Representativeness of the European social partner organisations: the Hotel, restaurant and catering (Horeca) sector

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This study sets out to provide the necessary information for assisting the existing sectoral social dialogue in the Hotel, restaurant and catering (Horeca) sector. It identifies the relevant national organisations on both sides of industry as well as analysing the relevant European organisations. The study consists of three main parts: a description of the economic background; an analysis of the social partner organisations in all EU Member States, focusing on membership, role in collective bargaining and public policy, and national and European affiliations; and finally, an analysis of the relevant European organisations, particularly membership composition and capacity to fulfill their role in the social dialogue. The EIRO series of studies on representativeness aims to identify relevant national and supranational social partner organisations in selected sectors. The impetus for these studies comes from the European Commission's desire to recognise the representative social partner organisations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU).

Objectives of study

The aim of this **representativeness** study is to identify the relevant national and supranational associational actors – that is the **trade unions** and **employer** associations – in the field of industrial relations in the Hotel, restaurant and catering (Horeca) sector, and show how these actors relate to the sector's European interest associations of labour and business. The impetus for this study, and for similar studies in other sectors, arises from the European Commission's aim to identify the representative social partner associations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU) (1.4Mb PDF). Hence, this study seeks to provide the basic information needed to support sectoral **social dialogue**. The effectiveness of the European social dialogue depends on whether its participants are sufficiently representative in terms of the sector's relevant national actors across the EU Member States. Hence, only European associations which meet this precondition will be admitted to the European social dialogue.

Against this background, the study will first identify the relevant national social partner organisations in the Horeca sector, subsequently analysing the structure of the sector's relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both the national and European level of interest representation.

The study includes only organisations whose membership domain is *'sector-related'* (Table 1).

Table 1: Determining the 'sector-relatedness' of an organisation

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

Scope	Question in the standardised questionnaire to all correspondents	Possible answers	Notes and Explanations
	… cover employees in enterprises of all sizes in the Horeca sector?	Yes/No	Often, organisations limit their domain to enterprises by size class (such as SMEs only).
	…cover all occupations in the Horeca sector?	Yes/No	Some organisations (notably trade unions) delimit their domain to certain occupations only. This sub-question intends to identify these occupational organisations.
Domain of the organisation outside the sector	Does the union also represent members outside the Horeca sector?	Yes/No	This question is again being addressed directly to the correspondents.

Source: Standardised Excel-based questionnaire, sent to EIRO National correspondents (2011).

At both national and European levels, many associations exist which are not considered to be social partner organisations as they do not deal with industrial relations. Thus, there is a need for criteria to clearly define 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 three criteria: the associations must be:

- a party to 'sector-related' collective bargaining;
- or a member of a 'sector-related' European association of business or labour that is on the Commission's list of European social partner organisations consulted under Article 154 of the EU treaty;
- or it must participate in the sector-related European social dialogue.

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

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

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

- includes those sector-related European social partner organisations that are on the Commission's list of consultation.

- considers any other European association with sector-related national social partner organisations – as defined above – under its umbrella.

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

Definitions

For the purpose of this study, the Horeca sector is defined in terms of the Statistical Classification of Economic Activities in the European Community (NACE), to ensure the cross-national comparability of the findings. According to the mandate of the European Commission, the Horeca sector is defined as embracing NACE (Rev. 2) 55 and 55, with the exclusion of class 55.29, 'other food serving activities', within the food and beverage serving activities.

This includes the following activities:

NACE Rev.2	Definition	Description
55	Accommodation	This division includes the provision of short-stay accommodation for visitors and other travellers.
55.10	Hotels and similar accommodation	This class includes the provision of accommodation, typically on a daily or weekly basis, principally for short stays by visitors. This includes the provision of furnished accommodation in guest rooms and suites. Services include daily cleaning and bed-making. A range of additional services may be provided such as food and beverage services, parking, laundry services, swimming pools and exercise rooms, recreational facilities and conference and convention facilities. This class includes accommodation provided by: - hotels - resort hotels - suite/apartment hotels - motels
55.20	Holiday and other short-stay accommodation	This class includes the provision of accommodation, typically on a daily or weekly basis, principally for short stays by visitors, in self-contained space consisting of complete furnished rooms or areas for living/dining and sleeping, with cooking facilities or fully equipped kitchens. This may take the form of apartments or flats in small free-standing multi-storey buildings or clusters of buildings, or single storey bungalows, chalets, cottages and cabins. Very minimal complementary services, if any, are provided. This class includes accommodation provided by: - children's and other holiday homes - visitor flats and bungalows - cottages and cabins without housekeeping services - youth hostels and mountain refuges
55.30	Camping grounds, recreational vehicle parks and trailer parks	This class includes: - provision of accommodation in camping grounds, trailer parks, recreational camps and fishing and hunting camps for short stay visitors - provision of space and facilities for recreational vehicles
55.9	Other accommodation	This class includes the provision temporary or longer-term accommodation in single or shared rooms or dormitories for students, migrant (seasonal) workers and other

		individuals. This class includes: - student residences - school dormitories - workers hostels - rooming and boarding houses - railway sleeping cars
56	Food and beverage service activities	This division includes food and beverage serving activities providing complete meals or drinks fit for immediate consumption, whether in traditional restaurants, self-service or take-away restaurants, whether as permanent or temporary stands with or without seating. Decisive is the fact that meals fit for immediate consumption are offered, not the kind of facility providing them.
56.10	Restaurants and mobile food service activities	This class includes the provision of food services to customers, whether they are served while seated or serve themselves from a display of items, whether they eat the prepared meals on the premises, take them out or have them delivered. This includes the preparation and serving of meals for immediate consumption from motorised vehicles or non-motorised carts. This class includes activities of: - restaurants - cafeterias - fast-food restaurants - take-out eating places - ice cream truck vendors - mobile food carts - food preparation in market stalls
56.21	Event catering activities	This class includes the provision of food services based on contractual arrangements with the customer, at the location specified by the customer, for a specific event.
56.30	Beverage serving activities	This class includes preparation and serving of beverages for immediate consumption on the premises. This class includes activities of: - bars - taverns - cocktail lounges - discotheques (with beverage serving predominant) - beer parlours - coffee shops - fruit juice bars - mobile beverage vendors

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

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all trade unions, **employer organisations** and multi-employer collective agreements which are 'sector-related' in terms of any of the following four aspects or patterns:

- 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 which do not deal with sector-specific matters;
- sectional overlap – the domain or scope covers part of the sector plus (parts of) one or more other sectors.

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

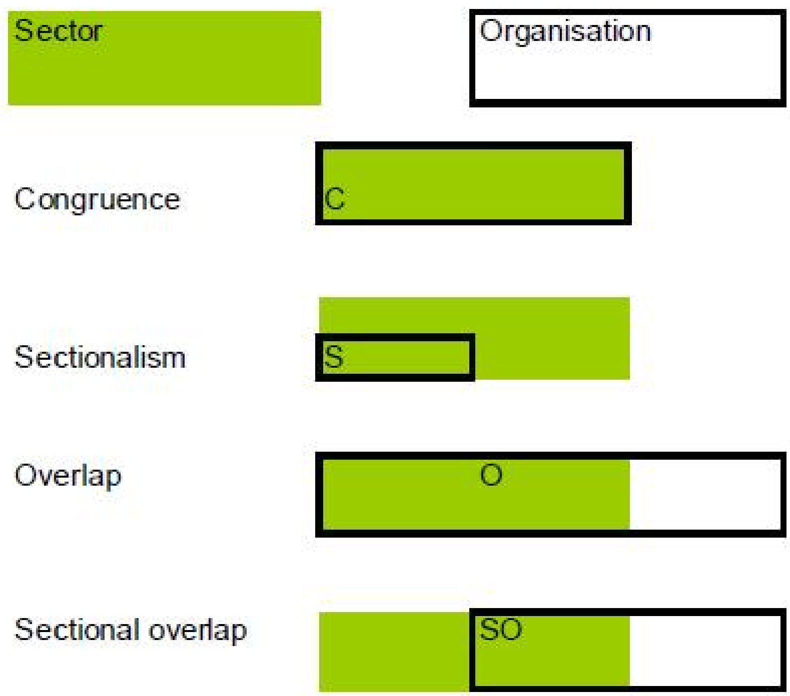

Figure 2: Sector-relatedness of social partner organisations: Domain patterns

Table 2: Pattern and scope of the organisation's domain

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

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

At European level, the European Commission established a Sectoral Social Dialogue Committee for the Horeca sector in 1999, while the social partners had been working together in an informal working party since 1983. The EU-level organisations which participate in the sector's European social dialogue are, on the employers' side, HOTREC, the umbrella association of national trade associations representing the hotels, restaurants, cafés and similar establishments in Europe, and the European Federation of Trade Unions in the Food, Agriculture and Tourism sectors (EFFAT) on the employee side. Thus, affiliation to one of these European organisations is a sufficient criterion for classifying a national association as a social partner organisation for the purpose of this study.

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 based on a standardised questionnaire in both Word and Excel format, which they complete through contacting the sector-related social partner organisations in their countries. The contact is generally made via telephone interviews in the first place, but might in certain cases be established via email. In case of non-availability of any representative, the national correspondents are asked to fill out the relevant questionnaire using secondary sources, such as information given on the social partner's website, or derived from previous research studies.

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

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

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

- personal estimates made by representatives of the respective organisations.

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

Quality assurance

In order to assure the quality of the information gathered, several verification procedures and feedback loops have been used.

- First, Eurofound staff together with the author of this report check the consistency of the figures provided, and make sure that the organisations listed match the criteria for inclusion for the purpose of this study (see Table 2)).
- Second, Eurofound sends the national contributions to both their national members of governing board and the European-level sector-related social partners' organisations. The peak level organisations then ask their affiliates to verify the information. Feedback received from the sector-related organisations is then taken into account if it is in line with the methodology of the study.
- Third, the complete study is finally evaluated by the European-level sectoral social partners and Eurofound's Advisory Committee on Industrial Relations, which consists of representatives from both sides of industry, governments and the European Commission.

Structure of report

The study consists of three main parts, beginning with a brief summary of the sector's economic background. The report then analyses the relevant social partner organisations in all EU Member States. 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 deciding on adequate representativeness is a matter for the political decision making process rather than an issue of research analysis.

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Economic background

The Horeca sector is an important element of the EU economy. In the European Union, within the non-financial business economy, it represents around 8% of the enterprise population, 7% of its workforce and 3% of the value added (Eurostat, Statistics in focus, 101/2009). The sector shows an overwhelming presence of SMEs, as more than 90% of all enterprises have less than 10 employees and therefore fall into the category of micro enterprises.

Employment characteristics

In 2010, total sectoral employment was almost 9.4 million workers, of whom 55% were women, 10 percentage points above the level in the overall workforce. The proportion of Horeca employment on total EU27 employment was 4.4%, slightly up (+0.2%) from the level recorded in 2007 (Eurostat, Tourism employment – Statistics Explained, 4 March 2012).

It is important to note that the Horeca sector has grown considerably in recent years and provided, thanks to its high labour intensity, a significant contribution to employment creation in the 2000s. There were 1.9 million new jobs in the sector between 2000 and 2007, and a good employment performance even during the recent economic crisis, with 200,000 jobs created between 2008 and 2010, especially in food and beverage service activities (Eurostat, LFS series – Detailed annual survey results, Employment by sex, age groups and detailed economic activity (1992-2008, NACE rev.1.1 two digit level and from 2008, NACE Rev.2 two digit level).

Employment in the Horeca sector presents some specific features. The above-average presence of women has already been noted, but it should be underlined that the sectoral share of female employment varies considerably across countries (Table 3) and it peaks in Finland and Poland at around 70%.

Another important characteristic is that Horeca employs many young people (about 60% of the total was under the age of 39 years in 2010, 15 percentage points above the share in the overall workforce), so that it represents an important vehicle for labour market entry for young job seekers.

Due to the high seasonal variation of tourism, which represents an important but not exclusive source of business for the Horeca sector, there are important variations in employment. In certain countries, such as Greece, these variations almost double the workforce in the summer period. In other countries, like Denmark and the Netherlands, there are no substantial variations in employment during the year (Eurostat, Tourism employment - Statistics Explained, 4 March 2012).

