



# Representativeness of the European social partner organisations: Footwear industry

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*This study examines the state of play regarding social dialogue in the footwear industry. It first gives a brief outline of the industry's economic background, then focuses on its social partner organisations in the EU Member States (except for Ireland, Luxembourg and Malta), looking in particular at membership levels, role in collective bargaining and public policy, and national and European affiliations. The report concludes with an analysis of the relevant European organisations in the footwear industry, in particular their membership composition and their capacity to negotiate. The aim of the EIRO representativeness studies is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. The impetus for these studies arises from the goal of the European Commission to recognise the representative social partner organisations to be consulted under the EC Treaty provisions. Hence, this study is designed to provide the basic information required to establish and evaluate sectoral social dialogue.*

## **Objectives of study**

The aim of this **representativeness** study is to identify the relevant national and supranational associational actors – that is, the **trade unions** and **employer organisations** – in the field of industrial relations in the footwear industry (the manufacture of footwear), and to show how these actors relate to the industry's European interest associations of labour and business. The impetus for this study, and for similar studies in other sectors, arises from the aim of the **European Commission** to identify the representative social partner organisations to be consulted under the EC Treaty provisions. 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 EU Member States. Therefore, only European organisations that meet this precondition will be admitted to the European social dialogue.

Against this background, the study will first identify the relevant national social partner organisations in the footwear industry, subsequently analysing the structure of the industry's relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both the national and European level of interest representation. The study includes only organisations whose membership domain is 'sector related' (see below). At both national and European levels, a multiplicity of associations exists, which are not considered as social partner organisations as they do not essentially deal with industrial relations. Thus, there is a need for clear-cut criteria that will enable analysis to 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/or 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 those sector-related European organisations that are on the Commission's list of consultation. In addition, the report considers any other sector-related European association with sector-related national social partner organisations under its umbrella. Thus, the aim of identifying the relevant

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sector-related national and European social partner organisations applies both a ‘top-down’ and ‘bottom-up’ approach.

## Definitions

For the purpose of this study, the footwear industry 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 footwear industry is defined as embracing NACE 15.2.0 (manufacture of footwear).

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

- congruence – the domain of the organisation or scope of the collective agreement must be identical to the NACE demarcation, as specified above;
- sectionalism – the domain or scope covers only a certain part of the sector, as defined by the aforementioned NACE demarcation, while no group outside the sector is covered;
- overlap – the domain or scope covers the entire sector, along with parts of one or more other sectors; however, it is important to note that the study does not include general associations that do not deal with sector-specific matters;
- sectional overlap – the domain or scope covers part of the sector as well as parts of one or more other sectors.

At European level, the European Commission established a European Sectoral Social Dialogue Committee for the footwear industry in 1999. The European Confederation of the Footwear Industry ([Confédération Européenne de la Chaussure, CEC](#)) on the employer side, as well as the [European Trade Union Federation: Textile, Clothing and Leather \(ETUF:TCL\)](#) on the employees’ side, participate in the sector’s European social dialogue. Thus, affiliation to one of these European organisations is a sufficient criterion for classifying a national association as a relevant 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 ETUF:TCL due to its multi-sectoral domain. Thus, the study will include only those organisations affiliated to ETUF:TCL whose domain relates to the footwear industry.

## Collection of data

The collection of quantitative data, such as those on membership, is essential for investigating the representativeness of the social partner organisations. Unless cited otherwise, this study draws on the country studies provided by the [EIRO national centres](#). It is often difficult to find precise quantitative data. In such cases, rough estimates are provided rather than leaving a question blank, given the practical and political relevance of this study. However, if there is any doubt over the reliability of an estimate, this will be noted.

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

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

- personal estimates made by representatives of the respective organisations.

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

## Structure of report

The report consists of three main parts, beginning with a brief summary of the footwear industry's economic background. The report then analyses the relevant social partner organisations in all of the EU Member States, with the exception of Ireland, Luxembourg and Malta where the footwear industry is or has become non-existent. The study therefore covers 24 European countries in total. The third part of the analysis considers the representative associations at European level. Each section will contain a brief introduction explaining the concept of representativeness in greater detail, followed by the study findings. As representativeness is a complex issue, it requires separate consideration at national and European level for two reasons. Firstly, the method applied by national regulations and practices to capture representativeness has to be taken into account. Secondly, the national and European organisations differ in their tasks and scope of activities. The concept of representativeness must therefore be suited to this difference.

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

## Economic background

Over the past 10 to 15 years, the EU footwear manufacturing industry has been undergoing extensive restructuring owing to globalisation, deregulation, trade liberalisation, technological change and competition from the Far East. During this period, the EU footwear industry has lost an indefinite, but significant, proportion of both companies and employment. For instance, according to CEC, some 60,000 jobs were lost in the EU footwear industry in 2005 alone, either directly or indirectly, following the closure of 915 factories. This major reduction in activities mainly ensued from the elimination of the quota system within the [World Trade Organization \(WTO\)](#) in January 2005, which had previously applied. In this respect, the footwear industry does not vary significantly from many other European manufacturing industries. Nevertheless, it is a salient property of the industry that it has to face increasing and dramatic competition from low labour cost countries – in particular, from Far East countries such as China and Vietnam. This competition is widely deemed extremely unfair due to extensive dumping and state intervention practices applied in these countries. It is estimated that, at the time of writing, no more than about 20,000 enterprises are still operating in the footwear industry in the 27 Member States of the European Union (EU27), which are estimated to employ less than 300,000 workers altogether. These figures suggest that the footwear industry is characterised by a predominance of small and medium-sized enterprises (SMEs). Based on economic indicators such as turnover, production and employment, Italy is still the sector's most important country in the EU. Other EU Member

States with relatively high manufacturing rates are the Czech Republic, Hungary, Slovakia, Spain, Poland, Portugal and Romania.

In order to address the continuously rising competitive pressure from abroad, EU footwear manufacturers are seeking to expand their strength, which lies in high quality output in terms of technical, design and fashion-related terms.

Recently, the Sectoral Social Dialogue Committee in the footwear industry has been working on the issues of **corporate social responsibility**, trade developments, market access and marking of origin in respect of footwear imported from non-EU countries. Moreover, the committee has urged the European Commission to prolong the existing anti-dumping measures in relation to unfair competitive practices causing injury to the Community industry. Moreover, the sectoral social partners at European level signed, in 2000, a code of conduct, which encourages both employers and workers to respect core labour standards, in line with the conventions of the [International Labour Organization \(ILO\)](#).

All but three of the EU27 Member States record sector-related business activities. Therefore, this study covers all Member States with the notable exception of Ireland, Luxembourg and Malta, where the sector is or has become non-existent. Tables 1 and 2 give an overview of the sector's development from the mid to late 1990s to the mid to late 2000s, presenting a few indicators which are important to industrial relations and social dialogue. In most Member States (10 out of 15), for which related data are available, the number of companies has more or less decreased, reflecting the generally shrinking trend of the sector. By contrast, in five countries, the number of companies has remained largely equal or even increased. However, these increases at least partially appear to be attributable to a change in the sectoral structure rather than to an actual growth in production and/or employment. Available data on total employment and the number of employees support the assumption of the starkly dwindling significance of the sector in most EU Member States. Moreover, in the case of Slovakia, the respective data of the time series are not directly comparable, since the 2007 figure – in contrast to the 1996 figure – includes small subcontractors.

All countries with available data record a decrease in overall employment and/or in the number of employees. In several countries, such as Cyprus, France, Slovenia, Sweden and the United Kingdom (UK), the majority of workplaces registered in the mid to late 1990s were lost within a decade. In all countries for which comparable data are available, the number of employees either largely corresponds or is fairly close to the total number in employment. This indicates that the sector is characterised by a relatively high incidence of standard employment. Tables 1 and 2 also show that women represent the majority of workers in the sector in most countries. In several countries for which data are available, such as Bulgaria, the Czech Republic, France, Romania and Slovakia, female employment is at least twice as high as male employment. Higher male employment rates compared with those of women are recorded only in the Netherlands and Spain, while the relationship between the sexes is largely balanced in the case of Cyprus, Denmark and Sweden. Table 2 also indicates that, as already outlined, the sector is quite small and is continuing to shrink. Its share of aggregate employment and the number of employees is 0.5% or lower in all of the countries under examination, except for Bulgaria, Portugal, Romania and Slovakia. In some countries, such as Belgium, Denmark, Latvia, the Netherlands and Sweden, regular employment in the sector is extremely scarce, comprising only a few hundreds of employees.

