems thus also prevail with regard to the sector's employers.

The employer organisations' domains tend to be somewhat narrower than those of the trade unions. Some 51.4% and 27% of these organisations rest on overlapping and sectionally overlapping domains, respectively. Strikingly, only one of these organisations – the Slovenian Employers' Association ([Združenje delodajalcev Slovenije, ZDS](#)) – has a domain that is cross-sectoral. Most cases of domain overlaps ensue from coverage of the broader services and hotels and restaurants sectors, including tourism and allied industries. Overlaps of this kind can be found, in particular, in Bulgaria, the Czech Republic, Denmark, Finland, Germany, Greece, Hungary, Italy, the Netherlands, Portugal, Slovenia, Spain, Sweden and the UK.

Sectionalism or sectional overlaps (in the case of broader domain demarcation in terms of sector) are mainly caused by domain demarcations focusing on company size and/or the exposed sector – as is the case of the International Contract Catering Association ([Verband der Internationalen Caterer in Deutschland, VIC](#)) in Germany, the National Employer Association of Catering and Services ([Syndicat national des entreprises de restauration et de services, SNERS](#)) in France, the [Irish Business and Employers Confederation \(IBEC\)](#) and the [Small Firms Association \(SFA\)](#) in Ireland, the National Confederation of Tertiary and Small Enterprises ([Confederazione Nazionale del Terziario e della Piccola Impresa, Confterziario](#)) and the Autonomous Federation of Traders, Representatives, Tourist Operators and Artisans ([Federazione Autonoma Rappresentanti, Commercianti, Operatori del Turismo ed Artigiani, Fedarcom](#)) in Italy, as well as the Swedish Hotel and Restaurant Association ([Sveriges Hotell- och Restaurangföretagare, SHR](#)).

Alternatively, the domain demarcations may focus on specific business activities within the sector, as in the following examples:

- Austria's Federal Association of Restaurants ([Fachverband Gastronomie, FG](#)) and Federal Association of Hotels ([Fachverband Hotellerie, FH](#));
- Italy's Movement of Cooperatives and Mutual Assistance – National Coordination of Employer Associations ([Movimento Cooperative e Mutue – Coordinamento nazionale Associazioni Imprenditoriali, MCM-CNAI](#)) and National Union of Italian Cooperatives ([Unione Nazionale Cooperative Italiane, UNCI](#)), which represent cooperatives only;
- Italy's National Association of Catering Operators ([Associazione Nazionale Operatori Catering, ASSOCATERING](#)), which organises catering companies in the transport sector;
- the Swedish Association of Local Authorities and Regions ([Sveriges Kommuner och landsting, SKL](#)), which gathers municipalities.

Three employer organisations (8.1% of the total) are sectional with regard to their domain. Some 13.5% have a domain which is more or less congruent with the sector definition. This means that the domain of these organisations largely focuses on the contract catering sector as defined earlier, although the possibility cannot be ruled out that one or more of these associations may also organise companies of contiguous sectors, such as tourism, hospitality or restaurant companies. The relative predominance of membership domains (sectionally overlapping in relation to the sector indicates that the sector definition tends to be narrower than the lines along which most sector-related employers identify their common interests and group together in associations. The two existing sector-related employer organisations of Austria (FG and FH) can rely on obligatory membership. This is due to their public-law status as chamber units. Representativeness of all other employer organisations is based on voluntary membership.

In countries with a pluralist structure in relation to employer organisations, these associations have usually – with the exception of Ireland – managed to arrive at non-competing relationships.

Their activities are complementary to each other as a result of interassociational differentiation according to either membership demarcation (as is the case of Austria, Sweden and, partially, Ireland and Italy) or functions and tasks (as is the case of Portugal, Slovenia, Spain and, partially, Italy).

As the figures on density show (Table 4), membership strength in terms of companies varies widely with regard to both the membership domain in general and the sector-related densities. The same holds true of the densities in terms of employees. As a general pattern, with only one or two exceptions, the densities of companies tend to be equal to or – where they differ – lower than the densities of employees. This suggests a higher propensity of the larger companies to associate, compared with their smaller counterparts. While one third of the employer organisations for which related data are available register a sectoral domain density in terms of companies higher than 50%, 53.8% of them do so with regard to their sectoral domain density in terms of employees. Indeed, some of the employer organisations record employee densities higher than 90%. This again underlines the greater willingness of larger companies to associate.

It may be inferred from these findings that, despite relatively low density rates in terms of companies, the employer organisations manage to gather the sector's most significant enterprises, as measured in terms of employment. Relatively low density rates in terms of companies result from the sector's company structure, which is characterised by a relatively high proportion of small and medium-sized enterprises (SMEs). Traditionally, small companies show less willingness to gather in associations. In general, the findings suggest that, in the contract catering sector, employers are relatively poorly organised in terms of companies but are better represented in terms of employees. However, it should be noted that no density data are available for a significant proportion of the employer organisations. Therefore, the data should once again be treated with caution.

Domain densities of the sector's employer organisations, both in terms of companies and employees, tend to be equal to or higher than the sectoral (domain) densities. This indicates that the associations face bigger problems in organising companies in the contract catering sector than in other sectors of the economy within their overall domain.

Table 4: Domain coverage, membership and density of employer organisations, 2007–2008

| Country and employer organisation name | Domain comprehensive ness | Membership | | | Density | | | |
|--|---------------------------|-------------------|---------------------------------|---------------------------------|------------|------------------------------|------------|------------------------------|
| | | Type ^a | Companies (companies in sector) | Employees (employees in sector) | Companies | | Employees | |
| | | | | | Domain (%) | Sector (sectoral domain) (%) | Domain (%) | Sector (sectoral domain) (%) |
| AT | | | | | | | | |
| FG | SO | Oblig. | 21,501 ^b (n.a.) | 114,007 (n.a.) | 100 | n.a. (100) | 100 | n.a. (100) |
| FH | SO | Oblig. | 9,432 ^b (n.a.) | 88,084 (n.a.) | 100 | n.a. (100) | 100 | n.a. (100) |
| BE | | | | | | | | |
| UBC | C | Vol. | 6 (6) | 7,000 (7,000) | 25 | 25 (25) | 80–85 | 80–85 (80–85) |
| BG | | | | | | | | |
| BTC | O | Vol. | 560 (5) | 60,000 (78) | n.a. | 1 (1) | n.a. | 1.1 (1.1) |
| CY | -- | -- | -- | -- | -- | -- | -- | -- |
| CZ | | | | | | | | |
| SOCR | O | Vol. | 103 (n.a.) | n.a. | n.a. | n.a. | n.a. | n.a. |
| DE | | | | | | | | |
| DEHOGA | O* | Vol. | 240,000 (n.a.) | 1,000,000 (n.a.) | n.a. | n.a. | n.a. | n.a. |
| VIC | S* | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| DK | | | | | | | | |
| HORESTA | O* | Vol. | 2,000 (77) | 52,500 (1,550) | 13 | 5 (5) | 75 | 30 (30) |
| SBA | O* | Vol. | 163 (20) | n.a. | 5 | 1.3 (1.3) | 80–90 | n.a. |
| EE | -- | -- | -- | -- | -- | -- | -- | -- |
| EL | | | | | | | | |