The Horeca sector is also characterised by a higher percentage of part-time employment: almost one third of workers in the accommodation and food service activities in the EU work part-time, compared to around one fifth in the whole economy (Eurostat, *Full-time and part-time employment by sex and economic activity*, reference year 2011). The higher presence of part-time work is seen particularly among men: in 2011, 21% of men in the accommodation and food service sector had a part-time job, against 9% in the whole workforce. For wemen, the difference is not as great: 39% instead of 32%. Similarly, temporary employment is higher in the accommodation and food service sector (18% compared to 12%, Eurostat, *Employment by sex, age and economic activity*, reference year 2011). Both indicators suggest that flexible and ‘atypical’ work tend to be more present in the Horeca sector than in the whole economy.

Table 3: Employment in the EU Horeca sector, 2010

	Employment			Female employment			Female emp. as % of total emp.
	Accommodation	Food & Beverages	Total	Accommodation	Food & Beverages	Total	
BE	20.6	119.3	139.9	12.4	54.6	67.0	47.9
BG	39.0	119.3	158.3	25.8	72.1	97.9	61.8
CZ	43.8	144.3	188.1	27.4	79.3	106.7	56.7
DK	18.6	68.6	87.2	11.5	37.7	49.2	56.4
DE	425.0	1,027.0	1,452.0	290.2	548.8	839.0	57.8
EE	6.9	12.0	18.9	:	9.7	:	:
IE	44.6	73.5	118.1	25.5	40.4	65.9	55.8
GR	61.8	237.8	299.6	36.5	103.4	139.9	46.7
ES	320.8	1,040.9	1,361.7	185.2	555.3	740.5	54.4
FR	233.4	725.1	958.5	137.6	324.1	461.7	48.2
IT	222.1	949.3	1171.4	111.6	480.8	592.4	50.6
CY	10.5	16.6	27.1	6.1	7.8	13.9	51.3
LV	6.0	23.2	29.2	:	18.8	:	:
LT	:	29.1	29.1	:	23.1	:	:
LU	1.6	3.9	5.5	:	1.7	:	:
HU	32.4	125.6	158.0	17.6	72.4	90.0	57.0
MT	7.8	4.7	12.5	2.5	:	:	:
NL	75.2	260.4	335.6	42.1	130.9	173.0	51.5
AT	86.1	162.6	248.7	58.7	95.2	153.9	61.9
PL	90.1	258.5	348.6	63.1	175.2	238.3	68.4
PT	55.9	223.8	279.7	29.2	142.6	171.8	61.4
RO	45.7	133.8	179.5	27.6	79.4	107.0	59.6
SL	13.2	33.0	46.2	7.6	18.3	25.9	56.1
SK	28.1	75.1	103.2	18.4	44.4	62.8	60.9
FI	16.8	64.8	81.6	11.0	46.8	57.8	70.8
SE	40.5	110.9	151.4	26.9	54.8	81.7	54.0
UK	308.9	1,078.5	1,387.4	172.4	565.3	737.7	53.2
EU27	2,259.6	7,121.8	9,381.4	1359.2	3784.4	5143.6	54.8

Source: Eurostat, LFS series – Detailed annual survey results, [Employment by sex, age groups and detailed economic activity (]()NACE Rev.2 two digit level), data extracted on 16 March 2012.

Table 4: Total employers and employment in Horeca, years as indicated

	Year	Number of companies	Total employment	Male employment	Female employment	Total sectoral employment as % of total in economy
AT	2000	38,133	212,400	74,100	138,300	5.80
AT	2009	n.a.	252,190	n.a.	n.a.	6.30
BE	2000	48,192	134,200	62,974	71,126	3.00
BE	2010	56,557	156,156	78,056	78,100	4.00
BG	2010	n.a.	131,458	81,681	49,777	4.00
BG	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CY	2005	n.a.	27,143	12,250	14,893	7.80
CY	2009	6,892	27,710	13,576	14,134	7.20
CZ	2000	n.a.	156,400	66,400	90,000	3.00
CZ	2010	n.a.	161,400	73,800	87,600	3.00
DE	2001	n.a.	122,9000	522,000	566,000	3.30
DE	2010	273,797	1,488,000	616,000	865,000	3.80
DK	2001	12,330	73,342	32,539	40,803	n.a.
DK	2008	12,630	76,716	36,226	40,490	n.a.
EE	1998	n.a.	14,000	2,300	11,700	2.30
EE	2010	1,897	19,400	5,000	14,400	3.40
ES	2000	522,632	991,186	532,695	458,490	6.00
ES	2010	579,228	1,399,666	644,004	755,662	7.00
FI	2000	10,054	66,013	19,420	46,597	3
FI	2009	11,126	79,559	22,079	57,480	3
FR	2003	195,479	798,300	n.a.	n.a.	n.a.
FR	2010	208,245	955,300	504,189	447,111	n.a.
GR	2000	37,329	272,770	157,730	115,040	7.00
GR	2010	42,218	302,219	162,679	139,541	7.00
HU	2000	n.a.	n.a.	n.a.	n.a.	n.a.
HU	2010	26,000	150,000	63,300	86,700	n.a.
IE	2004	n.a.	107,200	n.a.	n.a.	6.00

	Year	Number of companies	Total employment	Male employment	Female employment	Total sectoral employment as % of total in economy
IE	2010	n.a.	122,800	48,900	63,900	7.00
IT	2001	253,111	818,031	440,472	377,559	3.00
IT	2008	289,701	1,154,416	621,600	53,2816	5.00
LT	2006	2,706	38,900	5,600	33,300	3.00
LT	2011	3,080	33,600	7,200	26,300	3.00
LU	2000	2,400	13,000	7,150	5,850	5.00
LU	2010	2,800	17,000	9,350	7,650	5.00
LV	2000	1,765	16,868	4,072	12,896	2.00
LV	2010	21,38	20,768	5,942	14,826	3.00
MT	2005	2,056	16,620	10,319	6,301	9.00
MT	2010	2,970	17,968	11,175	6,793	9.00
NL	1999	38905	n.a.	n.a.	n.a.	n.a.
NL	n.a.	38515	n.a.	n.a.	n.a.	n.a.
PL	2000	94,774	225,700	76,600	149,100	2.00
PL	2010	124,214	252,500	88,800	163,700	2.00
PT	1999	28,422	174,223	75,392	98,831	7.00
PT	2009	39,494	235,483	95,883	139,600	8.00
RO	2000	11,933	122,838	47,064	75,774	1.14
RO	2009	26,170	179,841	72,488	107,353	1.95
SE	2000	9584	n.a.	n.a.	n.a.	n.a.
SE	2010	15914	n.a.	n.a.	n.a.	n.a.
SI	2000	8,600	28,899	11,848	17,051	4.00
SI	2010	7,728	33,782	13,638	20,144	4.00
SK	2000	1,422	65,300	25,400	39,900	3.00
SK	2010	5,106	103,600	40,700	62,900	5.00
UK	2000	105,225	1,169,300	492,694	676,606	4.00
UK	2010	128,705	1,346,620	655,407	691,213	5.00

Source: EIRO national contributions (2011), national statistics. Reference years are for employment data; those for number of companies may vary. For detailed description of sources and reference years for number of companies please refer to the national reports.

Table 5: Total employees in Horeca, years as indicated

	Year	Total employees	Male employees	Female employees	Total sectoral employees as % of total in economy
AT	2000	166,200	51,800	114,400	5.23
AT	2009	205,043	n.a.	n.a.	5.84
BE	2000	108,197	51,935	56,262	n.a.
BE	2010	119,907	57,872	62,035	n.a.
BG	n.a.	n.a.	n.a.	n.a.	n.a.
BG	2010	95,671	37,257	58,414	4.00
CY	2005	n.a.	n.a.	n.a.	n.a.
CY	2009	n.a.	n.a.	n.a.	n.a.
CZ	2000	122,100	45,100	77,100	3.00
CZ	2010	126,900	53,400	73,500	3.00
DE	2001	782,106	326,992	45,514	2.80
DE	2010	863,967	367,703	496,264	3.00
DK	2001	62,826	26,019	36,807	n.a.
DK	2008	67,833	30,446	37,387	n.a.
EE	1998	12,900	2,000	10,900	2.30
EE	2010	18,600	4,700	13,900	3.50
ES	2000	680,527	347,751	332,812	6.00
ES	2010	1075,845	460,500	615,345	7.00
FI	2000	59,123	16,644	42,483	3
FI	2009	71,970	18,369	53,601	4.00
FR	2003	,n.a.	n.a.	n.a.	n.a.
FR	2010	750,000	n.a.	n.a.	4.00
GR	2000	146,307	81,139	65,168	6.00
GR	2010	179,415	89,736	89,679	6.00
HU	2000	n.a.	n.a.	n.a.	n.a.

	Year	Total employees	Male employees	Female employees	Total sectoral employees as % of total in economy
HU	2010	n.a.	n.a.	n.a.	n.a.
IE	n.a.	n.a.	n.a.	n.a.	n.a.
IE	n.a.	n.a.	n.a.	n.a.	n.a.
IT	2001	423,476	211,542	211,934	2.00
IT	2008	692,291	345,825	346,466	4.00
LT	2006	29,807	n.a.	n.a.	4.00
LT	2011	34,764	n.a.	n.a.	4.00
LU	2000	13,000	7,150	5,850	5.00
LU	2010	17,000	9,350	7,650	5.00
LV	2000	16,523	3,965	12,558	2.00
LV	2010	20,675	5,915	14,760	3.00
MT	2005	9,232	n.a.	n.a.	7.00
MT	2010	8,341	n.a.	n.a.	6.00
NL	1999	235,400	109,700	125,700	n.a.
NL	2009	309,000	147,700	161,300	n.a.
PL	2000	167,300	49,500	117,800	2.00
PL	2010	205,700	66,800	138,900	2.00
PT	1999	151,783	59,833	91,950	6.00
PT	2009	209,929	80,052	129,877	7.00
RO	2000	113,856	40,894	72,962	1.89
RO	2009	173,088	68,093	104,955	2.86
SE	2000	87,453	n.a.	n.a.	n.a.
SE	2010	117,916	n.a.	n.a.	n.a.
SI	2000	24,413	10,497	13,916	3.00
SI	2010	28,264	12,029	16,235	4.00
SK	2000	56,400	19,600	36,800	3.00
SK	2010	87,100	30,700	56,400	5.00
UK	2000	1,042,930	418,048	624,882	4.00
UK	2010	1,204,871	582,425	622,446	5.00

Source: EIRO national contributions (2011), national statistics. For detailed description of sources please refer to the national reports.

National level of interest representation

In many Member States, statutory regulations explicitly refer to the concept of representativeness when assigning certain rights of interest representation and public governance to trade unions and/or employer organisations. The most important rights addressed by such regulations include:

- formal recognition as a party to collective bargaining;
- extension of the scope of a multi-employer collective agreement to employers not affiliated to the signatory employer organisation;
- participation in public policy and tripartite consultation bodies.

Under these circumstances, representativeness is normally measured by the membership strength of the organisations. For instance, statutory extension provisions usually allow for **extension of collective agreements** to unaffiliated employers only when the signatory trade union and employer association represent 50% or more of the employees within the agreement's domain.

As outlined above, the representativeness of the national social partner organisations is of interest to this study in terms of the capacity of their European umbrella organisations for participation in European social dialogue. Hence, the role of the national actors in collective bargaining and public policy-making 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 conditions and influence national public policies affecting the sector.