**Table 1: Total employment in footwear industry, 1996 and 2007**

	Number of employers		Total employment		Male employment		Female employment	
	1996	2007	1996	2007	1996	2007	1996	2007
<b>AT</b>	n.a.	103 <sup>a,b</sup> (>350) <sup>c</sup>	n.a.	1,761 <sup>a,c</sup> (>2,500)	n.a.	734 <sup>a</sup>	n.a.	1,027 <sup>a</sup>
<b>BE</b>	30	19	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<b>BG</b>	304 <sup>d</sup>	389	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<b>CY</b>	42	44 <sup>a</sup>	1,130	210 <sup>a</sup>	533	101 <sup>a</sup>	580	109 <sup>a</sup>
<b>CZ</b>	634	739	23,900	12,400	7,500	3,900	16,400	8,500
<b>DE</b>	n.a.	569 <sup>a</sup>	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<b>DK</b>	64 <sup>f</sup>	34	312	256	157	128	155	128
<b>EE</b>	20 <sup>d</sup>	22	1,558 <sup>d</sup>	965 <sup>g</sup>	331 <sup>d</sup>	n.a.	1,227 <sup>d</sup>	n.a.
<b>EL</b>	n.a.	920 <sup>e</sup>	n.a.	3,491 <sup>e</sup>	n.a.	1,597 <sup>e</sup>	n.a.	1,894 <sup>e</sup>
<b>ES</b>	3,153 <sup>h</sup>	2,167 <sup>e</sup>	66,493 <sup>h</sup>	40,795 <sup>e</sup>	36,300 <sup>h</sup>	24,491 <sup>e</sup>	30,193 <sup>h</sup>	16,304 <sup>e</sup>
<b>FI</b>	99	76	2,176	1,580	843	564	1,333	1,016
<b>FR</b>	n.a.	240	n.a.	9,264	n.a.	n.a.	n.a.	n.a.
<b>HU</b>	242	158	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<b>IT</b>	8,467	6,450	122,186	88,688	57,995	42,105	64,191	46,583
<b>LT</b>	n.a.	<65 <sup>e</sup>	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<b>LV</b>	n.a.	31 (~5) <sup>e</sup>	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<b>NL</b>	200	75 <sup>a</sup>	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<b>PL</b>	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<b>PT</b>	>1,609 <sup>j</sup>	>1,450 <sup>i</sup>	68,610 <sup>k</sup> (>54,622 <sup>j</sup> )	64,159 <sup>h</sup> (>46,560 <sup>i</sup> )	30,511 <sup>k</sup>	24,483 <sup>h</sup>	38,099 <sup>k</sup>	39,676 <sup>h</sup>
<b>RO</b>	n.a.	1,625 <sup>a</sup>	n.a.	86,970 <sup>a</sup>	n.a.	14,970 <sup>a</sup>	n.a.	72,000 <sup>a</sup>
<b>SE</b>	96	52	640	289	331	145	309	144
<b>SI</b>	188	88	6,363	2,028	1,802	803	4,561	1,225
<b>SK</b>	141	255 <sup>l</sup>	17,320	12,459	4,935	3,550	12,385	8,909
<b>UK</b>	n.a.	292	26,266	4,652	15,050	1,917	11,216	2,735

Notes: <sup>a</sup> = 2006; <sup>b</sup> = figure refers to companies; <sup>c</sup> = contradictory information due to different sources; <sup>d</sup> = 2000; <sup>e</sup> = 2008; <sup>f</sup> = 1999; <sup>g</sup> = 2000 and 2007 data are not directly comparable due to changes in mode of count; <sup>h</sup> = 2001; <sup>i</sup> = 2003; <sup>j</sup> = 1998; <sup>k</sup> = 1991; <sup>l</sup> = figure includes small subcontractors.

n.a. = not available

Source: EIRO national centres, 2009

**Table 2: Total employees in footwear industry, 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
<b>AT</b>	n.a.	1,677 <sup>a,b</sup> (>2,500)	n.a.	670 <sup>a</sup>	n.a.	1,007 <sup>a</sup>	n.a.	0.04 <sup>a</sup>	n.a.	0.05 <sup>a</sup>
<b>BE</b>	360	244	148	97	212	147	n.a.	n.a.	<0.01	<0.01
<b>BG</b>	16,623 <sup>c</sup>	16,595	4,403 <sup>c</sup>	3,405	12,220 <sup>c</sup>	13,190	n.a.	n.a.	0.87 <sup>c</sup>	0.70
<b>CY</b>	1,071	204 <sup>a</sup>	491	95 <sup>a</sup>	580	109 <sup>a</sup>	0.38	0.06 <sup>a</sup>	0.37	0.06 <sup>a</sup>
<b>CZ</b>	23,000	12,400	6,700	3,900	16,300	8,500	0.48	0.13	0.54	0.15
<b>DE</b>	n.a.	10,957 <sup>d</sup>	n.a.	4,539 <sup>d</sup>	n.a.	6,418 <sup>d</sup>	n.a.	n.a.	n.a.	0.03 <sup>d</sup>
<b>DK</b>	278	227	134	110	144	117	0.01	0.01	0.01	0.01
<b>EE</b>	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.30 <sup>c</sup>	0.10	n.a.	n.a.
<b>EL</b>	n.a.	2,669 <sup>d</sup>	n.a.	958 <sup>e</sup>	n.a.	1,711 <sup>d</sup>	n.a.	0.08 <sup>d</sup>	n.a.	0.08 <sup>d</sup>
<b>ES</b>	56,882 <sup>e</sup>	35,798 <sup>d</sup>	32,356 <sup>e</sup>	20,786 <sup>d</sup>	24,526 <sup>e</sup>	15,012 <sup>d</sup>	0.41 <sup>e</sup>	0.22 <sup>d</sup>	0.44 <sup>e</sup>	0.24 <sup>d</sup>
<b>FI</b>	2,036	1,527	743	529	1,293	998	0.10	0.06	0.11	0.07
<b>FR</b>	29,364	8,986	n.a.	2,763	n.a.	6,223	n.a.	n.a.	0.18	0.05
<b>HU</b>	13,865	7,766	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<b>IT</b>	109,321	79,350	51,901	37,672	57,420	41,678	0.57	0.38	0.68	0.46
<b>LT</b>	<2,502 <sup>f</sup>	<1,512	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	<0.22 <sup>f</sup>	<0.12
<b>LV</b>	n.a.	268 <sup>a</sup>	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.02
<b>NL</b>	1,500	800 (410) <sup>b</sup>	1,000	500	500	300	n.a.	n.a.	0.02	0.01
<b>PL</b>	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<b>PT</b>	63,234 <sup>g</sup>	59,260 <sup>e</sup>	26,845 <sup>g</sup>	21,472 <sup>e</sup>	36,389 <sup>g</sup>	37,788 <sup>e</sup>	1.66 <sup>g</sup>	1.38 <sup>e</sup>	2.00 <sup>g</sup>	1.56 <sup>e</sup>
<b>RO</b>	n.a.	86,707 <sup>a</sup>	n.a.	14,927 <sup>a</sup>	n.a.	71,780 <sup>a</sup>	n.a.	1.03 <sup>a</sup>	n.a.	1.86 <sup>a</sup>
<b>SE</b>	539	244	251	113	288	131	0.02	0.01	0.02	0.01

	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
<b>SI</b>	6,028	1,851	1,608	727	4,420	1,124	0.86	0.24	0.95	0.26
<b>SK</b>	17,036	12,224	4,854	3,483	12,182	8,741	0.82	0.53	0.86	0.60
<b>UK</b>	25,531	4,136	14,656	1,400	10,874	2,735	0.10	0.02	0.12	0.02

Notes: <sup>a</sup> = 2006; <sup>b</sup> = contradictory information due to different sources; <sup>c</sup> = 2000; <sup>d</sup> = 2008; <sup>e</sup> = 2001; <sup>f</sup> = 2003; <sup>g</sup> = 1991.

*n.a.* = not available

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; the 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 (see 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 the European social dialogue. Hence, the role of the national actors in collective bargaining and public policymaking constitutes another important component of representativeness. The effectiveness of European social dialogue tends to increase with the growing ability of the national affiliates of the European organisations to regulate the employment terms and influence national public policies affecting the sector.

A cross-national comparative analysis shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy (see Traxler, 2004, pp. 571–598). 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 report considers only organisations whose domain relates to the footwear industry. However, there is insufficient room in this report to delineate the domain demarcations of all 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. The research usually refers to relative membership strength as the density – in other words, the ratio of actual to potential members.

Furthermore, a difference also arises between trade unions and employer organisations in relation to measuring membership strength. Trade union membership simply means the number of unionised persons. In addition to taking the total membership of a trade union as an indicator of its strength, it is also reasonable to break down this membership total according to gender. However, measuring the membership strength of employer organisations is more complex since they organise collective entities, namely companies that employ employees. In this case, 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 as a sector-related social partner organisation, as defined earlier. Of the 24 countries under consideration, only one does not record any sector-related trade union – that is, Latvia. In the remaining 23 countries, 54 sector-related trade unions could be identified. None of these 54 trade unions has demarcated its domain in a way which is congruent with the sectoral 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 in footwear industry, 2007–2008**

Country	Type of membership <sup>a</sup>	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations <sup>b</sup>
			Members	Members in sector	Female membership (% of total membership)	Domain	Sector (sectoral domain)			
<b>AT</b>										
GMTN	Vol.	SO	223,349	<529	16.7%	n.a.	31.5% (42%–43%)	Yes	No	ÖGB, EFFAT, EMF, ETUF: TCL, EMCEF
GPA-DJP	Vol.	SO	244,623	33	43.4%	~20%	2% (7%–8%)	Yes	No	ÖGB, UNI-Europa, EFFAT, EMCEF, EPSU, Euro-cadres
<b>BE</b>										
CG-ABVV/FGTB	Vol.	SO*	370,304	n.a.	n.a.	n.a.	n.a.	Yes	Yes	ABVV/FGTB, ETUF: TCL
ACV/CSC Énergie et chimie	Vol.	SO*	53,815	n.a.	33%	n.a.	n.a.	Yes	Yes	ACV/CSC, EMCEF
ACLVB-CGSLB	Vol.	O*	259,367	n.a.	n.a.	n.a.	n.a.	Yes	Yes	ETUF: TCL, UNI-Europa
SETCa/BBTK	Vol.	SO*	373,876	n.a.	n.a.	n.a.	n.a.	Yes	No	ABVV- FGTB, UNI-Europa, EMCEF, Euro-cadres
CNE	Vol.	SO*	148,201	n.a.	64%	n.a.	n.a.	Yes	No	ACV/CSC, UNI-Europa, EMCEF, Euro-cadres
LBC-NVK	Vol.	SO*	300,055	n.a.	59%	n.a.	n.a.	Yes	No	ACV/