| | | | | | | | | |
|-----------|-----|------|----------------|-----------------|-------|---------------|--------------|--------------|
| POESE | O | Vol. | 10,000 (n.a.) | 250,000 (n.a.) | 9 | n.a. | 55 | n.a. |
| ES | | | | | | | | |
| FEHR | O* | Vol. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| CEHAT | O* | Vol. | 14,000 (n.a.) | 200,000 (n.a.) | n.a. | n.a. | n.a. | n.a. |
| FEADRS | O* | Vol. | 100 (11) | 100,000 (n.a.) | n.a. | n.a. | n.a. | n.a. |
| FI | | | | | | | | |
| FHR | O | Vol. | 2,400 (100) | 60,000 (8,700) | 90 | 24 (24) | 90 | 58 (58) |
| FR | | | | | | | | |
| SNRC | C* | Vol. | 28 (28) | n.a. | 29.5 | 29.5 (29.5) | n.a. | n.a. |
| SNERS | S* | Vol. | 53 (53) | 15,000 (15,000) | >55.8 | >55.8 (>55.8) | n.a. (>19.4) | 19.4 (>19.4) |
| HU | | | | | | | | |
| VIMOSZ | O | Vol. | 60 (10) | 100,000 (7,000) | 0.8 | 0.4 (0.4) | 52 | 33 (33) |
| IE | | | | | | | | |
| IBEC | SO* | Vol. | >7,500 (n.a.) | n.a. | n.a. | n.a. | n.a. | n.a. |
| SFA | SO* | Vol. | 8,000 (n.a.) | n.a. | n.a. | n.a. | n.a. | n.a. |
| AICC | C* | Vol. | n.a. | 7,195 (7,195) | n.a. | n.a. | n.a. | n.a. |
| IT | | | | | | | | |
| FIPE | O* | Vol. | 110,000 (n.a.) | 400,000 (n.a.) | 44.9 | n.a. | 60.1 | n.a. |
| ANGEM | C* | Vol. | 24 (n.a.) | 34,500 (n.a.) | 2 | 2 (n.a.) | 44.2 | 44.2 |
| FIEPET | O* | Vol. | 56,000 (n.a.) | 180,000 (n.a.) | 22.8 | 33.1 (n.a.) | 22.5 | 15.3 |

| | | | | | | | | |
|-------------------|-----|------|-------------------|-----------------------|------|------------|-------|--------------|
| | | | | | | | | |
| MCM CNAI | SO* | Vol. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| UCICT CNAI | O* | Vol. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| UNCI | SO* | Vol. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| CONFTER ZIARIO | SO* | Vol. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| FEDAR COM | SO* | Vol. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| ASSOCAT ERING | S* | Vol. | 6 (n.a.) | 2,500 (n.a.) | 2.6 | 0.5 (n.a.) | 10.9 | 3.2 |
| LT | -- | -- | -- | -- | -- | -- | -- | -- |
| LU | -- | -- | -- | -- | -- | -- | -- | -- |
| LV | -- | -- | -- | -- | -- | -- | -- | -- |
| MT | -- | -- | -- | -- | -- | -- | -- | -- |
| NL | | | | | | | | |
| VENECA | C | Vol. | 13 (13) | 18,000 (18,000) | 10 | 10 (10) | >90 | >90 (>90) |
| PL | -- | -- | -- | -- | -- | -- | -- | -- |
| PT | | | | | | | | |
| AHRESP | O* | Vol. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| APHORT | O* | Vol. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| RO | -- | -- | -- | -- | -- | -- | -- | -- |
| SE | | | | | | | | |
| SHR | SO | Vol. | 4,900 (10– 15) | 67,000 (4,800) | 75 | 1.3 (100) | 75.0 | 17 (100) |
| SKL | SO | Vol. | 310 (310) | 1,100,000 (28,700) | 100 | 30.7 (100) | 100.0 | 83 (100) |
| SI | | | | | | | | |

| | | | | | | | | |
|-----------|----|------|------------|----------------|------|------------------|----|----------------|
| TGZS | O* | Vol. | 2,400 (30) | 20,000 (350) | 50 | 25–50 (25–50) | 75 | 20 (20) |
| ZDS | O* | Vol. | 1,500 (4) | 200,000 (400) | n.a. | 3.4 (3.4) | 70 | 22.7 (22.7) |
| SK | -- | -- | -- | -- | -- | -- | -- | -- |
| UK | | | | | | | | |
| BHA | O | Vol. | 40,000 | 500,000 (n.a.) | 13 | n.a. | 33 | n.a. |

Notes: ^a Vol. = voluntary membership; Oblig. = obligatory membership. b = refers to employer companies only. * Domain overlap. O = Overlap, SO = Sectional overlap, S = Sectionalism, C = Congruence. n.a. = not available. See Annex for list of abbreviations and full names of organisations.

Source: EIRO national centres, 2009

Table 5: Collective bargaining, consultation and affiliations of employer organisations, 2007–2008

| | Collective bargaining | Consultation | National and European affiliations ^a |
|-----------|-----------------------|--------------|---|
| AT | | | |
| FG | Yes | Yes | WKÖ, HOTREC |
| FH | Yes | n.a. | WKÖ, HOTREC |
| BE | | | |
| UBC | Yes | Yes | FEDIS, VBO/FEB, FERCO |
| BG | | | |
| BTC | Yes | Yes | BIA |
| CY | -- | -- | -- |
| CZ | | | |
| SOCR | Yes | No | EuroCommerce, UGAL |
| DE | | | |
| DEHOGA | Yes ^b | Yes | BDA, FERCO ^c , HOTREC |
| VIC | n.a. | n.a. | DEHOGA, FERCO |
| DK | | | |
| HORESTA | Yes | No | Dansk Erhverv, DA, HOTREC |

| | Collective bargaining | Consultation | National and European affiliations^a |
|---------------|------------------------------|---------------------|---|
| SBA | Yes | No | <i>DI, DA, EFCI</i> |
| EE | -- | -- | -- |
| EL | | | |
| POESE | Yes | Yes | <i>GSEVEE</i> |
| ES | | | |
| FEHR | Yes | No | -- |
| CEHAT | Yes | No | HOTREC |
| FEADRS | Yes ^b | No | FERCO |
| FI | | | |
| FHR | Yes | Yes | <i>EK, FERCO</i> |
| FR | | | |
| SNRC | Yes | Yes | <i>MEDEF, FERCO</i> |
| SNERS | Yes | Yes | <i>CGPME</i> |
| HU | | | |
| VIMOSZ | Yes | Yes | <i>MGYOSZ, FERCO</i> |
| IE | | | |
| IBEC | Yes | Yes | |
| SFA | Yes | Yes | <i>IBEC</i> |
| AICC | No | Yes | FERCO |
| IT | | | |
| FIPE | Yes | Yes | <i>CONFCOMMERCIO, HOTREC</i> |
| ANGEM | Yes ^d | Yes | <i>FIPE, FERCO</i> |
| FIEPET | Yes | Yes | <i>ASSOTURISMO-CONFESERCENTI</i> |
| MCM CNAI | Yes | Yes | <i>CNAI</i> |
| UCICT CNAI | Yes | Yes | <i>CNAI</i> |
| UNCI | Yes | Yes | -- |
| CONFTERZIARIO | Yes | Yes | -- |
| FEDARCOM | Yes | Yes | <i>CIFA</i> |
| ASSOCATERING | Yes | Yes | <i>FIPE</i> |

| | Collective bargaining | Consultation | <i>National and European affiliations^a</i> |
|-----------|------------------------------|---------------------|--|
| LT | -- | -- | -- |
| LU | -- | -- | -- |
| LV | -- | -- | -- |
| MT | -- | -- | -- |
| NL | | | |
| VENECA | Yes | Yes | <i>VNO-NCW, FERCO</i> |
| PL | -- | -- | -- |
| PT | | | |
| AHRESP | Yes | No | <i>CTP, FERCO, HOTREC</i> |
| APHORT | Yes | No | <i>CTP, HOTREC</i> |
| RO | -- | -- | -- |
| SE | | | |
| SHR | Yes | Yes | FERCO, HOTREC |
| SKL | Yes | Yes | EU Committee of the Regions, CEMR, CLRAE |
| SI | | | |
| TGZS | Yes | Yes | GZS |
| ZDS | Yes | Yes | -- |
| SK | -- | -- | -- |
| UK | | | |
| BHA | No | Yes | <i>CBI, FERCO, HOTREC</i> |

Notes: ^a National affiliations appear in italics; only affiliations to sectoral European associations are listed. *b* = collective bargaining involvement through lower-level unit(s). *c* = affiliation through lower-level unit (that is, VIC). *d* = collective bargaining involvement through higher-level unit. See Annex for list of abbreviations and full names of organisations.

