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Representativeness of the European social partner organisations: Steel sector

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Contents

List of tables and figures

Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners (that is, the trade unions and employer organisations) in the steel sector, and to show how they relate to the sector's European level organisations representing employees and employers. The report is divided into three parts: an overview of the economic specificities and the employment trends in the steel sector; an analysis of the social partner organisations in all the 28 EU Member States, and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

In this section, the objectives of the study are presented along with an introduction to the applied methodology. The context of this study is the European Sectoral Social Dialogue Committee (ESSDC) for the steel sector that was established in 1999.

Objectives of the study

Representativeness studies are conducted for three reasons:

- the European Commission's aims to confirm the representatives of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU);
- representativeness is a criterion to be eligible for setting up of an ESSDC, or the participation in one of them;
- representativeness means also having the capacity to negotiate agreements that can lead to an implementation by Council decision as provided by Article 155 of the TFEU.

Representativeness is defined by the Commission Decision on the establishment of European Sectoral Social Dialogue Committees (98/500/EC) (European Commission, 1998). It includes the following requirements for an organisation to be recognised as a representative European social partner organisation:

- to relate to specific sectors or categories and be organised at European level;
- to consist of organisations that are themselves an integral and recognised part of Member States' social partner structures and have the capacity to negotiate agreements, and are representative of several Member States;
- to have adequate structures to ensure its effective participation in the work of the sectoral social dialogue committees.

To accomplish the aim of the study, the study first identifies the relevant national social partner organisations in the steel sector before 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 classed as steel-'sector-related'. In terms of territorial coverage, the study includes the EU28.

European sectoral social dialogue committee for the steel sector

The European sectoral social dialogue committee for the steel sector was established in 2006 by EMF (now IndustriAll Europe) and Eurofer. This was three years after the European Coal and Steel Community (ECSC) ceased to exist in July 2002 (Eurofound, 2006). Between 2002 and 2006, the European Economic and Social Committee took care of the social dialogue for the steel sector.

The foundations of the European sectoral social dialogue committee for the steel sector go back to the consultative committee providing for social dialogue in the Treaty of Paris (also known as the Treaty establishing the European Coal and Steel Community) in 1951, which was signed by Belgium, France, Germany, Italy, Luxembourg and the Netherlands. For the first time in history, European social dialogue was given an institutional forum via the ECSC consultative committee that brought together representatives of producers, workers, consumers and dealers from both the steel and coal sectors. This committee was consulted on aspects of industrial policy, including research and competition issues. At the request of the High Authority of the ECSC, a mixed committee for the harmonisation of working conditions in the steel industry[1] was established in 1954. This committee, which included representatives of employers and workers, represents the oldest example of European social dialogue. In this mixed committee, cooperation between social partners helped to anticipate and solve problems, and find the best practices to maintain competitiveness and the employability of workers (European Commission, 2002). In 1997, a Commission Decision formulated comprehensive rules for the activities of this committee for the steel sector, which is similar to the way the current European sectoral social dialogue committee functions (European Commission, 1997).

Since the establishment of the European sectoral social dialogue committee for the steel sector in 2006, European social dialogue in the steel sector has operated in a difficult context of strong and sometimes unfair international competition, increasing ecological requirements and a collapse in market demand in 2008–2009. The steel industry is highly cyclical, following economic trends in downstream sectors such as the automotive industry, shipbuilding, railways, etc. Over the past three or four decades, the European steel sector has undergone large-scale restructuring accompanied by widespread job losses (ETUI, n.d.).

The European sectoral social dialogue committee for the steel sector has so far discussed and taken joint positions on the European Emission Trading System, energy prices, trade policies in non-EU countries, the ageing workforce and issues regarding health, safety and wellbeing at work. In this context, Eurofound has contributed by releasing a report showcasing good practice examples of where social dialogue in the steel sector has tackled the topic of psychosocial constraints (Eurofound, 2014).

Definitions and methodology

The methodology applied is linked to the criteria identified in Commission Decision 98/500/EC (European Commission, 1998): sector-relatedness, membership and organisational capacity. Each of these criteria will be in this section, starting with sector relatedness (i.e. the demarcation of the steel sector).

In agreement with the social partners and the Commission, the steel sector is described as covering the following NACE[2] codes (Table 1).

Table 1: Demarcation of the steel sector with NACE codes

NACE codes	Corresponding economic activity
24.1	Manufacture of basic iron and steel, and of ferro alloys
24.2	Manufacture of tubes, pipes, hollow profiles and related fittings, of steel
24.3	Manufacture of other products of first processing of steel

Source: NACE (Rev.2).

Table 2 and Figure 1 present the four different types of sector relatedness. When the membership domains of trade unions and employer organisations fall within the steel sector as described here, this is a type of sector-relatedness that is known as ‘congruence’. If the membership domain of an organisation goes beyond the steel sector, it is called an ‘overlapping’ organisation. ‘Sectional’ is an organisation that covers a part of the steel sector and nothing else, whereas ‘sectional overlapping’ is an organisation that covers part of the steel sector and has membership in other sectors.

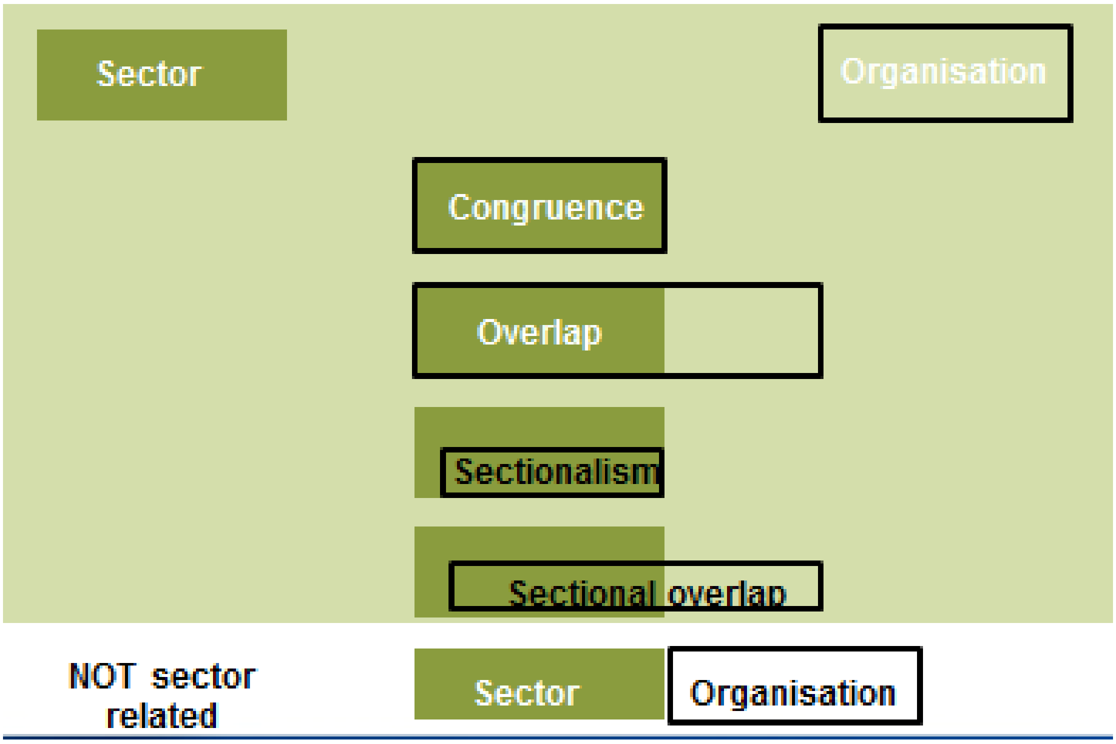
[1] A similar mixed committee was established for the coal sector.

[2] NACE stands for the ‘European statistical classification of economic activities’. Various NACE versions have been developed since 1970 and the version referred to in this report is NACE Rev 2.

Table 2: Domain patterns of the members of an organisation

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the domain of a union/employer organisation embrace potentially all employees/companies in the steel sector?	Does the union/employer organisation also potentially represent employees/companies outside the steel sector?
Congruence	Yes	No
Overlap	Yes	Yes
Sectionalism	No	No
Sectional overlap	No	Yes

Figure 1: Four different types of sector relatedness



Membership constitutes another important aspect of representativeness and this study looks at two levels. First, the geographical coverage of EU-level organisations (i.e. how many Member States EU-level trade union/employer organisations have affiliates in), and secondly, the organisational density of the national affiliates. The study also considers whether EU-level players include the most significant national-level players, or whether there are major gaps.

Membership of a social partner organisation requires the payment of membership fees on a regular basis; however, some organisations are reluctant to inform third parties about such payments. Taking into account the limits of transparency, this study does not distinguish between different membership statuses and, where possible, indirect membership is also taken into account.

The **organisational capacity** of the European social partners is analysed in terms of their ability to participate effectively in European sectoral social dialogue, commit themselves on behalf of their members and conclude binding agreements or actions that can be implemented or monitored across the EU through the support of their affiliates. To assess the **capacity to negotiate** of the partners, the actors, their objectives and the decision-making structures provided in their statutes are considered, as well as the outcome (in terms of agreed texts) and the processes through which the organisations obtained a mandate, support and approval from their member organisations during the negotiation process.

The involvement of their members in national-level collective bargainingis important, as it shows that the affiliates are able to obtain a mandate to negotiate on behalf of their members. This allows them to pass this mandate to the European-level organisation and to implement agreements or other jointly agreed texts in an autonomous way. The capacity to act autonomously is an important part of being able to contribute effectively to European sectoral social dialogue.

Finally, representativeness also depends upon the structures and resources of organisations, as well as their capacity to encourage the active participation of their members, combine the different interests of their member organisations and enhance their ability to act autonomously at European level.

Effective participation in European sectoral social dialogue committee meetings is assessed in terms of an organisation's presence at the meetings within the two years prior to the publication of this report. Involving internal structures within the European organisations when preparing for meetings can increase efficiency and make the organisation members feel represented, even if they are not directly participating.

Data collection

The representativeness studies combine top-down and bottom-up approaches. The top-down approach includes information gathering on all sector-related affiliates of the European associations Eurofer and IndustriAll Europe. For Eurofer these are affiliated employer organisations, but also directly affiliated steel-producing companies. The bottom-up approach looks at other organisations involved in steel-sector related collective bargaining in the EU and their membership of European-level organisations.

Unless cited otherwise, this study draws on the country studies provided by the Network of Eurofound Correspondents. Where precise quantitative data could not be obtained, estimates are provided rather than leaving a question blank.

The quantitative data may therefore stem from three sources:

- official statistics and representative survey studies
- administrative data, such as membership figures provided by the respective organisations (e.g. to calculate the density rates)
- estimates, expert opinions and assessments made by the Network of Eurofound Correspondents or representatives of the respective organisations.

Quality assurance

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of drawing up this study.

Firstly, combining the top-down and bottom-up approaches, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents. Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions and, if necessary, asked the national correspondents to revise them.

An overview of the national contributions was made available to the European social partners to allow their affiliates to double-check the details and provide feedback. As the partner organisations could see the reported information of other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information of their rivals, this process included an element of mutual control and recognition.

In addition, the national members of the Eurofound Governing Board were invited to check the consistency of the information in this report, to ensure that the bottom-up approach included all relevant sector-related organisations.

Draft versions of the overview report were shared with Eurofer, IndustriAll Europe and the Commission for feedback and comments. Taking all feedback into account, the final report was evaluated and approved during a meeting of the Eurofound advisory committee on industrial relations, which consists of industry representatives, governments and the Commission, in the presence of the sectoral social partner organisations identified in the report.

Structure of the report

This report consists of four main chapters.

1. The first chapter looks into economic developments within the steel sector in order to gain a better understanding of industrial relations in the sector.
2. The second chapter takes stock of the national sector-related trade unions and employer organisations in the steel sector. The extent to which they cover the entire sector and their involvement in collective bargaining or social dialogue will be analysed there.
3. The third chapter includes an assessment of the representativeness of the European social partners participating in the European sectoral social dialogue committee for the steel sector.
4. The fourth chapter draws conclusions, based on the findings presented in the previous chapters.

1. Economic background and employment trends in the sector

Over the last two decades, the steel sector in Europe has undergone important changes, marked by privatisation, internationalisation and concentration into a small number of large multinationals, accompanied by a transformation of working practices and major job losses in many countries. Radical changes in the steel industry since the 1980s may be accounted for by two principal factors.

- The radical transformation of the industry as a result of technological innovation. Steelmaking today is a high-technology industry. More efficient production of new, lighter steel means that less raw material is required in each finished product and hence less workers are needed to produce it.
- The withdrawal of the State from its long-standing ownership and control of the iron and steel industry in most countries and the sector's consequent privatisation. In western European countries, this process is almost complete and it is accelerating elsewhere.

A consequence of privatisation has been the internationalisation of the industry and the cross-border mergers and acquisitions that have accompanied it. These two main factors have also led to a radical transformation of working practices – seen as necessary to maintain a competitive steel industry in Europe – and to dramatic job losses in the EU. Recently, the crisis in the steel industry has entailed closure of industrial sites in several countries.

The sector remains an important part of the economy for several European countries. The steel industry, as defined within the statistical classification of economic activities in the European Community (Eurostat, 2008), has traditionally been a prime driver of industrialisation in Europe, originating from its function as a producer of important intermediate products for many other industries. Since the financial crisis in 2008, steel producers in the EU have struggled with weakened demand in the region, expensive environmental policies and cheap imports from outside the EU. Therefore, the sector has been declining at a steady rate and accounted for just 10% of global production in 2016. The economic crisis had a large impact on the sector and, in many countries, the number of companies decreased between 2010 and 2013, along with employment and production. Although the recovery of the steel sector after the crisis is still not complete, EU steel consumption ended 2016 on a stronger note than anticipated (Eurofer, 2017).

Over 20% of employees in the European steel industry work for two large steel-producing companies: ArcelorMittal and ThyssenKrupp Tata Steel. The latter was created by the merger in June 2018 of Tata and ThyssenKrupp, making it Europe's second largest steel group after ArcelorMittal. ArcelorMittal is the world's leading steel and mining company and has mills in 14 different EU countries, with other operations (e.g. sales, research and development) in other EU countries. In total, they employ about 83,000 people in Europe across approximately 400 sites. Tata Steel's primary steelmaking locations in Europe are in the Netherlands and the UK, with European downstream manufacturing operations in Belgium, Finland, France, Germany, Spain and Sweden. In total, Tata Steel employed 21,000 people in the EU in 2017. Despite the dominance of these larger firms, small companies operate in several Member States, with a lower average number of workers. In general, most EU countries have some form of steel industry, albeit very small in some cases.

There are still several issues that are currently relevant to the industry. The main challenges in the EU are linked to the cost and availability of raw materials and energy, environmental and climate change regulation, and competition from non-EU country producers. Significant energy price disparity with the main non-EU competitors (China, Japan, Russia, South Korea and the USA) in recent years has undermined the sector's ability to operate competitively. Steel production is an energy-intensive process that requires large amounts of coal, electricity and some natural gas. There are significant national variations in electricity prices, influenced by a wide range of factors from fossil fuel prices to government energy and climate change policy, to the method of distribution of transportation costs. European steel manufacturers are suffering from excessive operating costs arising from increased prices of electricity and natural gas (European Commission, 2017).

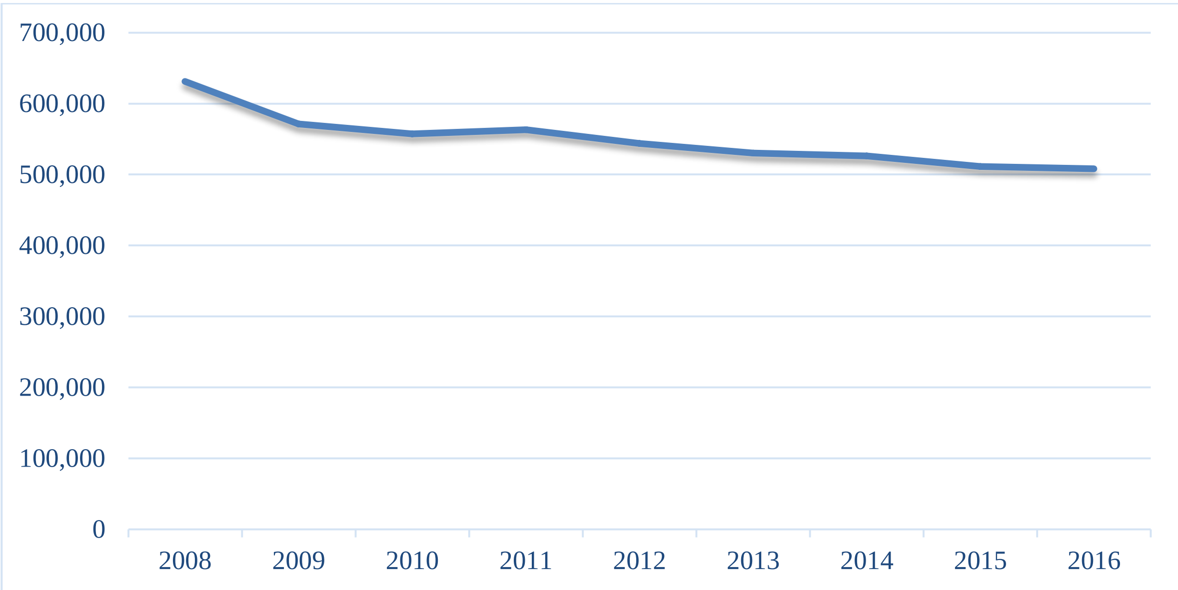
Perceived unfair trade practices by non-EU countries have had a significant effect on the competitiveness of the industry in Europe and social partners have been pushing to obtain fair trading conditions for EU producers through improved EU trade defence instruments. The dumping of steel from non-EU countries, such as China, has led the Commission to implement anti-dumping duties in order to reduce the pressure on European industry and help ensure a level playing field for EU steel (European Commission, 2018).

Environmental concerns also are having a significant effect on the industry. Under the EU's emissions trading system (ETS), the EU steel industry has been identified as having a 'very high risk' of carbon leakage. European social partners have called for changes to the ETS proposal to safeguard the global competitiveness of the EU steel industry (European Commission, 2018).

Employment trends since 2009

Employment in the steel sector has steadily decreased from over 630,000 in 2008 to 508,000 in 2016, according to figures obtained through Eurostat (Figure 2). Tables A3 and A4 (Annex 1) give a detailed overview of developments in the sector from 2009 to 2015, including the number of companies, the proportion of female employees and how the sector relates to the national economy.

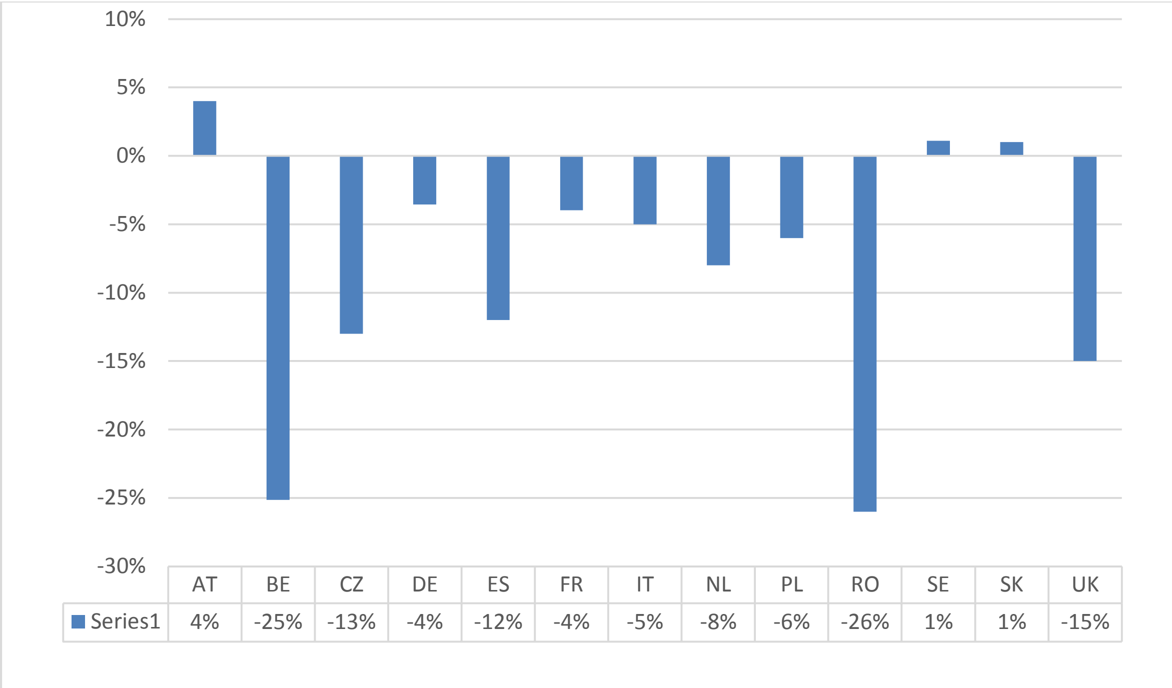
Figure 2: Evolution of employment in the steel sector, 2008–2016



Source: Eurostat (2016)

Figure 3 highlights countries in which at least 10,000 employees work in the sector. It shows that three countries – Austria, Slovakia and Sweden – recorded a relatively small gain in overall employment (employees, self-employed, and temporary agency workers where this can be observed) within the sector in the five year period between 2010 and 2015. Employment fell in most countries for which there is available data. Significant employment losses in relative terms can be seen in Belgium and Romania.

Figure 3: Change in the proportion of employment for Member States with over 10,000 employees in the steel sector

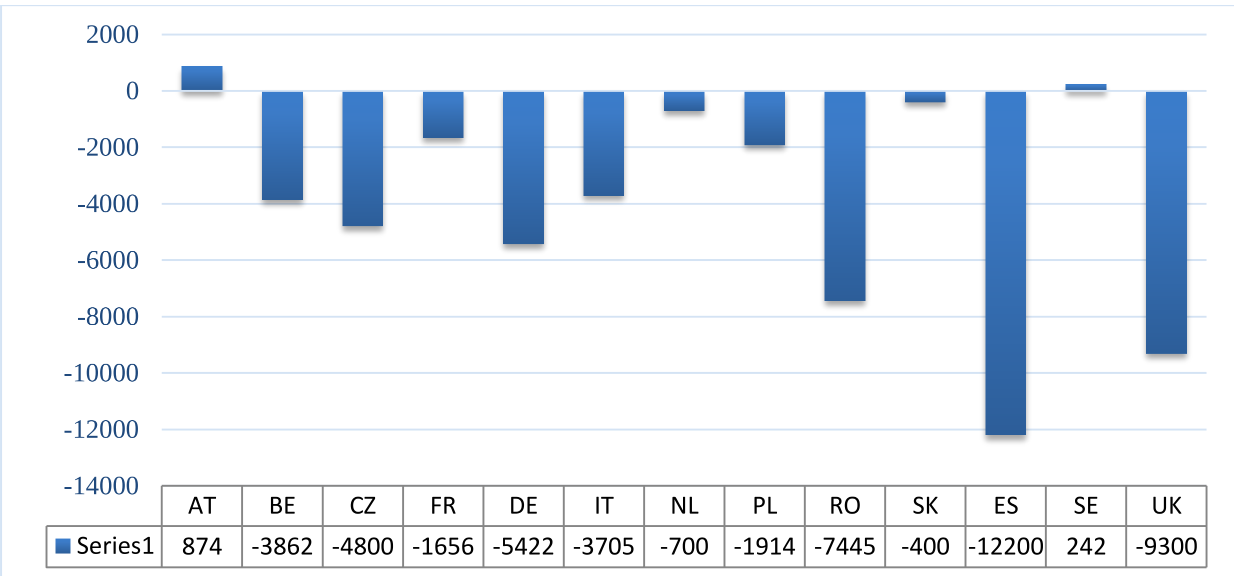


Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2016).