A cross-national comparative analysis shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy (Traxler, 2004). Social partner organisations that are engaged in multi-employer bargaining are incorporated in state policies to a significantly greater extent than their counterparts in countries where multi-employer bargaining is lacking. This can be attributed to the fact that only multi-employer agreements matter in macroeconomic terms, setting an incentive for the governments to persistently seek the cooperation of the social partner organisations. If single-employer bargaining prevails in a country, none of the collective agreements will have a noticeable effect on the economy due to their limited scope. As a result, the rationale for establishing generalised tripartite policy concertation will be significantly weaker, if not 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 which the organisation does not claim to represent. As already explained, this study considers only organisations whose domain relates to the Horeca sector. However, there is insufficient room in this report to delineate the domain demarcations of all the organisations. Instead, the report notes how they relate to the sector by classifying them according to the four patterns of 'sector-relatedness', as specified earlier. A more detailed description of how an organisation may relate to the sector can be found in Figure 1.

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

Furthermore, a difference also arises between trade unions and employer organisations in relation to measuring membership strength. Trade union membership simply means the number of unionised persons. However, in this context a clarification of the concept of 'member' should be made. Whereas in most countries recorded membership includes both employees in jobs and members who are not in active employment (such as unemployed people and retired workers), some countries provide information on employed membership only. Hence, two measures of trade union density have to be differentiated: gross union density (including inactive members) and net union density (referring to employed union members only). In addition to taking the total membership of a trade union as an indicator of its strength, it is also reasonable to break down this membership total according to gender.

Measuring the membership strength of employer organisations is more complex since they organise collective entities, namely companies that employ employees. In this case, therefore, two possible measures of membership strength may be used – one referring to the companies themselves, and the other to the employees working in the member companies of an employer organisation.

For a sector study such as this, measures of membership strength of both the trade unions and employer organisations have also to consider how the membership domains relate to the sector. If a domain is not congruent with the sector demarcation, membership density in the sector under investigation will most likely differ from the overall density, since the reference population for delimiting the relevant membership – the numerator – and identifying the potential members – the denominator – will not be the same. 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.

To summarise, this report basically distinguishes between three types of organisational densities, as defined in Table 6, which are – depending on data availability – also broken down into net and gross rates.

Table 6: Definition of organisational density figures

Type of density	Definition	Breakdown
Domain density	Number of employees (companies) organised by the organisation divided by total number of employees (companies) included in the organisation's membership domain	Net and gross; Employees (for trade unions); Companies and employees (for employer organisations)
Sectoral density	Number of employees (companies) organised by the organisation in the Horeca sector divided by total number of employees (companies) in	Net and gross; Employees (for trade unions); Companies and employees (for employer organisations)

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	the sector.	
Sectoral domain density	Number of employees (companies) organised by the organisation in the Horeca sector divided by total number of employees (companies) in the Horeca sector as demarcated by the organisation's domain	Net and gross; Employees (for trade unions); Companies and employees (for employer organisations)

Trade unions

Tables 7 and 8 present the trade union data on their domains and membership strength. The tables list all trade unions which meet at least one of the two criteria for classification as a sector-related social partner organisation, as defined earlier.

Table 7: Domain coverage and membership of trade unions in Horeca, 2010/11

	Trade Union	Type of mem-bership	Domain coverage	Members total	Members active	Members sector	Members sector active	Female member-ship as (%) of total
AT	GPA-djp	Voluntary	Sectional overlap	n.a.	180,000	n.a.	2,000	44
AT	vida	Voluntary	Sectional overlap	n.a.	152,000	n.a.	9,300	33
BE	ABVV-HORVAL*	Voluntary	Congruence	1482,000	27,000	1,482,000	27,000	n.a.
BE	CGSLB-ACLVB*	Voluntary	Congruence	250,000	n.a.	250,000	n.a.	n.a.
BE	CSC-ACV Alimentation *	Voluntary	Congruence	1550,000	30,000	1,550,000	30,000	n.a.
BG	FITUT*	Voluntary	Sectionalism	n.a.	n.a.	n.a.	n.a.	62
BG	ITUFECCTCS*	Voluntary	Overlap	5,340	5,340	2,225	2,225	65
BG	NFTSCT*	Voluntary	Overlap	n.a.	n.a.	n.a.	n.a.	58
CY	OEXEKA*	Voluntary	Congruence	15,765	n.a.	n.a.	n.a.	58
CY	SYXKA*	Voluntary	Congruence	14,692	n.a.	n.a.	n.a.	49
CZ	ČMOS PH ČR	Voluntary	Congruence	820	820	820	820	n.a.
DE	NGG	Voluntary	Overlap	205,646	n.a.	37,600	n.a.	41
DK	3F	Voluntary	Overlap	301,172	n.a.	n.a.	n.a.	35
EE	ESTAL*	Voluntary	Overlap	1,048	1,408	15	15	69
EE	ETKA*	Voluntary	Overlap	1,168	1,168	38	38	96
ES	CHTJ-UGT*	Voluntary	Overlap	75,271	66,607	35,201	n.a.	52

	Trade Union	Type of mem-bership	Domain coverage	Members total	Members active	Members sector	Members sector active	Female member-ship as (%) of total
ES	CIG-FEDERACIÓN DE SERVIZOS*	Voluntary	Sectional overlap	n.a.	n.a.	n.a.	n.a.	n.a.
ES	ELA-ZERBITZUAK*	Voluntary	Sectional overlap	n.a.	n.a.	n.a.	n.a.	n.a.
ES	FECOHT*	Voluntary	Overlap	110,316	96,759	43,494	n.a.	57
ES	LAB*	Voluntary	Sectional overlap	n.a.	n.a.	n.a.	n.a.	n.a.
ES	USO*	Voluntary	Overlap	n.a.	n.a.	n.a.	n.a.	n.a.
FI	PAM	Voluntary	Overlap	221,000	150,000	40,000	33,000	80
FR	CGT Services*	Voluntary	Overlap	37,000	n.a.	n.a.	n.a.	n.a.
FR	CSFV-CFTC Services*	Voluntary	Overlap	29,000	n.a.	n.a.	n.a.	n.a.
FR	FdS-CFDT*	Voluntary	Overlap	11,000	n.a.	n.a.	n.a.	n.a.
FR	FGTA-FO*	Voluntary	Overlap	n.a.	n.a.	n.a.	n.a.	n.a.
FR	INOVA CFE-CGC*	Voluntary	Sectional overlap	n.a.	n.a.	n.a.	n.a.	n.a.
GR	POEEYTE	Voluntary	Congruence	83,610	83,610	83,610	83,610	45
HU	VISZ	Voluntary	Congruence	20,000	20,000	20,000	20,000	n.a.
IE	Mandate	Voluntary	Sectional overlap	45,206	n.a.	n.a.	n.a.	66
IE	SIPTU	Voluntary	Sectional overlap	217,000	n.a.	n.a.	n.a.	37
IT	Conflavoratori*	Voluntary	Overlap	n.a	n.a	n.a	n.a	n.a.
IT	Fenasalc*	Voluntary	Overlap	n.a.	n.a.	n.a.	n.a.	n.a.
IT	Fesica*	Voluntary	Overlap	375,000	35,000	375,000	35,000	40
IT	Filcams*	Voluntary	Overlap	375,859	375,859	89,700	89,700	58
IT	Fisascat*	Voluntary	Overlap	233,887	233,887	n.a.	n.a.	60
IT	Manageritalia*	Voluntary	Sectional overlap	35,304	703	25,548	703	17
IT	Ugl Terziario*	Voluntary	Overlap	212,380	212,380	65,000	65,000	39
IT	UilTucs*	Voluntary	Overlap	113,956	113,956	n.a.	n.a.	50
LT	LMPS	Voluntary	Overlap	n.a.	n.a.	n.a.	n.a.	n.a.
LU	LCGB Commerce/ Handel*	Voluntary	Overlap	n.a.	n.a.	n.a.	n.a.	n.a.

	Trade Union	Type of membership	Domain coverage	Members total	Members active	Members sector	Members sector active	Female membership as (%) of total
LU	Alimentation et Hôtellerie OGBL*	Voluntary	n.a.	12,000	12,000	3,500	3,500	n.a.
LV	LAKRS	Voluntary	Overlap	7,695	7,695	350	350	n.a.
MT	GWU*	Voluntary	Overlap	41,575	34,543	3,190	3,190	18
MT	UHM*	Voluntary	Overlap	26,107	22,738	4,526	4,526	32
NL	CNV Vakmensen*	Voluntary	Overlap	140,000	140,000	2,000	2,000	45
NL	Die Unie/MHP*	Voluntary	Sectional overlap	64,500	64,500	350	350	50
NL	FNV Vakbewegig ng*	Voluntary	Congruence	460,000	460,000	22,000	22,000	47
PL	SKHG	Voluntary	Congruence	1,900	1,400	1,900	1,400	n.a.
PT	SITESE*	Voluntary	Overlap	10,000	700	8,000	600	68
PT	STHTASSR AM*	Voluntary	Sectional overlap	1,600	800	1,500	700	n.a.
PT	STIHTRSA*	Voluntary	Sectional overlap	2,000	1,500	1,500	1,300	n.a.
PT	STIHTRSC*	Voluntary	Sectional overlap	1,200	1,100	1,000	900	n.a.
PT	STIHTRSN*	Voluntary	Sectional overlap	1,500	1,300	1,200	1,000	n.a.
PT	STIHTRSS*	Voluntary	Sectional overlap	6,500	6,000	6,000	5,500	n.a.
RO	FST	Voluntary	Overlap	17,000	17,000	16,500	16,500	n.a.
SE	HRF*	Voluntary	Sectional overlap	35,878	27,700	33,000	26,700	n.a.
SE	Kommunal*	Voluntary	Sectional overlap	505,000	24,000	465,000	21,600	80
SE	Unionen	Voluntary	Sectional overlap	n.a.	500,000	5,300	4,500	n.a.
SI	SDGiTS KS90*	Voluntary	Congruence	4,000	4,000	4,000	4,000	65
SI	SGIT*	Voluntary	Congruence	9,000	9,000	9,000	9,000	68
SI	SODS*	Voluntary	Overlap	8,000	200	8,000	200	30
SK	OZ POCR	Voluntary	Overlap	12,000	325	11,000	295	76
SK	OZ PP	Voluntary	Sectional overlap	5,000	n.a.	4,500	n.a.	20
SK	OZP SR	Voluntary	Sectional overlap	3,500	3,500	n.a.	n.a.	50
UK	BFAWU	Voluntary	Overlap	22,786	n.a.	n.a.	n.a.	n.a.
UK	GMB*	Voluntary	Overlap	601,730	n.a.	n.a.	n.a.	n.a.

	Trade Union	Type of membership	Domain coverage	Members total	Members active	Members sector	Members sector active	Female membership as (%) of total
UK	Unite*	Voluntary	Overlap	1,474,564	n.a.	n.a.	n.a.	n.a.
UK	USDAW	Voluntary	Sectional overlap	386572	n.a.	n.a.	n.a.	n.a.