Country	Type of membership <sup>a</sup>	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations <sup>b</sup>
			Members	Members in sector	Female membership (% of total membership)	Domain	Sector (sectoral domain)			
										CSC, UNI-Europa, EMCEF, Euro-cadres
<b>BG</b>										
FOSIL	Vol.	O*	10,475	610	80%	n.a.	3.7% (3.7%)	Yes	No	CITUB, ETUF: TCL
FLI	Vol.	O*	5,000	60	70%	n.a.	0.4% (0.4%)	Yes	No	CL Podkrepa, ETUF: TCL
<b>CY</b>										
OBIEK	Vol.	O*	8,875	n.a.	30%	n.a.	n.a.	Yes	No	SEK, ETUF: TCL
SEVETTYK	Vol.	O*	5,666	50	43%	n.a.	24.5% (24.5%)	Yes	No	PEO
<b>CZ</b>										
OSTOK	Vol.	O	9,000	260	76%	n.a.	2.1% (2.1%)	Yes	No	CMKOS, ETUF: TCL
<b>DE</b>										
IGBCE	Vol.	O	701,053	3,300	19.4%	n.a.	25% (25%)	Yes	No	DGB, ETUF: TCL
<b>DK</b>										
3F	Vol.	O	332,835	14	33%	70%	6.2%	Yes	No	CO-Industri, ETUF: TCL, EMCEF, UNI-Europa, EFFAT, EPSU, ETF, EFBWW
<b>EE</b>										
ETTAF	Vol.	O	1,650	30	80%	1.3%	3.1%	Yes	No	EAKL,

Country	Type of membership <sup>a</sup>	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations <sup>b</sup>
			Members	Members in sector	Female membership (% of total membership)	Domain	Sector (sectoral domain)			
							(3.1%)			ETUF: TCL
<b>EL</b>										
OEKIDE	Vol.	O	21,500	530	n.a.	30.7%	20% (20%)	Yes	Yes	<i>GSEE</i> , ETUF: TCL
<b>ES</b>										
FITEQA-CC.OO	Vol.	O*	55,000	n.a.	27%	10%–11%	n.a.	Yes	Yes	<i>CC.OO</i> , ETUF: TCL
FIA-UGT	Vol.	O*	80,000	3,000	20%	10%–11%	7% (7%)	Yes	Yes	<i>UGT</i> , ETUF: TCL
<b>FI</b>										
Kemianliitto	Vol.	SO*	46,000	1,147	52%	85%	75% (92%)	Yes	Yes	<i>SAK</i> , ETUF: TCL, EMCEF
TU	Vol.	SO*	125,000	250	49%	79%	16% (85%)	Yes	Yes	<i>STTK</i> , UNI- Europa, EMF, EMCEF, ETUF: TCL, EFFAT, ETF, EFBWW
<b>FR</b>										
FS-CFDT	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	<i>CFDT</i> , ETUF: TCL
SNPE-FNAA-CFE-CGC	Vol.	SO*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	<i>CFE-CGC</i> , ETUF: TCL
CMTE-CFTC	Vol.	O*	n.a.	n.a.	60%	n.a.	n.a.	Yes	No	<i>CFTC</i> , ETUF: TCL
THC-CGT	Vol.	O*	n.a.	n.a.	50%	n.a.	n.a.	Yes	No	<i>CGT</i> , ETUF: TCL

Country	Type of membership <sup>a</sup>	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations <sup>b</sup>
			Members	Members in sector	Female membership (% of total membership)	Domain	Sector (sectoral domain)			
FGCTH-CGT-FO	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	<i>CGT-FO</i> , <i>ETUF</i> : <i>TCL</i>
<b>HU</b>										
BDSZ	Vol.	O	833	330	70%–80%	8.3%	4.2% (4.2%)	Yes	No	<i>MSZOSZ</i> <i>ETUF</i> : <i>TCL</i>
HVDSZ 2000	Vol.	O	11,640	230	n.a.	7.8%	3% (3%)	Yes	No	<i>MSZOSZ</i> <i>EPSU</i>
BVDO-SZSZ	Vol.	SO	1,300	30	30%	20%	0.4% (30%)	Yes	No	<i>FRDESZ</i> <i>LIGA</i>
<b>IT</b>										
FILTEA-CGIL	Vol.	O*	97,000	19,157	35%	19.4%	24.1% (24.1%)	Yes	Yes	<i>CGIL</i> , <i>ETUF</i> : <i>TCL</i>
FEMCA-CISL	Vol.	O*	131,545	11,291	30%	16.5%	14.2% (14.2%)	Yes	Yes	<i>CISL</i> , <i>ETUF</i> : <i>TCL</i> , <i>EMCEF</i>
UILTA-UIL	Vol.	O*	43,385	n.a.	n.a.	n.a.	n.a.	Yes	Yes	<i>UIL</i> , <i>ETUF</i> : <i>TCL</i>
UGL Chimici	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	<i>UGL</i>
<b>LT</b>										
LPIPSS	Vol.	O	980	30	98%	3%	<6% (<6%)	No	No	<i>LPS</i> <i>'Solidar-umas'</i> , <i>ETUF</i> : <i>TCL</i>
<b>LV</b>	–	–	–	–	–	–	–	–	–	–
<b>NL</b>										
FNV Bondgenoten	Vol.	O*	470,000	90	n.a.	n.a.	11.3%–22% (11.3%–22%)	Yes	Yes	<i>FNV</i> , <i>ETUF</i> : <i>TCL</i>
CNV Bedrijven-	Vol.	O*	90,000	30	n.a.	n.a.	3.8%–7.3% (3.8%–	Yes	Yes	<i>CNV</i> , <i>ETUF</i> :

Country	Type of membership <sup>a</sup>	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations <sup>b</sup>
			Members	Members in sector	Female membership (% of total membership)	Domain	Sector (sectoral domain)			
bond							7.3%)			TCL
<b>PL</b>										
OPZZ	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	No	No	ETUF: TCL
NSZZ Solidarność	Vol.	O*	n.a.	n.a.	n.a.	n.a.	n.a.	No	No	ETUF: TCL
<b>PT</b>										
Soicmadac	Vol.	SO*	4,500	4,300	66%	25%	10% (25%)	Yes	No	<i>FESETE, CGTP-IN, ETUF: TCL<sup>c</sup></i>
Sintevecc	Vol.	SO*	15,000	3,000	70%	n.a.	n.a.	Yes	No	<i>FESETE, CGTP-IN, ETUF: TCL<sup>c</sup></i>
SITESC	Vol.	SO*	4,000	n.a.	n.a.	n.a.	n.a.	Yes	No	<i>UGT</i>
STVNC	Vol.	SO*	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	–
STVSI	Vol.	SO*	<500	n.a.	n.a.	n.a.	n.a.	Yes	No	<i>UGT</i>
SINDEQ	Vol.	O*	7,000	n.a.	n.a.	n.a.	n.a.	No	No	<i>UGT, ETUF: TCL, EMCEF</i>
<b>RO</b>										
Pielarul	Vol.	O	8,000	7,350	n.a.	8.5%	9.2% (9.2%)	Yes	Yes	<i>CARTEL ALFA, ETUF: TCL</i>
<b>SE</b>										
IF Metall	Vol.	SO	400,000	n.a.	23%	96%	n.a.	Yes	No	<i>LO, ETUF: TCL, EMF, EMCEF</i>
Ledarna	Vol.	SO*	75,000	7	20%	15%	2.4% (29%)	Yes	No	<i>PTK, OFR, CEC</i>
Sveriges	Vol.	SO*	120,000	30	22%	60%	10%	Yes	No	<i>SACO, EMF,</i>

Country	Type of membership <sup>a</sup>	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	National and European affiliations <sup>b</sup>
			Members	Members in sector	Female membership (% of total membership)	Domain	Sector (sectoral domain)			
Ingenjörer							(75%)			UNI-Europa, FEANI, Eurocadres, EMCEF
Unionen	Vol.	SO*	500,000	100	50%	35%–50%	35% (67%)	Yes	No	<i>TCO, PTK, Eurocadres</i>
<b>SI</b>										
STUPIS	Vol.	O	9,100	>900	70%	43.3%	50% (50%)	Yes	No	ZSSS, ETUF: TCL
<b>SK</b>										
SOZ TOK	Vol.	O*	4,320	580	85%	n.a.	4.2% (4.2%)	No	Yes	<i>KOZ SR, ETUF: TCL</i>
OZ KOVO	Vol.	SO*	70,000	170	32%	49%	1.4% (14.2%)	Yes	Yes	<i>KOZ SR, EMF</i>
<b>UK</b>										
Unite	Vol.	O*	1,892,491	100	22.6%	7.5%	2.4% (2.4%)	No	No	<i>TUC, ETF, ETUF: TCL, EPSU, EMCEF, EMF, EFFAT, EFBWW</i>
Community	Vol.	O*	31,886	2,000	17%	0.1%	48.4% (48.4%)	Yes	Yes	<i>TUC, STUC, WTUC, ETUF: TCL</i>

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

<sup>a</sup> Vol. = voluntary

<sup>b</sup> National affiliations appear in italics; for the national level, only cross-sectoral (i.e. peak-level) associations are listed; for the European level, sectoral associations are only listed