Note: Due to the availability of data, figures for BE, DE, FR and SE are calculated on the basis of the number of employees. For BE, it is uncertain if 2015 and 2010 figures use the same definition. For a detailed description of sources, please refer to the national reports.

Figure 4 shows the losses in the number of employees in absolute figures. As shown, the most significant losses in terms of numbers occurred in Spain and the UK.

Figure 4: Changes in employment in absolute figures, 2008–2016



Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2016).

Table 3 shows the employment characteristics of the steel sector in EU28 countries and, specifically, the average number of employees per company. The table shows that there are variations in the size of companies among many Member States, based upon the number of employees. This suggests that the steel sector is made up of smaller enterprises in those countries. In Austria, Belgium and particularly in Luxembourg, there are a large number of employees per company, which suggests that the sector is made up of a smaller number of larger enterprises.

Table 3: Employment characteristics in the steel sector in the EU28, 2015

Country	Number of companies	Employment	Number of employees	Average employment per company
AT	49	21,113	21,104	430
BE	23	N.A.	11,502	500
BG	45	2,946	2,911	64
CY	4	48	N.A.	N.A.
CZ	216	33,400	32,900	24
DE	1,396	N.A.	147,678	105
DK	94	2,164	2,133	22
EE	12	N.A.	N.A.	N.A.
EL	320	4,495	4,175	13
ES	497	81,000	78,100	157
FI	74	8,565	N.A.	N.A.
FR	415	N.A.	39,951	96
HR	56	1,091	965	17
HU	143	6,541	6,485	45
IE	351	5,400	2,243	6
IT	1,877	74,071	71,828	38
LT	18	443	443	24
LU	4	4,131	4,131	1,032
LV	22	726	725	32
MT	12	19	9	0.75
NL	155	11,900	11,100	71
PL	920	32,568	N.A.	N.A.
PT	118	1,591	N.A.	N.A.
RO	178	20,334	20,300	114
SE	189	N.A.	22,075	116
SI	13	2,915	2,915	224
SK	192	22,600	22,400	116
UK	815	59,600	58,300	71

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2016).

Note: N.A.= not available. For BE, there are serious concerns about the quality of the estimated number of companies.

European steel sector workforce in 2015

Within the sector, there are quite different levels of employment depending upon the NACE code. Table 4 indicates the most recent employment figures based on NACE code and the proportion of employees in the sector as a whole. The manufacture of basic iron and steel and of ferro-alloys (NACE 24.1) is by far the biggest employer in the sector, accounting for 63% of all employment. The manufacture of steel tubes, pipes, hollow profiles and related fittings (NACE 24.2) accounts for 21% of all employment, and the manufacture of other products related to the primary processing of steel (NACE 24.3) accounts for 16%.

Table 4: Number and proportion of employees by NACE code, 2016

	NACE 24.1	NACE 24.2	NACE 24.3
Employees in the EU	319,694	108,593	80,000 (estimate)
Proportion of employment in sector	63%	21%	16%

Source: Eurostat (2016).

Table 5 illustrates Member States in which there are more than 10,000 employees in the steel sector. It presents the absolute number of persons employed in the sector (including self-employed and temporary agency workers) and the number of employees compared to the proportion of the overall workforce employed in the sector. The list generally comprises of larger Member States such as Germany, Italy, Spain and the UK that are likely to have a larger number of employees due to the relative size of the economy.

There is also a large number of employees in the Czech Republic and Slovakia, which suggests that the sector is relatively important in these Member States. This is illustrated in Table 6, which shows the countries that have the largest proportional steel sector employment as a percentage of the total employment and the number of employees in the economy. The steel sector has a relatively high proportion of employees (about 1%) in Luxembourg and Slovakia, with a relatively small absolute number of employees. In comparison to Germany, with the highest absolute number of steel sector employees, that corresponds to (a much lower) 0.2%.

Table 5: Member States with steel sector employment over 10,000, 2015

Country	Total employment	Sectoral employment as percentage of total employment in economy	Number of employees	Proportion of employees as percentage of total number of employees
AT	21,113	0.5	21,104	0.6
BE	n.a.	n.a.	11,502	n.a.
CZ	33,400	0.7	32,900	0.8
DE	n.a.	n.a.	147,678	0.4
ES	81,000	0	78,100	0.5
FR	n.a.	n.a.	39,951 (in 2013)	0.2
IT	74,071	0.3	71,828	0.4
NL	11,900	0.1	11,100	0.2
PL	32,568	0.2	n.a.	n.a.

RO	20,334	0.2	20,300	0.3
SE	n.a.	n.a.	22,075	0.5
SK	22,600	0.9	22,400	1.1
UK	59,600	0.2	58,300	0.2

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2016–2017).

Table 6: Countries with the highest proportion of the national workforce in the sector

Country	Number of companies	Number of employees	Share of sectoral employees as percentage of national total of employees
AT	49	21,104	0.6
BE	23	11,502	0.4
CZ	216	32,900	0.8
ES	497	78,100	0.5
LU	4	4,131	1.1
SE	189	22,075	0.5
SK	192	22,400	1.1

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2016).

In contrast to the Member States with a higher absolute number and higher proportions of employees in the steel sector, there are 10 other Member States with fewer than 3,000 employees in the steel sector. Based on the countries for which data is available, in Cyprus, Lithuania and Malta the steel sector has the least share of total employees as a percentage of the total number of national employees. In Malta, there is no steel sector to speak of, with only nine employees working within the relevant NACE codes. The steel sector also has little significance as an employer in Bulgaria, Croatia, Cyprus, Denmark, Latvia and Portugal, making up only 0.1% of the total number of employees. There is no information on the number of employees in the steel sector in Estonia but, because there were only 12 companies active in the steel sector in 2015 and no sector-related trade union or employer organisation, it can be assumed that Estonia should be added to this list. Ireland also has less than 3,000 steel sector employees in 351 companies, representing 0.3% of the overall total number of employees in the country.

Table 7: Countries with steel sector workforce below 3,000 employees

Country	Number of companies	Number of employees	Share of sectoral employees as percentage of national total of employees
BG	45	2,911	0.1
CY	4	48	0
DK	94	2,133	0.1
EE	12	N.A.	N.A.
HR	56	965	0.1
IE	351	2,243	0.3
LT	18	443	0
LV	22	725	0.1
MT	12	9	0
PT	118	1,591	0.1

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2016).

Note: Information not available for Cyprus, Estonia, Finland, France, Poland, Portugal and Slovenia.

To summarise, the EU steel sector employs around half a million people, 78% of whom are employed in five Member States: France, Germany, Italy, Spain and the UK. Employees in the German steel sector alone represent 29% of the EU steel workforce. In terms of companies, approximately 20% of the EU workforce is employed by the two largest EU steel producers. Besides the very large steel sector companies, there are also many companies with a smaller workforce. In terms of different activities in the sector, this first chapter illustrates that about 63% of the sector is employed in activities related to the manufacture of basic iron and steel, and ferro alloys (NACE 24.1).

2. National level of interest representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the steel sector. These are the affiliates of Eurofer and IndustriAll Europe (top-down data collection), as well all other national trade unions and employer organisations that have members in the sector and that are involved in sector-related collective bargaining (bottom-up data collection). There are 82 sector-related trade unions in 26 Member States and the Network of Eurofound Correspondents identified 43 sector-related employer organisations in 25 different Member States (Table 8).

Table 8: Number of sector-related organisations per country, 2016–2017

Number of sector-related organisations	Member States with respective number of trade unions	Member States with respective number of employer organisations
0	EE, MT	EE, IE, LU
1	CZ, DE, EL, HR, HU, LT, LV, SK	BE, BG, CY, CZ, DK, EL, FI, HR, HU, LT, LV, MT, NL, RO, SE, SK, UK
2	AT, BG, CY, IE, LU, RO	ES, PL, SI
3	SI, UK	AT, DE, FR, PT
4	SE	-
5	DK, FR, NL, PL, PT	-
6	FI	-
7	BE, ES, IT	-
8	-	IT

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

The two Member States without a trade union in the steel sector are Estonia and Malta. Table 8 also shows that there are no steel sector employer organisations in Estonia, Ireland and Luxembourg. In Estonia and Malta, there are only 12 companies active in the steel sector. The number of employees in Malta is also very small while, in Estonia, there is no information available on the number of employees. In Estonia, there are no trade unions or employer organisations, even though Arcelor Mittal Tallin OÜ and Mast Europe OÜ operate there. In Malta, there is an employer organisation but no trade union, while in Ireland and Luxembourg, there are trade unions but no employer organisations.

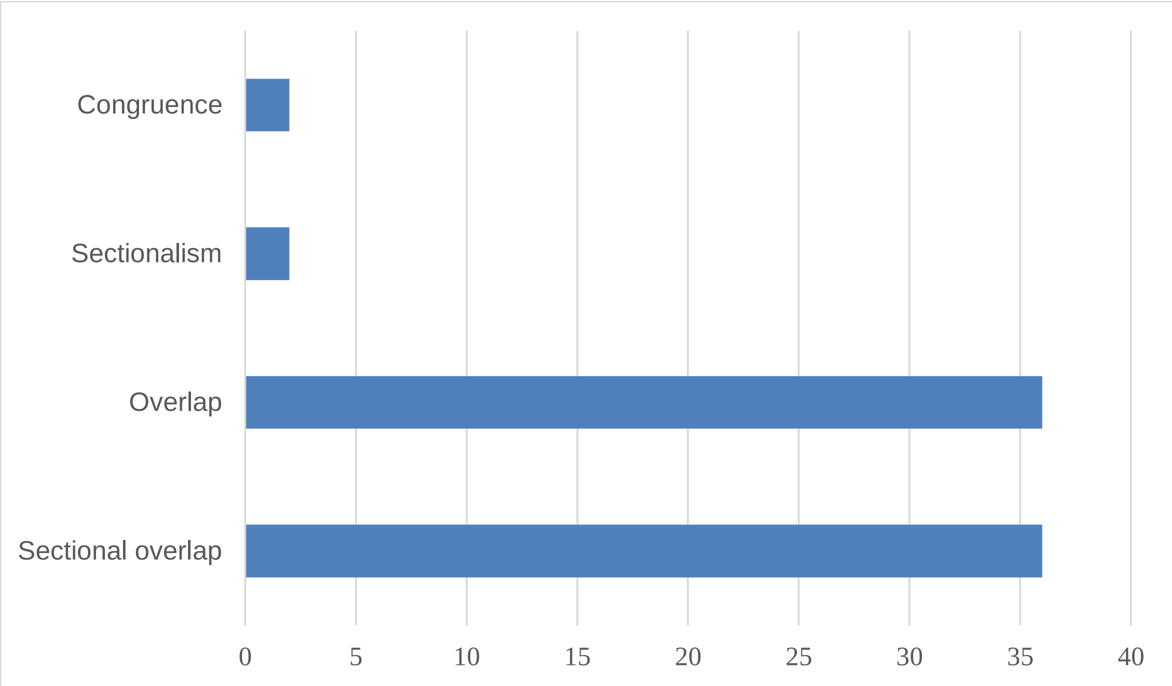
In Ireland, there are 2,243 employees in the steel sector that are organised by two trade unions, while 350 (relatively small) steel sector companies do not have a steel sector employer organisation. There is also no sector-related employer organisation in Luxembourg, which may be due to the small number of companies (4) operating there, of which Arcelor Mittal is the largest. Cyprus is an example of a country that has only 4 steel sector companies with 48 employees that are represented by 2 different sector-related trade unions and 1 employer organisation.

Sector relatedness of trade unions

The membership domain of trade unions is assessed by firstly classifying them according to the four patterns of sector-related domain explained in the methodological section. Information on the domain coverage is available for 78 of the 82 trade unions (94%). Very few trade unions demarcate their domain in a way that is perfectly congruent with the steel sector as defined for this study. Only two trade unions – in Bulgaria and Poland – show domain patterns of congruence. Figure 5 illustrates that

36 of the 82 trade unions (43%) have an overlapping membership domain. The 2 trade unions with a congruent membership domain and the 36 with an overlapping membership domain (together 46%) cover the entire sector in the country, with members ranging across all types of employees and from all types of companies. Two trade unions have a sectional domain pattern. While 38 of the 82 (46%) cover a section of the steel sector, they also have members from other sectors, which is known as ‘sectional overlap’.

Figure 5: Domain coverage of trade unions in the steel sector



Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

A breakdown of all the 78 trade unions for which the sectoral domain type is known can be found in Table 9.

In several Member States, the small size of the sector means that the few steel activities that exist overlap with the metal sector trade unions and are, thereby, covered by them. This is the case in countries such as Austria, Croatia, Cyprus, Finland and Lithuania.

Overlap occurs where general unions are the most important pattern of union organisation. In various cases, it arises when unions cover (nearly) all sectors of economic activity (the General Workers’ Union in Malta, the National Federation of Christian Trade Union and the Trade Union Confederation in the Netherlands, as well as Britain’s General Union (GMB) and Unite in the UK). Overlap also results from domain demarcations that include further or adjacent domains in addition to the steel sector. These are, for example:

- the manufacturing industry (Industria CCOO in Spain and IG Metall in Germany)
- the energy sector (Sindicato Nacional da Industria e da Energia (SINDEL) in Portugal)
- electrical workers (Sindicato das Inústrias Metalúrgicas e Afins (SIMA) in Portugal)

Table 9: Membership domain patterns of sector-related trade unions in the steel sector, 2016–2017

Country	Congruence	Sectionalism	Overlap	Sectional overlap
AT				PROGE, GPA-djp
BE			ACLVB/CGSLB	Metea (ACV-CSC), CNE (ACV-CSC), LBC-NVK (ACV-CSC), ABVV Metaal, MWB (ABVV-FGTB), LBC-NVK (ACV-CSC), SETCa-BBTK (FGTB-ABVV)
BG	NF Metallurgy			TU Metalicy
CY				OBIEK-SEK, SEMMHK - PEO
CZ				OS KOVO
DE			IG Metall	
DK				3F, Metal, HK/Privat, IDA, Dansk El-forbund
EL		Union of Workers at SIDENOR S.A.		
ES			CCOO Industria, UGT-FICA	ELA Industria y Construcción, LAB Industria, CIG-Industria, IC Industria
FI				Metalli, Pro, TEK, IL, YTN, Sähköliitto
FR			FGMM-CFDT, FTM-CGT, FO Métaux, CFTC Métallurgie, CFE-CGC	
HR			SMH	
HU			VASAS	
IE			SIPTU	TEEU
IT			Fiom Cgil, Fim Cisl, Uilm Uil, UGL metalmeccanici, Fismic	SAVT/MET, USAS/ASGB
LU			OGBL, LCGB	
NL			CNV Vakmensen, De Unie, FNV	VHP Tata Steel, VHP2
PL	SH PZZ 'Kadra'		KSH NSZZ Solidarność, FHZZ	SKHOiK ZZIT

PT			FIEQUIMETAL, SINDEL, SIMA, FETESE, SITESE	
RO		FSS Metarom		FNS Solidaritatea Metal
SE				IF Metall, Sveriges Ingenjörer, Ledarna, Unionen
SI			SKEI, KS 90 - SKEIE	
SK			OZ KOVO	
UK			Community, GMB, Unite	

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: Information provided for 78 trade unions where data are available.

The four different types of sector-related domains assess whether a trade union covers all types of economic activity in the sector, all types of employees in all types of companies and whether it spans the entire country. The steel sector coverage only assesses three different types of activities, broken down by the NACE codes 24.1, 24.2 and 24.3.

In Table 10, trade unions that cover these NACE code activities completely are marked in green, while red means the activities are not covered at all. No information is available for 3 of the 82 sector-related trade unions. In addition, only 4 of the 82 do not cover all 3 sectoral activities. Thus, 76 of the 83 cover all NACE code activities in the sector (92%). In 24 Member States, there is at least 1 trade union organising employees in all 3 different steel NACE code activities.

Table 10: Sector coverage of the 82 steel sector trade unions

Country	Trade union	NACE 24.1	NACE 24.2	NACE 24.3
AT	PROGE	Yes	Yes	Yes
	GPA-djp	Yes	Yes	Yes
BE	ACLVB /CGSLB	Yes	Yes	Yes
	Metea (ACV-CSC)	Yes	Yes	Yes
	CNE (ACV-CSC)	Yes	No	Yes
	LBC-NVK (ACV-CSC)	Yes	No	Yes
	SETCa-BBTK (FGTB-ABVV)	Yes	Yes	Yes
	ABVV Metaal	Yes	Yes	Yes
	MWB (ABVV-FGTB)	Yes	Yes	Yes
BG	TU Metalicy	Yes	Yes	Yes
	NF Metallurgy	Yes	Yes	Yes
CY	OBIEK-SEK	Yes	Yes	Yes
	SEMMHK - PEO	Yes	Yes	Yes

CZ	Odborový svaz KOVO (OS KOVO)	Yes	Yes	Yes
DE	IG Metall	Yes	Yes	Yes
DK	3F	Yes	Yes	Yes
	Metal	Yes	Yes	Yes
	HK/Privat	Yes	Yes	Yes
	IDA	Yes	Yes	Yes
	Dansk El-forbund	Yes	Yes	Yes
IE	SIPTU	Yes	Yes	Yes
	TEEU	N.A.	N.A.	N.A.
EL	Union of Workers at SIDENOR S.A	Yes	No	No
ES	CCOO Industria	Yes	Yes	Yes
	UGT-FICA	Yes	Yes	Yes
	FI-USO	Yes	Yes	Yes
	ELA Industria y Construcción	Yes	Yes	Yes
	LAB Industria	Yes	Yes	Yes
	CIG-Industria	Yes	Yes	Yes
	IC Industria	Yes	Yes	Yes
FI	Metalli	Yes	Yes	Yes
	Pro	Yes	Yes	Yes
	TEK	Yes	Yes	Yes
	IL	Yes	Yes	Yes
	YTN	Yes	Yes	Yes
	Sähköliitto	N.A.	N.A.	N.A.
FR	FGMM-CFDT	Yes	Yes	Yes
	FTM-CGT	Yes	Yes	Yes
	FO Métaux	Yes	Yes	Yes
	CFTC Métallurgie	Yes	Yes	Yes
	CFE-CGC	Yes	Yes	Yes
HR	SMH	Yes	Yes	Yes
HU	VASAS	Yes	Yes	Yes
IE	SIPTU	Yes	Yes	Yes
	TEEU	N.A.	N.A.	N.A.
IT	Fiom Cgil	Yes	Yes	Yes
	Fim Cisl	Yes	Yes	Yes
	Uilm Uil	Yes	Yes	Yes
	UGL	Yes	Yes	Yes

	metalmeccanici			
	Fismic	Yes	Yes	Yes
	SAVT/MET	Yes	Yes	Yes
	USAS/ASGB	Yes	Yes	Yes
LT	LMPSS	N.A.	N.A.	N.A.
LU	OGBL	Yes	Yes	Yes
	LCGB	Yes	Yes	Yes
LV	LIA	Yes	Yes	Yes
NL	CNV Vakmensen	Yes	Yes	Yes
	De Unie	Yes	Yes	Yes
	FNV	Yes	Yes	Yes
	VHP Tata Steel	Yes	Yes	Yes
	VHP2	Yes	Yes	Yes
PL	KSH NSZZ Solidarność	Yes	Yes	Yes
	FHZZ	Yes	Yes	Yes
	SH PZZ 'Kadra'	Yes	Yes	Yes
	SKHOiK ZZIT	Yes	Yes	Yes
	SH OZZZ PRC	Yes	Yes	Yes
PT	FIEQUIMETAL	Yes	Yes	Yes
	SINDEL	Yes	Yes	Yes
	SIMA	Yes	Yes	Yes
	FETESE	Yes	Yes	Yes
	SITESE	Yes	Yes	Yes
RO	FSS Metarom	Yes	Yes	Yes
	FNS Solidaritatea Metal	Yes	Yes	No
SE	IF Metall	Yes	Yes	Yes
	Unionen	Yes	Yes	Yes
	Sveriges Ingenjörer	Yes	Yes	Yes
	Ledarna	Yes	Yes	Yes
SI	SKEI	Yes	Yes	Yes
	KS 90 - SKEIE	Yes	Yes	Yes
	KNSS - SKEM	Yes	Yes	Yes
SK	OZ KOVO	Yes	Yes	Yes
UK	Community	Yes	Yes	Yes
	GMB	Yes	Yes	Yes
	Unite the Union (Unite)	Yes	Yes	Yes

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A.= not available. As only sector-related trade unions are included in this table (with members in the sector), justification is needed as to why three trade unions – for which there is no information about their membership in the different sector activities – are included. This is because they are members of IndustriAll Europe (which has asked them part of the top-down approach) and the assurance was given that they have some members in the steel sector.

Not all trade unions provided the numbers of their members in the sector. Table 11 shows the cumulative membership of all trade union members per country, which is divided by the total number of employees in the sector in order to obtain the trade union density, i.e. the percentage of trade union members in the sector.

As Table 11 indicates, a lot of information related to membership strength is missing for many trade unions and for many countries. The numbers in the table are those that were provided. Within each country, some trade unions may have more members than others. Unfortunately, the incompleteness of the available data does not allow a comparison of the relative membership strength of each trade union.

Table 11: Organisational density of trade unions in the steel sector

Country	Total sector employees 2015	Trade union members in the sector	Density (percentage of trade union members that make up total sector employees)
AT	21,104	6,700	32
BE	11,502	N.A.	N.A.
BG	3,600	2,911	81
CY	N.A.	N.A.	N.A.
CZ	32,900	22,000	67
DE	147,678	75,000	51
DK	2,133	N.A.	N.A.
EE	N.A.	N.A.	N.A.
EL	N.A.	N.A.	N.A.
ES	78,100	N.A.	N.A.
FI	N.A.	N.A.	N.A.
FR	39,951	4,100	10
HR	965	600	62
HU	6,485	3,300	51
IE	2,243	n.a	n.a
IT	71,828	N.A.	N.A.
LT	443	20	5
LU	4,131	N.A.	N.A.
LV	725	n.a	N.A.
MT	9	N.A.	N.A.
NL	11,100	4,861	44
PL	32,568	17,850	55

PT	N.A.	n.a	N.A.
RO	20,300	14,588	72
SE	22,075	19,198	86
SI	2,915	3,800	(*) 130
SK	22,400	11,500	51
UK	58,300	17,300	30

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A.= not available.(*): The number of members in the steel sector reported by the Slovenian trade unions appears to be higher than the number of employees in the sector, which means that either the number of employees in the sector is higher than 2,915, or that the number of active trade union members in the sector is lower than 3,800. It may include members working in the metal sector.