Source: EIRO national centres, 2009

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, often unclear domain demarcation and some rivalry for members – as is the case of Portugal, Slovenia and Sweden, see earlier – only minor competition for bargaining capacities, if any, has been identified (for example, in Sweden). In the case of the sector-related employer organisations, noticeable competition over collective bargaining capacities has been reported only in Ireland.

The data presented in Table 6 provide an overview of the system of sector-related collective bargaining in the EU27. The importance of collective bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (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 cases where two or more companies jointly negotiate an agreement. The relative importance of multi-employer bargaining, measured as a percentage of the total number of employees covered by a collective agreement, therefore provides an indication of the employer organisations' impact 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 [International Labour Organization \(ILO\)](#), 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 set an incentive for their workforce to unionise.

In comparison 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 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 (Traxler, Blaschke and Kittel, 2001).

Table 6: System of sectoral collective bargaining in contract catering sector, 2007–2008

| | Collective bargaining coverage (CBC) (%) | Proportion of multi-employer bargaining (MEB) as % of total CBC | Extension practices ^a |
|----|--|---|---|
| AT | 100 | Almost 100 | (Pervasive) |
| BE | 100 | 100 | Pervasive |
| BG | 100 ^b (n.a. ^c) | 100 ^b (0 ^c) | Pervasive |
| CY | 0 | n/a | n/a |
| CZ | n.a. | n.a. | No practice |
| DE | 25 | 60 | No practice |
| DK | 40 ^d | 80 ^d | No practice |
| EE | 0 | n/a | n/a |
| EL | 100 | 100 | Pervasive |
| ES | 100 | MEB prevailing | Pervasive |
| FI | 100 | 100 | Pervasive |
| FR | 100 | 100 ^e | Pervasive |
| HU | 100 | 83 | Limited/exceptional |
| IE | n.a. ^f | MEB prevailing | No practice |
| IT | 100 | 100 ^e | (Pervasive) |
| LT | 0 | n/a | n/a |
| LU | 0 | n/a | n/a |
| LV | 0 | n/a | n/a |
| MT | 15–25 ^d | 0 | n/a |
| NL | 100 | 100 | Pervasive |
| PL | 0 | n/a | n/a |
| PT | Almost 100 | >90 | Pervasive |
| RO | 100 ^g (0 ^c) | 100 ^g (n/a ^c) | No practice |
| SE | >90 | MEB prevailing | Limited/exceptional ^h (Pervasive ⁱ) |
| SI | Almost 100 | MEB prevailing | Pervasive |
| SK | 0 | n/a | n/a |
| UK | <5 | 0 | 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. ^a Extension practices include functional equivalents to

extension provisions, that is, obligatory membership and labour court rulings. Cases of functional equivalents are put in parentheses. b = cross-sectoral bargaining regulating minimum social insurance thresholds. c = sector-specific bargaining. d = rough estimate. e = supplemented by single-employer agreements. f = very low; national level (cross-sectoral) multi-employer agreements apply to unionised employments in the contract catering sector through social partnership pacts; supplementary single-employer bargaining rarely occurs. g = national, cross-sectoral bargaining. h = in the private sector. i = in the public sector. n.a. = not available. n/a = not applicable.

Source: EIRO national centres, 2009

Collective bargaining coverage

In terms of the sector's collective bargaining coverage, 14 of the 25 EU Member States for which related data are available record a remarkably high coverage rate of (almost) 100%. However, there are seven countries where collective bargaining is completely absent. A third group of countries records sector-related collective bargaining at a low level, with bargaining coverage rates from virtually zero in the UK (and probably Ireland) up to 40% in Denmark. It may be inferred from these findings that in more than half of the EU27, the sector's industrial relations structures are well-established, while they appear to be underdeveloped in one third to half of the Member States.

Closer consideration of the different countries reveals that collective bargaining coverage rates tend to be high in the 15 EU Member States prior to enlargement of the EU in 2004 (EU15) – with the notable exception of Denmark, Germany, Ireland, Luxembourg and the UK. On the other hand, sectoral bargaining standards widely vary among the new Member States (NMS) that joined the EU in 2004 and 2007. In the Baltic states of Estonia, Latvia and Lithuania, as well as Cyprus, Poland and Slovakia, sector-related bargaining is completely absent, due to the lack of sector-related representative social partner organisations on at least one of the two sides of industry (see Tables 3 and 4). By contrast, collective bargaining arrangements cover (almost) the entire sector in Bulgaria, Hungary, Romania and Slovenia, while at least part of the sector is covered in the Czech Republic and Malta. However, with regard to the high collective bargaining coverage rates recorded for Bulgaria and Romania, it should be noted that these rates result from cross-sectoral bargaining arrangements – regulating national minimum social insurance thresholds in Bulgaria and regulating national minimum pay and working time standards in Romania – rather than sector-specific bargaining arrangements.

In most of the countries with available information, several factors which sometimes interact with each other account for high coverage rates. One factor is the predominance of multi-employer bargaining. A second factor is the high density rates of the trade unions and/or employer organisations – as seen, for example, in Austria, Finland and Sweden. A third factor is the existence of pervasive extension practices – as observed in Belgium, Bulgaria, Finland, France, Greece, the Netherlands, Portugal, Slovenia, Spain and Sweden. While coverage in countries with prevalent multi-employer bargaining is generally high – with the exceptions of Denmark, Germany and Ireland – prevalent single-employer bargaining arrangements in the sector can only be found in Malta and the UK, where this form is the exclusive type of bargaining and where the collective bargaining coverage is low. In all other Member States where multi-employer bargaining is not the dominant type of employment regulation, collective bargaining is completely absent. This is the case of Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Poland and Slovakia.

Due to the prevalence of multi-employer settlements in the sector, the use of extension practices is significant. Pervasive extension practices in the contract catering sector are reported for several

countries, as listed above. In Slovenia, new legislation on the extension of collective agreements has recently been introduced, resulting in almost complete coverage in the contract catering sector at least. Regarding 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 being generally binding – even though a proportion of employers are alleged to frequently ignore these minimum provisions.

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 4 list only those sector-related trade unions and employer organisations that are usually consulted.