<sup>c</sup> = affiliation via higher-order unit

O = Overlap, SO = Sectional overlap, \* = domain overlap

n.a. = not available

Source: EIRO national centres, 2009

In the footwear industry, only trade unions recording domain demarcations that are sectionally overlapping in relation to the sector could be identified. Domain demarcations resulting in overlap in relation to the sector by far prevail in the footwear industry, at 61.1%. Overlap largely arises from two different modes of demarcation. The first one refers to general, that is cross-sectoral, domains – as seen, for example, in the case of the Federation of Liberal Trade Unions of Belgium (*Centrale Générale des Syndicats Libéraux de Belgique/Algemene Centrale der Liberale Vakbonden van België*, [CGSLB/ACLVB](#)), or the Allied Unions (*FNV Bondgenoten*) and the Industry, Food and Transport Workers' Union (*CNV Bedrijvenbond*) in the Netherlands, or in relation to the trade unions *Unite* and *Community* in the UK. The second and more frequent mode of demarcation resulting in overlap relates to various forms of multi-sector domains, covering contiguous sectors, mostly in the broader clothing and textiles segment of the economy. This is the case, for instance, in relation to the following trade union organisations: the Federation of Independent Trade Union Organisations in Light Industry (*Fédération des Organisations Syndicales de l'Industrie Légère*, FOSIL) and the Federation of Light Industry (*Федерация Лека Промисленост*, FLI) in Bulgaria; the Trade Union of Workers in the Textiles, Clothing and Leather Industry of Bohemia and Moravia (*Odborový svaz pracovníků textilního, oděvního a kožedělného průmyslu Čech a Moravy*, [OSTOK](#)) in the Czech Republic; the Services Federation of the French Democratic Confederation of Labour (*Fédération des Services – Confédération française démocratique du travail*, [FS-CFDT](#)), the Chemicals, Mining, Textiles and Energy Federation affiliated to the French Christian Workers' Confederation (*Fédération Chimie, Mines, Textile, Energie – Confédération française des travailleurs chrétiens*, [CMTE-CFTC](#)), the Textile, Clothing and Leather Federation of the General Confederation of Labour (*Fédération textile habillement cuir – Confédération générale du travail*, [THC-CGT](#)), and the General Federation of Leather, Textiles and Clothing (*Fédération générale des cuirs, textiles, habillement*, FGCTH) affiliated to the General Confederation of Labour – *Force ouvrière* (*Confédération générale du travail – Force ouvrière*, [CGT-FO](#)) in France; the Greek Textile, Clothing and Leather Workers' Federation (OEKIDE); the Workers' Union of Mining and Energy (*Bánya- és Energiaipari Dolgozók Szakszervezete*, [BDSZ](#)) in Hungary; the Italian Federation of Workers in Textiles, Leather, Clothing and Footwear (*Federazione Italiana Lavoratori Tessili Abbigliamento Cuoio Calzature*, [Filtea](#)) and the Italian Textiles and Clothing Workers' Union (*Unione Italiana Lavoratori Tessili e Abbigliamento*, [Uilta](#)) in Italy; the Textile and Leather Processing Industries Trade Union of Slovenia (*Sindikat tekstilne in usnjarsko-predelovalne industrije Slovenije*, [STUPIS](#)); the Slovak Trade Union Association of the Textile, Clothing and Leather Industry (SOZTOK) in Slovakia; and the Federation of Textiles, Leather, Chemical and Allied Industries (*Federación de Industrias de Textil, Piel, Químicas y Afines*, [FITEQA](#)) in Spain.

Sectional overlap can be found in exactly 38.9% of the cases and is thus the second most common mode of domain demarcation that occurs in the footwear industry. 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 seen in the case of the Belgian Union of White-Collar Staff, Technicians and Managers ([Syndicat des Employés, Techniciens et Cadres/Bond der Bedienden, Technici en Kaders, SETCa/BBTK](#)), or the National Agricultural and Food Federation ([Fédération nationale agroalimentaire](#), FNAA) 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](#)) in France, and the Swedish Organisation for Managers ([Ledarna -Sveriges chefsorganisation, Ledarna](#)) as well as the Swedish Association of Graduate Engineers ([Sveriges Ingenjörer](#));
- employment status – such as white-collar workers' status, as observed in the case of the Union of Salaried Employees, Graphical Workers and Journalists ([Gewerkschaft der Privatangestellten – Druck, Journalismus, Papier, GPA-DJP](#)) in Austria, the National Federation of White-collar Workers ([Landelijke Bedienden Centrale/Nationaal Verbond van het Kaderpersoneel, LBC/NVK](#)) in Belgium, the Union of Salaried Employees ([Toimihenkilöunioni, TU](#)) in Finland, and [Unionen](#) the trade union for professionals in Sweden's private sector; or blue-collar employees, as seen in the case of the Metalworking, Textiles, Agriculture and Food-processing Union ([Gewerkschaft Metall- Textil-Nahrung, GMTN](#)) in Austria, the United Federation of Danish Workers ([Fagligt Fælles Forbund, 3F](#)) in Denmark and the Union of Metalworkers ([IF Metall](#)) in Sweden;
- geographic region – as is the case for example regarding Portugal's [Union of Workers in the Shoe, Bag and Related Industries in the Districts of Aveiro and Coimbra](#) (SOICMADAC), the [Union Workers in the Textile, Clothing, Shoe and Tanning Sectors of the District of Porto](#) (SINTEVECC), the [Union of Salesmen of Northern and Central Portugal](#) (STVNC) and the [Union of Salesmen of Southern Portugal and the Islands](#) (STVSI), each of which are active in only certain regions or districts of the country.

Finally, 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 footwear industry. This is presumably because of the very small size of the sector, thus preventing sectionalist representation only.

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

Looking at the trade union membership data, it emerges that male employees comprise the majority group in over half (54.3%) of the trade unions for which membership data by gender are available. At first glance, this finding is quite surprising, since the sector's employment is clearly dominated by female employees (see Table 1). 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 footwear industry. For instance, Austria's blue-collar GMTN trade union records a female membership ratio (as a percentage of

the total trade union membership) of only 16.7% overall, while the proportion of female trade union members in the country's footwear industry is 70.3%.

Membership of the sector-related trade unions is voluntary in all cases of the 24 Member States under consideration. 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 about one fifth (20.8%) of the trade unions that document figures on density. Some 16.7% of the trade unions gather 70% or more of the employees covered by their domain, while 37.5% and 12.5% of the trade unions for which data are available organise fewer than 15% and 5% of the employees within their domain, respectively. The remaining trade unions (41.7%) record a density of between 15% and 50% of their potential members. These results indicate that the overall domain density of the sector-related trade unions is relatively low. However, it should also be noted that for only 24 out of the 53 sector-related trade unions, domain density data are recorded. Therefore, these figures should be treated with caution.

Compared with their already rather low overall domain densities, the sector-related trade unions' density in the footwear industry tends to be even lower. When looking at sectoral density, it is important to differentiate between the trade unions' sectoral density, on the one hand, and their sectoral domain density on the other. Whereas the former measures the ratio of the total number of trade union members 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. Even when taking into account the trade unions' sectoral domain density – which tends to be higher than their sectoral density for the reasons outlined above – the trade unions' density in the footwear industry tends to be lower compared with the density ratio referring to their domain on aggregate. Sectoral domain density is over 50% in the case of only 12.9% of the trade unions for which data are available. More than half (51.6%) of the trade unions record a sectoral domain density lower than 15%, and 35.5% of them record a sectoral domain density of between 15% and 50%. Again, it should be noted that for a considerable proportion of the sector-related trade unions, no data on sectoral domain density are available. With regard of those trade unions for which figures on both measures are recorded – that is, for sectoral domain density and domain density on aggregate – no clear picture can be drawn in terms of tendencies. There are almost as many trade unions with a lower sectoral domain density compared with the aggregate density as there are unions showing the reverse relationship between the two densities.

Relatively low unionisation rates in the footwear industry do not come as a surprise, given the small size of the vast majority of establishments in the sector, which in turn 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 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 footwear industry. For 20 out of the 24 countries under consideration, sector-related employer organisations are documented. In two of these countries, at least a proportion of the listed

employer organisations are not a party to collective bargaining. They are classified here as social partner organisations only due to their European-level affiliation to CEC. Some 19 of these 20 countries have one or more employer organisation engaged in collective bargaining. In four countries – Estonia, Latvia, Lithuania and Slovakia – there is no employer organisation that 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 footwear industry. 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 CEC, regardless of whether they have a role in national bargaining, which gives them the status of a social partner organisation within the framework of this study. Of the 31 employer organisations listed in Table 4, two organisations belong to this group. In 13 of the 20 countries where employer organisations exist, only one single employer organisation (in the meaning of a social partner organisation as defined earlier) has been established. In contrast to the trade union side, where pluralist associational systems are prevailing, on the employer side the sector is dominated by single-organisation systems.

Moreover, the domains of the employer organisations tend to be narrower than those of the trade unions. Some 45.2% and 22.6% of these organisations rest on overlapping and sectionally overlapping domains, respectively. Strikingly, none of these organisations – with the possible exception of the Swedish Industrial and Chemical Employers’ Association ([Industri- och Kemigruppen, IKG](#)) – has a domain that is cross-sectoral. Alternatively, most cases of domain overlaps ensue from coverage of the broader shoe manufacturing industry (including the production of special footwear, such as orthopaedic shoes) and/or the leather, textiles and clothing sector. Overlaps of this kind can be found, in particular, in Austria, Belgium, Bulgaria, Cyprus, the Czech Republic, Finland, Hungary, Italy, the Netherlands, Poland, Portugal, Romania, Slovenia and the UK. Sectionalism or sectionalist overlaps (in case of broader domain demarcation in terms of sector) are mainly caused by domain demarcations that focus on company size and/or mode of production, for example: small-scale craft versus industrial production – as is the case regarding the [Association of the Austrian Footwear Industry \(VS\)](#) and the [Federal Association of Small-scale Craft Shoemakers \(BIS\)](#) in Austria, the [National Federation of Producers of Custom-made Shoes and Shoe Repairers \(NVMS\)](#) in Belgium, the [Danish Shoemakers’ Guild \(DS\)](#) in Denmark, the [Hellenic Association of Footwear Manufacturers and Exporters \(ELSEVIE\)](#) and the [Federation of Footwear Manufacturers in Greece \(FFMG\)](#), and the Italian Association of Small and Medium-sized Enterprises in Textiles, Clothing, Shoes and Other Sectors ([Unione nazionale piccola e media industria tessile, abbigliamento, calzature ecc, Uniontessile](#)), the [General Italian Federation of Artisans – National Federation of the Fashion Industry \(CFNM\)](#) and the [National Confederation of Artisans and Small and Medium-Sized Enterprises – Federmoda \(CNA Federmoda\)](#) in Italy; or footwear components manufacturing only, as is the case regarding the Spanish Association of the Footwear Components Industry ([Asociación Española de Empresas de Componentes para el Calzado, AEC](#)). Five of the organisations (16.1%) are sectionalist with regard to their domain. The same proportion of organisations (16.1%) has a domain which is more or less congruent with the sector definition. This means that the domain of these organisations largely focuses on the manufacture of footwear industry as defined earlier, although one cannot rule out the possibility that one or another of these organisations may also organise companies of contiguous sectors, such as manufacturers of orthopaedic shoes or of wooden or plastic shoe parts. The relative predominance of membership domains (sectionally) overlapping in relation to the sector indicates that the

technical definition of the sector is narrower than the lines along which most sector-related employers identify their common interests and band together in associations. The two existing sector-related employer organisations of Austria – namely, VS and BIS – can rely on obligatory membership. This is due to their public-law status as chamber units.