For Poland, the total employment figure is used (no data on employees available).

Table 8 illustrated that there is more than one trade union in some Member States. In some cases, trade unions cover the exact same membership domain, but with a different ideological or organisational approach. This is called ‘pluralism’. Examples of trade union pluralism can be found in Belgium (with different national cross-sector affiliations to either socialist (ABVV-FGTB), catholic (ACV-CSC) or liberal ideologies (ACLVB-CGSLB), or in the Netherlands with the catholic CNV. Other examples of pluralism can be seen in Spain, with the ideologically different cross-sector pillar organisations UGT and CCOO and in Italy, with the ideologically different cross-sector pillar organisations CGIL, CISL and UIL.

In many cases, however, it appears that trade unions cover different segments of the sector, such as only blue- or white-collar employees, only some activities in the sector, some types of companies or some parts of the country. When different organisations cover different segments of the sector, it is called ‘fragmentation’. This makes those organisations complementary, because their membership domain does not overlap. In comparison, pluralism is when organisations that have roughly the same membership domain – and represent the same group of employees – co-exist. There are different types of explanation for fragmentation in the steel sector, as illustrated in Table 12.

Table 12: Reasons for fragmentation of trade unions

	Trade unions that only cover white- or blue-collar employees or a specific professional group of workers	**Trade unions that do not cover the entire metal sector, only part of the NACE codes**	**Trade unions that only cover some parts of the country**	**Trade unions that only cover some types of companies or size categories**
AT	PROGE, GPA-djp			
BE	Metea (ACV-CSC), CNE (ACV-CSC), LBC-NVK (ACV-CSC), SETCa-BBTK (FGTB-ABVV), ABVV Metaal, MWB (ABVV-FGTB)	CNE (ACV-CSC), BC-NVK (ACV-CSC)	CNE (ACV-CSC), LBC-NVK (ACV-CSC), ABVV Metaal, MWB (ABVV-FGTB)	LBC-NVK (ACV-CSC), SETCa-BBTK (FGTB-ABVV)
BG			TU Metalicy	
CZ				Odborový svaz KOVO (OS KOVO)

DK	3F, Metal, HK/Privat, IDA, Dansk El-forbund			
EL	Union of Workers at SIDENOR S.A	Union of Workers at SIDENOR S.A		
ES			ELA Industria y Construcción, LAB Industria, CIG-Industria, IC Industria	
FI	Metalli, Pro, TEK, IL, YTN, Sähköliitto			
IE	TEEU			
IT			SAVT/MET, USAS/ASGB	
NL	VHP2		VHP Tata Steel	VHP Tata Steel, VHP2
PL	SKHOiK ZZIT, SH OZZZ PRC			
RO		FNS Solidaritatea Metal		FSS Metarom, FNS Solidaritatea Metal
SE	IF Metall, Unionen, Sveriges Ingenjörer, Ledarna			Unionen

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: This table summarises the information from Table A12 in the Annex.

Sectionalism not only concerns the NACE codes but also other elements, such as territory and the inclusion of both blue- and white-collar workers, for example. In some cases, trade unions cover all three NACE code activities in the sector, as, for example, the two trade unions in Austria (PRO GE and GPA-djp). PRO GE, however, only addresses blue-collar workers and GPA-djp only white-collar workers. Together, they cover the entire sector, yet they both have members from other sectors, i.e. there is a sectional overlap in their membership domain.

Trade union involvement in collective bargaining or social dialogue

In the previous section, the sector-relatedness and membership strength of trade unions has been considered. In this section, their involvement in collective bargaining is analysed. Table 14 shows whether a trade union is involved in multi-employer bargaining or single-employer collective bargaining. Single-employer bargaining is, in fact, company-level collective bargaining, while multi-employer bargaining often involves the entire sector, or a part of it. The percentage in the fifth column stands for the proportion of employees in the sector that is covered by a collective bargaining agreement. The sixth column presents the number of employees covered by collective bargaining agreements signed by the respective trade unions.

Table 13: Collective bargaining involvement of the 82 steel sector trade unions

Country	Trade union	Multi-employer bargaining	Single-employer bargaining	Percentage covered	Number of workers covered by collective bargaining agreements in absolute numbers
AT	PROGE	x		100	14,000
	GPA-djp	x			7,000
BE	ACLVB /CGSLB	x	x	100	11,305
	Metea (ACV-CSC)	x	x		7,200
	CNE (ACV-CSC)	x	x		4,076
	LBC-NVK (ACV-CSC)	x	x		4,076
	SETCa-BBTK (FGTB-ABVV)	x	x		N.A.
	ABVV Metaal	x	x		7,200
	MWB (ABVV-FGTB)	x	x		7,200
BG	TU Metalicy	x	x		1,700
	NF Metallurgy	x	x		1,700
CY	OBIEK-SEK	x		40	19
	SEMMHK - PEO	x			19
CZ	Odborový svaz KOVO (OS KOVO)		x	42	20,200
DE	IG Metall	x	x	100	
DK	3F	x		80	2,089
	Metal	x			2,089
	HK/Privat	x			N.A.
	IDA				N.A.
	Dansk El-forbund	x			2,089
EL	Union of Workers at SIDENOR S.A.		x		
ES	CCOO Industria	x	x		
	UGT-FICA	x	x		
	FI-USO	x	x		
	ELA Industria y Construcción	x	x		125,000
	LAB Industria	x	x		N.A.
	CIG-Industria	x	x		N.A.
	IC Industria	x	x		N.A.

FI	Metalli	x		100	5,750
	Pro	x			23,000
	TEK				
	IL				
	YTN	x			55,000
	Sähköliitto	x			
FR	FGMM-CFDT	x	x		29,108
	FTM-CGT	x	x		29,108
	FO Métaux	x	x		29,108
	CFTC Métallurgie	x	x		29,108
	CFE-CGC	x	x		29,108
HR	SMH		x		
HU	VASAS		x	70	5,300
IE	SIPTU		x		3,000
	TEEU		x		
IT	Fiom Cgil	x	x		
	Fim Cisl	x	x		
	Uilm Uil	x	x		
	UGL metalmeccanici	x	x		
	Fismic	x	x		70,000
	SAVT/MET	x	x		
	USAS/ASGB	x	x		
LT	LMPSS				
LU	OGBL		x	100	4,180
	LCGB		x		4,180
LV	LIA	x	x		0
NL	CNV Vakmensen	x	x	98	11,100
	De Unie	x	x		11,100
	FNV	x	x		11,100
	VHP Tata Steel		x		8,500
	VHP2	x			650
PL	KSH NSZZ Solidarność		x	42.5	15,000
	FHZZ		x		30,000
	SH PZZ 'Kadra'		x		11,000
	SKHOiK ZZIT		x		12,000
	SH OZZZ PRC		x		
PT	FIEQUIMETAL	x	x	100	0

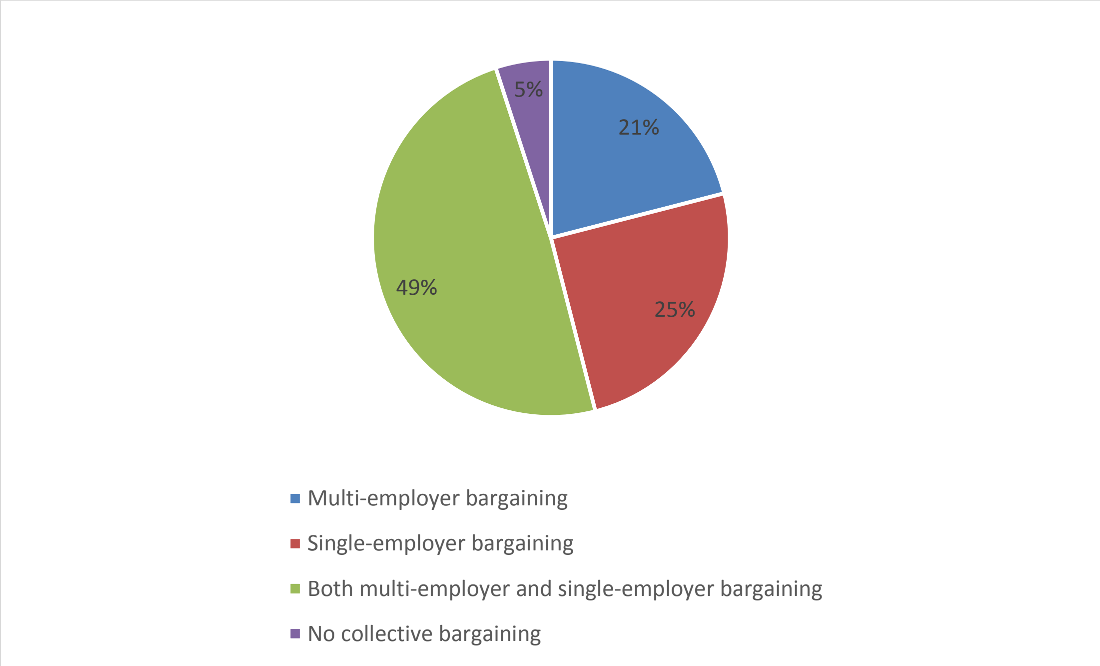
	SINDEL	x	x		38,000
	SIMA	x	x		
	FETESE	x	x		
	SITESE	x	x		
RO	FSS Metarom		x	99	17,000
	FNS Solidaritatea Metal		x		3,000
SE	IF Metall	X		90	12,700
	Unionen	X			
	Sveriges Ingenjörer	X			
	Ledarna	X			
SI	SKEI	X	x	100	2,915
	KS 90 - SKEIE	X			2,900
	KNSS - SKEM	X			2,915
SK	OZ KOVO	X	x	80	15,500
UK	Community		x		22,000
	GMB		x		11,000
	Unite the Union (Unite)		x		13,000

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A.= not available. The trade unions shaded in red are not affiliated to IndustriAll Europe.

Figure 6 shows the proportion of trade unions involved in collective bargaining and the type of bargaining they are involved in. Of the 82 sector-related trade unions, 3 are not involved in collective bargaining, while 79 of the 82 (96%) are. In total, 59 trade unions (or 72%) are involved in multi-level employer bargaining with an employer organisation as a counterpart. Of those 59, there are 19 (23%) that are only involved in multi-employer bargaining (indicated in red in Figure 6), while 40 (49%) are involved in both multi-employer bargaining and single-employer bargaining (indicated in green in Figure 6). Of the 82 sector-related trade unions, 37 (46%) are involved in single-employer bargaining. Of these 37, there are 20 (25%) that are only involved in single-employer bargaining (indicated in blue in Figure 6).

Figure 6: Involvement of trade unions in different forms of collective bargaining (%)



Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: Due to the limited size of the sector in several Member States, there is an absence of collective agreements.

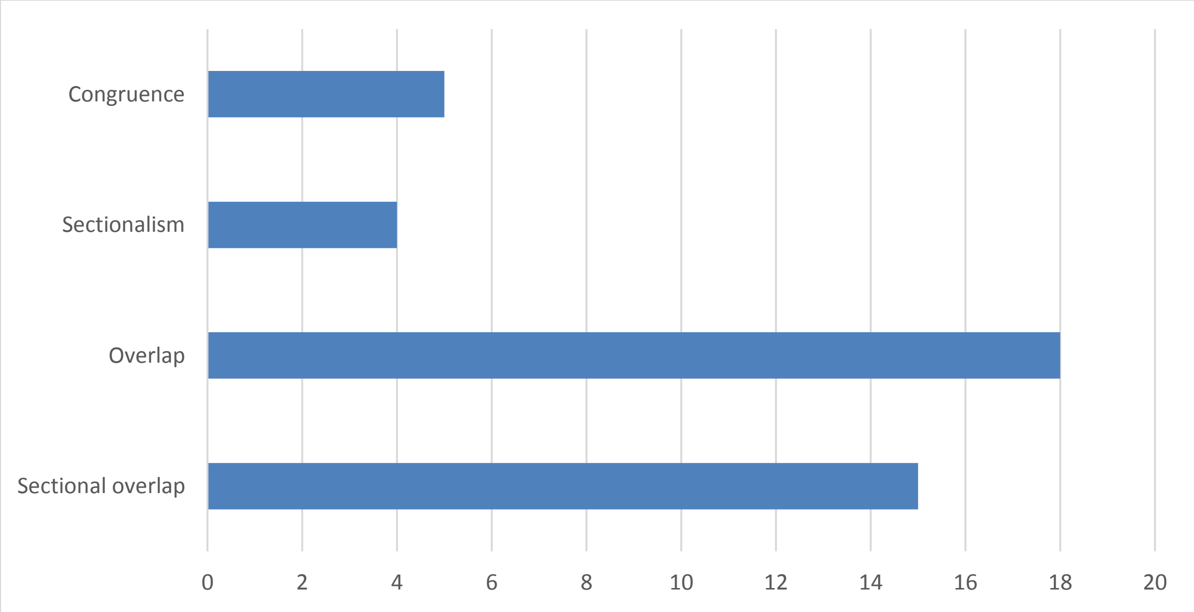
In several countries, agreements tend to take place at company level rather than at sector level. In Poland, for example, multi-employer collective bargaining has ceased to exist. The reasons are manifold, including: the reluctance of employers in the sector to take part (particularly in the context of the crisis); the relative importance of individual companies; the weakness of the only employer organisation in imposing any binding agreements on its members; and the lack of status of the employer organisation (in the case of Eurofer). In the Czech Republic, for example, the Steel Federation does not negotiate at sector level, but instead conducts collective bargaining at company level. In Romania, there has been no sectoral collective agreement in the last five years. However, company level collective agreement coverage is around 88% and there is over 50% union membership.

In some countries, such as Belgium, although collective bargaining at sector level exists, it is done in combination with single-employer agreements, which are common. Table 13 lists all the trade unions that are involved both in sector level collective bargaining and in single-employer bargaining.

Sector relatedness of employer organisations

The Network of Eurofound Correspondents identified 43 sector-related employer organisations in 26 Member States; no sector-related employer organisations were identified in Estonia or Luxembourg. The names and abbreviations of these employer organisations are presented in the Annex. Detailed data and information on employer organisations (membership domains, strength and affiliation to European-level employer organisations) are presented in Tables A6 and A7 in the Annex.

Figure 7: Domain coverage of employer organisations in the steel sector



Source: Authors, based on national contributions by Network of Eurofound Correspondents (2015).

Information on sector-relatedness is available for 42 of the 43 (95%) sector-related employer organisations. Five employer organisations (11%) from five different countries cover the steel sector in a congruent way. This means that their membership domain covers all activities within the sector, across all types of companies and throughout an entire country, without any member companies from other sectors.

It is important to note that Eurofer focusses on representing the interests of the steel sector's activities in NACE 24.1. By representing only NACE 24.1, Eurofer refers to a steel sector workforce of about 320,000 employees instead of the entire steel sector of approximately 500,000 employees (NACE 24.1, 24.2 and 24.3 together). Some of Eurofer's member organisations only cover NACE 24.1 activities, for example FVBS (in Austria), GSV (in Belgium) and MVAE (in Hungary). Like Eurofer, these organisations consider the steel sector to be NACE 24.1 and, therefore, regard their membership domain as being congruent to their own steel sector definition. However, in terms of the demarcation of the steel sector used in this study, they are considered sectional.

Table 14 includes 18 of the 43 employer organisations (41%) with an overlapping membership domain, which means they also have member companies from other sectors. In most cases, these 'other' sectors include the metalworking and machinery industries, such as Gesamtmetall in Germany or Federmeccanica in Italy. These 18 employer organisations, plus the 5 congruent ones, account for 23 of the 43 organisations (52%) that cover all activities, all types of companies and an entire country.

This is the case for employer organisations from 20 Member States. Four employer organisations are sectional in terms of their membership domain pattern (9%). Sectional overlap is the type of sector-relatedness of 15 out of 43 employer organisations (34%). This mainly results from domain demarcations of employer organisations excluding certain activities or sub-sectors within the steel sector and, at the same time, representing companies from additional or adjacent sectors. In Italy, seven employer organisations have a sectional overlap domain pattern.

This study shows that the two main domain patterns are overlap and sectional overlap (see Table 14 and Figure 7). In 21 Member States, there is only one single type of domain pattern. In the remaining Member States, different domain patterns co-exist for the different employer organisations in that country. In Germany, for example, there are three employer organisations, each with different domain patterns; one has a congruent membership domain, one a sectional and one an overlapping domain.

Table 14: Domain patterns of employer organisations in the steel sector

Country	Congruence	Sectionalism	Overlap	Sectional overlap
AT				FVBS, FMMGI, BSI
BE		G.S.V.		
BG			BAMI	
CY			SYMEBIK	
CZ				OSHŽ
DE	WV Stahl	VdS	AGV Stahl	
DK			DI	
EL		ENXE		
ES	UNESID		CONFEMETAL	
FI			Metallinjalostajat	
FR	GESIM		UIMM	A3M
HR			HUP-UMI	
HU				MVAE
IE			IBEC	
IT	Federacciai			Federmeccanica, Unionmeccanica – Confapi, CONFIMI Impresa meccanica, Cna Metalmeccanica di Produzione, Confartigianato, Casartigiani, CLAAI
LT			LINPRA	
LV			MASOC	
MT			Malta Employers Association (MEA)	
NL			FME	
PL			ZPPH, HIPH	
PT		ANEME		FENAME, AIMMAP
RO			Metalrugia / UniRomSider	
SE			Jernkontoret/ Industriarbetsgivarna	
SI			ZKM-GZS, ZDS	
SK			ZHTPG	
UK	UK Steel			

Source: Authors, based on national contributions by the Network of Eurofound correspondents (2015).

Note: WV Stahl is the only direct member of Eurofer. AGV Stahl and VdS (an employer organisation for steel sector companies in Saarland, a region in Germany) are only indirectly affiliated via their membership with WV Stahl. WV Stahl is a business association that deals with issues such as tax policy, material prices and industrial policy, while AGV Stahl is an employer organisation involved in *collective bargaining.VdS is involved in regional-level collective bargaining and is open to companies from outside the region. It is not directly affiliated to Eurofer yet, because it is part of WV Stahl, it is indirectly affiliated to Eurofer.UniRomSider (on Eurofer's website) is an umbrella organisation which, in turn, is member of Metalurgia. Metalurgia has 2 other members – Unitub (steel pipes) and Argos (ferro products) – both of which represent companies in the steel sector. However, Eurofer mentions UniRomSider, whereas this report mentions Metalurgia. UniRomSider's website states that it is a full member of Eurofer and represents the Romanian steel industry. To capture this situation, Table 14 cites this organisation as 'Metalurgia / UniRomSider'.Jernkontoret (on Eurofer's website) is strongly linked to Industriarbetsgivarna, an umbrella organisation that is responsible for collective bargaining.*

Congruence and Sectionalism in this study (NACE codes 24.1, 24.2 and 24.3) can deviate from actual sectoral focus (Eurofer and several members focus only on 24.1).

Most employer organisations in the steel sector cover all 3 NACE codes: 24.1, 24.2 and 24.3. Yet, as discussed, some only cover the activities in NACE 24.1. In 22 Member States, there is at least one employer organisation that covers all three NACE code activities. There is no information on the sector-relatedness of Greek and Lithuanian employer organisations. Table 15 illustrates the NACE coverage of each employer organisation.

Table 15: NACE code coverage of employer organisations

Country	Employer organisation	NACE 24.1	NACE 24.2	NACE 24.3
AT	FVBS	Yes	No	No
	FMMGI	No	Yes	Yes
	BSI	Yes	Yes	Yes
BE	G.S.V.	Yes	No	No
BG	BAMI	Yes	Yes	Yes
CY	SYMEBIK	Yes	Yes	Yes
CZ	Odvetvový svaz hutnictví železa (OSHŽ) (Note: legal form of interest group of employers)	Yes	Yes	Yes
DE	AGV Stahl	Yes	Yes	Yes
	WV Stahl	Yes	Yes	Yes
	VdS	Yes	Yes	Yes
DK	DI	Yes	Yes	Yes
EL	ENXE - Hellenic Steelmakers Union	N.A.	N.A.	N.A.
ES	UNESID	Yes	Yes	Yes
	CONFEMETAL	Yes	Yes	Yes
FI	Metallinjalostajat	Yes	Yes	Yes
FR	GESIM*	Yes	Yes	Yes
	UIMM	Yes	Yes	Yes
	A3M	Yes	Yes	Yes
HR	HUP-UMI	Yes	Yes	Yes
HU	MVAE	Yes	No	No
IE	IBEC	Yes	Yes	Yes
IT	Federmeccanica	Yes	Yes	Yes

	Unionmeccanica - Confapi	Yes	Yes	Yes
	CONFIMI Impresa meccanica	Yes	Yes	Yes
	Cna Metalmeccanica di Produzione	Yes	Yes	Yes
	Confartigianato	Yes	Yes	Yes
	Casartigiani	Yes	Yes	Yes
	CLAAI	Yes	Yes	Yes
	Federacciai	Yes	Yes	Yes
LT	LINPRA	N.A.	N.A.	N.A.
LV	MASOC	Yes	Yes	Yes
MT	Malta Employers Association (MEA)	Yes	Yes	Yes
NL	FME	Yes	Yes	Yes
PL	ZPPH	Yes	Yes	Yes
	HIPH	Yes	Yes	Yes
PT	ANEME	Yes	Yes	Yes
	FENAME	Yes	Yes	Yes
	AIMMAP	Yes	Yes	Yes
RO	Metalrugia / UniRomSider	Yes	Yes	Yes
SE	Jernkontoret/ Industriarbetsgivarna	Yes	Yes	Yes
SI	ZKM-GZS	Yes	Yes	Yes
	ZDS	Yes	Yes	Yes
SK	ZHTPG	Yes	Yes	Yes
UK	UK Steel	Yes	Yes	Yes

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

*Note: N.A.= not available. *Gesim is a member of Chambre Syndicale des Producteurs d'Aciers Fins et Speciaux, which is a French National Association that is affiliated to Eurofer.*

Not all of the 43 sector-related employer organisations provided information on the number of member companies or on the total workforce of their member companies. Information that was provided by employer organisations is available in the Annex. Table 16 sums up the membership data for all employer organisations per country. Based on this, organisational density rates have been calculated as a proportion of all companies in the sector and as a proportion of the sectoral workforce employed in the member companies.

The membership strength of employer organisations can be calculated in two different ways. One approach is to calculate how many individual companies there are by dividing the number of affiliated companies by the total number of companies in the sector. The other is to calculate workforce coverage by dividing the workforce of the affiliated companies by the number of employees within the sector.