Trade unions

At least some of the trade unions are regularly consulted by the authorities in 14 of the 23 EU Member States where sector-related trade unions are recorded. Nine countries report a lack of regular consultation of any of the trade unions. Since a multi-union system has been established in about half of the 23 countries with sector-related trade unions, the possibility cannot be ruled out that the authorities favour certain trade unions over others or that the unions compete for participation rights. In at least seven countries with a multi-union system – Belgium, France, Italy, the Netherlands, Slovenia, Sweden 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, there is no country where consultation rights are awarded only to certain trade unions while others are left out of consideration. Accordingly, there is no evidence of inter-union conflicts over participation in public policy matters in the contract catering sector.

Employer organisations

A vast majority – more specifically, 27 out of 35 – of the sector-related employer organisations for which related data are available are involved in consultation procedures. In countries with multi-organisation systems, only one case of conflict over participation rights of employer organisations is reported – from Ireland. This conflict, however, primarily relates to participation in national bargaining rather than consultation procedures. In the multi-organisation systems of France, Ireland, Italy, Slovenia and Sweden, where related data of all employer organisations are available, all of the sector's organisations are consulted. Conversely, in the pluralist systems of Denmark, Portugal and Spain, none of the employer organisations is regularly consulted. Similar to the situation among the trade unions, no country records the co-existence of an employer organisation that is consulted and one that is not. In 12 of the 20 countries with available

information on each side – Austria, Belgium, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Slovenia, Sweden and the UK – where employer organisations co-exist with trade unions, consultation rights are symmetrically attributed to the two sides of industry, in that at least one organisation on each side is consulted. On the other hand, in three of these 20 countries for which information on consultation is reported for organised business and labour – Bulgaria, the Czech Republic and Hungary – representatives of only one side are consulted. In those countries where an employer organisation in the context of the earlier definition of a social partner organisation does not exist – that is, Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Malta, Poland, Romania 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 one of the EU27 – that is, Ireland. This is mainly due to the small size of the contract catering sector. Table 7 lists only one single body of this kind, which is based on statutory law. The Irish Joint Labour Committee for Catering regulates minimum pay and determines conditions of employment for the catering industry. Other tripartite bodies listed in some of the national reports are not taken into account in this study, since they all cover broader industry segments such as the hotels and restaurants sector and thus do not specifically target the contract catering sector.

Table 7: Tripartite sector-specific boards of public policy in contract catering sector, 2007–2008

| | Name of body and scope of activity | Origin | Participants | |
|-----------|--|-----------|--------------|-----------------------|
| | | | Trade unions | Business associations |
| IE | Joint Labour Committee for Catering: regulates minimum pay and determines conditions of employment for the catering industry | Statutory | SIPTU | IBEC, SFA |

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

Source: EIRO national centres, 2009

European level of interest representation

At European level, eligibility for consultation and participation in 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 contract catering 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, namely EFFAT, and one on the employer side, namely FERCO, are particularly significant in the contract catering sector. Both of these organisations 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 organisations that are linked to the sector's national industrial relations actors.

Membership domain

As indicated by its name, EFFAT, which is affiliated to the [European Trade Union Confederation \(ETUC\)](#) and forms part – as a regional organisation – of the [International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations \(IUF\)](#), organises the food (processing), agriculture and tourism segment of the economy. Therefore, its membership domain overlaps in relation to the contract catering sector. By contrast, FERCO represents only contract catering companies; hence, its domain largely coincides with the sector under consideration. Nevertheless, some of its members also cover business areas outside the contract catering sector (see Table 4), particularly in the hospitality sector. FERCO organises only business or employer organisations rather than individual companies.

Membership composition

In terms of membership composition, it should be noted that the countries covered by EFFAT and FERCO extend beyond the 27 countries examined in this study. However, the report will only consider the members of these 27 countries. For EFFAT, Table 8 lists the membership of sector-related trade unions drawn from the national reports. At least one affiliation is recorded in each country under consideration except for six countries – Bulgaria, Estonia, Lithuania, Portugal, Romania and Slovakia. In some countries – such as Austria, Belgium, France, Italy, Luxembourg, the Netherlands, Spain, Sweden and the UK – multiple memberships occur. Overall, EFFAT counts 38 direct affiliations from the countries under examination. More than half of the trade unions listed in Table 3 are directly affiliated to EFFAT. Insofar as available data on sectoral membership of the national trade unions provide sufficient information on their relative strength, it may be concluded that EFFAT covers the sector's most important labour representatives. Exceptional cases of uncovered major trade unions in the sector may involve only two UGL

affiliates in Italy. A total of 33 of the 38 EFFAT members listed are involved in collective bargaining related to the contract catering sector, while five affiliates from countries such as Cyprus, Latvia, Luxembourg and Poland are not.

Table 8: Members of EFFAT, 2009

| | Members |
|----|--|
| AT | VIDA*, GPA-DJP* |
| BE | ACV/CSC-FaS*, HORVAL*, BBTk/SETCa*, ACLVB/CGSLB-LTU* |
| BG | -- |
| CY | OEXEKA-SEK |
| CZ | ČMOS PHCR* |
| DE | NGG* |
| DK | 3F* |
| EE | -- |
| EL | POEEYTE* |
| ES | FECOHT-CCOO*, FETCHTJ-UGT* |
| FI | PAM* |
| FR | FGTA-FO*, FS-CFDT*, FPCDS-CGT*, HCRBC-CFTC*, SNPE-CFE-CGC* |
| HU | VISZ* |
| IE | SIPTU* |
| IT | FILCAMS*, FISASCAT*, UILTuCS* |
| LT | -- |
| LU | OGB-L, LCGB |
| LV | LAKRS |
| MT | GWU* |
| NL | Horecabond FNV*, CNV Bedrijvenbond* |
| PL | NSZZ Solidarność |
| PT | -- |
| RO | -- |
| SE | HRF*, Kommunal*, Unionen* |
| SI | GIT* |
| SK | -- |
| UK | GMB*, Unite*, USDAW* |

*Notes: Membership list is confined to the sector-related associations of the countries under consideration. * Involved in sector-related collective bargaining. See Annex for list of abbreviations and full names of organisations.*

Source: EIRO national centres, 2009

Table 9 lists the members of FERCO. Of the 27 countries under consideration, FERCO has 12 under its umbrella through associational members from these countries. These countries appear to cover the 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 France, Ireland, Italy, Portugal, Spain and Sweden. Taking the sectoral membership data of the respective organisations of these countries as an indicator of their relative significance does not arrive at a clear picture of whether the most important associations are affiliated. This also holds true for the criterion of the organisations' role in collective bargaining, which does not show a clear trend in this respect either. In several countries, some important or even all employer organisations that conduct bargaining in the contract catering sector are not members of FERCO.

There are also two countries (Ireland and the UK) where the affiliates of FERCO are neither directly nor indirectly engaged in sector-related bargaining. Employer organisations that are not involved in collective bargaining may regard themselves as trade associations rather than as industrial relations actors. Of the 12 direct affiliates of FERCO, 10 are directly or indirectly – through higher or lower-order units – involved in sector-related collective bargaining. This means that FERCO's proportion of member organisations which are involved in bargaining largely corresponds to that of EFFAT. FERCO members cover collective bargaining in 10 of the 27 countries under consideration, which accounts for a significantly lower number compared with the 16 countries where sector-related collective bargaining is conducted by affiliates of its European-level counterpart – that is, EFFAT. This indicates that several sector-related employer organisations across the EU not affiliated to FERCO are involved in sector-related collective bargaining.