** = Domain overlaps with other sector-related trade unions.*

n.a. = not available

Table 8: Density, collective bargaining, consultation and affiliations of trade unions in Horeca, 2010/11

	Trade union	Domain total	Domain active	Sector	Sector active	Sectoral domain	Sectoral domain active	CB	Consul-tation	National	European
AT	GPA-djp	n.a.	16.00	n.a.	1.00	n.a.	9.00	Yes	Yes	OGB	EPSU; EMCEF; EFFAT; EFJ; UNI Europa
AT	vida	n.a.	22.00	n.a.	4.50	n.a.	6.00	Yes	Yes	OGB	EFFAT; ETF; EPSU; UNI EUROPA
BE	ABVV-HORVAL	16.50	16.50	n.a.	n.a.	n.a.	n.a.	Yes	Yes	FGTB-ABVV	EFFAT
BE	CGSLB - ACLVB	n.a.	0.00	n.a.	n.a.	n.a.	n.a.	Yes	Yes	ACLVB-CGSLB	EFFAT
BE	CSC-ACV Alimentation	18.00	18.00	n.a.	n.a.	n.a.	n.a.	Yes	Yes	CSC-ACV	EFFAT
BG	FITUT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	CITUB	UNI Europa
BG	ITUFE CCTCS	6.00	5.60	2.00	2.30	2.00	2.00	Yes	Yes	CITUB	UNI Europa
BG	NFTSCT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	CL 'PODKREPA'	UNI Europa
CY	OEXEKA	68.60	n.a.	68.60	n.a.	68.60	n.a.	Yes	No	SEK	EFFAT
CY	SYXKA	63.90	n.a.	63.90	n.a.	63.90	n.a.	Yes	No	PEO	None
CZ	ČMOS PH ČR	n.a.	0.00	n.a.	0.00	n.a.	0.00	Yes	Yes	CMKOS	EFFAT; UNI Europa
DE	NGG	n.a.	0.00	n.a.	0.00	n.a.	0.00	Yes	Yes	DGB	EFFAT
DK	3F	n.a.	75.00	n.a.	n.a.	n.a.	26.00	Yes	Yes	LO	EFFAT; UNI Europa; EMCEF

	Trade union	Domain total	Domain active	Sector	Sector active	Sectoral domain	Sectoral domain active	CB	Consul-tation	National	European
EE	ESTAL	1.20	1.20	n.a	n.a.	n.a.	0.10	No	Yes	EAKL	UNI Europa Commerce; Association of Baltic communication and Service Workers
EE	ETKA	1.00	1.00	n.a.	n.a.	n.a.	0.20	No	Yes	EAKL; AHL	UNI Europa Commerce
ES	CHTJ-UGT	n.a.	n.a.	3.30	n.a.	n.a.	n.a.	Yes	Yes	UGT	EFFAT; UNI Europa
ES	CIG-FEDERACIÓN DE SERVIZOS	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	n.a.	n.a.
ES	ELA-ZERBITZUAK	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	n.a.	n.a.
ES	FECOHT	n.a.	n.a.	4.00	n.a.	n.a.	n.a.	Yes	Yes	CCOO	EFFAT; UNI Europa
ES	LAB	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	n.a.	n.a.
ES	USO	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	n.a.	n.a.
FI	PAM	n.a.	n.a.	55.58	45.85	55.58	45.85	Yes	Yes	SAK	EFFAT
FR	CGT Services	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	CGT	EFFAT
FR	CSFV-CFTC Services	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	CFTC	n.a.
FR	FdS-CFDT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	CFDT	EFFAT; UNI Europa
FR	FGTA-FO	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	FO	EFFAT
FR	INOVA CFE-CGC	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	n.a.	n.a.
GR	POEEYTE	n.a.	n.a.	46.60	46.60	n.a.	n.a.	Yes	Yes	GSEE	EFFAT

	Trade union	Domain total	Domain active	Sector	Sector active	Sectoral domain	Sectoral domain active	CB	Consul-tation	National	European
HU	VISZ	5.00	5.00	10.00	10.00	10.00	10.00	Yes	Yes	Autonomok	EFFAT
IE	Mandate	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	ICTU	UNI Europa
IE	SIPTU	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	ICTU	UNI Europa
IT	Conflavoratori	n.a	n.a	n.a	n.a	n.a	n.a	Yes	n.a.	n.a.	n.a.
IT	Fenasalc	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	CISAL	n.a.
IT	Fesica	n.a.	n.a.	5.10	5.10	5.10	5.10	Yes	Yes	Confsal	Cesi
IT	Filcams	9.40	9.40	13.00	13.00	13.00	13.00	Yes	No	Cgil	EFFAT; UNI Europa
IT	Fisascat	5.80	5.80	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	Cisl	EFFAT; UNI Europa
IT	Manageritalia	7.10	5.10	0.10	0.10	14.10	14.10	Yes	Yes	Confedir-Mit	n.a.
IT	Ugl Terziario	n.a.	n.a.	9.40%	0.09	9.40%	9.40	Yes	Yes	Ugl	n.a.
IT	UilTucs	2.80	2.80	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	Uil	EFFAT; UNI Europa
LT	LMPS	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	No			
LU	LCGB Commerce/Handel	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	LCGB	EFFAT
LU	Alimentation et Hôtellerie OGBL	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	OGBL	EFFAT
LV	LAKRS	10-54	10	1.70	1.70	1.70	1.70	Yes	Yes	LBAS	EPSU; ETF; EFFAT

	Trade union	Domain total	Domain active	Sector	Sector active	Sectoral domain	Sectoral domain active	CB	Consul-tation	National	European
MT	GWU	25.90	21.50	18.50	18.50	18.50	18.50	Yes	Yes	None	EFBWW; EFFAT; EMF; EPSU; ETF; Eurocadres; EURO WEA; FERPA; UNI Europa
MT	UHM	18.90	16.50	26.70	26.70	27.00	27.00	Yes	Yes	CMTU	EUROFEDOP
NL	CNV Vakmensen	1.0	1.0	1.0	1.0	1.0	76.00	Yes	Yes	CNV	EFFAT
NL	Die Unie/MHP	1.0	1.0	1.0	n.a.	n.a.	n.a.	Yes	Yes	CMHP	n.a.
NL	FNV Vakbewegigng	n.a.	n.a.	7.00.	7.00	7.0	7.00	Yes	Yes	FNV	EFFAT
PL	SKHG	1.00	1.00	1.00	1.00	1.00	1.00	Yes	No	None	EFFAT
PT	SITESE	0.60	0.50	0.30	0.30	0.30	0.30	Yes	n.a.	UGT; FETESE	UNI Europa
PT	STHTASSRAM	3.20	3.00	0.40	0.30	3.00	2.80	Yes	No	CGTP. FESAHT	None
PT	STIHTRSA	2.90	2.10	0.60	0.60	2.00	2.20	Yes	No	CGTP. FESAHT	None
PT	STIHTRSC	2.40	2.00	0.50	0.40	2.00	2.30	Yes	No	CGTP. FESAHT	None
PT	STIHTRSN	2.10	1.70	0.60	0.50	2.00	1.70	Yes	No	CGTP. FESAHT	None
PT	STIHTRSS	8.10	7.50	2.90	2.60	8.00	7.90	Yes	No	CGTP. FESAHT	None
RO	FST	8.90	8.90	9.50	9.50	9.50	9.50	Yes	Yes	CNSLR	None
SE	HRF	28.70	22.20	28.00	22.60	47.10	22.30	Yes	Yes	LO	EFFAT
SE	Kommunal	71.80	66.10	20.40	18.40	72.70	65.00	Yes	Yes	LO	EPSU; (EFFAT); ETF

	Trade union	Domain total	Domain active	Sector	Sector active	Sectoral domain	Sectoral domain active	CB	Consul-tation	National	European
SE	Unionen	50.00	42.00	4.50	3.80	53.00	53.00	Yes	Yes	TCO	EFFAT
SI	SDGiTS KS90	14.00	14.00	14.00	14.00	14.00	14.00	Yes	Yes	KS90	n.a.
SI	SGIT	32.00	32.00	32.00	32.00	32.00	32.00	Yes	Yes	ZSSS	EFFAT
SI	SODS	3.00	3.00	1.00	1.00	2.00	2.00	Yes	No	ZSSS	None
SK	OZ POCR	4.00	n.a.	n.a.	0.00	n.a.	0.00	Yes	Yes	KOZ SR	EFFAT; UNI Europa
SK	OZ PP	10.00	10.00	0	0.00	0	0.00	No	No	KOZ SR	EFFAT
SK	OZP SR	n.a.	51.00	n.a.	n.a.	n.a.	n.a.	No	No	KOZ SR	EFFAT
UK	BFAWU	n.a.	0.00	n.a.	0.00	n.a.	0.00	Yes	Yes	TUC	EFFAT
UK	GMB	n.a.	0.00	n.a.	0.00	n.a.	0.00	Yes	Yes	TUC	EFFAT
UK	Unite	n.a.	0.00	n.a.	0.00	n.a.	10	Yes	Yes	TUC	EFFAT
UK	USDAW	n.a.	0.00	n.a.	0.00	n.a.	0.00	No	No	TUC	EFFAT

Note: The figures are rounded in all cases. Densities reported as 0% therefore refer to a figure of up to 0.49% and always more than 0%.

CB = collective bargaining

n.a. = not available

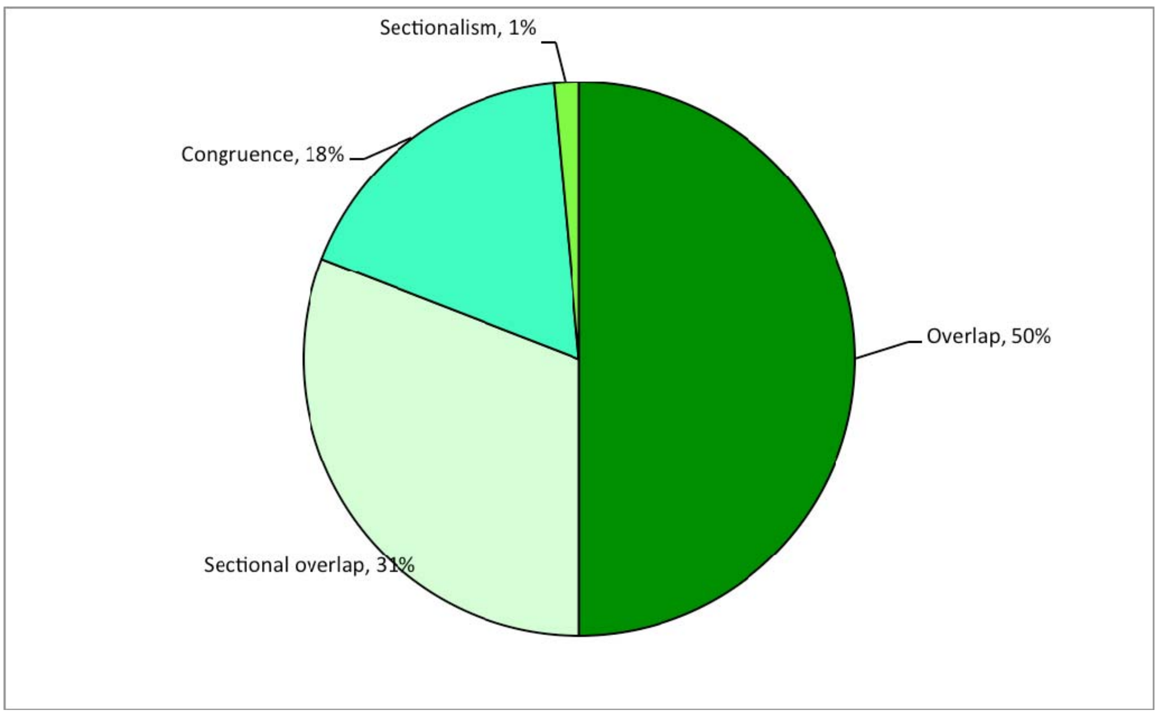
All countries included in the study record at least one sector-related trade union. The Lithuanian union LMPS was included in the study, even though it does not have any members in the Horeca sector, both because it is member of EFFAT and also because it used to recruit members in the Horeca sector and could still potentially do so, since its representational domain covers hotel, restaurant and catering activities.

In total, 69 sector-related trade unions could be identified, but for only 68 was it possible to collect information on the characterisation of their representational domain. Of these, 12 (18%) have demarcated their domain in a way which is congruent with the sector definition. This low proportion underscores the fact that statistical definitions of business activities rather differ from the lines along which employees identify common interests and band together in trade unions. Domain demarcations resulting in overlap in relation to the sector occur in 34 (or 50%) of cases. This is the commonest situation in the Horeca sector. Overlap by and large arises from two different modes of demarcation. The first one refers to general (cross-sectoral) domains (such as

3F in Denmark and Unite in the UK). The second mode in the sector relates to various forms of multi-sector domains, covering contiguous sectors, frequently in the broader services or retail segments of the economy (such as SIPTU in Ireland and Filcams, Fisascat and UILTuCS in Italy). Sectional overlaps involves 21 trade unions (31%). This mode usually emanates from domain demarcations which focus on certain categories of employees which are then organised across several or all sectors. Typically it this is the case for white- and blue-collar unions. Employee categories are specified by various parameters, such as distinct occupations (such as white-collar workers, as is the case of GPA-DJP in Austria, INOVA CFE-CGC in France, and Unionen in Sweden; or blue-collar employees, as is the case with vida of Austria; or managers as for Manageritalia in Italy), and geographic region (such as CIG-FEDERACIÓN DE SERVIZOS and ELA-ZERBITZUAK of Spain which are active only in Galicia and the Basque Country respectively). Finally, sectionalism can be found only in one case (1%). It ensues from the existence of sector-specific trade unions, which represent and organise only certain categories of employees in the sector; this is the case with the Bulgarian union FITUT (Federation of Independent Trade Unions in Tourism), which organises only tourism-related activities.