Table 16: Organisational density of employer organisations in the steel sector

Country	Total sector companies	Employer organisation members in the sector	Density	Total workforce of companies affiliated to employer organisations	Density as a percentage of the total number of employees in the steel sector
AT	49	100	205%	42,109	200
BE	23	11	48%	11,502	100
BG	45	3	7%	1,700	58
CY	4	2	50%	22	N.A.
CZ	216	8	4%	13700	42
DE	1,396	150	11%	171,200	116
DK	94	22	23%	2,089	98
EE	12	0	0%	N.A.	N.A.
EL	320	N.A.	N.A.	N.A.	N.A.
ES	497	N.A.	N.A.	N.A.	N.A.
FI	74	3	4%	8,400	N.A.
FR	415	N.A.	N.A.	N.A.	N.A.
HR	56	1	2%	20	2
HU	143	2	1%	4,550	70
IE	351	N.A.	N.A.	N.A.	N.A.
IT	1,877	N.A.	N.A.	N.A.	N.A.
LT	18	N.A.	N.A.	N.A.	N.A.
LU	4	0	0%	N.A.	N.A.
LV	22	5	23%	1,775	245
MT	12	12	100%	N.A.	N.A.
NL	155	26	17%	26,000	234
PL	920	N.A.	N.A.	N.A.	N.A.
PT	118	15	13%	1,500	N.A.
RO	178	25	14%	11,078	55
SE	189	160	85%	30,000	136
SI	13	13	100%	2,815	97
SK	192	2	1%	10,653	48
UK	815	21	3%	20,000	34

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A.= not available. See previous notes under Table 14 regarding data issues.

In several Member States, there is a high organisational density in the national representation of employers or employees. In Austria, compulsory membership means that there is 100% coverage in relation to employer organisations in the sector, although this is as part of the larger metal sector. In Germany, there is 90% of coverage of employees and regional actors settle collective agreements. In the Netherlands, there is one main steel producer that has 90% coverage, which includes all but high paid employees. In Denmark, workplace representation in the sector is high, especially in the largest companies, and there is a high density rate in Poland.

The employer organisation density – in terms of the proportion of workforce covered – is also shown in Table 16. When the proportions are above 100%, it suggests that there are overlapping membership domains and that the numbers may not only cover the workforce in the steel sector.

Table 8 at the beginning of section 2 shows the number of steel sector employer organisations per Member State. It indicates that there are 43 employer organisations, about half the number of sector-related trade unions (82). In 17 Member States, there is just 1 steel sector employer organisation, in 3 Member States there are 2, and in 4 there are 3. Only Italy has more, with eight steel sector-related employer organisations.

Table 17 below shows that fragmentation of employer organisations is mainly explained by the fact that some focus only on large companies and others only on small and medium-sized enterprises (SMEs). This appears to be the case in Austria, the Czech Republic, Italy and Portugal (marked in red in Table 17). The fact that different employer organisations cover companies in different segments or economic activities of the steel sector appears to contribute to fragmentation in Austria and France (marked in blue in Table 17). As there is only one employer organisation in Hungary, the fact that MVAE does not cover the entire sector is not a sign of fragmentation; because there is only one employer organisation, there is no fragmentation at all. There is also only one employer organisation in the Czech Republic, which means that regional limitations are not contributing at all to the fragmentation of employer organisations in the steel sector. Given the relative low average number of employer organisations, ideological pluralism does not appear to be a relevant factor here.

Table 17: Reasons for the fragmentation of employer organisations

Country	Employer organisation	Reasons			
		Company/business activities outside the sector	**All legal forms/ size classes**	**Whole sector (NACE codes)**	**All regions of the country**
AT	FVBS	Yes	No	No	Yes
	FMMGI	Yes	No	No	Yes
	BSI	Yes	No	Yes	Yes
BE	GSV	No	Yes	No	Yes
CZ	Odvetvový svaz hutnictví železa (OSHŽ) (Note: legal form of interest group of employers)	Yes	No	Yes	No

HU	MVAE	Yes	Yes	No	Yes
IT	Federmeccanica	Yes	No	Yes	Yes
	Unionmeccanica – Confapi	Yes	No	Yes	Yes
	CONFIMI Impresa meccanica	Yes	No	Yes	Yes
	Cna Metalmeccanica di Produzione	Yes	No	Yes	Yes
	Confartigianato	Yes	No	Yes	Yes
	Casartigiani	Yes	No	Yes	Yes
	CLAAI	Yes	No	Yes	Yes
PT	FENAME	Yes	No	Yes	Yes
	AIMMAP	Yes	No	N.A.	Yes

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A.= not available. See also previous remarks on focus on 24.1 within Eurofer and several employer organisations.

To summarise, there are 43 different employer organisations, 17 of which are the only employer organisation in the sector in their country. Most of the employer organisations have an overlapping - or a sectional overlapping – membership domain because their membership tends to include other manufacturing industries. In terms of sector coverage, in 22 Member States there is an employer organisation whose membership domain covers all three NACE code activities that are part of the steel sector. For Estonia, Ireland and Luxembourg, no sector-related employer organisations were included in this study.

Steel employer organisations involvement in collective bargaining

In the previous section, the sector-relatedness and membership strength of employer organisations has been considered. In this section, Table 18 analyses their involvement in collective bargaining, indicating whether they are involved in multi-employer collective bargaining or single-employer bargaining.

In Table 18, column 5 shows the percentage of all employees in the sector in the country that are covered by a collective bargaining agreement. The right-hand column (workforce covered) presents the number of employees covered by collective bargaining agreements signed by the respective employer organisation. Figure 8, below Table 18, provides a summary overview of this information.

Table 18: Collective bargaining involvement of employer organisations

Country	Employer organisation	Multi-employer bargaining	Single-employer bargaining	Percentage covered	Companies covered	Workforce covered
AT	FVBS	x	x	100	15	15,000
	FMMGI	x			35	6,000
	BSI	x			49	7,000
BE	G.S.V.	x		100	9	11,502
BG	BAMI	x			3	1,700
CY	SYMEBIK	x		40	2	19
CZ	Odvetvový svaz hutnictví železa (OSHŽ) (legal form of interest group of employers)			42	N.A.	N.A.
DE	AGV Stahl	x	x	100	61	65,000
	WV Stahl				N.A.	N.A.
	VdS	x			22	15,200
DK	DI	x		80	22	2,089
EL	ENXE - Hellenic Steelmakers Union				N.A.	N.A.
ES	UNESID				N.A.	N.A.
	CONFEMETAL	x			52	52
FI	Metallinjalostajat	x		100	70	8,400
FR	GESIM*	x			N.A.	24,892
	UIMM	x			415	4,216
	A3M				N.A.	N.A.
HR	HUP-UMI				0	0
HU	MVAE			70%	N.A.	N.A.
IE	IBEC		x		1	40
IT	Federmeccanica	x	x		N.A.	N.A.
	Unionmeccanica - Confapi	x	x		N.A.	N.A.
	CONFIMI Impresa meccanica	x	x		N.A.	N.A.
	Cna Metalmeccanica di Produzione	x	x		N.A.	N.A.
	Confartigianato	x	x		N.A.	N.A.
	Casartigiani	x	x		N.A.	N.A.
	CLAAI				N.A.	n..a.
	Federacciai				N.A.	N.A.
LT	LINPRA				0	0

LV	MASOC	x	x		N.A.	N.A.
MT	Malta Employers Association (MEA)				N.A.	N.A.
NL	FME	x		98%	154	2,600
PL	ZPPH			42.5%	0	0
	HIPH				N.A.	N.A.
PT	ANEME			100%	N.A.	N.A.
	FENAME	x			5	500
	AIMMAP	x			1,000	50,000
RO	Metalrugia / UniRomSider			99%	N.A.	N.A.
SE	Jernkontoret/ Industriarbetsgivarna	x		90%	160	30,000
SI	ZKM-GZS	x		100%	13	N.A.
	ZDS	x			13	2,915
SK	ZHTPG	x		80%	2	10,653
UK	UK Steel				N.A.	N.A.

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A.= not available.

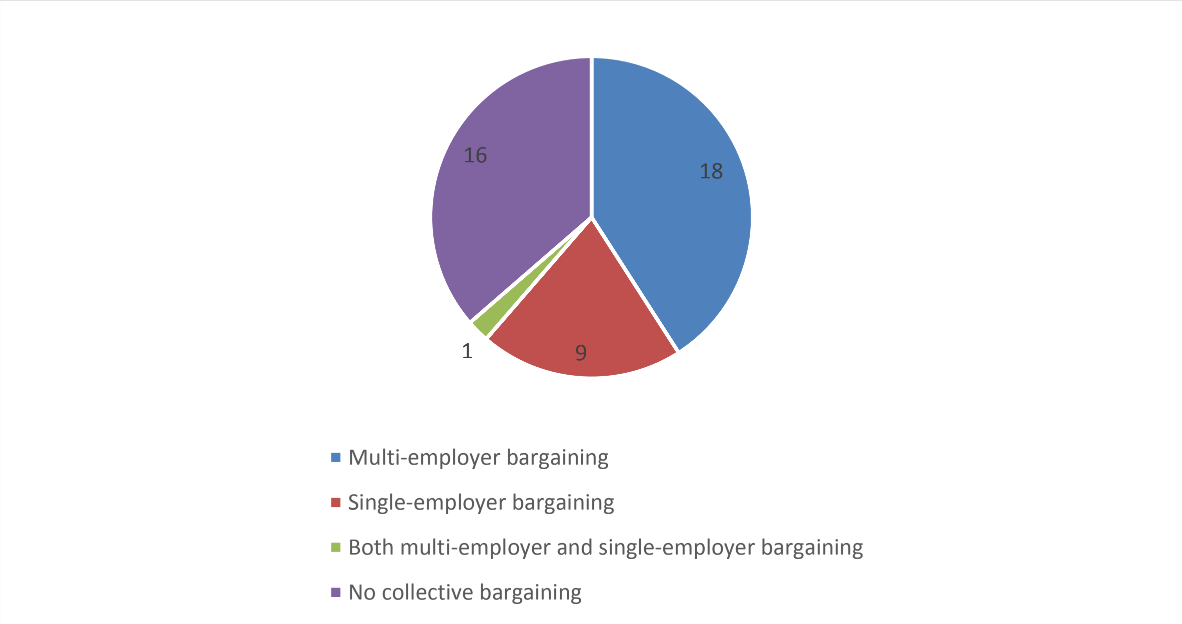
**Gesim is a member of Chambre Syndicale des Producteurs d'Aciers Fins et Speciaux, which is a French National Association that is affiliated to Eurofer.*

The employer organisations marked in red are those that are not affiliated to Eurofer UNESID. UNESID, the Spanish member of Eurofer questions the involvement of Confemetal in collective bargaining because, according to UNESID, no collective bargaining takes place in the steel sector in Spain. If there were any collective bargaining, UNESID claims it would be the actor involved. However, for now, this is not the case.

In total, 28 out of the 43 employer organisations (65%) are involved in sector-related collective bargaining. The other 15 employer organisations (35%) are not involved in collective bargaining. This is illustrated in purple in Figure 8 below.

Of these 28 employer organisations, 18 (42%) are involved in multi-employer bargaining, 9 (21%) carry out both single-employer bargaining and multi-employer bargaining and 1 (IBEC in IE) only provides support as an employers’ organisation to company level single-employer bargaining.

Figure 8: Involvement of employer organisations in collective bargaining



Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

There are no employer organisations involved in collective bargaining in Croatia, the Czech Republic, Greece, Hungary, Lithuania, Malta, Poland, Romania and the UK. However, only one employer organisation was identified for each of these countries (with the exception of Poland).

Collective bargaining patterns and social dialogue practices

The relevance of European sectoral social dialogue tends to increase the ability of the national affiliates of European organisations to influence national public policies affecting the sector (Perin and Léonard, 2011).

For the trade unions, 79 of the 82 (96%) are involved in collective bargaining, while for the employer organisations this is the case for 28 of the 43 (65%). Table 19 compares the types of collective bargaining involvement for national steel sector trade unions and employers.

Table 19: Collective bargaining in absolute figures

<table>
<tr><th></th><th colspan="2">Trade unions</th><th colspan="2">Employer organisations</th></tr>
<tr><td>No collective bargaining involvement</td><td>3</td><td></td><td>15</td><td></td></tr>
<tr><td>Single-employer collective bargaining only</td><td>20</td><td rowspan="3">79 (96%)</td><td>1</td><td rowspan="3">28 (63%)</td></tr>
<tr><td>Multi-employer collective bargaining</td><td>19</td><td>18</td></tr>
<tr><td>Both single- and multi-employer collective bargaining</td><td>40</td><td>9</td></tr>
<tr><td>Total</td><td colspan="2">82</td><td colspan="2">43</td></tr>
</table>

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Table 20 presents the collective bargaining information on a country-by-country basis, illustrating the different national collective bargaining patterns and collective bargaining coverage. Estonia, Lithuania and Malta are the only countries where sector-related collective bargaining does not exist. The table shows the sole, or most prevalent, type of collective bargaining per country.

Table 20: Form/level of bargaining per country

Form/level of bargaining	Trade union organisations by country
Multi-employer bargaining	AT, CY, DK, FI, SE
Multi-employer bargaining and single-employer bargaining	BE, BG, DE, ES, FR, IT, LV, NL, PT, SI, SK
Single-employer bargaining	CZ, EL, HR, HU, IE, LU, PL, RO, UK
No collective bargaining	EE, LT, MT

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

In several other countries, statutory provisions allow for the extension of collective agreements to unaffiliated employers only when the signatory trade union and/or employers' association represents a certain proportion of the employees within the agreement's domain – for example, at least 50% in countries such as Finland, Germany, Latvia and Portugal (Eurofound, 2016).

Table A8 in the Annex provides the information available on collective bargaining within each country, collected by Eurofound's Network of European Correspondents. Based on this information, Table 21 provides an overview of the collective bargaining coverage and the type of collective bargaining (single-employer, multi-employer, or both single and multi-employer).

Table 21: Collective bargaining coverage and collective bargaining level

	Collective bargaining coverage				**Information not available**
	90% or more	**50–80%**	**25–50%**	**1–25%**	
Single-employer bargaining sole level or prevailing level	LU, NL, RO	HU	CZ, PL	IE	EL, HR, UK
Multi-employer bargaining sole level or prevailing level	AT, BE, DE, FI, PT, SE, SI	DK, SK	CY		BG, ES, FR, IT, LV
No collective bargaining					EE, LT
Information not available					MT

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: the countries shaded in grey are those that have a steel sector workforce of more than 10,000 employees.

There was no information in relation to the amount of collective bargaining coverage available for 11 of the 28 Member States.

Participation in public policy

Apart from the sector-relatedness, organisational and membership strength of social partners and their involvement in collective bargaining, the participation in public policy is also a relevant indicator of the representativeness of national social partner organisations in the sector.

Interest associations may influence public policy in the following two ways.

- They may be consulted by the authorities on matters affecting their members.
- They may be represented on ‘corporatist’ (in other words tripartite) committees and policy consultation boards.

This study considers only cases of consultation and corporatist participation that relate explicitly to sector-specific matters. Consultation processes can be wide-ranging and, therefore, the organisations consulted by the authorities may vary according to issues and depend on changes in government.

In 18 Member States, at least 1 trade union and 1 employer organisation reported that they are consulted on public policymaking. In five countries, only trade union(s) or employer organisation(s) reported that they are consulted. In five countries (Estonia, Greece, Ireland, Malta and Slovenia), there is no participation by social partner organisations in public policymaking.

Trade unions or interest representations

Over half (47) of the 82 trade unions indicated that they were consulted, of which 16 said it was on a regular basis and 31 said it was on an ad-hoc basis. In contrast, 28 trade unions reported that they were not consulted, while there was no information available for a further 6 trade unions.

In Croatia, Cyprus, Estonia, Greece, Ireland, Lithuania, Malta and Slovenia, none of the trade unions said there were consulted (they responded ‘no’ or ‘no information available’).

Employer organisations or business associations

In total, 25 of the 43 employer organisations reported that they were consulted; 12 organisations indicated that no consultation took place while there was no information available in 6 cases. Of these 25, 12 reported that they were consulted regularly and 13 said they were consulted an ad-hoc basis. In all countries where employer organisations have been identified, these organisations were consulted, apart from in Croatia, Cyprus, Greece, Lithuania, Malta and Slovenia.

Table 22: Consultation of organisational bodies by country

	Trade unions consulted	No trade union consulted
Employer organisation consulted	AT, BE, CZ, DE, **DK**, **ES**, **FI**, **FR, HU**, **IT, LV, NL**, **PL**, PT, RO, SE, **SK, UK**	CY, HR, LT
No employer organisation consulted	**BG, LU**	**EE**, EL, IE, MT, SI

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: The countries marked in bold are those for which there is a tripartite or bipartite sector-specific board.

Tripartite/bipartite participation

Table 23 identifies sector-related tripartite and/or bipartite bodies along with the participating trade unions and employer organisations. In total, 14 countries (marked in bold in Table 22), have sector-related bodies.

Table 23: Tripartite and bipartite sector-specific boards of public policy

Country	Name of body and scope of activity	Bipartite/tripartite	Origin: agreement/statutory	Trade unions participating	Employer organisations participating
BG	Sectoral Council for Tripartite Cooperation in Metallurgy	Tripartite	Statutory	TU Metalicy; NF Metallurgy	BAMI
	Sectoral Council for Tripartite Cooperation in Healthy and Safe Working Conditions, Ministry of Economy	Tripartite	Statutory	TU Metalicy; NF Metallurgy	BAMI
	Sectoral Council for Tripartite Cooperation in Labour and Social Security Relations, Ministry of Economy	Tripartite	Statutory	TU Metalicy; NF Metallurgy	BAMI
DK	The Vocational Training Committee in Metal Industry	Bipartite	Statutory	Danish Metalworkers Union (Dansk Metal)	DI
	The Environmental Council of Industry	Bipartite	Statutory	CO-industri	DI
EE	Professional Council of Engineering, Metal and Machine Industry	Tripartite		IMTAL	EML
ES	Foundation of the metal sector for training, skills and employment monitoring sectoral trends	Bipartite	Agreement	CCOO Industria FICA-UGT /	FMFCE Bipartite Foundation[3]
	Metal sector industrial observatory	Tripartite	Agreement	CCOO Industria and FICA-UGT	N.A.
	The Interministerial Working Group on the future of the steel industry	Tripartite	Government's initiative (2014)	CCOO Industria FICA-UGT	N.A.

[3] The FMFCE bipartite foundation was created in 2003 by the most representative trade unions and employers' organisation in the metal sector. The Interministerial Working Group was created by the government and includes the most representative trade unions in the steel sector and the most relevant trade association in the steel sector.

FI	Occupational Safety Sector Group of the Centre for Occupational Safety for the Metal Sector	Tripartite	Agreement	Metalli, Pro, IL	Teknologiateollisuus
	National Education and Training Committee for the Mechanical and Metal Industry	Tripartite	Statutory	Metalli-SAK, Pro-STTK, IL-Akava, TEK-Akava, Trade Union of Education OAJ	Teknologiateollisuus-EK, Federation of Finnish Enterprises (Suomen Yrittäjät)
FR	Commission Paritaire	Bipartite	Statutory and agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération Confédérée FO de la Métallurgie	GESIM
	Institute to promote health and safety	Bipartite	Agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération Confédérée FO de la Métallurgie	GESIM
	Institute to promote social dialogue on sectoral level and the attractiveness of the sector	Bipartite	Agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération Confédérée FO de la Métallurgie	GESIM
	Institute to promote the skills and launch studies forecasting the future needs of competencies	Bipartite	Agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération Confédérée FO de la Métallurgie	GESIM
HU	Metallurgy Sectoral Dialogue Committee	Bipartite	Statutory	VASAS, Munkástanácsok, Alumíniumipari Szakszervezetek Szövetsége	MVAE, HUNGAMOSZ
IT	National Paritarian Institute for Metalworkers (EBM)	Bipartite	Agreement		Unionmeccanica - Confapi
	Supplementary pension fund for workers in the metalworking sector	Bipartite	Agreement	Fim Cisl, Uilm Uil	Federmeccanica Assistal

	Inter professional fund for vocational training	Bipartite	Agreement	Cgil, Cisl Uil	Confindustria
	Supplementary health care fund for workers of SMEs active in the metalworking sector	Bipartite	Agreement	Fim Cisl	Federmeccanica Assistal, Confimi Impresa meccanica,
	Inter-professional fund for continuous vocational training for employees in the artisan sector	Bipartite	Agreement	Cgil, Cisl, Uil	Confartigianato, Cna, Casartigiani, Claai
LU	Steel Tripartite Conference	Tripartite	Agreement	OGBL, LCGB	ArcelorMittal
LV	National Tripartite Cooperation Council	Tripartite	Statutory	LBAS	LDDK
NL	Pension fund for employees of the Social Unit IJmuiden	Bipartite	Agreement	FNV, VHP Tata Steel	None
PL	The Tripartite Sectoral Team for Social Conditions of Restructuring in the Steel Industry	Tripartite	Agreement	KSH NSZZ Solidarność SKHOiK ZZIT FHZZ SH OZZZ PRC SH PZZ 'Kadra'	ZPPH
SK	Economic and Social Council of the Slovak Republic (HSR)	Tripartite /	Statutory /	OZ KOVO representing the KOZ SR /	ZHTPG
	Industry Bipartite	Bipartite	Agreement	OZ KOVO, IOZ and OZ PBGNT	HTPG, ZSP SR, ZAP SR, ZEP SR, ZSPS
UK	Steel Council	Tripartite	Agreement	Community, GMB, Unite	UK Steel (plus individual companies)

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

3. European level of interest representation

In this chapter, the representativeness of the social partners at European level is assessed in three ways.

Firstly, the membership strength of both IndustriAll Europe and Eurofer is described, based on the collective coverage of their national affiliates in each of the Member States. Secondly, the organisational capacity of Eurofer and IndustriAll Europe is evaluated in terms of their capacity to participate effectively in the European sectoral social dialogue committee and their capacity to negotiate. European social partners' 'capacity to negotiate' is their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored on an EU-wide level through the support of their affiliates. On the one hand, this depends on whether the European-level organisations have procedures to obtain a mandate for negotiations and for getting approval from the members to sign texts. On the other hand, it depends on the number of countries in which European associations have members involved in collective bargaining.

Finally, every representativeness study also measures the limits of the representativeness of social partners involved in the European sectoral social dialogue committee, by counterweighting it with the representativeness of other European associations, and the national organisations not represented by IndustriAll Europe and Eurofer in the European sectoral social dialogue committee for the steel sector.

Membership domain: IndustriAll Europe

IndustriAll Europe is affiliated to the European Trade Union Confederation (ETUC) at cross-sector level.

Through its national affiliates, IndustriAll Europe covers all three NACE codes (24.1, 24.2 and 24.3) for the steel sector. With regards to the overall organisation, IndustriAll Europe covers most manufacturing industries. Its membership domain as a whole is multi-sectoral and, therefore, overlaps the steel sector under consideration in this report.

In the statutes of IndustriAll Europe, membership and affiliation is defined in article 7 and 8. Member trade unions are required to be democratic and independent, and affiliated to a national cross-sector trade union confederation that is affiliated to the ETUC. The Executive Committee takes membership-related decisions and can decide to make an exception to the required affiliation to a cross-sector confederation that is member of the ETUC with a two-thirds majority. The statutes of IndustriAll Europe only provide for full membership.

Of the 82 national steel sector trade unions, 59 (72%) are affiliated to IndustriAll Europe. This means in 24 of the 25 Member States that have a national steel sector-related trade union, there is 1 which is affiliated to IndustriAll Europe. In Greece, there is one steel sector trade union and it is not affiliated to IndustriAll Europe. In Denmark, Finland, Italy, the Netherlands, Poland, Portugal, Slovenia, Spain and Sweden, some – but not all – steel sector-related trade unions are members of IndustriAll Europe.