Table 9: Members of FERCO, 2009

| | Members |
|----|--------------|
| AT | -- |
| BE | UBC* |
| BG | -- |
| CY | -- |
| CZ | -- |
| DE | VIC-DEHOGA** |
| DK | -- |
| EE | -- |
| EL | -- |
| ES | FEADRS** |
| FI | FHT* |
| FR | SNRC* |

| | |
|-----------|----------|
| HU | VIMOSZ* |
| IE | AICC |
| IT | ANGEM*** |
| LT | -- |
| LU | -- |
| LV | -- |
| MT | -- |
| NL | VENECA* |
| PL | -- |
| PT | AHRESP* |
| RO | -- |
| SE | SHR* |
| SI | -- |
| SK | -- |
| UK | BHA |

*Notes: Membership list is confined to the sector-related associations of the countries under consideration. * Involved in sector-related collective bargaining. ** Collective bargaining involvement through lower-order unit(s). *** Collective bargaining involvement through higher-order units. See Annex for list of abbreviations and full names of organisations.*

Source: EIRO national centres, 2009

Capacity to negotiate

The third criterion of representativeness at European level refers to the organisations' capacity to negotiate on behalf of their own members. According to the General Secretary of FERCO, this association is authorised by its members to negotiate on behalf of them on an ad-hoc basis. The FERCO General Assembly retains the right to decide, case by case, on whether to engage in negotiations at European level and on the scope of the negotiation mandate. With regard to EFFAT, the Executive Committee is responsible for the composition and mandate of a delegation entrusted with negotiations with the European employer organisations. According to the EFFAT constitution, decisions on the outcomes of negotiations taken by the Executive Committee must have the support of at least two thirds of the members directly affected by the negotiations. This implies that EFFAT does have a mandate to negotiate on behalf of its members.

As proof of the weight of both EFFAT and FERCO, 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. Accordingly, European organisations other than EFFAT represent a relatively large proportion of both sector-related trade unions and countries. Among the organisations listed are the following:

- the [Union Network International – Europe \(UNI-Europa\)](#), with 12 affiliations covering eight countries;
- the [European Transport Workers’ Federation \(ETF\)](#), with eight affiliations covering five countries;
- the [European Federation of Public Service Unions \(EPSU\)](#), with seven affiliations covering six countries;
- the [European Mine, Chemical and Energy Workers’ Federation \(EMCEF\)](#), with four affiliations covering three countries;
- the [Council of European Professional and Managerial Staff \(Eurocadres\)](#), with three affiliations covering three countries;
- the [European Metalworkers’ Federation \(EMF\)](#), the [European Federation of Building and Woodworkers \(EFBWW\)](#) and the [European Trade Union Federation: Textile, Clothing and Leather \(ETUF:TCL\)](#), with three affiliations covering two countries each;
- the [European Workers’ Education Association \(EUOWEA\)](#), the [European Trade Union Liaison Committee on Tourism \(ETLC\)](#), the [Standing Committee of European Central Bank Unions \(SCECBU\)](#) and the [European Committee of Food, Catering and Allied Workers’ Unions within the International Union of Food Workers \(ECF-IUF\)](#), with one affiliation each.

Moreover, it should be noted that the affiliations listed in Table 3 may not necessarily be exhaustive. Nevertheless, and despite the large number of affiliations to European organisations other than EFFAT, this overview underlines the principal status of the latter association as the sector’s labour representative. This is mainly because many of the above affiliations to other European organisations reflect the overlapping domains of the affiliates rather than indicating a real reference of the affiliations to the contract catering sector.

Table 5 provides a similar overview of European organisations to which the sector-related employer organisations are affiliated. The results indicate that organisational links of the sector-related employer organisations with European federations other than FERCO are quite common, as the following list shows:

- the [Confederation of National Associations of Hotels, Restaurants, Cafés and Similar Establishments in Europe \(HOTREC\)](#), with 10 affiliations in eight countries;
- the [European Retail, Wholesale and International Trade Association \(EuroCommerce\)](#), the [Union of Groups of Independent Retailers of Europe \(UGAL\)](#), the [European Federation of Cleaning Industries \(EFCI\)](#), the [EU Committee of the Regions](#), the [Council of European Municipalities and Regions \(CEMR\)](#), and the [Congress of Local and Regional Authorities of Europe \(CLRAE\)](#), with one affiliation each.

While the latter affiliations again mainly reflect the overlapping domains of the FERCO affiliates, which frequently organise operators that are also engaged in sectors other than contract catering – such as the services sector or even the public sector – the numerous affiliations to HOTREC somewhat question the alleged role of FERCO as the unmatched European industrial relations actor on behalf of business in the sector. This is because HOTREC claims to gather member associations in a field of activity which is immediately contiguous to – if not sectionally overlapping in relation to – the food service activities subsector. Nevertheless, there are no signs that HOTREC would compete with FERCO for either members or competences in sector-specific industrial relations matters. Moreover, despite the numerous affiliations of FERCO members to HOTREC, the former association records a higher number of affiliations of sector-related national employer organisations than the latter. Apart from HOTREC, the relatively low

incidence of affiliations to European organisations other than FERCO highlights the relevance of the latter as the principal, if not only, European voice of business in the contract catering sector. This is despite the fact that this association only has some of the EU Member States under its umbrella through affiliations from these countries.

Commentary

The European contract catering sector is a relatively small sector, but one which has grown significantly in size over the previous decade. Despite ongoing market centralisation which has led to two or three global players dominating the market, the sector is still characterised by the prevalence of small (family-operated) companies. As in most other service-related sectors, industrial relations are not very strongly organised in food service activities. This situation is manifested in a relatively low degree of unionisation, a relatively scarce presence of employer organisations – which also tend to record low densities – and a high polarisation with regard to collective bargaining coverage. In almost one third of the EU27 Member States, collective bargaining is completely absent, whereas more than half of the countries record remarkably high coverage rates of (almost) 100%.

In this respect, the following pattern emerges: collective bargaining coverage rates tend to be high in the EU15 – with the exception of Denmark, Germany, Ireland, Luxembourg and the UK – with prevalent multi-employer bargaining settlements, while sectoral bargaining standards vary widely among the NMS. In the Baltic states and in Cyprus, Poland and Slovakia, sector-related bargaining is completely absent, due to the lack of sectoral social partner organisations on at least one of the two sides of industry. By contrast, collective bargaining arrangements cover (almost) the entire sector in Bulgaria, Hungary, Romania and Slovenia. Generally, high collective bargaining coverage rates in the sector are reinforced by the predominance of multi-employer arrangements and a significant use of extension practices.

Despite high levels of collective employment regulation in most of the EU15, both unionisation rates and densities of the employer organisations in the sector tend to be relatively low in these countries. The trade unions' problems in organising members in the contract catering sector ensue from a multiplicity of factors, such as a high incidence of female and migrant employment, the small size of establishments – thus often failing to meet the criteria for setting up workplace representation – high staff turnover and the limited capacity of the trade unions to set (selective) incentives for potential members. On the employer side, low densities mainly result from the prevalent company structure.

A series of pending economic, technical and labour market problems specific to the sector has prompted the European sector-related social partners to launch joint action in the framework of social dialogue. In this context, a number of joint programmes, guidelines and declarations, including an agreement on CSR, have been drawn up since 1998. Against this background, EFFAT and FERCO have to be regarded as the most important EU-wide representatives of the sector's employees and employers.

