



Representativeness of the European social partner organisations: Woodworking sector

Executive summary

Introduction

This study aims to provide the necessary information to encourage sectoral social dialogue in the woodworking sector. Eurofound's series of representativeness studies aims to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. To accomplish these aims, the study identifies the relevant national social partner organisations in the woodworking sector via a top-down approach (listing the members of the European affiliations) and a bottom-up approach via Eurofound's network of European correspondents. A national sector-related organisation is included in this study if it is: either regularly involved in sector-related collective bargaining; and/or affiliated to a sector-related European association of business or labour on the Commission's list of European social partner organisations consulted under Article 154 of the TFEU and/or which participates in the sector-related European social dialogue.

Defining the sector

For the purpose of this study, the woodworking 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. More specifically, woodworking is defined as embracing NACE (Rev. 2) 16. This includes the following activities:

- 16.1 Sawmilling and planing of wood;
- 16.2 Manufacture of products of wood, cork, straw and plaiting materials.

Economic background

The European Labour Force Survey (EU-LFS) for 2014 reported that the woodworking sector in EU Member States employs fewer than 1.5 million workers in total, 83% of whom are men. Most workers in the industry are

full-time employees in small companies with fewer than 10 workers. The sector is in decline, in part because of the persistent drop in demand for wooden goods, and in part due to low investment levels, high costs and competition from imports. The economic crisis has also impacted on the sector, and employment levels have fallen since 2008.

National level of interest representation

Trade unions

A pluralist associational system prevails in the woodworking sector in more than half of the EU Member States. In total, 62 sector-related trade unions have been identified in 27 European Member States (Malta does not have any sector-related trade union). Only one sector-related trade union is recorded in 11 countries, two unions in five countries and three unions in five countries, while six countries record four or more sector-related unions, thus displaying a fragmented landscape.

With regard to the density of the trade unions, sectoral density rates are only available for 27 out of 62 cases. Although the situation differs widely among countries and unions, the statistics show that more than half of the unions with available information record low or very low sectoral densities (less than 10%).

Employer organisations

On the employer side, 50 sector-related employer organisations are identified in 25 European Member States (Bulgaria, Malta and Poland do not record any sector-related employer organisation). Ten countries record only one employer organisation, nine countries record two, four countries record three and two countries four organisations or more.

With respect to the density of the employer organisations, sectoral densities are low, with only

one organisation showing a sectoral domain density in terms of companies that exceeds 50%. When information is available for both kinds of densities (28 cases), the sectoral domain densities of companies tend to be lower than the densities in terms of employees. This happens in 21 out of the 28 cases and could indicate a slightly higher propensity for the larger companies to associate, as compared to their smaller counterparts.

Collective bargaining

Ten of the 20 countries with available data record high rates of collective bargaining coverage, exceeding 80%; three countries record collective bargaining coverage rates between 50% and 70%; five countries record very low collective bargaining coverage rates – lower than 15%. Finally, Estonia and Malta do not have sectoral collective bargaining at all. The most powerful factor that explains the high collective bargaining coverage rates is the predominance of multi-employer bargaining. Similarly, the predominance of single-employer bargaining explains the lowest coverage rates.

European level of interest representation

The EFBWW has 34 direct affiliations from the countries under consideration, and 31 of them participate in sectoral collective bargaining.

CEI-Bois has 19 sectoral affiliations in 16 countries, and 16 are involved in sectoral collective bargaining.

Criteria for representativeness

According to the Commission Decision annexed to the Communication (COM(98)322final) organisations which are eligible to be consulted shall:

(a) (...) relate to specific sectors or categories and be organised at European level; (b) (...) consist of organisations which are themselves an integral and recognised part of Member States' social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States; (c) (...) have adequate structures to ensure their effective participation in the work of the Committees.

The third criterion of representativeness at European level refers to the organisations' capacity to negotiate on behalf of their members and to enter into 'contractual relations, including agreements' (Article 155 TFEU), i.e. the capacity to commit themselves and their national affiliates.

The EFBWW and CEI-Bois regulated this issue in a 'Memorandum of understanding on engagement in a social dialogue' (17 June 1994). According to article 2 of the memorandum 'both parties proceed on the assumption that final and/or binding declarations will be approved by their respective member organisations before public use'.

Accordingly, the EFBWW and CEI-Bois have an ad hoc mandate to negotiate on behalf of their members, but they have to consult their member organisations before concluding a binding declaration.

Other European-level organisations

A review of the membership of the national unions included in the study shows that there is only one European organisation mentioned here which covers at least three countries: IndustriAll European Trade Union (IndustriAll) – it covers six countries. The presence of this organisation reflects the overlapping domains of many trade unions, because the organisation does not claim to attract unions belonging to the woodworking sector.

A similar review of the membership of the national employer/ business associations reveals that some of them have different European associations other than CEI-Bois: the European Panel Federation (EPF), the European Furniture Manufacturers Federation (UEA) and European Furniture Industries Confederation (EFIC). According to the bottom-up approach, these European organisations are present in three countries (EPF), four countries (UEA) and six countries (EFIC) respectively. EPF is a branch federation of CEI-Bois, and UEA and EFIC are active in the manufacture of furniture, which falls outside the woodworking sector.

Conclusions

Top-down and bottom-up analyses of the woodworking sector in EU28 countries show that the EFBWW on the employees' side and CEI-Bois on the employers' side ought to be regarded as the most important EU-wide representatives of employers and employees within the sector.

Further information

The report *Representativeness of the European social partner organisations: Woodworking sector* is available at <http://eurofound.europa.eu/observatories/eurwork/comparative-information/representativeness-of-the-european-social-partner-organisations-woodworking-sector>

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