Table 24: Sector-related trade unions affiliated to IndustriAll Europe

Country	Trade unions affiliated to IndustriAll Europe	Trade unions not affiliated to IndustriAll Europe	Is the trade union with most members in the sector affiliated?
AT	PROGE, GPA-djp	-	Yes
BE	ACLVB, Metea, CNE, LBC-NVK, SETCa-BBTK, ABVV Metaal, MWB	-	Yes
BG	TU Metalicy, NF Metallurgy	-	Yes
CY	OBIEK-SEK	SEMMHK - PEO	
CZ	OS KOVO	-	Yes

DE	IG Metall	-	Yes
DK	Metal, IDA	3F, HK/Privat, Dansk El-forbund	N.A.
EL	-	Union of Workers at SIDENOR S.A	N.A.
ES	CCOO Industria, UGT-FICA, FI-USO, ELA	LAB Industria, CIG-Industria, IC Industria	N.A.
FI	Metalli, Pro, TEK, IL, Sähköliitto	YTN	N.A.
FR	FGMM-CFDT, FTM-CGT, FO Métaux, CFTC Métallurgie, CFE-CGC	-	Yes
HR	SMH	-	Yes
HU	VASAS	-	Yes
IE	SIPTU, TEEU	-	Yes
IT	Fiom Cgil, Fim Cisl, Uilm Uil	UGL metalmeccanici, Fismic, SAVT/MET, USAS/ASGB	N.A.
LT	LMPSS	-	Yes
LU	OGBL, LCGB	-	Yes
LV	LIA	-	Yes
NL	CNV Vakmensen, FNV	De Unie, VHP Tata Steel, VHP2	Yes
PL	KSH NSZZ Solidarność, FHZZ, SH PZZ 'Kadra'	SKHOiK ZZIT, SH OZZZ PRC	Yes
PT	FIEQUIMETAL, SINDEL, SIMA	FETESE, SITESE	N.A.
RO	FSS Metarom, FNS Solidaritatea Metal	-	Yes
SE	IF Metall, Unionen, Sveriges Ingenjörer	Ledarna	Yes
SI	SKEI	KS 90 – SKEIE, KNSS - SKEM	N.A.
SK	OZ KOVO	-	Yes
UK	Community, GMB, Unite	-	Yes

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A. = not available

Table 8 (section 2) showed that in 25 Member States, IndustriAll Europe has an affiliate that covers the entire steel sector. There are only three trade union members of IndustriAll Europe that do not cover the entire sector. In Belgium, CNE and LBC-NVK do not cover NACE 24.2, while in Romania FNS Solidaritatea Metal does not cover NACE 24.3. All other 55 steel sector trade union members of IndustriAll Europe cover NACE 24.1, 24.2 and 24.3.

In Table 13 (section 2.3), the steel sector trade unions that are not members of IndustriAll Europe are marked red. It shows that 79 of the 82 steel sector trade unions are involved in collective bargaining and of those, 55 (70%) are affiliated to IndustriAll Europe. In 15 Member States, all the trade unions that are involved in collective bargaining in the steel sector are also affiliated to IndustriAll Europe. This is the case for Austria, Belgium, Bulgaria, Croatia, Cyprus, the Czech Republic, France, Germany, Hungary, Ireland, Latvia, Luxembourg, Romania, Slovakia and the UK. In nine other Member States, some of the trade unions that are involved in collective bargaining are members of IndustriAll Europe, but not all of them. This is the situation in Denmark, Finland, Italy, the Netherlands, Poland, Portugal, Slovenia, Spain and Sweden. This means that in total, IndustriAll Europe has an affiliate that is involved in collective bargaining in the steel sector in 24 Member States, while there is collective bargaining in 25 Member States.

In Greece, there is one trade union involved in collective bargaining, but it is not affiliated to IndustriAll Europe. In Lithuania, there is also a trade union not affiliated to IndustriAll Europe, but it does not have any involvement in collective bargaining. Estonia and Malta have no steel sector trade unions.

Membership domain: Eurofer

Eurofer participates in the activities of the European Employers Network (EEN) of Business Europe but is not a member. The EEN is a platform for a number of European employer organisations to coordinate strategies and exchange of information on different European sectoral social dialogue committee activities. It also provides a link with EU cross-sector social dialogue.

Through its national member organisations, Eurofer covers a membership domain that is more or less congruent to the steel sector, as defined by NACE codes 24.1, 24.2 and 24.3. Therefore, Eurofer is only involved in 1 European sectoral social dialogue committee for the steel sector. As mentioned above, it has a strong focus on steel production (NACE code 24.1).

Eurofer provides for members and associate members in article 5 of its statutes. Membership or associate membership is open to companies and national federations of companies that produce or manufacture steel in at least one Member State. Members have the right to vote at the Eurofer General Assembly and they may be represented on the Board and other bodies of the organisation. Associate members do not have voting rights in the General Assembly and they may only participate in certain activities of the organisation. The rights and obligations and the membership fees (article 9) of both members and associate members are determined by Eurofer's internal rules.

Of the 43 steel sector employer organisations, 17 (40%) are affiliated to Eurofer. This means that Eurofer has an affiliate in 15 of the 25 Member States (60%) that have a steel sector employer organisation. The 10 countries that have a steel sector employer organisation that is not affiliated to Eurofer are Croatia, Cyprus, Denmark, Latvia, Lithuania, Malta, the Netherlands, Portugal, Slovakia and Slovenia.

Eurofer has a member organisation in Austria, France, Germany, Italy, Poland and Spain, but not all the steel sector employer organisations in those six countries are members of Eurofer. Table 25 presents the member organisations of Eurofer, the national steel sector employer organisations that are not affiliated to Eurofer, and an assessment of whether or not the affiliated organisation has the largest membership strength in the sector.

Table 25: Sector-related employer organisations affiliated to Eurofer

Country	Employer organisations affiliated to Eurofer	Employer organisations not affiliated to Eurofer	Is the largest employer organisation a member of Eurofer?
AT	FVBS	FMMGI, BSI	No
BE	GSV	-	Yes
BG	BAMI	-	Yes
CY	-	SYMEBIK	No
CZ	OSHŽ	-	Yes

DE	AGV Stahl, WV Stahl	VdS	Yes
DK	-	DI	No
EL	ENXE	-	Yes
ES	UNESID	CONFEMETAL	N.A.
FI	Metallinjalostajat	-	Yes
FR	GESIM, A3M	UIMM	No
HR	-	HUP-UMI	-
HU	MVAE	-	Yes
IE	-	IBEC	No
IT	Federacciai	Federmeccanica, Unionmeccanica – Confapi, CONFIMI Impresa meccanica, Cna Metalmeccanica di Produzione, Confartigianato, Casartigiani, CLAAI	No
LT	-	LINPRA	No
LV	-	MASOC	No
MT	-	Malta Employers Association (MEA)	No
NL	-	FME	No
PL	HIPH	ZPPH	No
PT	-	ANEME, FENAME, AIMMAP	No
RO	Metalrugia / UniRomSider	-	Yes
SE	Jernkontoret/ Industriarbetsgivarna	-	Yes
SI	-	ZKM-GZS, ZDS	No
SK	-	ZHTPG	No
UK	UK Steel	-	Yes

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Table 13 (section 2.2) lists only four employer organisations that do not cover the entire steel sector and two other organisations for which there is no information on their sector-relatedness. The Austrian, Belgian and Hungarian members of Eurofer only cover NACE 24.1, and the fourth steel sector employer organisation – FMMGI in Austria – does not cover the entire steel sector, is not affiliated to Eurofer and only covers NACE 24.2 and 24.3.

In Table 18, the steel sector employer organisations that are not members of Eurofer are marked red. It shows that 28 of the 43 employer organisations (65%) are involved in collective bargaining. Of those 28, 7 (26%) are affiliated to Eurofer. In Belgium, Bulgaria, Finland and Sweden all the employer organisations involved in collective bargaining are also members of Eurofer.

There are, however, 12 Member States with an employer organisation that is involved in collective bargaining, without being affiliated to Eurofer. Austria, France and Germany have a Eurofer member involved in collective bargaining, while they also have another employer organisation involved in collective bargaining that is not a member of Eurofer. In Italy and Spain there is a Eurofer member that is not involved in collective bargaining, while in both countries there is another employer organisation that is involved in collective bargaining that is not affiliated to Eurofer. In Cyprus, Denmark, Ireland, the Netherlands, Portugal, Slovakia and Slovenia there is an employer organisation participating in collective bargaining that is not a member of Eurofer.

The membership domain of Eurofer combines employer organisations with direct corporate members. This notably includes the largest companies (see Tables A11a and A11b in the Annex). Several companies have branches in more than one Member State. The companies that are directly affiliated to Eurofer have been analysed in the framework of this study. Table 26 below illustrates

- how the corporate members that play an important role in the representativeness of Eurofer relate to the sector
- their workforce in the given country
- its involvement in collective bargaining
- the other Member States in which that company operates
- whether it is affiliated to a national steel sector employer organisation

The international character of some of the companies makes the analysis challenging.

The membership domain of Eurofer, based upon the affiliated employer organisations, is extended with corporate members from Luxembourg, the Netherlands, Poland, Portugal, Slovakia and Slovenia; none of these six countries have an employer organisation that is affiliated to Eurofer. Offcine Tecnosider – an Italian company that is direct corporate member of Eurofer – is affiliated to a national employer organisation that is not member of Eurofer. As such, it adds to the representativeness of Eurofer to an extent, yet there is already another national steel sector employer organisation, Federacciai, that is member of Eurofer.

Table 26: Corporate members of Eurofer (adding to its representativeness)

Country	Corporate members of Eurofer	NACE 24.1	NACE 24.2	NACE 24.3	Number of employees in the country	Employees in other Member States	Involved in collective bargaining?	Affiliation to national employer organisation
Multi	Arcelor Mittal	Yes	Yes	Yes		BE, CZ, DE, ES, LU, PL, RO	Yes (at least in CZ, FR, LU, PL, RO)	
CZ	Trinecké železárny,	Yes	No	Yes	12,352	-	Yes	OSHZ
	Vítkovice Steel, a. s.	Yes	No	No	935	-	Yes	OSHZ
EL	Hellenic Halyvourgia S.A. international	Yes	No	No	700	BG	Yes	ENXE
ES	Megasa	Yes	Yes	Yes		PT	Yes	
HU	Dunaferr	Yes	No	Yes	5,500	CZ, PL	Yes	MVAE
IT	Offcine Tecnosider	Yes	No	No	108	-	**Yes**	Union Meccanica Confapi
NL	FNSteel	No	No	Yes	350	DE, FR, SE, UK,	**Yes**	FME
	Tata Steel	Yes	Yes	Yes		UK	**Yes**	

PT	SN (part of Magasa concern)	Yes	No	No	700	ES	Yes	
SI	SIJ	Yes	Yes	Yes	3,043	AT, DE, HR, IT, RO, UK	Yes	ZDS, ZKM-GZS
	Štore Steel, d.o.o.	Yes	No	No	527	-	Yes	ZKM-GZS
UK	Tata Steel	Yes	Yes	Yes		NL	Yes	
	British Steel	Yes	Yes	Yes		-	Yes	

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: A full list of all companies affiliated to Eurofer can be seen in Tables A11a and A11b in the Annex.

Many companies that are directly affiliated to Eurofer are involved in collective bargaining, in some cases in several countries. Therefore, the corporate members add to the number of Member States in which Eurofer has an affiliate involved in collective bargaining. For nine Member States, Eurofer has a corporate member involved in collective bargaining but does not have an employer organisation affiliated in those countries (marked in dark purple in Table 26). This is the case for Italy, Luxembourg, the Netherlands, Poland, Portugal, Slovakia, Slovenia, Spain and the UK. For four other Member States, Eurofer has an employer organisation affiliated that is not involved in collective bargaining, but a corporate member is making collective bargaining agreements (marked in light purple in Table 26). This is the case for the Czech Republic, Greece, Hungary and Romania. Therefore, there are 13 additional Member States in which Eurofer has a corporate member involved in collective bargaining.

Steel sector representativeness of IndustriAll Europe and Eurofer

Table 27 summarises the steel sector representativeness of both IndustriAll Europe and Eurofer with their respective affiliated trade unions and employer organisations. There are 82 steel sector trade unions in 25 Member States, of which 58 trade unions (72%) from 24 Member States are members of IndustriAll Europe. From the 79 steel sector trade unions involved in collective bargaining, 55 (69%) are affiliated. IndustriAll Europe has a member involved in collective bargaining in 22 Member States.

As for the steel sector, there are 43 employer organisations in 16 Member States, of which 17 (40%) are affiliated. Of the 27 employer organisations involved in collective bargaining, there are 7 (26%) that are affiliated to Eurofer and are, as such, represented in the steel sector European sectoral social dialogue committee. Eurofer has a member organisation in 14 of the 25 Member States in which there is an employer organisation and it has an employer organisation member that is involved in collective bargaining in 6 Member States.

As already indicated in this study, Eurofer has corporate members in five Member States in which it does not have an affiliated employer organisation. This brings the number of Member States in which Eurofer has an affiliate from 14 to 19. It also increases the number of Member States in which it has a member involved in collective bargaining from 6 to 19. This is because, in 13 Member States, it has a corporate member involved in collective bargaining, even though it does not have an affiliated employer organisation involved.

Table 27: Membership structure of IndustriAll Europe and Eurofer

	Number of organisations	Number of Member States with organisation(s)	Number of organisations involved in collective bargaining	Number of Member States with organisation(s) involved in collective bargaining
All sector-related trade unions	82	25	79	24
Affiliates of IndustriAll Europe	58	24	55	22
Percentage affiliated	71%	96%	70%	92%
All sector-related employer organisations	43	26	28	17
Employer organisations affiliated to Eurofer (direct and indirect)	16	14	7	6
Percentage affiliated	36%	54%	25%	35%
Member States with additional representativeness through corporate members of Eurofer		5		13
Total number of Member States with a Eurofer affiliate (employer organisations and companies)		19		19
Total percentage of employer organisations and companies affiliated to Eurofer		68%		68%

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Table 27 considers each Member State as equal, while there is more steel sector activity, employment and production in some Member States and less in others. Table 28 assesses the situation for the Member States with at least 10,000 steel sector employees.

Table 28: Affiliations in Member States with over 10,000 employees in the steel sector

	Employment 2015	At least one trade union affiliated to IndustriAllEurope	At least one IndustriAllEurope affiliate involved in collective bargaining	At least one employer organisation affiliated to Eurofer	Eurofer affiliate involved in collective bargaining	Corporate member of Eurofer adding to representativeness	Eurofer corporate member involved in collective bargaining
AT	21,113	Yes	Yes	Yes	Yes	Yes	Yes
BE	11,502	Yes	Yes	Yes	Yes	Yes	No
CZ	33,400	Yes	Yes	Yes	No	Yes	Yes
DE	147,678	Yes	Yes	Yes	Yes	Yes	No
ES	81,000	Yes	Yes	Yes	No	Yes	Yes
FR	39,951	Yes	Yes	Yes	Yes	Yes	Yes
IT	74,071	Yes	Yes	Yes	No	Yes	Yes
NL	11,900	Yes	Yes	No	No	Yes	Yes
PL	32,568	Yes	Yes	Yes	No	Yes	Yes
RO	20,334	Yes	Yes	Yes	No	Yes	Yes
SE	22,075	Yes	Yes	Yes	Yes	Yes	No
SK	22,600	Yes	Yes	No	No	Yes	Yes
UK	59,600	Yes	Yes	Yes	No	Yes	Yes

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: The number of employees in the steel sector in France was not available for 2016; the given number is for 2013. The figures for Belgium, Germany and Sweden represent the number of employees.

IndustriAll Europe and Eurofer both have members involved in collective bargaining in each of these 13 Member States. Only five Member States have an employer organisation affiliated to Eurofer that is involved in collective bargaining. The corporate members of Eurofer increase this to the full 13 Member States.

Other European trade union associations

The representativeness of IndustriAll Europe has two limitations. Firstly, there are Member States in which IndustriAll Europe does not have an affiliated trade union; Estonia, Greece and Malta. In Estonia and Malta, there are no sector-related trade unions involved in collective bargaining, whereas there is one in Greece. Furthermore, in Denmark, Italy, the Netherlands, Poland, Portugal, Slovenia and Sweden there are sector-related trade unions that are not affiliated to IndustriAll Europe (marked in yellow in Table 29), besides trade unions from those countries that are members of IndustriAll Europe. Secondly, there are the other European trade union associations to which the sector-related trade unions are affiliated. These are listed in green in Table 29 for each of the Member States. None of these associations are steel sector-related, which leads to the conclusion that IndustriAll Europe is the only European trade union association that is steel sector-related.

Table 29: Sector-related trade unions affiliated to other European associations

Country	Trade unions affiliated to IndustriAll Europe	Trade Unions not affiliated to IndustriAll Europe	Other European trade union associations	National trade unions affiliated to other associations
AT	PROGE, GPA-djp	--	EFFAT	PROGE, GPA-djp
			ETUC	PROGE, GPA-djp
			EPSU	GPA-djp
			EFJ	GPA-djp
			UNI Europa	GPA-djp
BE	ACLVB, Metea, CNE, LBC-NVK, SETCa-BBTK, ABVV Metaal, MWB	--	IVV	ACLVB /CGSLB
			EVV	ACLVB /CGSLB
			ETUC	ABVV Metaal, MWB (ABVV-FGTB)
BG	TU Metalicy, NF Metallurgy	--	--	--
CY	OBIEK-SEK	SEMMHK - PEO	UNI Europa	OBIEK-SEK
			EFFAT	OBIEK-SEK
			TUIMM-WUFTU	SEMMHK - PEO
CZ	OS KOVO	--	--	--
DEDK	Metal, IDA	3F, HK/Privat, Dansk El-forbund	ITF	3F
			PSI	3F
			Uni-global	3F, HK/Privat
			BWI	3F
EL	--	Union of Workers at SIDENOR S.A	--	--
ES	CCOO Industria, UGT-FICA, FI-USO, ELA	LAB Industria, CIG-Industria, IC Industria	--	--
FI	Metalli, Pro, TEK, IL, Sähköliitto	YTN	Uni-Global	TEK
			Nordic ICTS	TEK
			Nordic IN	TEK
			ETUC	TEK, YTN
			Eurocadres	TEK, YTN
			BWI	Sähköliitto
			NBTF	Sähköliitto
FR	FGMM-CFDT, FTM-CGT, FO Métaux, CFTC Métallurgie, CFE-CGC	--	--	--
HR	SMH	--	--	--
HU	VASAS	--	--	--

IE	SIPTU, TEEU	--	--	--
IT	Fiom Cgil, Fim Cisl, Uilm Uil	UGL metalmeccanici, Fismic, SAVT/MET, USAS/ASGB	--	--
LT	LMPSS	--	--	--
LU	OGBL, LCGB	--	--	--
LV	LIA	--	ETUC	LIA
NL	CNV Vakmensen, FNV	De Unie, VHP Tata Steel, VHP2	ETUC	CNV Vakmensen, FNV, VHP Tata Steel
			Eurocadres	CNV Vakmensen, FNV, VHP Tata Steel, VHP2
PL	KSH NSZZ Solidarność, FHZZ, SH PZZ ‘Kadra’	SKHOiK ZZIT, SH OZZZ PRC	--	--
PT	FIEQUIMETAL, SINDEL, SIMA	FETESE, SITESE	--	--
RO	FSS Metarom, FNS Solidaritatea Metal	--	--	--
SE	IF Metall, Unionen, Sveriges Ingenjörer	Ledarna	Nordic-IN	IF Metall
SI	SKEI	KS 90 – SKEIE, KNSS - SKEM	ETUC	SKEI
SK	OZ KOVO	--	--	--
UK	Community, GMB, Unite		BWI	GMB, Unite
			ITF	GMB, Unite
			IUF	GMB, Unite
			PSI	GMB, Unite
			Uni Global	GMB, Unite

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: The red shading indicates EU Member States where there is no affiliated organisation, the yellow shading indicates countries whose organisations are not represented in the ESSDC, while the green shading indicates the presence of trade unions affiliated to other European trade union organisations.

Other European employer organisations and EU business associations

A similar two-fold assessment of the limitations of the representativeness of Eurofer can be made. Firstly, the Member States in which Eurofer does not have an affiliated employer organisation should be considered, as well as the Member States in which there are sector-related employer organisations involved in collective bargaining that are not affiliated to Eurofer. Secondly, the representativeness of other steel sector-related European employer organisations - or EU business associations - should be considered.

In Table 30, the 13 Member States in which Eurofer does not have an employer organisation affiliated are marked in red. The four Member States in which Eurofer has a corporate member – Luxembourg, the Netherlands, Portugal and Slovenia – should be deducted from this, which brings the number of Member States without an affiliate to nine, mostly countries with low numbers of employees in the sector.

The national steel sector-related employer organisations involved in collective bargaining that are not affiliated to Eurofer, from 15 different Member States, are marked in yellow in Table 30. As stated, corporate members of Eurofer are involved in collective bargaining in many countries. This increases the involvement of Eurofer members in collective bargaining from 6 to 19 countries.

Table 30: Sector-related employer organisations affiliated to Eurofer

Country	Employer organisations affiliated to Eurofer	Employer organisations not affiliated to Eurofer that participate in collective bargaining	Other European employer associations	National employer organisations affiliated to these associations
AT	FVBS	FMMGI, BSI	Orgalime	FMMGI
			CAEF	FMMGI
			EUROPUMP	FMMGI
			CEEMET	BSI
BE	GSV	-	CET	G.S.V.
			CIELFFA	G.S.V.
			ESTA	G.S.V.
BG	BAMI	--	-	-
CY	-	SYMEBIK	-	-
CZ	OSHŽ	-	ESTA	OSHŽ
DE	AGV Stahl, WV Stahl	VdS	-	-
DK	-	DI	CEEMET	DI
			BusinessEurope	DI
EL	ENXE	-	--	--
ES	UNESID	CONFEMETAL (according to UNESID there is no collective bargaining at sectoral level)	CIELFFA	UNESID
			ESTA	UNESID
			CEEMET	CONFEMETAL
			Orgalime	CONFEMETAL
FI	Metallinjalostajat		ESTA	Metallinjalostajat
FR	GESIM, A3M	UIMM	CEEMET	UIMM
			Eurometaux	A3M
HR	-	HUP-UMI	-	-
HU	MVAE	-	-	-
IE	-	IBEC	-	-
IT	Federacciai	Federmeccanica, Unionmeccanica – Confapi, CONFIMI Impresa meccanica, Cna Metalmeccanica di Produzione, Confartigianato, Casartigiani, CLAAI	CEA-PME	Unionmeccanica - Confapi
			UEAPME	Cna Metalmeccanica di Produzione, Confartigianato, Casartigiani
			EMU	Cna Metalmeccanica di Produzione,

				Confartigianato, Casartigiani
LT	-	LINPRA	Orgalime	LINPRA
			EFFRA	LINPRA
			EUPC	LINPRA
			ECP	LINPRA
			CEEMET	LINPRA
			Manufuture	LINPRA
LU	Corporate member (collective bargaining)	-	-	-
LV	-	MASOC	Orgalime	MASOC
MT	-	Malta Employers Association (MEA)	CEEP	MEA
			BECC	MEA
NL	Corporate member (collective bargaining)	FME	CEEMET	FME
			Orgalime	FME
PL	HIPH	ZPPH	-	-
PT	Corporate member (collective bargaining)	ANEME, FENAME, AIMMAP	CEEMET	ANEME
			Orgalime	ANEME, AIMMAP
			FEW	ANEME
			CEMA	ANEME
			CECIMO	AIMMAP
			CEIR	AIMMAP
			EUMABOIS	AIMMAP
RO	Metalrugia / UniRomSider	-	-	-
SE	Jernkontoret/ Industriarbetsgivarna	-	-	-
SI	Corporate member (collective bargaining)	ZKM-GZS, ZDS	BUSINESS EUROPE CEE	ZDS
			BIAC	ZDS
			IOE	ZDS
SK	-	ZHTPG	-	-
UK	UK Steel	-	CET	UK Steel
			CIELFFA	UK Steel
			ESTA	UK Steel

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

The red marked boxes stand for EU member states where there is no affiliated organisation, the yellow marked boxes are countries for which there are organisations not represented in the ESSDC, while the green marked organisations are employers organisations affiliated to other European Employers Organisations.