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Annex: List of abbreviations

| Country | Abbreviation | Full Name of organisation |
|----------------------|-----------------|---|
| Austria (AT) | FG | Federal Association of Restaurants (<i>Fachverband Gastronomie</i>) |
| | FH | Federal Association of Hotels (<i>Fachverband Hotellerie</i>) |
| | GPA-DJP | Union of Salaried Employees, Graphical Workers and Journalists (<i>Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier</i>) |
| | ÖGB | Austrian Trade Union Federation (<i>Österreichischer Gewerkschaftsbund</i>) |
| | VIDA | VIDA Trade Union |
| | WKÖ | Austrian Federal Economic Chamber (<i>Wirtschaftskammer Österreich</i>) |
| Belgium (BE) | ABVV/FGTB | Belgian General Federation of Labour (<i>Algemeen Belgisch Vakverbond/Fédération Générale du Travail de Belgique</i>) |
| | ACLVB/CGSLB | Federation of Liberal Trade Unions of Belgium (<i>Algemene Centrale der Liberale Vakbonden van België/Centrale Générale des Syndicats Libéraux de Belgique</i>) |
| | ACLVB/CGSLB-LTU | Liberal Trade Union, affiliated to ACLVB/CGSLB |
| | ACV/CSC | Confederation of Christian Trade Unions (<i>Algemeen Christelijk Vakverbond/Confédération des Syndicats Chrétiens</i>) |
| | BBTK/SETCa | Union of White-collar, Technical and Executive Employees (<i>Bond der Bedienden, Technici en Kaders/Syndicat des Employés, Techniciens et Cadres</i>) |
| | FaS | Food and Services |
| | FEDIS | Federation of Distribution in Belgium |
| | HORVAL | Federation of Food, Horeca and Services (<i>Centrale Voeding, Horeca, Diensten/Centrale Alimentations, Horeca, Services</i>) |
| | VBO/FEB | Belgian Federation of Employers (<i>Verbond van Belgische Ondernemingen/Fédération des Entreprises de Belgique</i>) |
| | UBC | Belgian Union of Catering (<i>Unie van Belgische Catering/Union Belge de Catering</i>) |
| Bulgaria (BG) | BIA | Bulgarian Industrial Association |

| | | |
|----------------------------|---------------|---|
| | BTC | Bulgarian Tourism Chamber |
| | CITUB | Confederation of Independent Trade Unions in Bulgaria |
| | CL Podkrepa | Confederation of Labour Podkrepa |
| | ITUFECCTCS | Federation of Employees in Commerce, Cooperatives, Tourism, Credit and Social Services |
| | NFTSCBT | National Trade Union Federation ‘Trade, Services, Control Bodies and Tourism’ |
| | TUTB | Trade Unions of Tourism in Bulgaria |
| Cyprus (CY) | OEXEKA-SEK | Hotel, Catering and Restaurant Employees Federation |
| | SEK | Cyprus Workers’ Confederation (<i>Συννομοσπονδία Εργαζομένων Κύπρου</i>) |
| Czech Republic (CZ) | ČMKOS | Czech-Moravian Confederation of Trade Unions (<i>Českomoravská konfederace odborových svazů</i>) |
| | ČMOS PHCR | Czech-Moravian Trade Union of Catering, Hotels and Tourism (<i>Českomoravský odborový svaz pohostinství, hotelů a cestovního ruchu</i>) |
| | SOCR | Czech Confederation of Commerce and Tourism (<i>Svaz obchodu a cestovního ruchu České republiky</i>) |
| Denmark (DK) | 3F | United Federation of Danish Workers (<i>Fagligt Fælles Forbund</i>) |
| | DA | Confederation of Danish Employers (<i>Dansk Arbejdsgiverforening</i>) |
| | Dansk Erhverv | Danish Chamber of Commerce |
| | DI | Confederation of Danish Industry |
| | HORESTA | Employers’ Association for the Hotel, Restaurant and Tourism Sector (<i>Hotel- og Restaurationsbranchens Arbejdsgiverforening</i>) |
| | LO | Danish Confederation of Trade Unions (<i>Landsorganisationen i Danmark</i>) |
| | SBA | Danish Service Industries Federation (<i>Servicebranchens Arbejdsgiverforening</i>) |
| Estonia (EE) | -- | |
| Finland (FI) | EK | Confederation of Finnish Industries (<i>Elinkeinoelämän keskusliitto</i>) |
| | FHR | Finnish Hotel and Restaurant Association |
| | PAM | Service Union United (<i>Palvelualojen ammattiliitto</i>) |
| | SAK | Central Organisation of Finnish Trade Unions (<i>Suomen Ammattiliittojen Keskusjärjestö</i>) |

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|---------------------|---------|--|
| France (FR) | CFDT | French Democratic Confederation of Labour (<i>Confédération française démocratique du travail</i>) |
| | CFE-CGC | French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff (<i>Confédération française de l'encadrement – Confédération générale des cadres</i>) |
| | CFTC | French Christian Workers' Confederation (<i>Confédération française des travailleurs chrétiens</i>) |
| | CGPME | Confederation of Small and Medium-Sized Enterprises (<i>Confédération générale des petites et moyennes entreprises</i>) |
| | CGT | General Confederation of Labour (<i>Confédération générale du travail</i>) |
| | CGT-FO | General Confederation of Labour – <i>Force ouvrière</i> |
| | FGTA-FO | General Federation of Food Workers (<i>Fédération générale des travailleurs de l'alimentation</i>) – <i>Force ouvrière</i> |
| | FPCDS | Federation of Commerce and Services Staff (<i>Federation des Personnels du Commerce, de la Distribution et des Services</i>) |
| | FS-CFDT | Services Federation (<i>Federation des services</i>) of the French Democratic Confederation of Labour |
| | HCRBC | National Union of Hotel and Restaurant Staff (<i>Syndicat National CFTC du Personnel des Hôtels, Cafés, Restaurants, Bars et Collectivités</i>) |
| | MEDEF | Movement of French Enterprises |
| | SNERS | National Employer Association of Catering and Services (<i>Syndicat national des entreprises de restauration et de services</i>) |
| | SNPE | National Union of Managerial Staff (<i>Syndicat national du personnel de l'encadrement CFE-CGC INOVA</i>) |
| | SNRC | National Employer Association of Catering (<i>Syndicat national de la restauration collective</i>) |
| Germany (DE) | BDA | German Confederation of Employers' Associations (<i>Bundesvereinigung der Deutschen Arbeitgeberverbände</i>) |
| | DEHOGA | German Hotels and Restaurants Association (<i>Deutscher Hotel- und Gaststättenverband</i>) |
| | DGB | Confederation of German Trade Unions (<i>Deutscher Gewerkschaftsbund</i>) |
| | NGG | Trade Union for Food, Beverages, Tobacco, Hotel and Catering and Allied Workers (<i>Gewerkschaft Nahrung-</i> |