In the majority of countries covered by this study, there is more than one union organising the Horeca sector. In particular, in ten countries there is one single sector-related trade union, whereas in the remaining 17 a pluralist representation structure is present on the labour side.

Figure 2: Horeca sector-related trade unions and their domain patterns (N=68)



Source: EIRO national contributions (2011)

Figure 2: Horeca sector related trade unions and their domain patterns (N=68)

As the domains of the trade unions often overlap with the demarcation of the sector, so do their domains with one another in the case of those countries with a pluralist trade union 'landscape' in the Horeca sector. Table 8 also illustrates these inter-union domain overlaps. Inter-union overlaps of domains are endemic; they involve 50 organisations out of a total of 69. In all countries with more than one sector-related trade union, the domain of any of them overlaps with the domain of all or most of the others. Depending on the scale of mutual overlap, this results in possible competition for members. Inter-union competition is recorded from several countries, but it should be underlined that this is the case for far less organisations: 19. In many cases, in fact, trade unions cooperate in joint collective bargaining at sectoral and decentralised levels. Rivalries are reported in Belgium, Estonia, France, Portugal, UK, and occasionally in Austria as regards the membership of white-collar employees. Competition often refers to membership while cooperation usually prevails in collective bargaining also in these cases.

On average, female employees represent practically half of trade union members in the unions covered by this study (with a simple mean of 52% for the 36 cases where the information is available). Variations are significant across union organisations and they partly reflect the representational domain, with a lower presence of women in the case of representation of managers (in Manageritalia only 17% of members are women) or blue-collar workers (only one third of members of vida in Austria are women). However, also the distinct features of national Horeca sectors and of individual unions matter. For instance, the Estonian trade union ETKA has an almost completely female membership basis (96%) and the Finnish PAM has a very large female membership (80%).

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

The absolute numbers of trade union members differ widely, ranging from about 1.5 million (in the case of UK's Unite – The Union) to only around one thousand workers (as in the cases of ETKA and ESTAL in Estonia and of STIHTRSC in Portugal). 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.

In fact, density is the measure of membership strength which is more appropriate to perform a comparative analysis. In this context it should be noted that density figures in this section refer to net ratios, which means that they are calculated on the basis of active employees only, rather than taking all union members (those in jobs and those who are not) into account. This is mainly because research usually considers net union densities as more informative compared to gross densities, since the former measure tends to reflect unionisation trends among the active workforce more quickly and appropriately than the latter (only the active workforce is capable of taking industrial action).

Membership rates are available for only a number of the sector-related organisations. Sectoral density tends to be of a low level, since 28 unions are under 10% and three are above 30% (but we have to remember that we are in a situation of multiple unions in a majority of countries – see Table 8 and Table 9). The simple average of available sectoral density rates (38 cases) is 8%. Compared with their overall domain densities, the sector-related trade unions' density in the Horeca sector are lower, with a certain increase in the case of sectoral domain densities. The former is 12% (40 cases) while the latter is 13% (38 cases).

In fact, when looking at sector density (again referring only to active members), it is important to differentiate between the trade unions' *sectoral* density on the one hand and their *sectoral domain* density on the other. Whereas the former measures the ratio of the total number of members of a trade union in the sector to the number of employees in the sector (as demarcated by the NACE classification), the latter indicates the total number of members of a trade union in the sector in relation to the number of employees which work in that part of the sector as covered by the union domain (Figure 2). 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 sectionalistically overlapping in relation to the sector.

As noted above, when taking the trade unions' *sectoral domain* density into account (which tends to be higher than their *sectoral* density for the reasons outlined above), the trade unions' density in the Horeca sector is in line with the density ratio referring to their domain on aggregate. It should be noted that for nearly half of the sector-related trade unions (that is in 30 cases) no data on sectoral domain density are available. In regard of those trade unions for which figures on both measures (i.e. sectoral domain density and domain density on aggregate) are recorded, there is a tendency of presenting similar densities in the two domains (34 cases). Some unions with a multisectoral coverage, like 3F in Denmark, and GPA-djp and vida in Austria, show significantly lower density rates in the Horeca sector, so that it can be regarded as a relatively weaker context compared to the their overall representational domain.

Employer organisations

Tables 9 and 10 present the membership data for the employer organisations in the Horeca sector. Almost for all of the 27 countries under consideration at least one sector-related **employer organisation** is documented, with the only exception of Poland, where no sector-related employer association is present and collective bargaining takes place exclusively at company level within a large former-state owned group of companies, Orbis. In at least nine of these countries, a proportion of the listed employer/business organisations are not a party to collective bargaining (see Table 9). 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' (**TN0311101S**). Such sector-related trade associations also exist in the Horeca sector.

In terms of their *national* scope of activities, all of the associations which are not involved in collective bargaining according to Table 11 either primarily or exclusively act as trade associations in their country. It is the conceptual decision to include all associational affiliates to EU-level organisations involved in Sectoral Social Dialogue, 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 74 employer/business organisations listed in Table 10 and Table 11, at least ten organisations belong to this group.

Twenty-one of the 26 countries for which related data are available have one or more employer organisations engaged in sector-related collective bargaining. In five countries, employer/business organisations do not take part in sector-related collective bargaining. This is the case for countries where only company-level bargaining is present in the Horeca sector, Malta and the UK, and of the three Baltic countries, Estonia, Latvia and Lithuania, where no collective bargaining takes place in the Horeca sector.

In nine of the 26 countries for which full information on the sector-related associational landscape is given, only one single employer organisation (in the meaning of a social partner organisation as defined before) has been established (Bulgaria, Denmark, Estonia, Finland, Latvia, Lithuania, Luxembourg, Malta, and Netherlands). Pluralist associational systems are thus prevailing both on the trade union and employer sides. As far as employers are concerned, this is probably the result of a relatively diversified representation linked to the various relevant subsectors which are present in Horeca, as well as to the importance of SMEs. Business organisations often tend to represent well-defined interests within relatively narrow sectors.

Table 9: Domain coverage and membership of employer organisations in Horeca, 2010/11

	Employer organisation	Type of membership	Domain coverage	Companies	Companies in sector	Employees	Employees in sector
AT	FVG*	Compulsory	Sectionalism	57,000	57,000	129,000	129,000
AT	FVH*	Compulsory	Sectionalism	17,805	17,805	104,218	104,218
AT	VVAT*	Voluntary	Sectional overlap	55,000	52,000	200,000	180,000
BE	COMEOS	Voluntary	Sectionalism	n.a.	n.a.	n.a.	n.a.
BE	Fed Horeca Bruxelles	Voluntary	Sectionalism	n.a.	n.a.	n.a.	n.a.
BE	Fed Horeca Vlaanderen	Voluntary	Sectionalism	n.a.	n.a.	n.a.	n.a.
BE	Fed Horeca Wallonie	Voluntary	Sectionalism	n.a.	n.a.	n.a.	n.a.
BE	UBC	Voluntary	Sectionalism	n.a.	n.a.	n.a.	n.a.
BG	BTC	Voluntary	Sectionalism	120	120	30,207	30,207
CY	ACTE*	Voluntary	Overlap	30	30	4,500	4,500
CY	PASYXE*	Voluntary	Sectionalism	280	280	n.a.	n.a.
CZ	AHR ČR	Voluntary	Overlap				
CZ	SOCR ČR	Voluntary	Overlap	n.a.	n.a.	n.a.	n.a.
DE	BdS*	Voluntary	Sectionalism	700	700	100,000	100,000
DE	DEHOGA*	Voluntary	Congruence	70,000	70,000	n.a.	n.a.
DE	IHA	Voluntary	Sectionalism	1,269	1,269	n.a.	n.a.
DK	HORESTA	Voluntary	Congruence	2,100	2,100	50,000	50,000
EE	EHRL*	Voluntary	Overlap	94	69	2,500	n.a.
ES	CEHAT*	Voluntary	Sectionalism	14,000	14,000	n.a.	n.a.
ES	FEHR*	Voluntary	Congruence	n.a.	n.a.	n.a.	n.a.
ES	PRODELIVERY*	Voluntary	Sectionalism	n.a.	n.a.	n.a.	n.a.
FI	MaRa	Voluntary	Sectional overlap	2,400	2,200	60,000	50
FR	CPIH*	Voluntary	Sectional overlap	n.a.	n.a.	n.a.	n.a.
FR	FAGIHT*	Voluntary	Congruence	n.a.	n.a.	n.a.	n.a.
FR	SNRTC*	Voluntary	Sectional overlap	n.a.	n.a.	n.a.	n.a.
FR	SYNHORCAT*	Voluntary	Congruence	10,000	10,000	955,300	955,300
FR	UMIH*	Voluntary	Congruence	n.a.	n.a.	n.a.	n.a.
GR	OEZE	Voluntary	Sectionalism	1,000	1,000	n.a.	n.a.
GR	OKE	Voluntary	Sectionalism	40,000	40,000	n.a.	n.a.
GR	POESE	Voluntary	Sectionalism	20,000	20,000	n.a.	n.a.
GR	POX	Voluntary	Sectionalism	6,500	6,500	118,000	118,000

	Employer organisation	Type of membership	Domain coverage	Companies	Companies in sector	Employees	Employees in sector
HU	HAH	Voluntary	Sectionalism	n.a.	n.a.	n.a.	n.a.
HU	VIMOSZ	Voluntary	Sectionalism	46	46	n.a.	n.a.
IE	IBEC*	Voluntary	Overlap	7,500	1,000	n.a.	n.a.
IE	IHF*	Voluntary	Sectionalism	n.a.	n.a.	n.a.	n.a.
IE	RAI	Voluntary	Sectionalism	n.a.	n.a.	n.a.	n.a.
IT	AICA*	Voluntary	Sectionalism	n.a.	n.a.	n.a.	n.a.
IT	Assocamping*	Voluntary	Sectionalism	n.a.	n.a.	n.a.	n.a.
IT	Assohotel*	Voluntary	Sectionalism	n.a.	n.a.	n.a.	n.a.
IT	Assoturismo*	Voluntary	Sectional overlap	48,000	n.a.	n.a.	n.a.
IT	Confterziario*	Voluntary	Sectional overlap	n.a.	n.a.	n.a.	n.a.
IT	FAITA*	Voluntary	Sectionalism	1,600	1,600	4,000	4,000
IT	FED.AR.COM*	Voluntary	Sectional overlap	n.a.	n.a.	n.a.	n.a.
IT	Federalberghi*	Voluntary	Sectionalism	27,000	27,000	200,000	200,000
IT	Federturismo*	Voluntary	Overlap	n.a.	n.a.	n.a.	n.a.
IT	FIEPeT*	Voluntary	Sectional overlap	n.a.	n.a.	n.a.	n.a.
IT	FIPE*	Voluntary	Sectional overlap	110,000	100,400	400,000	n.a.
IT	Italia Turismo-CIDEC*	Voluntary	Sectional overlap	n.a.	n.a.	n.a.	n.a.
IT	UCICT*	Voluntary	Sectional overlap	n.a.	n.a.	n.a.	n.a.
IT	UNCI*	Voluntary	Sectional overlap	7,825	n.a.	129,301	n.a.
LT	LVRA	Voluntary	Overlap	316	291	9,000	8,800
LU	HORESCA	Voluntary	Congruence	2,650	2,650	12,000	12,000
LV	LKA	Voluntary	Sectionalism	23	23	110	110
LV	LTA	Voluntary	Sectional overlap	155	34	n.a.	n.a.
LV	LVRA*	Voluntary	Overlap	300	290	10,000	9,700
MT	MHRA	Voluntary	Congruence	405	405	n.a.	n.a.
NL	KHN	Voluntary	Congruence	15,800	15,800	344,250	344,250
PT	AHP*	Voluntary	Sectionalism	430	430	n.a.	n.a.
PT	AHRESP*	Voluntary	Congruence	n.a.	n.a.	n.a.	n.a.
PT	AIHSA*	Voluntary	Sectionalism	1,000	1,000	n.a.	n.a.
PT	APHORT*	Voluntary	Congruence	n.a.	n.a.	n.a.	n.a.
PT	HRCentro*	Voluntary	Sectionalism	1,000	1,000	n.a.	n.a.
RO	FIHR*	Voluntary	Congruence	n.a.	n.a.	15,000	15,000