The second limitation to the representativeness of Eurofer derives from the other EU employer organisations – and EU business associations – to which national employer organisations are affiliated. These are marked in blue in Table 30. Table 31 shows other EU employer associations and business associations that emerge from this analysis.

Table 31: Other EU associations with steel sector national employer organisations as members

Other EU employer organisation/EU business association		Member States with a sector-related employer organisation involved in collective bargaining (according to bottom-up data collection)	Member States with an affiliate according to organisation's website	Steel sector-related? (Yes or No)
Abbreviation	**Full name**			
BECC	Association of Interprofessionals Employers Business - European Capital Cities	1	CY, CZ, DE, EL, ES, FR, IT, MT, PL, PT	No
BIAC	Business and Industry Advisory Committee to the OECD	1	AT, BE, BG, DE, DK, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, NL, PL, PT, SE, SI, SK, UK	No
BE CEE	Business Europe CEE	2	All Member States	No
CAEF	The European Foundry Association	1	AT, BE, BG, CY, CZ, DE, DK, ES, FI, FR, HR, HU, IT, LT, NL, PL, PT, SE, SI, UK	Yes
CEA-PME	European Confederation of Small and Medium Enterprise Associations	1	AT, BE, BG, DE, ES, FR, HU, IT, PL, PT, RO, SI	No
CECIMO	European Association of the Machine Tool Industries	1	AT, BE, CZ, DE, DK, ES, FI, FR, IT, NL, PT, SE, UK	No
CEEMET	Organisation for European Technology and Industry Employers	7	AT, BE, DE, DK, ES, FR, HR, HU, IT, LV, NL, PT, SE, SI, UK	Yes
CEIR	European Association for the Valves and Fittings Industry	1	ES, FI, FR, IT, PT, SE, UK	No
CEMA	European Agricultural Machinery	1	AT, BE, DE, DK, ES, FR, IT, NL, UK	No
CET	European Committee for Wire Drawing	2	BE, CZ, DE, ES, FR, HU, IT, NL, PL, PT, SE, SK, UK	Yes
Cielffa	European Federation of the National Associations of Cold Rolled Narrow Steel	3	AT, CZ, DE, ES, FR, IT, SE, UK	Yes

	Strip Producers and Companies			
ECP4	European Composites, Plastics and Polymer Processing Platform	1	BE, CZ, DE, DK, ES, FI, FR, IE, IT, LT, PT, UK	No
EFRA	European Federation of Radio Operated Model Automobiles	1	AT, BE, BG, CZ, DE, DK, EL, ES, FI, FR, HR, HU, IE, IT, LU, NL, PL, PT, SE, SI, SK, UK	No
EMU	European Metalworkers' Union	1	AT, BE, DE, HU, NL	Yes
ESTA	European Steel Tube Association	5	AT, CZ, DE, EL, ES, FI, FR, IT, NL, PL, RO, SE, SK, UK	Yes
Eumabois	European Federation of Woodworking Machinery Manufacturers	1	AT, BE, CZ, DE, ES, FI, FR, IT, LT, PL, PT, SK	No
EuPC	European Plastics Converters	1	AT, BE, BG, CY, CZ, DK, DE, EL, ES, FR, HR, IE, IT, LT, NL, PL, PT, RO, SE, UK	No
Eurometaux	European Non-Ferrous Metals Association	1	AT, BE, BG, DE, FI, FR, IT, PL, UK	Yes
Europump	The European Pump Manufacturers Association	1	AT, BE, CZ, DE, DK, EL, FI, FR, IT, NL, PL, SE, UK	No
FEM	European Materials Handling Federation	1	BE, BG, DE, ES, FI, FR, IT, NL, SE, UK	No
IOE	International Organisation of Employers	1	www.ioe-emp.org/	No
Manufuture	European Technology Platform	1	AT, BE, CZ, DE, DK, EL, ES, FI, FR, IE, IT, LU, NL, PL, PT, RO, SE, SI, SK, UK	No
Orgalime	European Engineering Industries Association	6	AT, BE, BG, DE, DK, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, NL, PT, SE, SI, UK	Yes
UEAPME	European Association of Craft, Small and Medium-Sized Enterprises	1	All Member States (except UK)	No

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Several Member States have employer organisations that are affiliated to CEEMET, the European employer organisation representing the interests of the metal, engineering and technology-based industries, which has a particular focus on labour market policy and industrial relations issues. CEEMET's mission is to represent, promote and defend the social policy-related interests of employers in the metal, engineering and technology-based industries at European level.

Another relevant employer organisation is Orgalime, the European Engineering Industries Association that speaks for 40 trade federations representing companies in the mechanical, electrical, electronics and metalworking and metal articles industries of 20 European countries. Through the bottom up data collection for the steel sector, was reported that Orgalime has affiliates representing the steel sector in (at least) 6 EU member states., as is indicted in Table 31.

Five Member States have an employer organisation affiliated to the European Steel Tube Association (ESTA). ESTA represent the interests of the National Steel Pipe Association and, consequently, of almost all producers of steel pipes in the EU. Another relevant organisation that is affiliated to several employer organisations in several Member States is CIELFFA, the European Federation of the National Associations of Cold Rolled Narrow Steel Strip Producers and Companies.

In this context, it is important to recall that Eurofer focusses on representing the interests of steel sector activities in NACE 24.1. In doing so, it refers to a steel sector workforce of about 320,000 employees out of the entire steel sector of approximately 500,000 employees (NACE 24.1, 24.2 and 24.3 together).

The capacity to negotiate of IndustriAll Europe and Eurofer

Since the establishment of the steel sector European sectoral social dialogue committee, 5 joint texts have been produced over a period of 12 years.

Table 32: Agreed texts by Eurofer and EMF/IndustriAll Europe in the steel sector ESSD committee

Year	Agreed text
2018	IndustriAll Europe officially supported and submitted comments to Eurofer's document *Towards an EU Masterplan for a Low-Carbon, Competitive European Steel Value Chain* and its proposal for a *Big Scale Initiative*.
2016	Campaigned for fair trade measures by co-signing the *European Industrial Manifesto for Free and Fair Trade* (February 2016).
2016	Released the joint position: *Review of the EU ETS post 2020: reconciling climate ambition with industry's competitiveness and employment* (November 2016).
2016	Organised a steel demonstration on Monday 15 February of 5,000 steel workers under the banner '*Say 'no' to MES for China'.*
2016	Organised march on 9 November of 15 000 steel workers under the *banner 'No to a Europe without Steel'.*
2015	Released the joint position: *Review of the EU ETS post 2020: reconciling climate ambition with industry's competitiveness and employment.*
2015	Released a joint declaration on the G7 summit, Elmau *Supporting a globally sustainable economy which reconciles environmental objectives with competitiveness and the creation of quality employment*.
2015	Released a joint position on the *European Council Conclusions on 2030 Climate and Energy Policy Framework*.
2014	Released a joint position on the *European Council Conclusions on 2030 Climate and Energy Policy Framework*.
2014	Released a review of ETS, an open letter to Heads of State and government.

2014	Released a joint report: *Industrial relation practices related to psychosocial constraints at work in the steel sector*.
2013	Released a joint Eurofer-IndustriAll Europe *Declaration on the European Steel Action Plan*
2010	Released a common EMF-Eurofer position on EU climate change policy.
2008	Released a joint EMF-Eurofer statement on the Commission proposal for the revision of the EU Emission Trading System (EU-ETS).
2006	Released rules of procedure for the European sectoral social dialogue committee in the steel sector.

IndustriAll Europe is not equipped with an explicit, permanent mandate to negotiate on behalf of its members in matters of European social dialogue. Rather, the IndustriAll Europe Statutes provide for detailed mandate procedures in relation to the nominations of the sectoral social dialogue committees in various sectors. According to Appendix II of the Statutes, the

> *affiliates concerned can nominate members depending on the number of mandates in the working groups and plenary of the sectoral social dialogue. The delegation shall be composed taking into account sectoral and regional representativeness.*

Moreover, the Appendix also stipulates the procedure for platforms and statements in the sectoral social dialogue, obliging the sectoral social dialogue members to ‘propose and prepare possible platforms and statements in close cooperation with the Secretariat’ of IndustriAll Europe. Thereby, the ‘members of the sectoral social dialogue shall act in line with the policies and procedures as agreed by the Executive Committee and Congress’ as the highest bodies within the European Federation, in order to guarantee the participation of all national member unions in matters of the European social dialogue.

With regard to the internal mandate procedure for negotiations in the framework of the sectoral social dialogue, the Secretariat is responsible for informing the Executive Committee and the Social Dialogue Committee about the possibility of entering negotiations, while the ‘Executive Committee shall decide, in consultation with the Social Dialogue Committee members, whether negotiations should take place’. At the suggestion of the Secretariat the ‘decision on the platform for negotiations and the delegation shall be taken by the Executive Committee in consultation with the Social Dialogue Committee and all the affiliates possibly via a written procedure and by a two-thirds majority’. Adoption of texts requires a qualified majority of at least two-thirds within the Executive Committee.

As for Eurofer, its statutes include as objectives the provision of information, guidance and services to its members, the advancement of steel production in Europe and the representation of the common interests towards third parties. This setting of objectives is more in line with an association promoting its business interests and does not include a specific, explicit mandate for their European sectoral social dialogue involvement.

The main governing bodies of Eurofer are a General Assembly, a Board of Directors and an Executive Committee. The main competences of the General Assembly are the approval of the annual budget, the approval of rules on membership fees and amendments to the statutes. It meets twice a year. Three different voting procedures are provided for decision making in the Eurofer General Assembly. For the appointment of Board members, half of the votes plus one is required, for amendments to the statutes a four-fifths majority is required and, for all other decisions, a two-thirds majority. Eurofer’s Board of Directors meets twice a year. Its main competences are the election of the President, vice presidents and the Director General of the organisation, the adoption of internal rules (complementing the statutes), and deciding upon membership issues. It strives for consensus, but if this is not possible, decisions require a two-third majority. The President and vice presidents of Eurofer form its Executive Committee that provides the political and organisational direction and strategies. The Executive Committee meets twice a year and also strives for consensus, but when this is not possible it can decide with a majority of 50% plus one of its members. It is not clear whether the draft, joint positions Eurofer reaches with IndustriAll Europe are mentioned or approved by the Executive or Board of Eurofer, or whether the Eurofer members are informed about this simply via the Eurofer website.

It is not clear whether Eurofer has any internal rules regarding the approval of positions taken in the European sectoral social dialogue committee, yet it is clear that the rules of procedure of the committee form the basis for its activities and decision-making. The list of achieved joint texts supports the assumption that the activities in the European sectoral social dialogue committee are to support lobbying activities in line with the second objective in the Eurofer statutes: ‘the advancement of EU steel production industries’.

Effective participation in the steel sector European sectoral social dialogue committee

Looking at the effective participation in the European sectoral social dialogue committee for the steel sector over the years 2016 and 2017, there were representatives involved from trade unions from 14 Member States and from employer organisations from 15 Member States.

Table 33: Effective participation in the ESSD committee for the steel sector

Member States with active trade union participation in the ESSD committee for the steel sector in 2016–2017	AT, BE, BG, CZ, DE, ES, FI, FR, IT, LU, PL, PT, SE, UK
Member States with active employer organisation participation in the ESSD committee for the steel sector in 2016–2017	AT, BE, CZ, DE, ES, FI, FR, IT, LU, NL, PL, PT, SE, SK, UK

Source: Eurofound and European Commission

Member organisations that are not directly represented in meetings of the European sectoral social dialogue committee are normally kept informed about developments in the committee via their participation in the meetings of statutory bodies of their European organisation, or via its intranet or website.

4. Conclusions

With a European workforce of about a half a million employees, the European steel sector is known for a high number of employees in France, Germany, Italy, Spain and the UK. In terms of companies, a high proportion of the workforce is employed in a relatively small number of very large (mostly multinational) steel-producing companies. There are, however, also a significant number of much smaller steel sector companies.

In terms of national organisations, the second chapter described the industrial relations landscape with 82 steel sector-related trade unions in 26 different Member States and 43 steel sector-related employer organisations from 25 different Member States. In 24 different Member States there are trade unions involved in collective bargaining, while for the steel sector employer organisations identified (including corporate members), this is the case in 19 different Member States.

At European level, IndustriAll Europe and Eurofer are the mutually recognised sectoral social partners in the European sectoral social dialogue committee for the steel sector.

IndustriAll Europe has 58 sector-related trade unions in 24 Member States. Of those 58, there are 55 affiliated trade unions involved in steel sector-related collective bargaining in 25 Member States. In all 13 Member States with more than 10,000 employees in the steel sector, IndustriAll Europe has an affiliate covering the whole sector.

IndustriAll Europe has the capacity to participate effectively in the European sectoral social dialogue committee and to negotiate on behalf of its members, and has proven its capacity to participate and contribute effectively to the committee.

In nine Member States, there are steel sector trade unions that are not affiliated to IndustriAll Europe. Table 24 illustrates that in a majority of Member States (18) the largest, most representative national steel sector trade union is affiliated to IndustriAll Europe and is, thereby, represented in the steel sector European sectoral social dialogue committee. In Greece, the largest steel sector trade union is not affiliated. In seven other Member States, there is insufficient information available to make this assessment. In Estonia and Malta there are no steel sector trade unions.

As for other European associations with affiliated trade unions in the steel sector, none of them are steel sector-related. This leads to the conclusion that IndustriAll Europe is the only – and thereby the most representative – European trade union organisation in the steel sector.

Eurofer has 17 affiliated employer organisations in 15 different Member States. In France and Germany, Eurofer has two affiliated employer organisations. In 13 Member States, Eurofer has an affiliate covering the entire steel sector in the country. The Eurofer affiliates from Austria, Belgium and Hungary only cover NACE 24.1 activities. Eurofer also has a strong focus on this part of the sector.

Eurofer has an affiliate in 8 of the 13 Member States with more than 10,000 employees in the steel sector. However, the 40 corporate members of Eurofer can be added to this, including all the largest companies. There are five additional Member States in which Eurofer has no employer organisation affiliated, but a corporate member. Together, this brings the total up to 19 Member States with a member organisation or company.

Of the 17 affiliated employer organisations, 7 are involved in collective bargaining in 6 different Member States. Including the corporate members, Eurofer covers these 19 Member States in terms of involvement in collective bargaining. Regarding the 13 Member States with more than 10,000 employees in the sector (Table 28), the employer associations and corporate members affiliated to Eurofer cover all 13 countries – including collective bargaining.

Eurofer has the capacity to participate effectively in the European sectoral social dialogue committee. Based on an assessment of the Eurofer statues alone, it can be concluded that it does not yet have a mandate to commit the organisation beyond positions taken to defend business interests in general. It can, however, not be overlooked that, when required, Eurofer can obtain a mandate via its statuary bodies to provide decision making procedures and approve an European sectoral social dialogue committee text. On the basis of the available information, it can be concluded that decisions are made by the employers' side during the preparation meetings of the European sectoral social dialogue committee, rather than through internal Eurofer structures.

There are several other European associations with steel sector-related member organisations in this study. Some of them are found to be steel sector-related and have a significant membership-based representativeness in the sector. Examples are the European Foundry Association (EFA) with members in 20 Member States. In addition, Orgalime has a steel sector-related member in 20 Member States. Therefore, it can be concluded that these two organisations have more affiliates than Eurofer in one or more Member State. However, here it is important to note that Eurofer (and several members) mainly focus on NACE 24.1.

The following organisations also have members in the steel sector.

- CEEMET has steel sector-related members in 15 Member States.
- The European Steel Tube Association (ESTA) has steel sector members in 14 Member States.
- The European Committee for Wire Drawing (CET) has steel sector members in 13 Member States.
- Eurometaux has steel sector members in 10 Member States.
- CIELFFA has steel sector members in eight Member States.
- The European Metal Union (EMU) has a steel sector member in five Member States.

All other European associations mentioned here (EFA, Orgalime, ESTA, CET, Eurometaux, CIELFA and EMU) can be considered as European business associations, deploying advocacy of strictly business-oriented interests of the affiliated organisations. The only exception is CEEMET, which clearly is a European employer organisation, as illustrated by the representativeness study for the metal sector.

In conclusion, with the notable inclusion of corporate members, Eurofer has a significant representativeness in the sector in most Member States, particularly in those that have a significant number of employees working in the sector. There are, however, also a significant number of organisations and members that are not represented by Eurofer, as well as number of other European associations with a significant membership in the steel sector.

Taking everything into consideration, Eurofer, can be regarded as the most representative European steel sector association. Moreover, Eurofer is the only European association that is active and involved in the field of social dialogue, and it has proven its capacity to participate fully and contribute effectively to the steel sector European sectoral social dialogue committee.

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Annex 1: Details of individual organisations

Table A1: Abbreviations of trade unions

Country	Abbreviation in English	Full name in English	Full name in original language
AT	PROGE	Manufacturing Union	Produktionsgewerkschaft
	GPA-djp	Union of Salaried Private Sector Employees, Graphical Workers and Journalists	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier
BE	ACLVB /CGSLB	General Federation for Liberal Trade Unions in Belgium	Algemene Centrale der Liberale Vakbonden / Centrale General des Syndicats Liberals
	Metea (ACV-CSC)	Metea (ACV-CSC)	Metea (ACV-CSC)
	CNE (ACV-CSC)	National federation for white-collar workers	Centrale nationale des employés
	LBC-NVK (ACV-CSC)	Country-wide central for white-collar workers	Landelijke Bedienden Centrale
	SETCa-BBTK (FGTB-ABVV)	Federation for white-collar employees, technicians and executives	Bond van bedienden, technici en kaderleden
	ABVV Metaal	ABVV Metal	ABVV Metaal
	ABVV-FGTB	General Federation of Belgian Labour	Algemeen Belgisch Vakverbond Fédération Générale du Travail de Belgique
	MWB (ABVV-FGTB)	Metallurgists Wallonia Brussels	Métallurgistes Wallonie Bruxelles
BG	TU Metalicy	Trade Union Metalicy	
	NF Metallurgy	National Federation Metallurgy	
CZ	OS KOVO	Trade Union KOVO	Odborový svaz KOVO
DE	IG Metall	German Metalworkers’ Union	Industriegewerkschaft Metall
DK	3F	United Federation of Danish Workers	Fagligt Fælles Forbund
	Metal	Danish Metalworkers’ Union	Dansk Metal
	HK/Privat	HK Denmark	HK Danmark
	IDA	The Danish Society of Engineers	Ingeniørforeningen i Danmark
	DEF	Danish Union of Electricians	Dansk El-forbund,
EL	Union of Workers at Hellenic Halyvourgia S.A.	Union of Workers at Hellenic Halyvourgia S.A.	
	Union of Workers at SIDENOR S.A	Union of Workers at SIDENOR S.A	
ES	CCOO Industria		
	UGT-FICA	Federation of Industry,	Federación de Industria,

		Construction and Agriculture of the General Workers' Union	Construcción y Agro de la Unión General de Trabajadores
	FI-USO	Federation of Industry of the Workers' Trade Union	Federación de Industria de la Unión Sindical Obrera
	ELA Industria y Construcción	Federation of Industry and Construction of the Basque Workers' Solidarity	Federación de Industria y Construcción de ELA (Euskal Langileen Alkartasuna)
	LAB Industria	Federation of Industry of Nationalist Workers' Committees	Federación de Industria de LAB (Langile Abertzaleen Batzordeak)
	CIG-Industria	Federation of Industry of the Inter-union Galician Confedration	Federación de Industria de la Confederación Sindical Gallega
	IC Industria	Federation of Industry of the Inter-union Canarian confederation	Federación de Industria de la confederación Intersindical Canaria
FI	Metalli	Finnish Metalworkers' Union	Metallityöväen Liitto ry
	Pro	Trade Union Pro	Ammattiliitto Pro ry
	TEK	Academic Engineers and Architects in Finland Tekniikan akateemiset TEK	Tekniikan akateemiset
	IL	Union of Professional Engineers in Finland	Insinööriliitto ry
	YTN	Federation of Professional and Managerial Staff	Ylemmät toimihenkilöt YTN ry
	Sähköliitto	Finnish Electrical Workers' Union	Sähköalojen ammattiliitto ry
FR	FGMM-CFDT	General Federation of Mining and Metal Industry - French Democratic Confederation of Labour	Fédération Générale des Mines et de la Métallurgie – Confédération Française démocratique du Travail
	FTM-CGT	Workers' Federation of the Metal Industry – General Confederation of Labour	Fédération des Travailleurs de la Métallurgie – Confédération générale du travail
	FO Métaux	Metal Industry's' Federation FO	Fédération Confédérée FO de la Métallurgie
	CFTC Métallurgie	Metalworkers' union CFTC	Syndicat CFTC de la Métallurgie
	CFE-CGC	French Confederation of Professional and Managerial Staff/ General Confederation of Professional and Managerial Staff – Metalworking Federation	Confédération française de l'encadrement – confédération générale des cadres
HR	SMH	Metal Workers' Trade Union of Croatia - Industrial Trade Union	Sindikat metalaca Hrvatske - Industrijski sindikat
HU	VASAS	Hungarian Metalworkers' Federation	Vasas Szakszervezeti Szövetség
IE	SIPTU	Services Industry Professional & Technical Union	Services Industry Professional & Technical Union