| | | <i>Genuß-Gaststaetten</i>) |
|---------------------|--------------|--|
| | VIC | Association of International Caterers (<i>Verband der Internationalen Caterer in Deutschland</i>) |
| Greece (EL) | GSEE | Greek General Confederation of Labour (<i>Γενική Συνομοσπονδία Εργατών Ελλάδας</i>) |
| | GSEVEE | Hellenic Confederation of Professionals, Craftsmen and Merchants (<i>Γενική Συνομοσπονδία Επαγγελματιών Βιοτεχνών Εμπόρων Ελλάδας</i>) |
| | POEYTE | Panhellenic Federation of Catering Workers and Tourist Profession Employees (<i>Πανελλήνια Ομοσπονδία Εργατών Επισιτισμού και Υπαλλήλων Τουριστικών Επαγγελματιών</i>) |
| | POESE | Panhellenic Federation of Restaurants and Related Businesses (<i>Πανελλήνια Ομοσπονδία Εστιατορικών και Συναφών Επαγγελματιών</i>) |
| Hungary (HU) | ASZSZ | Alliance of Autonomous Trade Unions (<i>Autonóm Szakszervezetek Szövetsége</i>) |
| | MGYOSZ | Confederation of Hungarian Employers and Industrialists (<i>Munkaadók és Gyáriparosok Országos Szövetsége</i>) |
| | VIMOSZ | Hungarian Hospitality Employers' Association (<i>Turisztikai és Vendéglátó Munkaadók Országos Szövetsége</i>) |
| | VISZ | Hungarian Trade Union of Catering and Tourism (<i>Vendéglátó és Idegenforgalmi Szakszervezet</i>) |
| Ireland (IE) | AICC | Association of Irish Contract Caterers |
| | IBEC | Irish Business and Employers Confederation |
| | ICTU | Irish Congress of Trade Unions |
| | SFA | Small Firms Association |
| | SIPTU | Services, Industrial, Professional and Technical Union |
| Italy (IT) | ANGEM | National Association of Public Catering and Service Enterprises (<i>Associazione Nazionale delle Aziende di Ristorazione Collettiva e Servizi</i>) |
| | ASSOCATERING | National Association of Catering Operators (<i>Associazione Nazionale Operatori Catering</i>) |
| | ASSOTURISMO | Italian Federation of Tourism (<i>Federazione Italiana del Turismo</i>) |
| | CGIE | General Council of Italians Abroad (<i>Consiglio Generale degli Italiani all'Estero</i>) |
| | CGIL | General Confederation of Italian Workers (<i>Confederazione Generale Italiana del Lavoro</i>) |

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|----------------|--|
| CIFA | Italian Confederation of Autonomous Federations (<i>Confederazione Italiana Federazioni Autonome</i>) |
| CISAL | Italian Confederation of Autonomous Workers' Trade Unions (<i>Confederazione Italiana Sindacati Autonomi Lavoratori</i>) |
| CISL | Italian Confederation of Workers' Trade Unions (<i>Confederazione Italiana Sindacati Lavoratori</i>) |
| CIU | Italian Confederation Unionquadri (<i>Confederazione Italiana Unionquadri</i>) |
| CNAI | National Coordination of Employer Associations (<i>Coordinamento Nazionale Associazioni Imprenditori</i>) |
| CONFCOMMERCIO | General Confederation of Italian Commerce and Tourism (<i>Confederazione Generale Italiana del Commercio, del Turismo e dei Servizi</i>) |
| CONFESERCENTI | Italian Confederation of Commercial, Tourist and Service Concerns (<i>Confederazione Italiana Esercenti Attività Commerciali Turistiche e dei Servizi</i>) |
| CONFLAVORATORI | Confederation of Workers (<i>Confederazione dei Lavoratori</i>) |
| CONFSAL | General Trade Union Confederation of Autonomous Workers (<i>Confederazione Generale Sindacati Autonomi Lavoratori</i>) |
| CONFTERZIARIO | National Confederation of Tertiary and Small Enterprises (<i>Confederazione Nazionale del Terziario e della Piccola Impresa</i>) |
| FEDARCOM | Autonomous Federation of Traders, Representatives, Tourist Operators and Artisans (<i>Federazione Autonoma Commercianti, Rappresentanti, Operatori del Turismo e Artigiani</i>) |
| FENASALC | National Federation of Autonomous Trade Unions for Workers in Commerce (<i>Federazione Nazionale Autonoma Sindacati lavoratori Commercio</i>) |
| FIEPET | Italian Federation of Public and Tourist Concerns (<i>Federazione Italiana Esercenti Pubblici e Turistici</i>) |
| FILC | Italian Federation of Workers in Commerce (<i>Federazione Italiana Lavoratori Commercio</i>) |
| FILCAMS | Italian Federation of Workers in the Commerce, Tourism and Services Sector (<i>Federazione Italiana Lavoratori Commercio Turismo e Servizi</i>) |
| FILT | Italian Federation of Transport Workers (<i>Federazione Italiana Lavoratori Trasporti</i>) |
| FIPE | Italian Federation of Public Concerns (<i>Federazione Italiana Pubblici Esercizi</i>) |

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|------------------------|--------------|--|
| | FISASCAT | Italian Federation of Commercial Services and Tourism (<i>Federazione Italiana Sindacati Addetti Servizi Commerciali Affini e del Turismo</i>) |
| | FISMIC | Autonomous Trade Union of Metalworkers and Related Industries (<i>Sindacato Autonomo Metalmeccanici e Industrie Collegate</i>) |
| | FIT | Italian Transport Federation (<i>Federazione Italiana Trasporti</i>) |
| | MCM | Movement of Cooperatives and Mutual Assistance (<i>Movimento Cooperative e Mutue</i>) |
| | SALTAE | Autonomous Trade Union of Tertiary and Related Industry Workers in Euganeo (<i>Sindacato Autonomo Lavoratori Terziario e Affini Euganeo</i>) |
| | UCICT | Christian Union of Italian Commerce and Tourism (<i>Unione Cristiana Italiana Commercio e Turismo</i>) |
| | UGL | General Union of Workers (<i>Unione Generale del Lavoro</i>) |
| | UGL CT | General Union of Workers – Commerce and Tourism |
| | UGL TA | General Union of Workers – Air Transport (<i>Trasporto Aereo</i>) |
| | UIL | Union of Italian Workers (<i>Unione Italiana del Lavoro</i>) |
| | Uiltrasporti | Italian Union of Transport Workers (<i>Unione Italiana dei Lavoratori dei Trasporti</i>) |
| | UILTuCS | Italian Union of Workers in the Commerce, Tourism and Services Sector (<i>Unione Italiana Lavoratori Turismo Commercio e Servizi</i>) |
| | UNCI | National Union of Italian Cooperatives (<i>Unione Nazionale Cooperative Italiane</i>) |
| Latvia (LV) | LAKRS | Latvian Trade Union of Public Services and Transport Workers (<i>Latvijas Sabiedrisko Pakalpojumu un Transporta Darbinieku Arodbiedrība</i>) |
| Lithuania (LT) | -- | |
| Luxembourg (LU) | CGT-L | General Confederation of Labour of Luxembourg (<i>Confédération Générale du Travail du Luxembourg</i>) |
| | LCGB | Luxembourg Christian Union Federation (<i>Lëtzebuenger Chrëschtliche Gewerkschafts-Bond</i>) |
| | OGB-L | Independent Luxembourg Union Federation (<i>Onofhängege Gewerkschaftsbond Lëtzebuerg</i>) |
| Malta (MT) | GWU | General Workers' Union |
| Netherlands | CNV | Christian Trade Union Federation (<i>Christelijk Nationaal</i>) |