In those countries with a pluralist structure in relation to employer organisations, these associations have usually – perhaps with the exception of Slovenia – managed to maintain non-competing relationships. Their activities are complementary to each other as a result of interassociational differentiation by either membership demarcation (as is the case of Austria, Greece and, partially, Italy) or functions and tasks (as is the case of Italy and Sweden).

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. Except for a few associations in Italy, where a reverse relationship exists, 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. The deviant position of Italy in this respect arises from the fact that some organisations organise mainly or exclusively small-scale craft/artisan companies with very few or even no employees. In general, overall densities of the organisations in the sector tend to be higher compared with trade union densities (see above). One third and as many as 86.7% of the organisations for which related data are available register a sectoral domain density higher than 50% in terms of companies and employees, respectively. Some of them record employee densities higher than 90%. This again underlines the higher willingness of larger companies to associate.

One can infer from these findings that, despite relatively low density rates in terms of companies, the employer organisations manage to gather the sector’s most significant companies, 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 high proportion of SMEs. Traditionally, small companies show a lower willingness to gather in associations. In general, the findings suggest that, in the footwear industry, the employers are relatively poorly organised in terms of companies and quite well in terms of employees represented. However, it should be noted that for a significant proportion of the employer organisations, no density data are available. Therefore, the data should once again be treated with caution.

**Table 4: Domain coverage, membership and density of employer organisations in footwear industry, 2007–2008**

Country	Domain coverage	Membership			Density (%)			
		Type <sup>a</sup>	Companies (companies in sector)	Employees (employees in sector)	Companies		Employees	
					Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
<b>AT</b>								
VS	S	oblig.	23 (23)	1,391 (1,391)	100%	22% (100%)	100%	n.a. (100%)
BIS	SO	oblig.	800 (350)	3,200 (2,500)	100%	78% (100%)	100%	n.a. (100%)
<b>BE</b>								

Country	Domain coverage	Membership			Density (%)			
		Type <sup>a</sup>	Companies (companies in sector)	Employees (employees in sector)	Companies		Employees	
					Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
FEBIC	O*	vol.	21 (n.a.)	n.a. (n.a.)	n.a.	n.a.	n.a.	n.a.
NVMS	SO*	vol.	n.a. (n.a.)	n.a. (n.a.)	n.a.	n.a.	n.a.	n.a.
<b>BG</b>								
BULFFLGI	O	vol.	105 (82)	6,000 (4,000)	n.a.	21.1% (21.1%)	n.a.	24.1% (24.1%)
<b>CY</b>								
CMFL-GAA	O	vol.	26 (18)	n.a. (n.a.)	n.a.	41% (41%)	n.a.	n.a.
<b>CZ</b>								
ATOK	O	vol.	63 (1)	n.a. (n.a.)	n.a.	0.14% (0.14%)	n.a.	n.a.
<b>DE</b>								
HDS	C	vol.	78 (78)	n.a. (n.a.)	n.a.	n.a.	n.a.	n.a.
<b>DK</b>								
DS	S	vol.	35	7 (7)	100%	n.a. (100%)	100%	3.1% (100%)
<b>EE</b>								
<b>EL</b>								
ELSEVIE	S	vol.	120 (120)	>2,000 (>2,000)	Almost 100%	13% (almost 100%)	Almost 100%	75% (almost 100%)
FFMG	S	vol.	>400 (>400)	400 (400)	>50%	43.5% (>50%)	57%	15% (57%)
<b>ES</b>								
FICE	C*	vol.	>700 (>700)	n.a. (n.a.)	n.a.	32% (32%)	n.a.	n.a.
AEC	S*	vol.	280 (280)	n.a. (n.a.)	n.a.	13% (13%)	n.a.	n.a.
<b>FI</b>								
FLIA	O	vol.	38 (34)	1,658 (1,400)	16%	45% (45%)	87%	90% (90%)
<b>FR</b>								
FFC	C	vol.	240 (240)	8,986 (8,986)	Almost 100%	Almost 100% (100%)	Almost 100%	Almost 100% (100%)

Country	Domain coverage	Membership			Density (%)			
		Type <sup>a</sup>	Companies (companies in sector)	Employees (employees in sector)	Companies		Employees	
					Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
<b>HU</b>								
BCE-MKSZ	O	vol.	23 (14)	8,200 (4,935)	26.7%	8.9% (8.9%)	63%	63.5% (63.5%)
<b>IT</b>								
ANCI	C*	vol.	810 (n.a.)	23,328 (n.a.)	12.5%	12.5% (12.5%)	29.4%	29.4% (29.4%)
Union Tessile	SO*	vol.	3,280 (n.a.)	80,663 (n.a.)	n.a.	n.a.	n.a.	n.a.
CFNM	SO*	vol.	19,350 (n.a.)	164,800 (n.a.)	n.a.	42.1% (n.a.)	n.a.	27.3% (n.a.)
Unione CNA FEDER-MODA	SO*	vol.	25,000 (n.a.)	200,000 (n.a.)	31.2%	38.7% (n.a.)	22.6%	15.1% (n.a.)
Casartigiani	SO*	vol.	84,663 (n.a.)	35,587 (n.a.)	5.8%	5.4% (n.a.)	5.8%	0.3% (n.a.)
CLAAI	SO*	vol.	115,976 (n.a.)	48,749 (n.a.)	8%	5.9% (n.a.)	8%	2.1% (n.a.)
<b>LT</b>	–	–	–	–	–	–	–	–
<b>LV</b>	–	–	–	–	–	–	–	–
<b>NL</b>								
FNLS	O	vol.	45 (16)	n.a. (330)	n.a.	21.3%–34% (21.3%–34%)	n.a.	41.3%–80.5% (41.3%–80.5%)
<b>PL</b>								
PIPS	O	vol.	63 (n.a.)	n.a. (n.a.)	n.a.	n.a.	n.a.	n.a.
<b>PT</b>								
APICCAPS	O	vol.	365 (n.a.)	n.a. (n.a.)	20%	20% (20%)	n.a.	n.a.
<b>RO</b>								
PINC	O	vol.	1,000 (900)	55,000 (54,000)	56%	59% (59%)	58.5%	62.3% (62.3%)
<b>SE</b>								
Industri- och Kemi-Gruppen	O*	vol.	1,200 (10)	85,000 (150)	80%	20% (20%)	n.a.	n.a.

Country	Domain coverage	Membership			Density (%)			
		Type <sup>a</sup>	Companies (companies in sector)	Employees (employees in sector)	Companies		Employees	
					Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
Svenska skofabrikan tföreningen	C*	vol.	5 (5)	150 (150)	10%	10% (10%)	75%	75% (75%)
<b>SI</b>								
ZTOUPI	O*	vol.	59 (6)	n.a. (935)	11%	7% (7%)	n.a.	50.5% (50.5%)
STU	O*	vol.	n.a. (n.a.)	n.a. (n.a.)	70%	n.a.	n.a.	n.a.
<b>SK</b>	–	–	–	–	–	–	–	–
<b>UK</b>	–	–	–	–	–	–	–	–
BFA	O	vol.	100 (>100)	25,000 (2,400)	34.3%	34.3% (34.3%)	n.a.	50%–60% (50%–60%)

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

<sup>a</sup> vol. = voluntary membership; oblig. = obligatory membership

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

\* = Domain overlap

n.a. = not available

Source: EIRO national centres, 2009

**Table 5: Collective bargaining, consultation and national/European affiliations of employer organisations in footwear industry, 2007–2008**

Country	Collective bargaining	Consultation	National and European affiliations <sup>a</sup>
<b>AT</b>			
VS	yes	yes	WKÖ
BIS	yes	yes	WKÖ
<b>BE</b>			
FEBIC	yes	yes	FEB-VBO, CEC, CEDDEC
NVMS	yes	yes	UNIZO
<b>BG</b>			
BULFFLGI	yes	no	BIA, COTANCE
<b>CY</b>			

<b>Country</b>	<b>Collective bargaining</b>	<b>Consultation</b>	<b>National and European affiliations<sup>a</sup></b>
CMFL-GAA	yes	no	<i>OEB</i>
<b>CZ</b>			
ATOK	yes	no	<i>KZPS CR</i>
<b>DE</b>			
HDS	yes	n.a.	–
<b>DK</b>			
DS	yes	no	–
<b>EE</b>	–	–	–
<b>EL</b>			
ELSEVIE	yes	yes	<i>SEV, CEC</i>
FFMG	yes	yes	<i>GSEVEE</i>
<b>ES</b>			
FICE	yes	yes	<i>CEOE, CEPYME, CEC</i>
AEC	yes	yes	<i>CEOE, CEPYME</i>
<b>FI</b>			
FLIA	yes	yes	<i>EK, CEC, COTANCE</i>
<b>FR</b>			
FFC	yes	no	<i>CEC</i>
<b>HU</b>			
BCE-MKSZ	yes <sup>b</sup>	no	<i>MGYOSZ, CEC, COTANCE</i>
<b>IT</b>			
ANCI	yes	yes	<i>Confindustria, FIAMP, CFI, CEC</i>
Union Tessile	yes	yes	<i>Confapi</i>
CFNM	yes	yes	<i>Confartigianato Imprese, ATS, ACTE</i>
Unione CNA Federmoda	yes	yes	<i>CNA, ATS, ACTE</i>
Casartigiani	yes	yes	–
CLAAI	yes	yes	–

<b>Country</b>	<b>Collective bargaining</b>	<b>Consultation</b>	<b>National and European affiliations<sup>a</sup></b>
<b>LT</b>	–	–	–
<b>LV</b>	–	–	–
<b>NL</b>	–	–	–
<b>FNLS</b>	yes	yes	CEC
<b>PL</b>	–	–	–
<b>PIPS</b>	no	no	CEC
<b>PT</b>	–	–	–
<b>APICCAPS</b>	yes	no	<i>CIP, CEC</i>
<b>RO</b>			
<b>PINC</b>	yes	yes	<i>UGIR 1903, COTANCE</i>
<b>SE</b>			
Industri- och KemiGruppen	yes	no	<i>Industriarbetsgivarna, Svenskt Näringsliv</i>
Svenska Skofabrikantföreningen	no	no	<i>IKG, CEC</i>
<b>SI</b>			
<b>ZTOUPI</b>	yes	no	<i>GZS, CEC, Euratex</i>
<b>STU</b>	yes	no	<i>ZDS</i>
<b>SK</b>	–	–	–
<b>UK</b>			
<b>BFA</b>	yes	yes	CEC

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

<sup>a</sup> = national affiliations appear in italics; only affiliations to sectoral European associations are listed

<sup>b</sup> = collective bargaining involvement via higher-order unit (i.e. MKSZ)

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 and of unclear domain demarcation, only in one country (Portugal) has inter-union rivalry and competition for bargaining capacities been identified (see above). In the case of the sector-related employer organisations, no noticeable competition over collective bargaining capacities has been reported.