	TEEU	Technical Electrical & Engineering Union	Technical Electrical & Engineering Union
IT	Fiom Cgil	The Federation of Metallurgical Employees and Workers	Federazione Impiegati operai metallurgici
	Fim Cisl	Italian Metalworkers' Federation	Federazione italiana metalmeccanici
	Uilm Uil	The Italian Metalworkers' Union	Unione italiana lavoratori metalmeccanici
	UGL metalmeccanici	The General Union of Work, Metalworkers	Unione generale del lavoro, metalmeccanici
	Fismic	Autonomous Trade Union of Metalworkers and Related Industries	Sindacato autonomo metalmeccanici e industrie collegate
	SAVT/MET	Autonomous Trade Union of Valle D'Aosta 'Travalleiurs'/MET	Sindacato autonomo valdostano 'Travalleiurs'/MET
	USAS/ASGB	Sud-Tirol Autonoumos Trade Unions	Sindacato autonomo del Sud Tirol
LT	LMPSS	Unification of Lithuanian Metalworkers' Trade Unions	Lietuvos metalistų profesinių sąjungų susivienijimas
LU	OGBL	Steel and Mines Union – Trade Union Confederation of Luxembourg	Syndicat Sidérurgie et Mines – Onofhängege Gewerkschaftsbond Lëtzebuerg
	LCGB	Union of the Companies of the Steel and Metallurgy	Syndicat des Entreprises de la Sidérugie et de la Métallurgie
LV	LIA	Latvian Industrial Workers Trade Union	Latvijas industriālo nozaru arodbiedrība
NL	CNV Vakmensen	National Federation of Christian Trade Unions Professionals	Christelijk Nationaal Vakverbond Vakmensen
	De Unie	The Union	De Unie
	FNV	Federation of Dutch Trade Unions	Federatie Nederlandse Vakbeweging
	VHP Tata Steel	Interest organization for middle groups and higher personnel at Tata Steel	Belangenorganisatie voor middengroepen en hoger personeel bij Tata Steel
	VHP2	Association of Higher Personnel 2	Vereniging Hoger Personeel 2
PL	KSH NSZZ 'Solidarność'	The National Steel Section of the Independent Self-Governing Trade Union 'Solidarity'	Krajowa Sekcja Hutnictwa Niezależny Samorządny Związek Zawodowy 'Solidarność'
	FHZZ	Steelworkers' Trade Union Federation	Federacja Hutniczych Związków Zawodowych
	SH PZZ 'Kadra'	Steelworks' Section of the Trade Union Alliance 'Kadra'	Sekcja Hutnicza Porozumienie Związków Zawodowych 'Kadra'
	SKHOiK ZZIT	National Steel and Founding Section of the Trade Union of Engineers and Technicians	Sekcja Hutnictwa, Odlewnictwa i Koksownictwa Związek Zawodowy Inżynierów i Techników

	SH OZZZ PRC	Steelworks' Section of the National Trade Union Association of Continuous Process Industry Employees	Sekcja Hutnictwa Ogólnokrajowego Zrzeszenia Związków Zawodowych Pracowników Ruchu Ciągłego
PT	FIEQUIMETAL	Federation of Unions in the Metal, Chemical, Pharmaceutical and Electric Industries and in Energy and Mining	Federação Intersindical das Indústrias Metalúrgicas, Química, Farmacêutica, Eléctrica, Energia e Minas
	SINDEL	National Union of Manufacturing and Energy	Sindicato Nacional da Indústria e da Energia
	SIMA	Union of Manufacturing in Metal and related Industries	Sindicato das Indústrias Metalúrgicas e Afins
	FETESE	Federation of Unions in Manufacturing and Services	Federação dos Sindicatos da Indústria e Serviços
	SITESE	Union of Workers and Technicians in Services	Sindicato dos Trabalhadores e Técnicos de Serviços
RO	FSS Metarom	Ferrous Metalurgy Workers' Trade Union Federation Metarom	Federatia Sindicala a Siderurgistilor METAROM
	FNS Solidaritatea Metal	National Trade Union Federation Solidaritatea Metal	Federatia Nationala Sindicala Solidaritatea Metal
SE	IF Metall	The Union of Metal Workers	Industrifacket Metall
	Unionen	Unionen	Unionen
	Sveriges Ingenjörer	Swedish Association of Graduate Engineers	Sveriges Ingenjörer
	Ledarna	The Confederation of Executives and Managerial Staff	Ledarna
SI	SKEI	Trade Union of the Metal and Electro Industry of Slovenia	Sindikat kovinske in elektroindustrije Slovenije
	KS 90 - SKEIE	Confederation of Trade Unions 90 - Trade Union of Metal, Electro and Electronical Industry	Konfederacija sindikatov 90 - Sindikat kovinske, elektroindustrije in elektronike
	KNSS - SKEM	Confederation of New Trade Unions of Slovenia - Trade Union of the Metal, Electro and Metallurgy Industries	Neodvisnost, Konfederacija novih sindikatov Slovenije
SK	OZ KOVO	Metal Trade Union Association	Odborovy zvaz Kovo
UK	Community	Community	Community
	GMB	GMB	GMB
	Unite	Unite the Union	Unite the Union

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Table A2: Abbreviations of employer organisations

Country	Abbreviation in English	Full name in English	Full name in original language
AT	FVBS	Association of the Austrian Mining and Steel Industry	Fachverband Bergwerke und Stahl
BE	G.S.V	Belgian Steel Federation	Groupement de la Siderurgie/Staalindustrie
BG	BAMI	Bulgarian Association of the Metallurgical Industry	Българска асоциация на металургичната индустрия
CY	SYMEBIK	Cyprus Metal Industries Association	Σύνδεσμος Μεταλλουργικών Βιομηχανιών Κύπρου
CZ	OSHŽ (Note: legal form of interest group of employers)	The Steel Federation	Odvetvový svaz hutnictví železa
DE	AGV Stahl	Federal employer association for the German steel industry	Arbeitgeberverband Stahl
DK	DI	Confederation of Danish Industry	Dansk Industri
EL	ENXE	Hellenic Steelmakers Union	Enosi Halivourgion Elladas
ES	UNESID	Union of Steel Companies	Unión de Empresas Siderúrgicas
FI	Metallinjalostajat	Association of Finnish Steel and Metal Producers	Metallinjalostajat ry
FR	GESIM	Organisation of the Steel and Metal Industry companies	Groupement des Entreprises Sidérurgiques et Métallurgiques
HR	HUP-UMI	Croatian Employers' Association – Metal Industry Association	Hrvatska udruga poslodavaca - udruga metalne industrije
HU	MVAE	Association of the Hungarian Steel Industry	Magyar Vas- és Acélipari Egyesülés
IT	Federmeccanica	The Italian Federation of Metalworking Industries	Federazione Sindacale dell'Industria Metalmeccanica Italiana
LT	LINPRA	Engineering Industries Association of Lithuania Employer	Lietuvos inžinerinės pramonės asociacija
LV	MASOC	Association of Mechanical Engineering and Metalworking Industries of Latvia	Mašīnbūves un metālapstrādes Rūpniecības Asociācija
MT	MEA	Malta Employers' Association	Malta Employers' Association

NL	FME	Federation for Metal and Electrotechnical Industry	Federatie voor de Metaal- en Electrotechnische Industrie
PL	ZPPH	The Association of the Steel Industry Employers	Związek Pracodawców Przemysłu Hutniczego
PT	ANEME	National Association of Metal and Electromechanical Companies	Associação Nacional das Empresas Metalúrgicas e Electromecânicas
RO	Metalrugia / UniRomSider	Employer organisation Metalurgia	Federatia Patronala Metalurgia
SE	Jernkontoret/ Industriarbetsgivarna	Swedish Association of Industrial Employers	Industriarbetsgivarna
SI	ZKM-GZS	Metals and Nonmetals Association- Chamber of Commerce and Industry of Slovenia	Združenje kovinskih materialov in nekovin-GZS
SK	ZHTPG	Association of Metallurgy, the Extractive Industry and Geology	Zvaz hutnictva, tazobneho priemyslu a geologie
UK	UK Steel	UK Steel	UK Steel

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Table A3: Total companies and employment in the steel sector, 2010–2015 (approximately)

	Year	No. of companies	Year	Total employment	Female employment	Female employment as percentage of total employment	Total sectoral employment as percentage of total employment
AT	2010	50	2010	20,239	1,848	9	0.5
	2015	49	2015	21,113	N.A.	N.A.	0.5
BE	2010	35	2010	N.A.	N.A.	N.A.	N.A.
	2015	23	2015	N.A.	N.A.	N.A.	N.A.
BG	2010	41	2010	4,672	1,115	24	0.2
	2015	45	2015	2,946	695	24	0.1
CY	2010	2	2010	58	11	19	0.014
	2015	4	2015	48	9	19	0.013
CZ	2010	283	2010	38,200	4,500	12	0.8
	2015	216	2015	33,400	6,100	18	0.7
DE	2010	1539	2010	159,000	19,000	12	0.3
	2015	1396	2015	N.A.	17,000	N.A.	N.A.

DK	2010	92	2010	2,165	355	16	0.1
	2015	94	2015	2,164	349	16	0.1
EE	2010	8	2010	N.A.	N.A.	N.A.	N.A.
	2015	12	2015	N.A.	N.A.	N.A.	N.A.
EL	2010	1159	2010	7,605	826	11	0.171
	2015	320	2015	4,495	346	8	0.124
ES	2010	563	2010	93,000	11,700	13	0.5
	2015	497	2015	81,000	9,800	12	0.5
FI	2010	75	2010	11,071	N.A.	N.A.	0.5
	2015	74	2015	8,565	N.A.	N.A.	0.4
FR	2010	445	2010	N.A.	N.A.	N.A.	N.A.
	2015	415	2015	N.A.	N.A.	N.A.	N.A.
HR	2010	73	2010	1,703	N.A.	N.A.	0.1
	2015	56	2015	1,091	N.A.	N.A.	0.1
HU	2010	148	2010	7,009	1,122	16	0.2
	2015	143	2015	6,541	916	14	0.2
IE	2010	366	2010	2,600	N.A.	N.A.	0.1
	2015	351	2015	5,400	N.A.	N.A.	0.3
IT	2010	1952	2010	78,471	5,697	7	0.3
	2015	1877	2015	74,071	5,765	8	0.3
LT	2010	19	2010	597	N.A.	N.A.	N.A.
	2015	18	2015	443	N.A.	N.A.	N.A.
LU	2010	3	2010	5,018	435	9	1.39
	2015	4	2015	4,131	443	11	1.01
LV	2010	20	2010	2,739	551	20	0.5
	2015	22	2015	726	173	24	0.1
MT	2010	13	2010	21	N.A.	N.A.	0
	2015	12	2015	19	N.A.	N.A.	0
NL	2010	135	2010	12,900	1,032	8	0.2
	2015	155	2015	11,900	952	8	0.1
PL	2010	N.A.	2010	34,482	N.A.	N.A.	0.2
	2015	920	2015	32,568	N.A.	N.A.	0.2
PT	2010	90	2010	2,677	N.A.	N.A.	0.07
	2015	118	2015	1,591	N.A.	N.A.	0.09
RO	2010	200	2010	27836	N.A.	N.A.	0.3
	2015	178	2015	20,334	N.A.	N.A.	0.2
SE	2010	205	2010	N.A.	N.A.	N.A.	N.A.
	2015	189	2015	N.A.	N.A.	N.A.	N.A.

SI	2010	14	2010	3,120	413	13	0.4
	2015	13	2015	2,915	376	13	0.4
SK	2010	268	2010	22,300	2,500	11	1
	2015	192	2015	22,600	3,200	14	0.9
UK	2010	430	2010	70,800	11,700	17	0.2
	2015	815	2015	59,600	5,500	9	0.2

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A. = not available.

Table A4: Total employees in the steel sector, 2010–2015

Country	Year	Total employees	Female employees	Female employees as percentage of total employees	Total sectoral employees as percentage of total employment
AT	2010	20,231	1,848	9	0.6
	2015	21,104	N.A.	N.A.	0.6
BE	2010	15,364	1,000	7	0.4
	2015	11,502	881	8	0.43
BG	2010	4,639	1,106	24	0.2
	2015	2,911	682	23	0.1
CY	2010	N.A.	N.A.	N.A.	N.A.
	2015	N.A.	N.A.	N.A.	N.A.
CZ	2010	37,200	4,500	12	0.9
	2015	32,700	6,100	19	0.8
DE	2010	153,100	17,405	11	0.5
	2015	147,678	16,719	11	0.4
DK	2010	2,128	354	17	0.1
	2015	2,133	348	16	0.1
EE	2010	N.A.	N.A.	N.A.	N.A.
	2015	N.A.	N.A.	N.A.	N.A.
EL	2010	6,445	759	12	0.224
	2015	4,175	346	8	0.178
ES	2010	90,300	11,200	12	0.6
	2015	78,100	9,200	12	0.5
FI	2010	N.A.	N.A.	N.A.	N.A.
	2015	N.A.	N.A.	N.A.	N.A.
FR	2010	41,607	N.A.	N.A.	N.A.
	2015	39,951	N.A.	N.A.	N.A.
HR	2010	1,565	N.A.	N.A.	0.1

	2015	965	N.A.	N.A.	0.1
HU	2010	6,857	1,097	16	0.2
	2015	6,485	908	14	0.2
IE	2010	N.A.	N.A.	N.A.	0.1
	2015	2,243	N.A.	N.A.	0.3
IT	2010	75,533	5,210	7	0.4
	2015	71,828	5,513	8	0.4
LT	2010	597	N.A.	N.A.	0
	2015	443	N.A.	N.A.	0
LU	2010	5,018	435	9	1.48
	2015	4,131	443	11	1.08
LV	2010	2,739	551	20	0.5
	2015	725	173	24	0.1
MT	2010	12	N.A.	N.A.	0
	2015	9	N.A.	N.A.	0
NL	2010	11,800	944	8	0.2
	2015	11,100	888	8	0.2
PL	2010	N.A.	N.A.	N.A.	N.A.
	2015	N.A.	N.A.	N.A.	N.A.
PT	2010	1,780	276	16	0.05
	2015	N.A.	N.A.	N.A.	N.A.
RO	2010	27,745	N.A.	N.A.	0.5
	2015	20,300	N.A.	N.A.	0.3
SE	2010	21,833	N.A.	N.A.	0.54
	2015	22,075	N.A.	N.A.	0.52
SI	2010	3,120	413	13	0.4
	2015	2,915	N.A.	N.A.	N.A.
SK	2010	22,000	2,000	9	1.1
	2015	22,400	3,200	14	1.1
UK	2010	67,600	11,200	17	0.3
	2015	58,300	5,500	9	0.2

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A. = not available

Table A5: Collective bargaining, consultation and affiliations of trade unions in the steel sector, 2015–2017

Country	Trade union	Collective bargaining	Collective bargaining coverage	Consultation/ frequency	National and European affiliations
AT	PROGE	M	14,000	Regularly	IndustriAll Global Union, ILO, ITUC-CSI-IGB, IUF – UITA – IUL, TUAC, industriAll Europe, EFFAT, ETUC
	GPA-djp	M	7,000	Ad-hoc	IndustriAll Global Union, ITUC-CSI-IGB, UNI global union, industriAll Europe, ETUC, EPSU, EFFAT, EFJ
BE	ACLVB /CGSLB	M + S	11,305	Regularly	IVV , EVV, IndustriAll Europe
	Metea (ACV-CSC)	M + S	7,200	Regularly	CES, IndustriAll
	CNE (ACV-CSC)	M + S	4,076	Regularly	Industriall, CES
	LBC-NVK (ACV-CSC)	M + S	4,076	Ad-hoc	Industrial European and Global
	SETCa-BBTK (FGTB-ABVV)	M + S	N.A.	Regularly	IndustriAll
	ABVV Metaal	M + S	7,200	Ad-hoc	ETUC, IndustriAll Europe, IndustriAll global
	MWB (ABVV-FGTB)	M + S	7,200	Ad-hoc	ETUC, IndustriAll Europe, IndustriAll global
BG	TU Metalicy	M + S	1,700	Ad-hoc	IndustriAll Europe, IndustriAll global
	NF Metallurgy	M + S	1,700	Regularly	IndustriAll Europe, IndustriAll global
CZ	Odborový svaz KOVO (OS KOVO)	S	20,200	Ad-hoc	IndustriAll
DE	IG Metall	M + S	N.A.	Ad-hoc	IndustriAll
DK	3F	M	2,089	Ad-hoc	Central Organisation of Industrial Employees in DK, CO-industri, IndustryAll Europe, ITF, PSI, Uni-global, BWI, ETF, NTF, EFFAT, UNI Europa, EFBWW, EPSU

	Metal	M	2,089	Ad-hoc	
	HK/Privat	M	N.A.	N.A.	Central Organisation of Industrial Employees in DK, CO-industri Industryll Europe, UNI Global Union, UNI Europa
	IDA	N.A.	N.A.	N.A.	IndustriAll Global Union, IndustriAll Europe
	Dansk El-forbund	M	2,089	N.A.	Central Organisation of Industrial Employees in DK, CO-industri, IndustryAll Europe
EL	Union of Workers at SIDENOR S.A	S	N.A.	N.A.	
ES	CCOO Industria	M + S	N.A.	Ad-hoc	IndustriAll Global Union, IndustriAll Europe
	UGT-FICA	M + S	N.A.	Ad-hoc	IndustriAll Global Union, IndustriAll Europe
	FI-USO	M + S	N.A.	N.A.	IndustriAll Global Union, IndustriAll Europe
	ELA Industria y Construcción	M + S	125,000	N.A.	IndustriAll Global Union, IndustriAll Europe
	LAB Industria	M + S	N.A.	N.A.	
	CIG-Industria	M + S	N.A.	N.A.	
	IC Industria	M + S	N.A.	N.A.	
FI	Metalli	M	5,750	Regularly	IndustriAll Global Union, IndustriAll Europe, Nordic-IN
	Pro	M	23,000	Ad-hoc	IndustriAll Europe, IndustriAll Global Nordic-IN
	TEK	N.A.	N.A.	Regularly	ETUC Eurocadres, IndustriAll Global Union, Network International UNI Global / Europe / Nordic ICTS Nordic-IN Cooperation with Nordic engineer organisations
	IL	N.A.	N.A.	Regularly	IndustriAll Global

					Union, IndustriAll Europe, Eurocadres, European Federation of National Engineering Associations (FEANI), UNI Europa
	YTN	M	55,000	Ad-hoc	ETUC (via Akava) Eurocadres (via Akava)
	Sähköliitto	M	N.A.	N.A.	BWI, IndustriAll Global Union, NBTF, NEF, IndustriAll Europe, EFBWW
FR	FGMM-CFDT	M + S	29,108	N.A.	IndustriAll Global Union, IndustriAll Europe
	FTM-CGT	M + S	29,108	N.A.	IndustriAll Global Union, IndustriAll Europe
	FO Métaux	M + S	29,108	N.A.	IndustriAll Global Union, IndustriAll Europe
	CFTC Métallurgie	M + S	29,108	N.A.	IndustriAll Global Union, IndustriAll Europe
	CFE-CGC	M + S	29,108	N.A.	IndustriAll Global Union, IndustriAll Europe, European Federation of Managers in the Steel Industry (FEDEM)/CEC European Managers
HR	SMH	S	N.A.	N.A.	IndustriAll Europe, IndustriAll Global Union
HU	VASAS	S	5,300	Ad-hoc	IndustriAll Europe, IndustriAll Global Union
IE	SIPTU	S	3,000	N.A.	IndustriAll
	TEEU	S	N.A.	N.A.	IndustriAll
IT	Fiom Cgil	M + S	N.A.	Ad-hoc	IndustriAll Europe, IndustriAll Global Union
	Fim Cisl	M + S	N.A.	Ad-hoc	IndustriAll Europe, IndustriAll Global Union
	Uilm Uil	M + S	N.A.	N.A.	IndustriAll Europe, IndustriAll Global Union

	UGL metalmeccanic i	M + S	N.A.	Regularly	
	Fismic	M + S	70,000	Ad-hoc	
	SAVT/MET	M + S	N.A.	N.A.	
	USAS/ASGB	M + S	N.A.	N.A.	
LT	LMPSS	N.A.	0	N.A.	IndustriAll
LU	OGBL	S	4,180	Ad-hoc	IndustriAll Europe, IndustriAll Global Union
	LCGB	S	4,180	Regularly	IndustriAll
LV	LIA	M + S	0	Regularly	ETUC via LBAS, IndustriAll Europe, IndustriAll Global Union
NL	CNV Vakmensen	M + S	11,100	N.A.	Via CNV to ETUC and Eurocadres, IndustriAll
	De Unie	M + S	11,100	N.A.	
	FNV	M + S	11,100	Ad-hoc	ETUC, Eurocadres, IndustriAll
	VHP Tata Steel	S	8,500	N.A.	Via VCP to ETUC and Eurocadres
	VHP2	M	650	Ad-hoc	Eurocadres
PL	KSH NSZZ Solidarność	S	15,000	Regularly	IndustriAll Europe
	FHZZ	S	30,000	Ad-hoc	IndustriAll Europe
	SH PZZ ‘Kadra’	S	11,000	Ad-hoc	IndustriAll Global Union
	SKHOiK ZZIT	S	12,000	Regularly	
	SH OZZZ PRC	S	N.A.	N.A.	
PT	FIEQUIMET AL	M + S	0	N.A.	
	SINDEL	M + S	38,000	N.A.	IndustriAll Europe, IndustriAll Global Union, EPSU
	SIMA	M + S	N.A.	Regularly	IndustriAll Europe
	FETESE	M + S	N.A.	N.A.	
	SITESE	M + S	N.A.	N.A.	
RO	FSS Metarom	S	17,000	Ad-hoc	IndustriAll Europe, IndustriAll Global Union
	FNS Solidaritatea	S	3,000	Ad-hoc	IndustriAll Europe, IndustriAll Global

	Metal				Union
SE	IF Metall	M	12,700	Ad-hoc	IndustriAll Europe, IndustriAll Global Union, Nordic-IN
	Unionen	M	N.A.	Ad-hoc	IndustriAll Europe
	Sveriges Ingenjörer	M	N.A.	Ad-hoc	IndustriAll Europe, IndustriAll Global Union
	Ledarna	M	N.A.	Ad-hoc	CEC European Managers (CEC)
SI	SKEI	M + S	2,915	N.A.	ETUC, IndustriAll
	KS 90 - SKEIE	M	2,900	N.A.	
	KNSS - SKEM	M	2,915	N.A.	
SK	OZ KOVO	M + S	15,500	Regularly	IndustriAll
UK	Community	S	22,000	Ad-hoc	IndustriAll Europe, IndustriAll Global Union
	GMB	S	11,000	Ad-hoc	IndustriAll Global Union, BWI, ITF, IUF, PSI, UNI Global Union, EFFAT, EPSU, ETF, UNI Europa.
	Unite the Union (Unite)	S	13,000	Ad-hoc	IndustriAll Global Union, BWI, ITF, IUF, PSI, UNI Global Union, EFFAT, EPSU, ETF, UNI Europa.