	Employer organisation	Type of membership	Domain coverage	Companies	Companies in sector	Employees	Employees in sector
RO	FPTR*	Voluntary	Overlap	2,500	2,450	20,932	20,624
SE	LI*	Voluntary	Sectional overlap	890	300	45,000	2,000
SE	SHR*	Voluntary	Overlap	3,752	3,652	64,009	61,009
SE	SKL*	Voluntary	Sectional overlap	760	330	1,045,000	25,100
SI	TGZS*	Voluntary	Congruence	1,100	1,000	20,000	19,000
SI	ZDOPS*	Voluntary	Overlap	2,700	n.a.	22,000	n.a.
SI	ZDS*	Voluntary	Overlap	1,450	50	250,000	19,000
SK	ZHR SR	Voluntary	Congruence	221	221	4,200	4,200
SK	ZOCR	Voluntary	Overlap	105	2	40,000	10,000
UK	BBPA	Voluntary	Sectional overlap	n.a.	n.a.	600,000	600,000
UK	BHA	Voluntary	Congruence	40,000	40,000	500,000	500,000

** = Domain overlaps with other sector-related employer/business organisations.*

n.a. = not available

Table 10: Density, collective bargaining, consultation and affiliations of employer/ business organisations in Horeca, 2010/11

	Employer org.	Companies			Employees			CB	Consul -tation	National	European
		Domain	Sector	Sector al	Domain	Sector	Sectoral domain				
AT	FVG	100	51-75	100	100	63	100	Yes	Yes	WKO	HOTREC
AT	FVH	100	41	100	100	51	100	Yes	Yes	WKO	HOTREC
AT	VVAT	91–100	91–100	91–100	91–100	76–90	91–100	No	Yes	None	HOTREC
BE	COMEOS	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	FEB-VOB	EuroComm erce
BE	Fed Horeca Bruxelles	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	UCM	HOTREC
BE	Fed Horeca Vlaanderen	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	UNIZO	HOTREC
BE	Fed Horeca Wallonie	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	UCM	HOTREC
BE	UBC	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	COMEO S	FERCO
BG	BTC	0.5	0.5	1.0	17.4	17.4	23.2	Yes	Yes	n.a.	n.a.
CY	ACTE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	None	None
CY	PASYXE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	None	HOTREC
CZ	AHR ČR							No	Yes	SOCR CR	HOTREC

	Employer org.	Companies			Employees			CB	Consul-tation	National	European
		Domain	Sector	Sectoral	Domain	Sector	Sectoral domain				
CZ	SOCR ČR	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	None	EuroCommerce
DE	BdS	60	n.a.	n.a.	80	n.a.	n.a.	Yes	Yes	BDA	n.a.
DE	DEHOGA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	BTW	HOTREC
DE	IHA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	No	Yes	BDA. via BTW in BDI	HOTREC
DK	HORESTA	17	17	17	74	74	74	Yes	Yes	DA	HOTREC, Nordisk Besögsnäring
EE	EHRL	5.06	n.a.	3.64	4.46	n.a.	n.a.	No	Yes	ETTK	HOTREC
ES	CEHAT	61.07	2.42	61.07	n.a.	n.a.	n.a.	Yes	Yes	CEOE	HOTREC
ES	FEHR	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	CEOE	HOTREC
ES	PRODELIVERY	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	n.a.	n.a.
FI	MaRa	n.a.	19.8	n.a.	n.a.	69.5	n.a.	Yes	Yes	EK	HOTREC
FR	CPIH	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	CGAD	HOTREC
FR	FAGIHT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	None	HOTREC
FR	SNRTC	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	MEDEF	n.a.
FR	SYNHORCAT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	CGPME	HOTREC
FR	UMIH	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	MEDEF	HOTREC
GR	OEZE	n.a.	2.4	n.a.	n.a.	n.a.	n.a.	Yes	No	GSEVEE	n.a.
GR	OKE	n.a.	94.7	n.a.	n.a.	n.a.	n.a.	Yes	Yes	GSEVEE	None
GR	POESE	n.a.	47.4	n.a.	n.a.	n.a.	n.a.	Yes	Yes	GSEVEE	None
GR	POX	n.a.	15.4	n.a.	n.a.	65.8	n.a.	Yes	Yes	SETE	None
HU	HAH	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	HOTREC
HU	VIMOSZ	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	Confederation of Hungarian Employers and Industrialists	FERCO
IE	IBEC	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	None	EuroCommerce
IE	IHF	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	No	Yes	n.a.	n.a.
IE	RAI	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	No	Yes	n.a.	n.a.
IE	SFA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
IT	AICA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	Confindustria	None

	Employer org.	Companies			Employees			CB	Consul-tation	National	European
		Domain	Sector	Sectoral	Domain	Sector	Sectoral domain				
IT	Assocamping	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	Confesercenti; Assoturismo	None
IT	Assohotel	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Confesercenti; Assoturismo	None
IT	Assoturismo	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	Confesercenti	None
IT	Confterziario	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	None	None
IT	FAITA	64.0	0.6	64.0	60.6	0.6	60.6	Yes	Yes	Confcommercio; Confturismo	EFCO&HPA
IT	FED.AR.COM	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	None	None
IT	Federalberghi	67.5	9.3	67.5	83.4	28.9	83.4	Yes	Yes	Confcommercio; Confturismo	HOTREC
IT	Federturismo	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	Confindustria	None
IT	FIEPeT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	Confesercenti; Assoturismo	None
IT	FIPE	44.0	34.8	43.7	53.3	n.a.	n.a.	Yes	n.a.	Confcommercio; Confturismo	HOTREC
IT	Italia Turismo-CIDEC	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	CIDEC	None
IT	UCICT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	CNAI	None
IT	UNCI	9.5	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	None	None
LT	LVRA	9	9.4	9.4	22.5	25.3	25.3	No	Yes	None	HOTREC
LU	HORESCA	n.a	n.a	n.a	n.a	n.a	n.a	Yes	Yes	n.a.	HOTREC
LV	LVRA	14	14	14	48.4	48.4	48.4	No	Yes	LDDK	HOTREC
MT	MHRA	13.6	13.6	13.6	n.a.	n.a.	n.a.	No	Yes	None	HOTREC
NL	KHN	n.a.	52	n.a.	n.a.	72.5	n.a.	Yes	Yes	VNO-NCW	HOTREC
PT	AHP	3	1	3	10–25	10–25	10–25	Yes	n.a.	CTP	HOTREC
PT	AHRESP	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	CTP; CIP	HOTREC; FERCO
PT	AIHSA	8	2	8	10–25	0–9	10–25	Yes	n.a.	CTP	n.a.

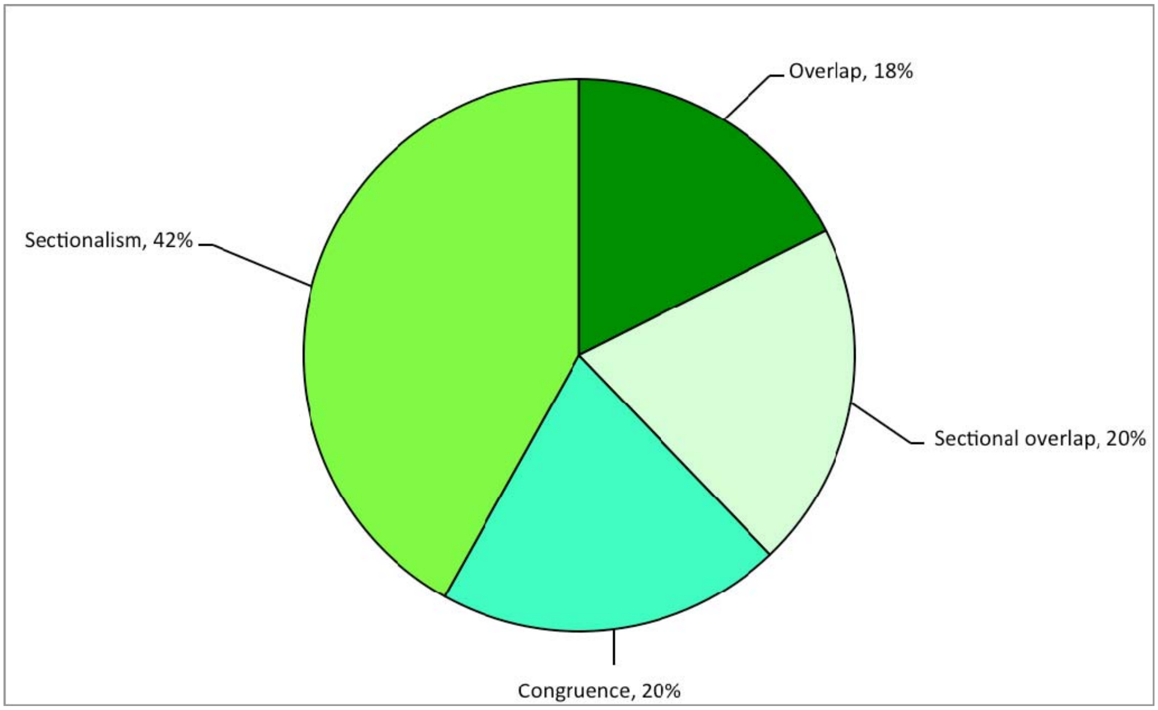
	Employer org.	Companies			Employees			CB	Consul -tation	National	European
		Domain	Sector	Sector al	Domain	Sector	Sectoral domain				
PT	APHORT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	CTP	HOTREC
PT	HRCentro	12	2	12	10–25	0–9	10–25	Yes	n.a.	CTP	n.a.
RO	FIHR	n.a.	n.a.	n.a.	8.7	8.7	8.7	Yes	Yes	UGIR	HOTREC
RO	FPTR	9.26	9.36	9.36	11.02	11.92	11.92	Yes	Yes	CNPR	
SE	LI	40.45	1.89	42.86	78.95	1.7	33.33	Yes	n.a.	Svenskt Näringsliv	CIAA
SE	SHR	37.52	22.95	24.35	53.34	51.74	50.84	Yes	Yes	Svenskt Näringsliv	HOTREC
SE	SKL	43.83	2.07	91.67	98.4	21.29	98.43	Yes	No	None	CEEP; CEMR
SI	TGZS	14.0	13.0	13.0	14.0	13.0	13.0	Yes	Yes	n/a	EFCO & HPA
SI	ZDOPS	2	0	0	8	0	0	Yes	No	n/a	None
SI	ZDS	1.0	1.0	1.0	53.0	67.0	58.0	Yes	Yes	n/a	
SK	ZHR SR	4	4	4	5	5	5	No	Yes	RUZ SR	HOTREC
SK	ZOCR	1	0–9	0–9	16	0–9	0–9	Yes	No	RUZ SR	EuroComm erce
UK	BBPA	26–50	10–25	26–50	26–50	n.a.	51–75	No	Yes	n.a.	HOTREC
UK	BHA	20	31	31	33.3	41.5	33.3	No	Yes	None	HOTREC

Note: The figures have rounded in all cases. Densities reported as 0% hence refer to a figure of 0.49% to more than 0%.

n.a. = not available

The employer organisations' domains tend to be narrower than those of the trade unions. First, the two types of overlap cover 38% of cases, compared to almost 80% in the case of unions. Congruence is similar on two the sides of industry, as it concerns 20% of employer organisations and 18% of trade unions; sectionalism is far more present among employers as it involves 42% of cases compared to only 2%. This pattern is essentially linked to two features of employer representation. Trade associations tend to focus on quite specific economic activities, since they essentially act in the political arena and they can benefit from relatively high specialisation in terms of more homogeneous interests and clearer objectives. Representation of specific parts of the Horeca sector lead sectionalism, as in the cases where hotels and restaurants have specific associations, as happens in many countries (for instance, Austria, Germany, Greece, Ireland, Italy) or where territorial representation emerges (this is the case, for instance, in Belgium and Portuguese hotels).