The data presented in Table 6 provide an overview of the system of sector-related collective bargaining in the 24 countries under consideration. The importance of collective bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (see Traxler, 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 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 then enables them to participate in the bargaining process and to benefit from the organisation's related services in a situation where the respective collective agreement will bind them in any case (see Traxler, Blaschke and Kittel, 2001).

**Table 6: System of sectoral collective bargaining in footwear industry, 2007–2008**

Country	Collective bargaining coverage (CBC)	Proportion of multi-employer bargaining (MEB) as % of total CBC	Extension practices <sup>a</sup>
AT	100%	100%	(Pervasive)
BE	100%	MEB prevailing	Pervasive
BG	n.a. (100% <sup>b</sup> )	0% (100% <sup>b</sup> )	No practice
CY	Almost 100%	100%	No practice
CZ	n.a.	MEB prevailing	Limited/exceptional
DE	Almost 100%	Almost 100%	No practice
DK	6.2%	100%	No practice
EE	At least 17.7%	0%	No practice
EL	100%	100%	Pervasive
ES	100%	100%	Pervasive
FI	100%	100%	Pervasive
FR	Almost 100%	Almost 100%	No practice
HU	26%	0%	No practice
IT	100%	100%	(Pervasive)
LT	0%	n/a	n/a
LV	0%	n/a	n/a
NL	100%	MEB prevailing	Pervasive
PL	~10%	0%	No practice
PT	Almost 100%	99%	Pervasive
RO	100%	100%	Pervasive
SE	Almost 100%	Almost 100%	No practice
SI	Almost 100%	Almost 100%	Pervasive
SK	40%–50%	0%	No practice
UK	20%	MEB prevailing	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*

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

*<sup>b</sup> = when considering agreements on minimum social insurance thresholds, which are not wage agreements however*

*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 22 countries for which related data are available record an extraordinarily high coverage rate of (almost) 100% (Table 6). Conversely, collective bargaining is completely absent in only two countries. A third group of countries records sector-related collective bargaining at a very or rather low level, with bargaining coverage rates of between about 6% (as is the case of Denmark) and 40%–50% (as is the case of Slovakia). One can infer from these findings that in about two thirds of the 24 countries under consideration, the sector's industrial relations structures are well-established, while they appear to be underdeveloped in about one third of the countries. Closer consideration regarding the different countries reveals that collective bargaining coverage rates tend to be high in the 15 EU Member States prior to enlargement in 2004 and 2007 (EU15), with the notable exception of Denmark and the UK. On the other hand, sectoral bargaining standards vary widely among the 2004 accession countries. In Latvia and Lithuania, for instance, 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 Cyprus, Romania and Slovenia, while at least part of the sector is covered in Estonia, Hungary, Poland and Slovakia.

In most of the countries with available information, several factors which sometimes interact with each other account for the 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, France, Greece and Sweden. A third factor is the existence of pervasive extension practices – as observed in the case of Belgium, Finland, Greece, the Netherlands, Portugal, Romania, Slovenia and Spain. While coverage in countries with prevalent multi-employer bargaining is generally high, with the exception of Denmark and the UK, single-employer bargaining arrangements in the sector are the exclusive type of bargaining in Bulgaria, Estonia, Hungary, Poland and Slovakia. In the latter group of countries, collective bargaining coverage is deemed to be low.

Due to the prevalence of multi-employer settlements in the sector, the use of extension practices is significant. Pervasive extension practices in the footwear industry 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 footwear industry 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.

## **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 nine of the 23 countries where sector-related trade unions are recorded. In 14 of the countries, a lack of regular consultation of any of the trade unions is reported. Since a multi-union system has been established in 15 out of the 23 countries with sector-related trade unions, one cannot rule out the possibility that the authorities favour certain trade unions over others or that the unions compete for participation rights. In five countries with a multi-union system – namely, Finland, Italy, the Netherlands, Slovakia and Spain – where a noticeable practice of consultation is observed, any of the existing trade unions may take part in the consultation process. By contrast, in Belgium and the UK, only some of the sector-related trade unions are consulted. Nevertheless, there is no evidence of inter-union conflicts over participation in public policy matters in the footwear industry.

### *Employer organisations*

More than half or 18 out of the 30 sector-related employer organisations for which related data are available are involved in consultation procedures. In countries with multi-organisation systems, no cases of conflict over participation rights among employer organisations are reported. In the multi-organisation systems of Austria, Belgium, Greece, Italy and Spain, where related data for all of the employer organisations are available, all of the sector's organisations are consulted. Conversely, in the pluralist systems of Slovenia and Sweden, none of the employer organisations is regularly consulted. Moreover, none of the countries records the co-existence of an organisation which is consulted and one that is not. In eight of the 19 countries with available information on each side – namely, Belgium, Finland, Greece, Italy, the Netherlands, Romania, Spain 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 only one of these 19 countries for which information on consultation is reported for organised business and labour – namely Austria – representatives of only one side, that is the employers, are consulted. In those countries where an employer organisation in the context of the aforementioned definition of a social partner organisation does not exist – that is, Estonia, Latvia, Lithuania and Slovakia – business is not necessarily excluded from consultation procedures. Under these circumstances, sectoral trade associations may be consulted, which has been the case until recently – as seen, for instance, in Slovakia.

### *Tripartite participation*

Turning from consultation to tripartite participation, the findings reveal that genuinely sector-specific tripartite bodies have been established in only two of the 24 countries under consideration – that is, Italy and the UK. This is mainly due to the small size of the footwear industry. Table 7 below lists a total of only three bodies of this kind, all of which are based on agreement. The UK-based [Skillset](#) organisation aims to improve the skills of textiles and footwear workers. In Italy, a tripartite committee for the realisation of the three-year national vocational training plan for the footwear industry has been set up. In addition, the country has established a tripartite fashion observatory, whose tasks and functions however are not quite clear. Other tripartite bodies listed in some country reports are not taken into account in this study, since they all cover broader industry segments such as the chemical or textiles sector and thus do not specifically target the footwear industry.

**Table 7: Tripartite sector-specific boards of public policy in footwear industry, 2007–2008**

Country	Name of body and scope of activity	Origin	Participants	
			Trade unions	Business associations
<b>IT</b>	Fashion Observatory	Agreement	FEMCA-CISL, FILTEA-CGIL, UILTA-UIL	ANCI, CFNM, CNA Federmoda, CLAAI, Casartigiani
	Tripartite Committee for the realisation of the three-year national vocational training plan for the footwear industry	Agreement	FEMCA-CISL, FILTEA-CGIL, UILTA-UIL	ANCI
<b>UK</b>	Skillset – the sector skills council for the fashion and textiles sector – aims to improve workers’ skills	Agreement	Community, GMB, Unite	BFA

*Notes: 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 footwear industry 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 ETUF:TCL, and one on the employer side, namely CEC, are particularly significant in the footwear industry. 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, ETUF:TCL, which is in turn affiliated to the [European Trade Union Confederation \(ETUC\)](#) and the [International Textile, Garment and Leather Workers' Federation \(ITGLWF\)](#), organises the whole textile, clothing and footwear segment of the economy. Therefore, its membership domain overlaps in relation to the footwear industry. By contrast, CEC represents only footwear companies; hence, its domain largely coincides with the sector under consideration. Nevertheless, some of its members also cover business areas outside the footwear industry (see Table 5). Moreover, CEC organises only business/employer organisations rather than individual companies.

### **Membership composition**

In terms of membership composition, it should be noted that the countries covered by ETUF:TCL and CEC extend beyond the 24 countries examined in this study. However, the report will only consider the members of these 24 countries. For ETUF:TCL, Table 8 lists the membership of sector-related trade unions drawn from the country reports. Accordingly, at least one affiliation in each country under consideration, except for Latvia, is recorded. In some countries – such as Belgium, Bulgaria, Finland, France, Italy, the Netherlands, Poland, Portugal, Spain and the UK – multiple memberships occur. Overall, ETUF:TCL counts 36 direct and two indirect (through a higher-order unit) affiliations from the countries under examination. More than two thirds of the trade unions listed in Table 3 are either directly or indirectly affiliated to ETUF:TCL. As far as available data on sectoral membership of the national trade unions provide sufficient information on their relative strength, one can conclude that ETUF:TCL covers the sector's most important labour representatives of the sector. Exceptional cases of uncovered major trade unions in the sector do not occur. Some 32 of the direct and indirect members of ETUF:TCL are involved in collective bargaining related to the footwear industry; six affiliates from countries such as Lithuania, Poland, Portugal, Slovakia and the UK are not.