| | | |
|----------------------|-------------------|---|
| (NL) | | <i>Vakverbond)</i> |
| | CNV Bedrijvenbond | Industry, Food and Transport Workers' Union, affiliated to CNV |
| | De Unie | Dutch General Independent Union |
| | FNV | Federation of Dutch Trade Unions (<i>Federatie Nederlandse Vakbeweging</i>) |
| | FNV Horecabond | Hotels, Restaurants and Catering Union, affiliated to FNV |
| | MHP | Federation of Managerial and Professional Staff Unions (<i>Vakcentrale voor Middengroepen en Hoger Personeel</i>) |
| | VENECA | Association of Dutch Catering Operators (<i>Vereniging Nederlandse Cateringorganisaties</i>) |
| | VNO-NCW | Confederation of Netherlands Industry and Employers (<i>Vereniging van Nederlandse Ondernemingen-Nederlands Christelijk Werkgeversverbond</i>) |
| Poland (PL) | NSZZ Solidarność | Independent and Self-Governing Trade Union Solidarity (<i>Niezależny Samorządny Związek Zawodowy Solidarność</i>) |
| Portugal (PT) | AHRESP | Association of Hotels, Restaurants and Similar Services of Portugal (<i>Associação da Hotelaria, Restauração e Similares de Portugal</i>) |
| | APHORT | Portuguese Association of Hotels, Restaurants and Tourism (<i>Associação Portuguesa de Hotelaria, Restauração e Turismo</i>) |
| | CGTP | General Portuguese Workers' Confederation (<i>Confederação Geral dos Trabalhadores Portugueses</i>) |
| | CTP | Confederation of Portuguese Tourism (<i>Confederação do Turismo Português</i>) |
| | FESAHT | Federation of Unions in Food, Beverages, Hotels and Tourism of Portugal (<i>Federação dos Sindicatos de Alimentação, Bebidas, Hotelaria e Turismo de Portugal</i>) |
| | FETESE | Federation of Unions of Workers and Technicians in Services (<i>Federação dos Sindicatos dos Trabalhadores de Serviços</i>) |
| | SITese | Union of Workers in Administration, Commerce, Hotels and Services (<i>Sindicato dos Trabalhadores de Escritório, Comércio, Hotelaria e Serviços</i>) |
| | STHTASSM | Union of Workers in Hotels, Tourism, Food and Similar Services of Madeira (<i>Sindicato dos Trabalhadores na Hotelaria, Turismo, Alimentação, Serviços e Similares da Região Autónoma da Madeira</i>) |
| | STIHTRSA | Union of Workers in Hotels, Tourism, Restaurants and Similar Industries of the Algarve (<i>Sindicato dos</i> |

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|----------------------|-------------|--|
| | | <i>Trabalhadores da Indústria de Hotelaria, Turismo, Restaurante e Similares do Algarve)</i> |
| | STIHTRSC | Union of Workers in Hotels, Tourism, Restaurants and Similar Industries of Central Portugal |
| | STIHTRSN | Union of Workers in Hotels, Tourism, Restaurants and Similar Industries of Northern Portugal |
| | STIHTRSS | Union of Workers in Hotels, Tourism, Restaurants and Similar Industries of Southern Portugal |
| | UGT | General Workers' Confederation (<i>União Geral de Trabalhadores</i>) |
| Romania (RO) | -- | |
| Slovakia (SK) | -- | |
| Slovenia (SI) | GIT | Catering and Tourism Workers' Union of Slovenia (<i>Sindikat delavcev gostinstva in turizma Slovenije</i>) |
| | GZS | Chamber of Commerce and Industry of Slovenia (<i>Gospodarska zbornica Slovenije</i>) |
| | KS90 | Confederation of Trade Unions '90 of Slovenia (<i>Konfederacija sindikatov '90 Slovenije</i>) |
| | SDGiTS KS90 | Catering and Tourism Workers' Union of Slovenia at KS90 (<i>Sindikat delavcev gostinstva in turizma Slovenije pri Konfederaciji 90</i>) |
| | TGZS | Tourism and Hospitality Chamber of Slovenia (<i>Turistico Gostinska Zbornica Slovenije</i>) |
| | ZDS | Slovenian Employers' Association (<i>Zdruzenje delodajalcev Slovenije</i>) |
| | ZSSS | Association of Free Trade Unions of Slovenia (<i>Zveza svobodnih sindikatov Slovenije</i>) |
| Spain (ES) | CCOO | Trade Union Confederation of Workers' Commissions (<i>Confederación Sindical de Comisiones Obreras</i>) |
| | CEHAT | Spanish Confederation of Hotels and Tourist Accommodation Establishments (<i>Confederación Española de Hoteles y Alojamientos Turístico</i>) |
| | ELA | Basque Workers' Solidarity (<i>Eusko Langileen Alkartasuna</i>) |
| | FEADRS | Spanish Federation of Social Catering Associations (<i>Federación Española de Asociaciones Dedicadas a la Restauración Social</i>) |
| | FECOHT | National Federation of Commerce, Hotel and Catering and Tourism Workers (<i>Federación Estatal de Comercio Hostelería y Turismo</i>) |

| | | |
|----------------------------|----------|--|
| | FEHR | Spanish Federation of Hotels and Restaurants (<i>Federación Española de Hostelería</i>) |
| | FETCHTJ | National Federation of Commerce, Hotel and Lottery Workers (<i>Federación Estatal de Trabajadores de Comercio Hostelería y Juego</i>) |
| | LAB | Basque Country Union (<i>Langile Abertzaleen Batzordeak</i>) |
| | UGT | General Workers' Confederation (<i>Unión General de Trabajadores</i>) |
| | USO | Workers' Trade Union Federation (<i>Union Sindical Obrera</i>) |
| Sweden (SE) | HRF | Hotel and Restaurant Workers' Union (<i>Hotell- och Restaurang Facket</i>) |
| | Kommunal | Swedish Municipal Workers' Union |
| | LO | Swedish Trade Union Confederation (<i>Landsorganisationen i Sverige</i>) |
| | SHR | Swedish Hotel and Restaurant Association (<i>Sveriges Hotell- och Restaurangföretagare</i>) |
| | SKL | Swedish Association of Local Authorities and Regions (<i>Sveriges Kommuner och Landsting</i>) |
| | Unionen | Trade Union for Professionals in the Private Sector |
| United Kingdom (UK) | BHA | British Hospitality Association |
| | CBI | Confederation of British Industry |
| | CSEU | Confederation of Shipbuilding and Engineering Unions |
| | GMB | General, Municipal, Boilermakers and Allied Trade Union |
| | STUC | Scottish Trades Union Congress |
| | TUC | Trades Union Congress |
| | Unite | Unite the Union |
| | USDAW | Union of Shop, Distributive and Allied Workers |

| | Abbreviation | Full name of organisation |
|---------------|---------------------|--|
| Europe | CEMR | Council of European Municipalities and Regions |
| | CLRAE | Congress of Local and Regional Authorities of Europe |

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| ECF-IUF | European Committee of Food, Catering and Allied Workers' Unions within the International Union of Food Workers |
| EFBWW | European Federation of Building and Woodworkers |
| EFCI | European Federation of Cleaning Industries |
| 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 |
| ETLC | European Trade Union Liaison Committee on Tourism |
| ETUC | European Trade Union Confederation |
| ETUF: TCL | European Trade Union Federation: Textiles, Clothing and Leather |
| EURATEX | European Apparel and Textile Organisation |
| Eurocadres | Council of European Professional and Managerial Staff |
| EuroCommerce | European Retail, Wholesale and International Trade Association |
| EUROWEA | European Workers' Education Association |
| FERCO | European Confederation of Contract Catering Organisations (<i>Fédération Européenne de la Restauration Collective Concédée</i>) |
| HOTREC | Confederation of National Associations of Hotels, Restaurants, Cafés and Similar Establishments in Europe |
| SCECBU | Standing Committee of European Central Bank Unions |
| UGAL | Union of Groups of Independent Retailers of Europe |
| UNI-Europa | Union Network International – Europe |

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