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A. = not available

Table A6: Membership of employer/business organisations in the steel sector, 2016

Country	Employer organisation	Membership				
		Type	Companies	Companies in sector	Employees	Employees in sector
AT	FVBS	Compulsory	120	15	17,244	15,109
	FMMGI	N.A.	724	35	126,000	6,000
	BSI	Compulsory	6,047	50	415,059	21,000
BE	G.S.V.	Voluntary	11	9	11,502	11,502
BG	BAMI	Voluntary	33	3	8,000	1,700
CY	SYMEBIK	Voluntary	52	2	N.A.	22
CZ	Odvetvový svaz hutnictví železa (OSHŽ)	Voluntary	11	8	15,000	13,700

DE	AGV Stahl	Voluntary	70	50	75,000	70,000
	WV Stahl	Voluntary	78	78	86,000	86,000
	VdS	Voluntary	22	22	15,200	15,200
DK	DI	Voluntary	10,000	22	1,200,000	2,089
EL	ENXE - Hellenic Steelmakers Union	N.A.	N.A.	N.A.	N.A.	N.A.
ES	UNESID	Voluntary	44	44	22,364	22,364
	CONFEME-TAL	Voluntary	1e+05	N.A.	N.A.	N.A.
FI	Metallinjalos-tajat	Voluntary	7	3	14,500	8,400
FR	GESIM	Voluntary	85	85	26,957	26,957
	UIMM	Voluntary	13,000	N.A.	231,5000	N.A.
	A3M	Voluntary	350	N.A.	62500	N.A.
HR	HUP-UMI	Voluntary	94	1	2,100	20
HU	MVAE	Voluntary	14	2	6,100	4,550
IT	Federmeccan-ica	Voluntary	16,000	N.A.		N.A.
	Unionmecca-nica - Confapi	Voluntary	20,000	N.A.	N.A.	N.A.
	CONFIMI Impresa meccanica	Voluntary	N.A.	N.A.	N.A.	N.A.
	Cna Metalmecca-nica di Produzione	Voluntary	40,000	N.A.	150,000	N.A.
	Confartigiana to	Voluntary	30,000	N.A.	85,000	N.A.
	Casartigiani	Voluntary	30,000	N.A.	85,000	N.A.
	CLAAI	Voluntary	18,000	N.A.	90,000	N.A.
	Federacciai	Voluntary	133	133	40,000	40000
LT	LINPRA	Voluntary	81	N.A.	N.A.	N.A.
LV	MASOC	Voluntary	153	5	12	1775
MT	Malta Employers' Association (MEA)	Voluntary	490	12	55,000	N.A.
NL	FME	Voluntary	2,300	26	22,5000	26,000
PL	ZPPH	Voluntary	20	N.A.	N.A.	18,000
	HIPH	N.A.	N.A.	N.A.	N.A.	N.A.

	ANEME	Voluntary	550	5	33,000	500
	FENAME	Voluntary	574	5	35,000	500
	AIMMAP	Voluntary	800	5	44915	500
RO	Metalurgia	Voluntary	30	25	21,138	11,078
SE	Industriarbet-sgivarna	Voluntary	900	160	90,000	30,000
SI	ZKM-GZS	Voluntary	64	6	7,400	1,315
	ZDS	Voluntary	1,400	7	N.A.	1500
SK	ZHTPG	Voluntary	29	2	18,803	10,653
UK	UK Steel	Voluntary	21	21	20,000	20,000

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A. = not available

Table A7: Collective bargaining, consultation and affiliations of employers/business organisations in the steel sector

Country	Employer organisation	Collective bargaining (M: multi-employer; S: single-employer)	Collective bargaining coverage		Consultation/ Frequency	National and European affiliations
			Companies	Employees		
AT	FVBS	M + S	15	15,000	N.A.	WKO, Eurofer, CET, CIELFFA, ESTA
	FMMGI	M	35	6,000	Regularly/ institutional basis	WKO, Orgalime, CAEF, EUROPUMP, CIMAC
	BSI	M	49	7,000	Regularly/ institutional basis	WKO, CEEMET
BE	G.S.V.	M	9	11,502	Ad-hoc	VOKA, Flanders' Chamber of Commerce and Industry, Union Wallone des Entreprises, Eurofer, CET, CIELFFA, ESTA
BG	BAMI	M	3	1,700	N.A.	BIA, Eurofer, WSA
CY	SYMEBIK	M	2	19	Ad-hoc	OEB
CZ	Odvetvový svaz hutnictví železa (OSHŽ)*	N.A.	N.A.	N.A.	Regularly/ institutional basis	Svaz prumyslu a dopravy CR Hospodárská komora CR, Eurofer, WSA
DE	AGV Stahl	M + S	61	65,000	N.A.	BDA
	WV Stahl	N.A.	N.A.	N.A.	Regularly/ institutional basis	BDI, Eurofer, WSA
	VdS	M	22	15,200	Ad-hoc	VSU, BDA, BDI

DK	DI	M	22	2,089	Ad-hoc	Confederation of Danish Employers, DA, CEEMET, BusinessEurope, BIAC
EL	ENXE - Hellenic Steelmakers Union	N.A.	N.A.	N.A.	N.A.	Eurofer
ES	UNESID	N.A.	N.A.	N.A.	Ad-hoc	CEOE, AENOR, Eurofer, ESTA, CIELFA, WORLDSTEEL
	CONFEME TAL	M	52	52	N.A.	CEOE, CEPYME, CEEMET, Orgalime
FI	Metallinjalo-stajat	M	70	8,400	Regularly/ institutional basis	Confederation of Finnish Industries, EK Federation of Finnish Technology Industries, Eurofer, ESTA, WORLDSTEEL
FR	GESIM	M	N.A.	24,892	Ad-hoc	MEDEF – UIMM, Eurofer
	UIMM	M	415	4,216	Ad-hoc	MEDEF – CGPME, CEEMET
	A3M	N.A.	N.A.	N.A.	N.A.	MEDEF UIMM, GFI, AIMCC, Eurofer, Eurometaux, WORLDSTEEL
HR	HUP-UMI	N.A.	0	0	Regularly/insti tutional basis	Croatian Employers' Association
HU	MVAE	N.A.	N.A.	N.A.	Ad-hoc	Confederation of Hungarian Employers and Industrialists, MGYOSZ, Hungarian National Association of Machinery and Power Engineering Industries, MAGEOSZ, Eurofer, WORLDSTEEL
IT	Federmecca nica	M + S	N.A.	N.A.	Regularly/ institutional basis	Confindustria, CEEMET
	Unionmecca nica - Confapi	M + S	N.A.	N.A.	N.A.	CONFAPI, CEA-PME
	CONFIMI Impresa meccanica	M + S	N.A.	N.A.	N.A.	CONFIMI
	Cna Metalmecca nica di Produzione	M + S	N.A.	N.A.	N.A.	CNA PRODUZIONE, UEAPME, EMU

	Confartigianato	M + S	N.A.	N.A.	N.A.	Confartigianato, UEAPME, EMU
	Casartigiani	M + S	N.A.	N.A.	N.A.	Confartigianato, UEAPME, EMU
	CLAAI	N.A.	N.A.	N.A.	N.A.	None
	Federacciai	N.A.	N.A.	N.A.	Ad-hoc	Confindustria, Eurofer
LT	LINPRA	N.A.	0	0	Ad-hoc	LPK, Orgalime, EFFRA, EUPC, ECP4, CEEMET, MANUFUTURE
LV	MASOC	M + S	N.A.	N.A.	Regularly/ institutional basis	LDDK; Orgalime, CEEMET
MT	Malta Employers Association (MEA)	N.A.	N.A.	N.A.	N.A.	CEEP, BECC, IOE, ILO
NL	FME	M	154	2,600	Regularly/ institutional basis	VNO-NCW, CEEMET, Orgalime
PL	ZPPH	N.A.	0	0	Regularly/ institutional basis	Employers of Poland
	HIPH	N.A.	N.A.	N.A.	N.A.	
	ANEME	N.A.	N.A.	N.A.	Regularly/ institutional basis	CIP, FENAME, Orgalime, CEEMET, FEM
	FENAME	M	5	500	N.A.	None
	AIMMAP	M	1,000	50,000	N.A.	CIP, CECIMO, CEIT, EUMABOIS, Orgalime
RO	Metalurgia	N.A.	N.A.	N.A.	Ad-hoc	CONPIROM, Eurofer
SE	Industriarbe-tsgivarna	M	160	30,000	Ad-hoc	Confederation of Swedish Enterprise, Eurofer
SI	ZKM-GZS	M	13	N.A.	N.A.	GZS
	ZDS	M	13	2,915	N.A.	BUSINESSEUROPE CEE, BIAC, IOE
SK	ZHTPG	M	2	10,653	Regularly/institutional basis	RUZ SR, APZ
UK	UK Steel	N.A.	N.A.	N.A.	Ad-hoc	Eurofer, CET, CIELFFA, ESTA

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A. = not available.

*Legal form of interest group of employers.

Table A8: The system of sectoral collective bargaining

Country	Collective bargaining coverage (estimates)	Share of multi-employer agreements in total collective bargaining coverage (estimates)	Practice of extending multi-employer agreements to employers who are not affiliated to the signatory employer organisations in the sector
AT	100%	100%	No
BE	100%	N.A.	Yes
BG	57%	N.A.	No
CY	40%	N.A.	No
CZ	42%	0%	N.A.
DE	100%	0%	N.A.
DK	80%	Multi-employer bargaining prevailing	No
EE	0%	0%	n/a
EL	N.A.	N.A.	No
ES	100%	N.A.	Yes
FI	100%	100%	Yes
FR	N.A.	47%	Yes
HR	0%	0%	N.A.
HU	70%	0%	N.A.
IE	20%	N.A.	No
IT	N.A.	100%	Yes
LT	0%	0%	No
LU	100%	0%	No
LV	N.A.	0%	N.A.
MT	0%	0%	N.A.
NL	90%	25%	Yes
PL	42%	0%	No
PT	100%	50%	Yes
RO	99%	N.A.	No
SE	90%	100%	Yes
SI	100%	Multi-employer bargaining prevailing	No
SK	80%	47%	Yes
UK	40%	0%	No

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A. = not available

Table A9: Bipartite and tripartite sector specific boards of public policy

Country	Name of the body and scope of activity	Bipartite/ tripartite	Origin: agreement/ statutory	Trade unions participating	Employer organisations participating
BG	Sectoral Council for Tripartite Cooperation in Metallurgy	Tripartite	Statutory	TU Metalicy, NF Metallurgy	BAMI
	Sectoral Council for Tripartite Cooperation in a healthy and safe working conditions, Ministry of Economy	Tripartite	Statutory	TU Metalicy, NF Metallurgy	BAMI
	Sectoral Council for Tripartite Cooperation in labour and social security relations, Ministry of Economy	Tripartite	Statutory	TU Metalicy, NF Metallurgy	BAMI
DK	The Vocational Training Committee in the metal industry	Bipartite	Statutory	Danish Metalworkers Union (Dansk Metal)	DI
	The Environmental Council of Industry	Bipartite	Statutory	CO-industri	DI
EE	Professional Council of Engineering, Metal and Machine Industry	Tripartite		IMTAL	EML
ES	Foundation of the metal sector for training, skills and employment monitoring sectoral trends	Bipartite	Agreement	CCOO Industria, FICA-UGT	FMFCE Bipartite Foundation
	Metal sector industrial observatory	Tripartite	Agreement	CCOO Industria, FICA-UGT	N.A.
	The Interministerial Working Group on the future of the steel industry	Tripartite	Government's initiative (2014)	CCOO Industria, FICA-UGT	N.A.
FI	Occupational Safety Sector Group of the Centre for Occupational Safety for the Metal Sector	Tripartite	Agreement	Metalli, Pro, IL	Teknologiateollis -uus
	National Education and Training Committee for the Mechanical and Metal Industry	Tripartite	Statutory	Metalli-SAK, Pro-STTK, IL-Akava, TEK-Akava, Trade Union of Education OAJ	Teknologiateollis uus-EK, Federation of Finnish Enterprises (Suomen Yrittäjät)

FR	Commission Paritaire	Bipartite	Statutory /Agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération Confédérée FO de la Métallurgie	GESIM
	Institute to promote health and safety	Bipartite	Agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération Confédérée FO de la Métallurgie	GESIM
	Institute to promote social dialogue on sectoral level and the attractiveness of the sector	Bipartite	Agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération Confédérée FO de la Métallurgie	GESIM
	Institute to promote the skills and to launch studies forecasting the future needs of competencies	Bipartite	Agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération Confédérée FO de la Métallurgie	GESIM
HU	Metallurgy Sectoral Dialogue Committee	Bipartite	Statutory	VASAS, Munkástanácsok , Alumíniumipari Szakszervezetek Szövetsége	MVAE, HUNGAMOSZ
IT	National paritarian institution for metalworkers (EBM)	Bipartite	Agreement		Unionmeccanica - Confapi
	Supplementary pension fund for workers in the metalworking sector	Bipartite	Agreement	Fim Cisl, Uilm Uil	Federmeccanica Assistal
	Inter professional fund for vocational training	Bipartite	Agreement	Cgil, Cisl Uil	Confindustria
	Supplementary health care fund for workers of SMEs active in the metalworking sector	Bipartite	Agreement	Fim Cisl	Federmeccanica Assistal, Confimi Impresa meccanica,
	Inter-professional fund for continuous vocational training for employees in the artisan sector	Bipartite	Agreement	Cgil, Cisl, Uil	Confartigianato, Cna, Casartigiani, Claai
LU	Steel Tripartite Conference	Tripartite	Agreement	OGBL, LCGB	ArcelorMittal
LV	National Tripartite Cooperation Council	Tripartite	Statutory	LBAS	LDDK

PL	The Tripartite Sectoral Team for Social Conditions of Restructuring in Steel Industry	Tripartite	Agreement	KSH NSZZ Solidarność SKHOiK ZZIT FHZZ SH OZZZ PRC SH PZZ 'Kadra'	ZPPH
SK	Economic and Social Council of the Slovak Republic (HSR)	Tripartite	Statutory	OZ KOVO representing the KOZ SR	ZHTPG
	Industry Bipartite	Bipartite	Agreement	OZ KOVO, IOZ and OZ PBGNT	HTPG, ZSP SR, ZAP SR, ZEP SR, ZSPS
UK	Steel Council	Tripartite	Agreement	Community, GMB, Unite	UK Steel (plus individual companies)

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A. = not available

Table A10: IndustriAll Europe membership, 2017

Country	**Membership**
AT	PROGE, GPA-djp
BE	ACLVB /CGSLB, Metea (ACV-CSC), CNE (ACV-CSC), LBC-NVK (ACV-CSC), SETCa-BBTK (FGTB-ABVV), ABVV Metaal, MWB (ABVV-FGTB)
BG	TU Metalicy, NF Metallurgy
CZ	OS KOVO
DE	IG Metall
DK	Metal, IDA
ES	CCOO Industria, UGT-FICA, FI-USO, ELA Industria y Construcción
FI	Metalli, Pro, Tek, IL, Sähköliitto
FR	FGMM-CFDT, FTM-CGT, FO Métaux, CFTC Métallurgie, CFE-CGC
HR	SMH
HU	VASAS
IE	SIPTU, TEEU

IT	FIOM CGIL, FIM CISL, UILM UIL
LT	LMPSS
LU	OGBL, LCGB
LV	LIA
NL	CNV Vakmensen, FNV
PT	FIEQUIMETAL, SINDEL, SIMA
RO	FSS Metarom, FNS Solidaritatea Metal
SE	IF Metall, Unionen, Sveriges Ingenjörer, Ledarna
SI	SKEI
SK	OZ KOVO
UK	Community, GMB, UNITE

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Table A11a: Steel producing companies that are directly affiliated to Eurofer

Name	**Location**
Acciaieria Arverdi S.p.A.	Cremona, Italy
ArcelorMittal Group	Luxembourg
BSW – Badische Stahlwerke GmbH	Kehl/Rhein, Germany
CELSA Group	Castellbisbal (Barcelona), Spain
Deutsche Edelstahlwerke GmbH	Witten, Germany
Halyvourgiki Inc.	Athens, Greece
Hellenic Halyvourgia	Kifissia – Athens, Greece
ISD Dunaferr Danube Ironworks Private Company Limited by Shares	Dunaujvaros, Hungary
Lech – Stahlwerke GmbH	Meitingen – Herbertshofen, Germany
Marienhütte Stahl- und Walzwerk GmbH	Graz, Austria
SIJ Slovenian Steel Group	Ljubljana, Slovenia
Salzgitter AG	Salzgitter, Germany
Store Steel	Store, Slovenia
Trinecke Zelezarny AS	Trinec-Staré Mesto, Czech Republic
U.S. Steel Kosice	Kosice, Slovak Republic
voestalpine AG	Linz, Austria
Tata Steel Europe Ltd	London, United Kingdom
Acerinox SA	Madrid, Spain
Georgsmarienhütte Group	Georgsmarienhütte, Germany
Stahlwerk Thüringen GmbH	Unterwellenborn, Germany
Aperam	Luxembourg
AG der Dillinger Hüttenwerke	Dillingen/Saar, Germany
NLMK Europe	La Louvière, Belgium
Sidenor SA	Marousi, Greece
ISD Huta Częstochowa Sp.z.o.o.	Częstochowa, Poland
CMC Poland	Zawiercie, Poland
Duferdofin-Nucor Srl	S. Zeno Naviglio – BS, Italy
FNsteel	Alblasserdam, Netherlands
Officine Tecnosider	S. Giorgio di Nogaro (UD), Italy
ILVA SpA	Milano Italy
Riva Forni Elettrici SpA	Milano, Italy
Vitkovice Steel a.s.	Ostrava, Czech Republic
Promet Steel JSC	Burgas region, Bulgaria
AG Siderurgica Balboa S.A.	Jerez de los Caballeros (Badajoz), Spain

British Steel	North Lincolnshire, United Kingdom
Metinvest Trametal s.p.a.	Genova, Italy
thyssenKrupp AG	Essen, Germany
Outokumpu Oyj	Espoo, Finland
MEGASA Group	Naron, Spain
Saarstahl AG	Völklingen, Germany

Table A11b: Main steel producing companies that are not members of Eurofer

Country	Company name	NACE 24.1	NACE 24.2	NACE 24.3	Number of employees in the country	Employees in other countries	Involvement in collective bargaining	Other European Associations the company is member of
CY	FNK Steel Ltd.	No	Yes	No	17	No	No	N.A.
PT	LUSOSI-DER	No	No	Yes	200	DE, Brazil	Yes	N.A.
RO	COS Targoviste	Yes	No	No	1,300		Yes	
	TMK Resita	Yes	No	No	713	IT, DE, U.S.A	Yes	Metalurgia
	Silcotub SA	No	Yes	No	1,700	IT, RU, Canada, Turkey, Brazil, Argentina, Peru, Mexico	Yes	
SK	ZP	No	Yes	No	3,000		Yes	Via OSHZ (in CZ), ESTA

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Table A12: Reasons for fragmentation of trade unions

Country	Trade union	Reasons for fragmentation of trade unions				
		Employees outside the sector	Blue- and white-collar	The whole sector (NACE codes)	All regions of the country	All legal forms/size classes
AT	GPA-djp	Yes	No	Yes	Yes	Yes
	PROGE	Yes	No	Yes	Yes	Yes
BE	ABVV Metaal	Yes	No	Yes	No	Yes
	CNE (ACV-CSC)	Yes	No	No	No	Yes

	LBC-NVK (ACV-CSC)	Yes	No	No	No	No
	Metea (ACV-CSC)	Yes	No	Yes	Yes	Yes
	MWB (ABVV-FGTB)	Yes	No	Yes	No	Yes
	SETCa-BBTK (FGTB-ABVV)	Yes	No	Yes	Yes	No
BG	TU Metalicy	Yes	Yes	Yes	No	Yes
CZ	Odborový svaz KOVO (OS KOVO)	Yes	Yes	Yes	Yes	No
DK	3F	Yes	No	Yes	Yes	N.A.
	Dansk El-forbund	Yes	No	Yes	Yes	Yes
	HK/Privat	Yes	No	Yes	Yes	Yes
	IDA	Yes	No	Yes	Yes	Yes
	Metal	Yes	No	Yes	Yes	Yes
ES	CIG-Industria	Yes	Yes	Yes	No	Yes
	ELA Industria y Construcción	Yes	Yes	Yes	No	Yes
	IC Industria	Yes	Yes	Yes	No	Yes
	LAB Industria	Yes	Yes	Yes	No	Yes
FI	IL	Yes	No	Yes	Yes	Yes
	Metalli	Yes	No	Yes	Yes	Yes
	Pro	Yes	No	Yes	Yes	Yes
	Sähköliitto	Yes	No	#N/A	Yes	Yes
	TEK	Yes	No	Yes	Yes	Yes
	YTN	Yes	No	Yes	Yes	Yes
IE	TEEU	Yes	No	N.A.	Yes	Yes
IT	SAVT/MET	Yes	Yes	Yes	No	Yes
	USAS/ ASGB	Yes	Yes	Yes	No	Yes
NL	VHP Tata Steel	Yes	Yes	Yes	No	No
	VHP2	Yes	No	Yes	Yes	No
PL	SKHOiK ZZIT	Yes	No	Yes	Yes	Yes

RO	FNS Solidaritatea Metal	Yes	Yes	No	Yes	No
SE	IF Metall	Yes	No	Yes	Yes	Yes
	Ledarna	Yes	No	Yes	Yes	Yes
	Sveriges Ingenjörer	Yes	No	Yes	Yes	Yes
	Unionen	Yes	No	Yes	Yes	No
SI	KNSS - SKEM	Yes	N.A.	Yes	Yes	Yes

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

Note: N.A. = not available. Information is in relation to trade unions where complete information has been provided.

Annex 2: Network of Eurofound Correspondents

Table A13: Correspondents who contributed to the study

Country	Name	Organisation
AT	Bernadette Allinger	FORBA
BE	Guy Van Gyes	HIVA – KU Leuven
BG	Gabriela Yordanova	Bulgarian Academy of Sciences
CY	Pavlos Kalosinatos	Cyprus Labour Institute (INEK-PEO)
CZ	Petr Pojer	Research Institute for Labour and Social Affairs
DE	Sandra Vogel	Cologne Institute for Economic Research
DK	Carsten Jorgensen	FAOS, University of Copenhagen
EE	Ingel Kadarik	Praxis Centre for Policy Studies
EL	Elena Kousta Penny Georgiadou	Labour Institute of GSEE
ES	Pablo Sanz	Notus
FI	Anna Savolainen	Oxford Research
FR	Frederic Turlan	IR Share
HR	Predrag Bejaković	Institute of Public Finance
HU	Annamaria Kunert	Policy Agenda
IE	Andy Prendergast	IRN Publishing
IT	Anna Arca Sedda	Fondazione Giacomo Brodoloni
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Frederic Turlan	IR Share
LV	Kriss Karnitis	EPC Ltd
MT	Luke Fiorini	Centre for Labour Studies, University of Malta
NL	Noelle Payton	University of Amsterdam
PL	Dominik Owczarek	Institute of Public Affairs
PT	Reinhard Naumann	
RO	Nicoleta Stoiciu	European Institute of Romania
SE	Anna Savolainen Anna-Karin Gustafsson	Oxford Research AB
SI	Barbara Luzar	Faculty of Social Sciences, University of Ljubljana
SK	Rastislav Bednarik	Institute for Labour and Family Research
UK	Mark Carley	

This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the steel sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue and their capacity to negotiate agreements. The aim of Eurofound's representativeness studies on representativeness is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. This study identified Eurofer (representing employers) and IndustriAll Europe (representing employees) as the most representative European-level social partner organisations in the steel sector.

The European Foundation for the Improvement of Living and Working Conditions (Eurofound) is a tripartite European Union Agency whose role is to provide knowledge in the area of social, employment and work-related policies. Eurofound was established in 1975 by Council Regulation (EEC) No. 1365/75 to contribute to the planning and design of better living and working conditions in Europe.

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