Figure 3: Horeca sector-related employer's organisations/business associations and their domain patterns (N=74)



Source: EIRO national contributions 2011

Figure 3: Horeca sector related employer's organisations/business associations and their domain patterns (N=74)

In those countries with a pluralist structure in relation to employer organisations, these associations have managed to arrive at non-competing and often collaborative relationships.

As the figures on density show (Table 11), membership strength in terms of companies varies widely with regard to both the membership domain in general and the sector-related densities. The same holds true for the densities in terms of employees. Both the domain and the sectoral domain densities in terms of companies tend to be lower than the densities in terms of employees to a large extent. This reflects the usual higher propensity of the larger companies to associate, as compared to their smaller counterparts.

In general, overall densities of the employer/business organisations in the sector tend to be higher compared to trade union densities (see above). However, the sectoral features (with the strong presence of SMEs) and the representational characteristics (with the plurality of associations active at national level) lead to relatively low individual membership rates, especially if the copmany associational rate is taken into consideration. Having said that, it is notable that still a significant proportion of employer organisations show quite high density rates, as nine of the 25 organisations for which data are available (that is over a third) associate companies which employ over 50% of the sectoral employment. In general, the findings suggest that in the Horeca sector the employers are quite well organised in terms of both companies and employees represented, with an average sectoral associational rate of 21% in terms of companies (29 cases) and 33% in terms of employees (25 cases)[1]. However, it should be noted that density data are available only for a small number of the employer/business associations (between 30% and 40% of all cases, depending on the indicator) and that rates are often provided as estimations. Therefore, the data set should again be treated cautiously.

Collective bargaining and its actors

Tables 8, 9 and 10 list all of the social partners engaged in sector-related collective bargaining and consultation. The data presented in Table 11 provide an overview of the system of sector-related collective bargaining in the 27 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 (Traxler et al., 2001) . Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

Table 11: System of sectoral collective bargaining in Horeca (2011)

	Main level	Coverage rate (main level)	Additional level	Coverage rate (additional level)	Extension (a)
AT	Sectoral	100	Company	n.a.	(2)
BE	Sectoral	100	Company	n.a.	2
BG	Sectoral	6	n.a.	n.a.	0
CY	Sectoral	50	Company	n.a.	0
CZ	Sectoral	35	n.a.	n.a.	0
DE	Sectoral	Around 40	Company	2% in WG and 7% in EG	1
DK	Sectoral	At least 74	Company	n.a.	0
EE	No CB	n/a	n/a	n.a.	0
ES	Sectoral	Over 70	Company	n.a.	2
FI	Sectoral	90	Company	22	2
FR	Sectoral	Almost 100	Company	n.a.	2
GR	Sectoral	100	Local and company	n.a.	2
HU	Sectoral	100	n.a.	n.a.	2
IE	Sectoral	72	Company	14	(2)(b)
IT	Sectoral	Almost 100	Company	n.a.	(2)
LT	No CB	n/a	n/a	n/a	n/a
LU	Company	Marginal	None	n/a	n/a
LV	No CB	n/a	n/a	n.a.	1
MT	Company	5	None	n/a	0

[1] For density rates, if a range of values was given instead of an exact figure, calculations used the lowest value. For instance, for the 0-9% range, 0% was used, and for the 10-25% class, 10% was utilised.

NL	Sectoral	100	None	n/a	2
PL	Company	1,5	None	n/a	0
PT	Sectoral	Almost 100	Company	Marginal	2
RO	Sectoral	100	n.a.	n.a.	2 (ended in 2011)
SE	Sectoral	75	Company	60	0
SI	Sectoral	90-95	None	n.a.	0-1
SK	Company	1	n.a	n.a.	0
UK	Company	5,4	None	n/a	0

Source: EIRO national contributions 2011

Main level: main collective bargaining level

Coverage rate = collective bargaining coverage: employees covered as a percentage of the total number of employees in the sector; Main level: coverage rate of main level of collective bargaining; Additional level: coverage rate of the additional level of collective bargaining. The two bargaining areas (main and additional) may overlap.

(a) *Extension practices (including functional equivalents to extension provisions, i.e. obligatory membership and labour court rulings): 0 = no practice, 1 = limited/exceptional, 2 = pervasive. Cases of functional equivalents are put in parentheses.*

(b) The extension concerns minimum rates of pay and conditions of work proposed by Joint Labour Committees (JLCs) composed of representatives of workers and employers in the sector concerned. The pay and conditions agreed by the representatives on the JLCs are given force of law in Employment Regulation Orders (EROs) made by the Labour Court on foot of proposals made to the Court by the JLCs.

n.a. = not available

n/a = not applicable

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, only the company or its divisions are the party to the agreement. The relative importance of multi-employer bargaining, measured as a percentage of the total number of employees covered by a collective agreement, therefore provides an indication of the impact of the employer organisations on the overall collective bargaining process.

The second indicator considers whether statutory extension schemes have been applied to the sector. For reasons of brevity, this analysis is confined to extension schemes which widen the scope of a collective agreement to employers not affiliated 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.

- Extending a collective agreement to the employees who are not unionised in the company covered by the collective agreement is a standard of the International Labour Organization, aside from any national legislation.

- If employers did not extend a collective agreement concluded by them, even when not formally obliged to do so; 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 et al., 2001).

Collective bargaining coverage

In terms of the sector's collective bargaining coverage, 15 of the 27 countries for which related data are available record high coverage rates of at least 70% (Austria, Belgium, Denmark, Spain, Finland, France, Greece, Hungary, Ireland, Italy, Netherlands, Portugal, Romania, Sweden, and Slovenia); eight of them record coverage rates of (almost) 100% (Austria, Belgium, France, Hungary, Italy, Netherlands, Portugal, and Romania).

Conversely, there are six countries where collective bargaining coverage is below 10% or marginal (Bulgaria, Luxembourg, Malta, Poland, Slovakia and UK). With the exception of Bulgaria, these are the countries where only company-level bargaining is present. In three countries (Cyprus, Czech Republic and Germany), the coverage rate lies roughly between 30% and 50%. In Germany, the coverage rate is 48% in western Lander and 25% in the eastern part of the country (taking into consideration employment in establishments with at least five employees). In the remaining three countries (Estonia, Latvia and Lithuania) no collective bargaining is present.

One can say from these findings that in more than half of the 27 countries under consideration the sector's industrial relations structures are well-established, while they appear to be weak in around one-third of the countries.

In most of the countries with available information, several factors which sometimes interact with each other account for the high coverage rates: the predominance of multi-employer bargaining (see Table 12); high density rates of the trade unions and/or employer organisations; and the existence of pervasive extension practices, such as in Belgium, Finland, France, Greece, Luxembourg, the Netherlands, Portugal, Romania (for the intersectoral agreement), and Spain.

The presence of extension practices in the Horeca sector are reported for several countries (for instance, in Belgium, Spain, Finland, France, Greece, Hungary, Netherlands, Portugal, and Romania). It should be noted that for Romania, the extension of the sectoral collective agreement is no longer available after 2011. Referring to the aim of extension provisions making multi-employer agreements generally binding, the provisions for obligatory membership in the Austrian Fachverband Gastronomie (FVG) and in the Fachverband Hotellerie (FVH), which are part of the system of compulsory representation of the Federal Economic Chamber (WKO), represent a functional equivalent. Another functional equivalent to statutory extension schemes can be found in Italy. According to the country's constitution, minimum conditions of employment must apply to all employees. The country's labour court rulings relate this principle to the multi-employer agreements, to the extent that they are regarded as generally binding. In Ireland, a system similar to extension mechanisms is present through the generally binding nature of the Employment

Regulation Orders (EROs) issued by the Labour Court following a proposal by the Joint Labour Committees (JLCs) on minimum rates of pay and conditions of work for workers. In the Horeca sector, there are two JLCs for catering (one for Dublin and one for the rest of the country) and one JLC for hotels outside Dublin and Cork.

Participation in public policymaking

Interest associations may partake in public policy in two basic ways:

- they may be consulted by the authorities on matters affecting their members;
- they may be represented on tripartite committees and boards of policy concertation.

This study considers only cases of consultation and corporatist participation which relate explicitly to sector-specific matters. Consultation processes are not necessarily institutionalised and, therefore, the organisations consulted by the authorities may vary according to the issues to be addressed and also depending on changes in government. Moreover, the authorities may initiate a consultation process on occasional rather than a regular basis. Given this variability, in Table 9 and Table 11 only those sector-related trade unions and employer organisations are flagged that are *usually* consulted.

Trade unions

At least some of the trade unions are regularly consulted by the authorities in at least 23 of the 27 countries where sector-related trade unions are recorded. Four countries cite a lack of regular consultation of any of the trade unions (Cyprus, Lithuania, Poland, and Portugal). In most countries with a multi-union system where a noticeable practice of consultation is observed, all of the existing trade unions take part in the consultation process.

Employer organisations

Almost all of the sector-related employer/business organisations for which related data are available are involved in consultation procedures. In every country at least one employer organisation is regularly consulted on sector-related policies, with the exception of Portugal for which no relevant information could be collected, and Poland where no employer organisation as defined in this study is present.

Tripartite participation

Turning from consultation to tripartite participation, the findings reveal that a sector-specific tripartite body has been established in six countries (see Table 12). They most often cover the tourism sector and address general issues, but there are also more specialised bodies which cover health and safety issue or skill development. The former type of body is present in Bulgaria, Spain, Slovenia and Romania, while the second can be found in Estonia, Romania and UK. Generally, they are statutory bodies.

Table 121: Tripartite sector-specific boards of public policy in Horeca (2010/11)

	Name of body and scope of activity	Origin	Trade unions participating	Business associations participating
BG	Committee at the Ministry of Economy, Energy and Tourism (MEET)	Agreement	CITUB and CL Podkrepa	BTC
EE	Estonian Qualifications Authority (Kutsekoda) Service Professionals Council	Statutory	Estonian Trade Union of Commercial and Servicing Employees (ETKA)	Estonian Hotel and Restaurants Association (EHRL)
ES	The Spanish Council of Tourism	Statutory	UGT and CCOO	CEOE and CEPYME
SI	Council for Tourism	Statutory	GIT	ZDS, TGZS, OZS
RO	Social dialogue commission at Ministry of Regional Development and Tourism (Ministerul Dezvoltării Regionale şi Turismului, MDRT	Statutory	All TU confederations	All EAs representative at national level
RO	Sectoral committee for vocational training in Tourism, hotels and restaurants, under the aegis of National Council for Adults Vocational Training (Consiliul Național pentru Formarea Profesională a Adulților, CNFPA)	Statutory	FSTR	FPTR
UK	Health and Safety Executive	Statutory	Unite	BHA, BBPA
UK	People 1st – The Sector Skills Council (skills and training	Statutory	GMB	BHA, BBPA

European level of interest representation

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

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

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

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

Membership domain

EFFAT, which is affiliated to the European Trade Union Confederation (ETUC), organises the food, agriculture and tourism sector. Therefore its membership domain largely overlaps the Horeca sector. HOTREC, instead, has a representational domain which essentially coincides with the Horeca sector. HOTREC organises both employer and business organisations.

Membership composition

In terms of membership composition, it should be noted that the countries covered by EFFAT and HOTREC extend beyond the countries examined in this study. However, the report will only consider the members of these countries. For EFFAT, Table 13 documents a list of membership of sector-related trade unions, as covered by the national reports.