**Table 8: Members of ETUF:TCL, 2009**

<b>Country</b>	<b>Members</b>
<b>AT</b>	GMTN*
<b>BE</b>	CG-ABVV/FGTB*, ACLVB/CGSLB*
<b>BG</b>	FOSIL*, FLI-Podkrepa*
<b>CY</b>	OBIEK/SEK*
<b>CZ</b>	OSTOK*
<b>DE</b>	IGBCE*
<b>DK</b>	3F*
<b>EE</b>	ETTAF*
<b>EL</b>	OEKIDE*
<b>ES</b>	FITEQA-CC.OO*, FIA-UGT*
<b>FI</b>	Kemiantliitto*, TU*
<b>FR</b>	FS-CFDT*, SNPE-FNAA-CFE-CGC*, CMTE-CFTC*, THC-CGT*, FGCTH-CGT-FO*
<b>HU</b>	BDSZ*
<b>IT</b>	FILTEA-CGIL*, FEMCA-CISL*, UILTA-UIL*
<b>LT</b>	LPIPSS
<b>LV</b>	–
<b>NL</b>	FNV Bondgenoten*, CNV Bedrijvenbond*
<b>PL</b>	OPZZ, NSZZ Solidarność
<b>PT</b>	SOICMADAC**, SINTEVECC**, SINDEQ
<b>RO</b>	Pielarul*
<b>SE</b>	IF Metall*
<b>SI</b>	STUPIS*
<b>SK</b>	SOZTOK
<b>UK</b>	Unite, Community*

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

*See Annex for list of abbreviations and full names of organisations.*

*\* Involved in sector-related collective bargaining*

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

*Source: EIRO national centres, 2009*

Table 9 lists the members of CEC. Of the 24 countries under consideration, CEC has 13 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 Belgium, Greece, Italy, Slovenia, Spain and Sweden. As far as they are available, one can infer from the sectoral membership data of the respective organisations of these countries that the most important associations are affiliated. However, taking into account also the role in collective bargaining as an indicator of an association's significance does not show a clear trend in this respect. In several countries, some important or even all employer organisations that conduct bargaining are not members of CEC. Moreover, in two countries – namely, Poland and Sweden – the affiliates of CEC are not engaged in bargaining. Employer organisations that are not involved in collective bargaining may regard themselves as trade associations rather than as industrial relations actors. Of the 13 direct affiliates of CEC, 11 are directly or indirectly (through a higher-order unit) involved in sector-related collective bargaining. This means that, in comparison with ETUF:TCL, no significant difference in terms of CEC's proportion of member organisations that are involved in bargaining can be found. CEC members cover collective bargaining in 11 of the 24 countries under consideration, which accounts for only slightly more than half of the number (20) of countries where sector-related collective bargaining is conducted by affiliates of its European-level counterpart, that is, ETUF:TCL. This indicates that there is quite a number of sector-related employer organisations across the EU not affiliated to CEC that are involved in collective bargaining. Moreover, this relationship underlines the role of single-employer bargaining conducted by the trade unions in some countries.

**Table 9: Members of CEC, 2009**

<b>Country</b>	<b>Members</b>
<b>AT</b>	–
<b>BE</b>	FEBIC*
<b>BG</b>	–
<b>CY</b>	–
<b>CZ</b>	–
<b>DE</b>	–
<b>DK</b>	–
<b>EE</b>	–
<b>EL</b>	ELSEVIE*
<b>ES</b>	FICE*

Country	Members
FI	FLIA*
FR	FFC*
HU	BCE**
IT	ANCI*
LT	–
LV	–
MT	–
NL	FNLS*
PL	PIPS
PT	APICCAPS*
RO	–
SE	Svenska Skofabrikantföreningen
SI	ZTOUPI*
SK	–
UK	BFA*

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

*See Annex for list of abbreviations and full names of organisations.*

*\* Involved in sector-related collective bargaining*

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

*Source: EIRO national centres, 2009*

## Capacity to negotiate

The third criterion of representativeness at the European level refers to the organisations' capacity to negotiate on behalf of their own members. According to the General Secretary of ETUF:TCL and the General Director of CEC, both organisations have in their statutes not obtained a general negotiating mandate by their respective members in matters of the European social dialogue. Instead, they have a general mandate to represent their respective members at European level. According to the respective organisations' officials, the Executive Committee of ETUF:TCL and both the Executive Committee and the General Assembly of CEC decide on a case by case basis whether to engage in negotiations at European level and on the scope of the negotiating mandate. In the case of ETUF:TCL, the respective affiliates eventually sign and endorse the agreements, joint statements or other documents concluded by the European social partners.

As proof of the weight of both ETUF:TCL and CEC, 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 ETUF:TCL represent a relatively large proportion of both sector-related trade unions and countries. Among the organisations listed are the following:

- the [European Mine, Chemical and Energy Workers' Federation \(EMCEF\)](#), with 14 affiliations covering eight countries;
- [UNI-Europa](#), with eight affiliations covering five countries;
- the [European Metalworkers' Federation \(EMF\)](#), with six affiliations covering five countries;
- the [Council of European Professional and Managerial Staff \(Eurocadres\)](#), with six affiliations covering three countries;
- the [European Federation of Trade Unions in the Food, Agriculture and Tourism Sectors and Allied Branches \(EFFAT\)](#), with five affiliations covering four countries;
- the [European Federation of Public Service Unions \(EPSU\)](#), with four affiliations covering four countries;
- the [European Federation of Building and Woodworkers \(EFBWW\)](#) and the [European Transport Workers' Federation \(ETF\)](#), with three affiliations covering three countries each;
- the [European Confederation of Executives and Managerial Staff \(CEC\)](#) and the European Federation of National Engineering Associations ([Fédération Européenne d'Associations Nationales d'Ingénieurs, FEANI](#)), with one affiliation each.

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

Table 5 provides a similar overview of the 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 CEC only rarely exist. The following affiliations are found:

- the [European Confederation of National Associations of Tanners and Dressers \(COTANCE\)](#), with four affiliations in four countries;
- the [European Textile Collectivities Association \(ACTE\)](#), with two affiliations in one country;
- the [European Apparel and Textile Organisation \(Euratex\)](#) as well as the [European Confederation of the Shoe Retail Trade Associations \(CEDDEC\)](#), with only one affiliation each.

The relatively low incidence of affiliations to European organisations other than CEC highlights the relevance of the latter as the unmatched European voice of business in the sector, even though the federation only has a proportion of the EU Member States under its umbrella through affiliations from these countries.

## Commentary

The European footwear industry is a small sector that has shrunk markedly in size over the last couple of decades. This decline is as a direct result of low-cost competition in less developed economies, in particular the Far East, as well as the tendency of EU companies to ‘offshore’ their operations to cheaper locations. Such a development is likely to have also reduced the number of trade union members within the sector – as is reported, for instance, in the UK. In turn, declining trade union members may have caused the trade unions to dedicate fewer resources to the sector, given the small level of employment in the footwear industry. The rate of trade union density in the footwear industry across the EU is relatively low, with sectoral density rates below 15% in the case of the majority of the sector-related trade unions. Low unionisation in the sector is also reflected by the fact that the membership domain of all sector-related trade unions overlaps or sectionally overlaps in relation to the sector. This means that the trade unions’ organisational structures are not tailored to the specific interests of employees in the footwear industry, which, in turn, impedes a very particular and favourable trade union representation on behalf of the sector’s employees. Nevertheless, industrial relations tend to be quite well organised in a majority of the Member States that record business activities in the sector. This is reflected by the high collective bargaining coverage rates in about two thirds of the countries under consideration. Moreover, in contrast to the low unionisation rates on the employee side, densities in terms of employer representation tend to be relatively high – at least in terms of employees covered. This implies that there is a higher willingness among the larger and most significant companies (measured in terms of employment) to associate, whereas many small companies, which account for the majority of establishments in the European footwear industry, often refrain from gathering in associations. However, the fact that many of the larger companies are organised in associations has been crucial for the establishment and prevalence of multi-employer bargaining in most of the countries.

As indicated above, the sector’s collective bargaining coverage is extraordinarily high in 14 of the 22 countries for which related data are available. Conversely, only two countries could be identified where sector-related collective bargaining is completely absent. Closer consideration shows that collective bargaining coverage rates tend to be very high in the EU15, with the exception of Denmark and the UK, while sectoral bargaining standards vary widely among the 2004 accession countries. In Latvia and Lithuania, sectoral 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. On the other hand, collective bargaining arrangements cover almost the entire sector in Cyprus, Romania and Slovenia. Generally, high collective bargaining coverage rates in the sector are supported by the predominance of multi-employer arrangements and a significant use of extension practices.

High pressure from low labour cost countries has prompted the European sector-related social partners to seek joint strategies to cope with the sector’s challenges of increasing imports from the Far East and the need to successfully compete on quality, without diminishing existing employment standards. Therefore, the sector’s social partners at European level – that is, CEC on the employers’ side and ETUF:TCL on the employees’ side – have launched some joint initiatives in the framework of social dialogue. In this context, a series of joint programmes and guidelines, including a code of conduct, have been drawn up since 2000. Against this background, CEC and ETUF:TCL have to be regarded as by far the most important, if not the only, EU-wide representatives of the footwear industry’s employers and employees.