In the case of EFFAT, there is at least one affiliation in most of the countries under consideration, except in Bulgaria, Estonia, Portugal, and Romania. In some countries – such as Austria, France, Italy, the Netherlands, Spain, Sweden, Slovakia and UK – multiple memberships occur. On aggregate, EFFAT counts 41 direct affiliations from the countries under examination. More than half of the trade unions listed in Table 9 are directly affiliated to EFFAT. As far as available data on sectoral membership of the national trade unions provide sufficient information on their relative strength, one can conclude that EFFAT covers the sector's most important labour representatives. 36 of the 41 direct members of EFFAT for which information is available are involved in collective bargaining related to the Horeca sector.

Table 14 lists the members of HOTREC covered by the national reports. The organisation has under their umbrella associational members from nearly all of the 27 countries under consideration here, with the exception of Bulgaria, Romania, Slovenia and Poland. As far as data are available, one can say from the sectoral membership data of the respective organisations that important national associations are affiliated.

Table 13: EFFAT Membership (2011)

	Name	Full name
AT	GPA-djp	Gewerkschaft der Privatangestellten - Druck, Journalismus, Papier (Union of Salaried Employees, Graphical Workers and Journalists)
AT	Vida	vida
BE	ABVV-HORVAL	Belgian General Federation of Labour - HORVAL (Alimentation-Horeca Sector), Fédération Générale du Travail de Belgique – HORVAL (FGTB-HORVAL)/Algemeen Belgisch Vakverbond – HORVAL (ABVV-HORVAL)
BE	CGSLB-ACLVB	Federation of Liberal Trade Unions of Belgium, Centrale Générale des Syndicats Libéraux de Belgique (CGSLB) Algemene Centrale der Liberale Vakbonden van België (ACLVB)
BE	CSC-ACV Alimentation	Confederation of Christian Trade unions (Alimentation and services), Confédération des Syndicats Chrétiens (CSC)/Algemeen Christelijk Vakverbond (ACV)
CY	OEXEKA	The Hotel, Catering and Restaurant Employees Federation, formerly known as the Federation of Hotel Industry Employees (OYXEB)
CZ	ČMOS PH ČR	The Czech-Moravian Trade Union of Catering, Hotels and Tourism
DE	NGG	Gewerkschaft Nahrung Genuss Gaststätten
DK	3F	United Federation of Danish Workers
ES	CHTJ-UGT	Federation of Commerce, Catering trade, Tourism and Gambling of the General Workers Confederation
ES	FECOHT	Federation of Commerce, Catering Trade and Tourism of the Trade Union Confederation of Workers' Commissions
FI	PAM	The Service Union United
FR	CGT-Services	Fédération CGT Commerce Distribution Services
FR	FdS-CFDT	Fédération des services CFDT
FR	FGTA-FO	Fédération Générale des Travailleurs de l'Agriculture, de l'Alimentation, des Tabacs et Allumettes et des Services Annexes - Force Ouvrière
FR	INOVA CFE-CGC	INOVA Confédération française de l'encadrement - confédération française des cadres
GR	POEEYTE	Pan-Hellenic Federation of Catering Employees – Tourism Profession Employees
HU	VISZ	The Hungarian Trade Union of Catering and Tourism
IE	SIPTU	Services, Industrial, Professional and Technical Union
IT	Filcams	Federazione Italiana Lavoratori Commercio, Turismo e Servizi
IT	Fisascat	Federazione Italiana Sindacati Addetti Servizi Commerciali Affini Turismo
IT	UilTucs	Unione Italiana dei Lavoratori Turismo Commercio e Servizi
LT	LMPS	Lithuanian Trade Union of Food producers, Lietuvos Maistininku Profesiné Sajunga
LU	LCGB Commerce/Handel	LCGB Commerce/Handel

	Name	Full name
LU	Alimentation et Hôtellerie OGBL	Alimentation et Hôtellerie OGBL
LV	LAKRS	Latvian Trade Union of Public Service and Transport Workers
MT	GWU	General Workers' Union
NL	CNV Vakmensen	CNV Vakmensen
NL	FNV Vakbewegigng	Horeca union Federatie Nederlandse Vakbeweging
PL	SKHG	National Section of Hotels and Gastronomy of NSZZ 'Solidarity' (Sekcja Krajowa Hotelarstwa i Gastronomii NSZZ 'Solidarność')
SE	HRF	The Hotel & Restaurant Workers´ Union
SE	Kommunal	The Municipal Workers' Union
SE	Unionen	Unionen
SI	SGIT	The Catering and Tourism Workers' Union of Slovenia
SK	OZ POCR	Odborový zväz pracovníkov obchodu a cestovného ruchu
SK	OZ PP	Odborový zväz pracovníkov poľnohospodárstva na Slovensku
SK	OZP SR	Odborový zväz potravinárov Slovenskej republiky
UK	BFAWU	Bakers, Food & Allied Workers' Union
UK	GMB	GMB
UK	Unite	Unite - The Union
UK	USDAW	Union of Shop, Distributive and Allied Workers

Table 14: HOTREC Membership (2011)

	Name	Full name
AT	FVG (APRA)	Fachverband Gastronomie
AT	FVH (APHA)	Fachverband Hotellerie
AT	VVAT	Veranstalterverband Österreich
BE	Fed Horeca Bruxelles	Brussels Area Employers fédération of hotels, restaurants, cafés et assimilated works, Fédération patronale des hôteliers, restaurateurs, cafetiers et professions assimilées de la Région de Bruxelles-Capitale
BE	Fed Horeca Vlaanderen	Federation of Hotels, restaurants, cafés of Flanders, Federatie van Hotel-, Restaurant-, Caféhouders en Aanverwanten van Vlaanderen
BE	Fed Horeca Wallonie	Interprovinciale des Fédérations d'Hôteliers, Restaurateurs,Cafetiers et Entreprises assimilées de Wallonie
CY	PASYXE (CHA)	Cyprus Hotel Association
CZ	AHR ČR	Association of Hotels and Restaurants of the Czech Republic
DE	DEHOGA	Deutscher Hotel- und Gaststättenverband
DE	IHA	Hotelverband Deutschland

	Name	Full name
DK	HORESTA	Association for the hotel, restaurant and tourism industry in Denmark, Hotel-, Restaurant-, Catering- og Turisterhvervets ovedorganisation
EE	EHRL (EHRA)	Estonian Hotel and Restaurants Association, Eesti Hotellide ja Restoranide Liit
ES	CEHAT	Spanish Federation of Hotels and Holiday Accommodation
ES	FEHR	Spanish Federation of Accommodation and Food Services Activities
FI	MaRa (FHA)	Finnish Hospitality Association
FR	CPIH	Confédération des professionnels indépendants de l'hôtellerie
FR	FAGIHT	Fédération autonome générale de l'industrie hôtelière touristique
FR	GNC	Chaînes Hôtelières
FR	SYNHORCAT	Syndicat national des hôteliers, restaurateurs, cafetiers et traiteurs
FR	UMIH	Union des Métiers et des Industries de l'Hôtellerie
GR	HCH	Hellenic Chamber of Hotels
HU	HAH	Hungarian Hotel and Restaurant Association
IE	IHF	Irish Hotels Federation
IE	RAI	Restaurant Association of Ireland
IT	Federalberghi	Federazione delle Associazioni Italiane Alberghi e Turismo
IT	FIPE	Federazione Italiana Pubblici Esercizi
LT	LVRA (LHRA)	Lithuanian Association of Hotels and Restaurants
LU	HORESCA	Fédération Nationale des Hôteliers, Restaurateurs et Cafetiers du Grand-Duché de Luxembourg
LV	LVRA (AHRL)	Association of Latvian Hotels and Restaurants
MT	MHRA	Malta Hotel and Restaurants Association
NL	KHN	Koninklijke Horeca Nederland
PT	AHP	Associação da Hotelaria de Portugal
PT	AHRESP	Associação da Hotelaria, Restauração e Similares de Portugal
PT	APHORT	Associação Portuguesa de Hotelaria, Restauração e Turismo
SE	SHR	The Swedish Hotel and Restaurant Association
SK	ZHR SR (SAHR)	Zväz hotelov a reštaurácií Slovenskej republiky
UK	BBPA	British Beer and Pub Association
UK	BHA	British Hospitality Association

Some of the organisations affiliated to HOTREC are not engaged in collective bargaining. Of the 38 members of HOTREC, at least 26 are involved in sector-related collective bargaining. Employer/Business organisations which are not involved in collective bargaining may regard themselves as trade associations rather than as industrial relations actors. This situation involves the affiliates operating in the countries where no collective bargaining takes place (Estonia, Latvia and Lithuania), or where existing agreements are concluded directly by companies at decentralised levels (as in the cases of Malta and UK). Moreover, some member organisations operate exclusively as trade associations (as in Austria for VVAT, in the Czech Republic for AHR ČR, and in Germany for IHA). Conversely, in some countries sectoral collective bargaining is carried out by organisations which are not affiliated to HOTREC. This is the case for Bulgaria, Romania, and Slovenia, where HOTREC does not have any members.

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 its constitution, EFFAT is committed to carry out a number of tasks in relation to European issues, including 'negotiations in sector-specific questions at European level', 'co-ordination of collective bargaining activities and policies concerning minimum agreements and framework agreements at European level', and the 'promotion and development of the sectoral and interprofessional Social Dialogue' (Art. I.2). EFFAT's Executive Committee decides 'on the composition and the mandate of the delegation entrusted with negotiations with the European employers' associations' and 'on the outcomes of negotiations'. The decisions on the outcome of negotiations 'shall have the support of at least two thirds of the organisations directly concerned by the negotiations' (Art. V.3). Other EFFAT bodies involved in the preparation and implementation of European level negotiations are the Management Committee, the Secretariat and the Sector Assemblies.

On the employer side, HOTREC represent their respective members in matters of the European sectoral social dialogue. In particular, HOTREC's Social Dialogue Steering Committee is responsible for running all social dialogue actitivites, 'based on the mandate conferred by the General Assembly. The social dialogue Steering Committee comprises five HOTREC representatives, including one Chairman, which are elected by the General Assembly for a renewable period of two years' (HOTREC website, Organisation).

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

For the trade unions, these affiliations are listed in Table 9. Accordingly, European organisations other than EFFAT represent a relatively small proportion of both sector-related trade unions and countries. For reasons of brevity, only those European organisations are mentioned here which cover at least three countries. There are only three organisations which meet this criterion, UNI Europa, with 19 affiliated organisations covered by this study, EPSU (European Federation of Public Service Unions), with five affiliates in four countries, and ETF (European Transport Workers' Federation) with four affiliations in four countries. This situation usually involves multi-sector or general unions, so that the national organisations maintain different affiliations for the various industries they cover. For instance, it should be noted that in 12 cases, national organisations are members of both EFFAT and UNI Europa. Single affiliations to UNI Europa and involvement in collective bargaining can be found in Bulgaria, Ireland and Portugal. In sum, the affiliations to European organisations other than EFFAT which refer to the Horeca sector are quite limited and this overview underlines the principal status of EFFAT as the sector's labour representative.

An analogous review of the membership of the national employer/business associations can be derived from Table 11. The other European organisations with national sector-related affiliates in at least three countries within the Horeca sector are EuroCommerce, with four affiliations in four countries, and FERCO (European Federation of Contract Catering Organisations) with three affiliations in three countries.

In conclusion, EFFAT and HOTREC appear by far the most important sector-related European organisations.

Commentary

Industrial relations in the Horeca sector in the European Union tend to be well-organised, despite the presence of a large proportion of SMEs, which traditionally does not constitute a favourable environment for trade union organisations. Collective bargaining coverage is, on average, quite high, mainly thanks to the prevalence of sectoral bargaining and the utilisation of extension procedures. Indeed, where company bargaining is the norm, collective bargaining coverage rates tend to be very low. Another interesting sectoral feature is the diversification of representation, also on the employer side, which partly reflects the various subsectors which constitute Horeca. This 'dispersion' at national level is reduced by the presence of sectoral 'peak' organisations in a number of countries, especially for the employers (for instance in Italy and Portugal), as well as at EU-level through the affiliation to EFFAT and HOTREC. As a consequence, overall, EFFAT and HOTREC have to be regarded as the by far most important, if not the only EU-wide representatives of the sector's employers and employees.

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