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## Annex: List of abbreviations

Country	Abbreviation	Full name of organisation
<b>Austria (AT)</b>	BIS	Federal Association of Small-scale Craft Shoemakers
	GMTN	Metalworking, Textiles, Agriculture and Food-processing Union
	GPA-DJP	Union of Salaried Employees, Graphical Workers and Journalists
	ÖGB	Austrian Trade Union Federation
	VS	Association of the Austrian Footwear Industry
	WKÖ	Austrian Federal Economic Chamber
	<b>Belgium (BE)</b>	ABVV/FGTB
ACLVB/CGSLB		Federation of Liberal Trade Unions of Belgium
ACV/CSC		Confederation of Christian Trade Unions
CG		General Federation
CNE		National Federation of White-Collar Workers
FEBIC		Belgian Federation of the Footwear Industry
LBC/NVK		Federation of White-Collar Workers and Managers
NVMS		National Federation of Producers of Custom-made Shoes and Shoe Repairers
SETCa/BBTK		Belgian Union of White-Collar Staff, Technicians and Managers
VBO/FEB		Belgian Federation of Employers
<b>Bulgaria (BG)</b>		BIA
	BULFFLGI	Branch Union of Leather, Fur, Footwear and Leather Goods Industry
	CITUB	Confederation of Independent Trade Unions in Bulgaria
	CL Podkrepa	Confederation of Labour 'Podkrepa'
	FLI	Federation of Light Industry
	FOSIL	Federation of the Independent Trade Union Organisations in Light Industry
	<b>Cyprus (CY)</b>	CMFLGA
OBIEK		Federation of Industrial Workers of Cyprus
OEB		Cyprus Employers' and Industrialists' Federation
PEO		Pancyprian Federation of Labour

Country	Abbreviation	Full name of organisation
	SEK	Cyprus Workers' Federation
	SEVETTYK	Cyprus Industrial, Commercial, Press-printing and General Services Workers' Trade Union
<b>Czech Republic (CZ)</b>	ATOK	Association of Textile, Clothing and Leather Industry
	ČMKOS	Czech-Moravian Confederation of Trade Unions
	KZPS CR	Confederation of Employers' and Entrepreneurs' Associations of the Czech Republic
	OSTOK	Trade Union of Workers in Textiles, Clothing and Leather Industry of Bohemia and Moravia
<b>Denmark (DK)</b>	3F	United Federation of Danish Workers
	CO-Industri	Cartel of Trade Unions in Industry
	DS	Danish Shoemakers' Guild
	LO	Danish Confederation of Trade Unions
<b>Estonia (EE)</b>	EAKL	Confederation of Estonian Trade Unions
	ETTAF	Estonian Industry Workers' Trade Union
<b>Finland (FI)</b>	EK	Confederation of Finnish Industries
	FLIA	Finnish Leather Industry Association
	Kemianliitto	Chemical Workers' Union
	SAK	Central Organisation of Finnish Trade Unions
	STTK	Finnish Confederation of Salaried Employees
	TU	Union of Salaried Employees
<b>France (FR)</b>	CFDT	French Democratic Confederation of Labour
	CFE-CGC	French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	CFTC	French Christian Workers' Confederation
	CGT	General Confederation of Labour
	CGT-FO	General Confederation of Labour – <i>Force Ouvrière</i>
	CMTE-CFTC	Chemicals, Mining, Textiles and Energy Federation of the French Christian Workers' Confederation
	FFC	French Federation of the Footwear Industry
	FGCTH-CGT-FO	General Federation of Leather, Textiles and Clothing of the General Confederation of Labour – <i>Force ouvrière</i>
	FS-CFDT	Services Federation of the French Democratic

Country	Abbreviation	Full name of organisation
		Confederation of Labour
	SNPE-FNAA	National Union of Leather and Hide Managerial Staff of the National Agricultural and Food Federation
	THC-CGT	Textile, Clothing and Leather Federation of the General Confederation of Labour
<b>Germany (DE)</b>	DGB	Confederation of German Trade Unions
	HDS	Federal Association of the Footwear Industry
	IGBCE	Mining, Chemicals and Energy Industrial Union
<b>Greece (EL)</b>	ELSEVIE	Hellenic Association of Footwear Manufacturers and Exporters
	FFMG	Federation of Footwear Manufacturers in Greece
	GSEE	Greek General Confederation of Labour
	GSEVEE	General Confederation of Greek Small Businesses and Trades
	OEKIDE	Federation of Workers in the Textile, Clothing and Leather Industry
	SEV	Hellenic Federation of Enterprises
<b>Hungary (HU)</b>	BCE	Association of the Leather and Shoe Industry
	BDSZ	Trade Union of Leather Industry Employees
	BVDOSZSZ	National Trade Union of Prison Workers
	FRDESZ	Independent Trade Union Association of Military and Police Employees
	HVDSZ 2000	Trade Union of Local and Municipal Workers 2000
	LIGA	Democratic League of Independent Trade Unions
	MGYOSZ	Confederation of Hungarian Employers and Industrialists
	MKSZ	Association of the Hungarian Light Industry
	MSZOSZ	National Association of Hungarian Trade Unions
<b>Italy (IT)</b>	ANCI	National Association of Italian Footwear Factories
	ATS	Textiles and Health Association
	Casartigiani	Autonomous Confederation of Artisan Unions
	CFI	Industrial Fair Committee
	CFNM	General Italian Federation of Artisans – National Federation of the Fashion Industry
	CGIL	General Confederation of Italian Workers

<b>Country</b>	<b>Abbreviation</b>	<b>Full name of organisation</b>
	CISL	Italian Confederation of Workers' Trade Unions
	CLAAI	Confederation of Free Italian Artisan Unions
	CNA Federmoda	National Confederation of Artisans and Small and Medium-sized Enterprises – Federmoda
	Confapi	Italian Confederation of Private Small and Medium Enterprises
	Confartigianato Imprese	General Italian Confederation of Artisans
	Confindustria	General Confederation of Italian Industry
	FEMCA-CISL	Federation of Energy, Fashion, Chemical and Related Sector Workers
	FIAMP	Italian Federation of Personal and Fashion Accessories
	FILTEA	Italian Federation of Clothing and Textiles Workers
	UGL	General Workers' Union
	UGL-Chimici	General Workers' Union – Chemicals
	UIL	Union of Italian Workers
	UILTA	Italian Textiles and Clothing Workers' Union
	Union Tessile	National Union of Small and Medium Enterprises in the Textiles and Clothing Industry
<b>Latvia (LV)</b>	–	–
<b>Lithuania (LT)</b>	LPIPSS	Lithuanian Trade Union of Industry Workers 'Solidarity'
	LPS 'Solidarumas'	Lithuania Trade Union 'Solidarity'
<b>Netherlands (NL)</b>	CNV	Christian Trade Union Federation
	CNV Bedrijvenbond	Industry, Food and Transport Workers' Union
	FNLS	Federation for Leather Products and Shoes
	FNV	Dutch Trade Union Federation
	FNV Bondgenoten	Allied Unions
<b>Poland (PL)</b>	NSZZ Solidarność	Independent and Self-Governing Trade Union 'Solidarity'
	OPZZ	All-Poland Alliance of Trade Unions
	PIPS	Polish Chamber of Shoe and Leather Industry
<b>Portugal (PT)</b>	APICCAPS	Portuguese Footwear, Components and Leather Goods Manufacturers' Association
	CGTP	General Confederation of Portuguese Workers

<b>Country</b>	<b>Abbreviation</b>	<b>Full name of organisation</b>
	CIP	Confederation of Portuguese Industry
	FETESE	Federation of Service Workers' and Technicians' Unions
	SINDEQ	Democratic Union of Energy, Chemical, Textile and Other Industries
	SINTEVECC	Union of Workers in the Textile, Clothing, Shoe and Tanning Sectors of the District of Porto
	SITESC	Office, Services and Commerce Employees' Union
	SOICMADAC	Union of Workers in the Shoe, Bag and Related Industries in the Districts of Aveiro and Coimbra
	STVNC	Union of Salespersons of Northern and Central Portugal
	STVSI	Union of Salespersons of Southern Portugal and Islands
	UGT	General Workers' Confederation
<b>Romania (RO)</b>	Cartel Alfa	National Trade Union Confederation Cartel Alfa
	FS 'Pielarul'	Trade Union Federation 'Pielarul'
	PINC	Leather and Footwear Employers' Association
	UGIR 1903	General Union of Romanian Industrialists 1903
<b>Slovakia (SK)</b>	KOZ SR	Central Confederation of Trade Unions
	OZ Kovo	Metal Trade Union Association
	SOZ TOK	Slovak Trade Union Association of the Textile, Clothing and Leather Industry
<b>Slovenia (SI)</b>	GZS	Chamber of Commerce and Industry of Slovenia
	STU	Section for the Textile and Leather Industry
	STUPIS	Slovenian Trade Union of Textile and Leather Processing Industries
	ZDS	Slovenian Employers' Association
	ZSSS	Confederation of Free Trade Unions of Slovenia
	ZTOUPI	Textiles, Clothing and Leather Processing Association
<b>Spain (ES)</b>	AEC	Spanish Association of the Footwear Components Industry
	CC.OO	Trade Union Confederation of Workers' Commissions
	CEOE	Spanish Federation of Employer Organisations
	CEPYME	Spanish Confederation of Small and Medium-sized Enterprises

Country	Abbreviation	Full name of organisation
	FIA	Federation of Allied Industries
	FICE	Spanish Federation of the Footwear Industry
	FITEQA	Federation of Textiles, Fur, Chemical and Allied Industries
	UGT	General Workers' Confederation
<b>Sweden (SE)</b>	IF Metall	Union of Metalworkers
	Industri- och KemiGruppen	Swedish Industrial and Chemical Employers' Association
	Industriarbetsgivarna	Association of Employers in Manufacturing Industry
	Ledarna	Confederation of Executives and Managerial Staff
	LO	Swedish Trade Union Confederation
	OFR	Public Employees' Negotiation Council
	PTK	Council for Negotiation and Co-operation
	SACO	Swedish Confederation of Professional Associations
	Svenska Skofabrikantföreningen	Swedish Federation of the Footwear Industry
	Sveriges Ingenjörer	Swedish Association of Graduate Engineers
	Svenskt Näringsliv	Confederation of Swedish Enterprise
	TCO	Swedish Confederation of Professional Employees
	Unionen	Union of White-collar Workers
<b>United Kingdom (UK)</b>	BFA	British Footwear Association
	Community	General Trade Union
	STUC	Scottish Trades Union Congress
	TUC	Trades Union Congress
	Unite	Unite the Union
	WTUC	Wales Trades Union Congress
<b>Europe</b>	ACTE	European Textile Collectivities Association
	CEC	European Confederation of Executives and Managerial Staff
	CEC	European Confederation of the Footwear Industry
	CEDDEC	European Confederation of Shoe Retail Trade Associations

<b>Country</b>	<b>Abbreviation</b>	<b>Full name of organisation</b>
	COTANCE	European Confederation of National Associations of Tanners and Dressers
	EFBWW	European Federation of Building and Woodworkers
	EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions
	EMCEF	European Mine, Chemical and Energy Workers' Federation
	EMF	European Metalworkers' Federation
	EPSU	European Federation of Public Service Unions
	ETF	European Transport Workers' Federation
	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
	FEANI	European Federation of National Engineering Associations
	UNI-Europa	Union Network International – Europe

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