Representativeness of the European social partner organisations: Footwear sector

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Abstract

This study provides information designed to encourage sectoral social dialogue in the footwear industry. The aim of Eurofound's series of studies on representativeness is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. Top-down and bottom-up analyses of the footwear sector in the EU identified the IndustriAll European Trade Union (IndustriAll Europe) (representing employees) and the European Confederation of the Footwear Industry (CEC) (representing employers) as the most important European-level social partner organisations in the sector.

Country codes

AT	Austria	**FI**	Finland	**NL**	Netherlands
BE	Belgium	**FR**	France	**PL**	Poland
BG	Bulgaria	**HR**	Croatia	**PT**	Portugal
CY	Cyprus	**HU**	Hungary	**RO**	Romania
CZ	Czech Republic	**IE**	Ireland	**SE**	Sweden
DE	Germany	**IT**	Italy	**SI**	Slovenia
DK	Denmark	**LT**	Lithuania	**SK**	Slovakia
EE	Estonia	**LU**	Luxembourg	**UK**	United Kingdom
EL	Greece	**LV**	Latvia		
ES	Spain	**MT**	Malta		

Introduction

The aim of this representativeness study is to identify the relevant national and supranational social actors – that is, the trade unions and employer organisations – in the field of industrial relations in the footwear sector, and to show how these actors relate to the sector's European interest associations of labour and business. The impetus for this study, and for similar studies in other sectors, arises from the European Commission's aim to identify the representative social partner associations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU) and to be eligible for participation in the European social dialogue committees. This study, therefore, seeks to provide the basic information needed to assess the existing sectoral social dialogue in the footwear sector. The relevance and – probably – the efficiency of European social dialogue depend on whether its participants are sufficiently representative in terms of the sector's relevant national actors across the EU Member States.

To accomplish this aim, the study first identifies the relevant national social partner organisations in the footwear sector before analysing the structure of the sector's relevant European organisations and, in particular, their membership composition. This involves clarifying the unit of analysis at both the national and European levels of interest representation. The study includes only organisations whose membership domain is classed as 'sector-related' (see Table 1).

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

Scope	Question in the standardised questionnaire to all correspondents	Possible answers	Note and explanations
	Does the domain of the trade union/employer organisation potentially cover …		
Domain of the organisation within the sector	… the entire footwear sector, including all of its sub-activities as a whole?	Yes/No	This question refers to the economic sub-activities of the NACE code chosen. Some organisations may delimit their domain to only part of the sub-activities.
	… all occupations within the footwear sector among both blue-collar workers and white-collar workers?	Yes/No	Some trade unions may delimit their domain to certain occupations or categories of workers only.
	… all forms and size classes of enterprises (for instance, public ownership, private ownership, multinationals, domestic companies and SMEs – only insofar as they exist in the sector)?	Yes/No	Some organisations may delimit their domain, for instance, to public sector companies/employees or SMEs only.
	… employees/companies, within the sector, in all regions of the country?	Yes/No	Some organisations may delimit their domain to certain regions instead of the entire territory of the country.
Domain of the organisation outside the sector	… employees/companies/ business activities outside the footwear sector?	Yes/No	Some organisations may enlarge their domain to other activities not included in the footwear sector.

Source: Standardised questionnaire sent to Eurofound's Network of European Correspondents (2017)

At both national and European levels, many associations exist that are not considered social partner organisations as they do not essentially deal with industrial relations. Thus, there is a need for criteria to distinguish the social partner organisations clearly from other associations.

For the **national-level associations**, classification as a sector-related social partner organisation implies – aside from actually having members in the sector – fulfilling one of the following two criteria:

- be a party to sector-related collective bargaining;
- be a member of a sector-related European association of business or labour that is on the European Commission's list of European social partner organisations consulted under Article 154 of the TFEU and/or participates in the sector-related European social dialogue.

Taking affiliation to a European social partner organisation as a sufficient criterion for determining a national association as a social partner does not necessarily imply that the association is involved in industrial relations in its own country. Hence, this selection criterion may seem odd at first glance. However, if a national association is a member of a European social partner organisation, it becomes involved in industrial relations matters through its membership of the European organisation – through informal communication, consultation procedures and eventually the implementation of agreements concluded by the European social partners at national level.

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

For the purpose of this study, a **European association** is considered a relevant sector-related interest organisation if it meets the following criteria:

- it is on the Commission's list of interest organisations to be consulted on behalf of the sector under Article 154 TFEU;
- it participates in the sector-related European social dialogue.
- it has asked to be consulted on behalf of the sector under Article 154 TFEU.

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

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

Definitions

For the purpose of this study, the sector is defined in terms of the Statistical Classification of Economic Activities in the European Community (NACE) to ensure the cross-national comparability of the findings. The NACE code reflects the field of activities covered by the relevant European sectoral social dialogue committee.

More specifically, the sector is defined as embracing the NACE (Rev. 2) class 15.20: Manufacture of footwear (Eurostat, 2008). This class includes, in particular, the following activities:

- manufacture of footwear for all purposes, of any material, by any process, including moulding;
- manufacture of leather parts of footwear;
- manufacture of uppers and parts of uppers, outer and inner soles, heels, etc.;
- manufacture of gaiters, leggings and similar articles.

This class excludes:

- manufacture of footwear of textile material without applied soles;
- manufacture of wooden shoe parts (e.g. heels and lasts);
- manufacture of rubber boot and shoe heels and soles, and other rubber footwear parts;
- manufacture of plastic footwear parts;

- manufacture of ski-boots;
- manufacture of orthopaedic shoes.[1]

The domains of the trade unions and employer organisations and the scope of the relevant collective agreements are likely to vary from this precise NACE definition. The study, therefore, includes all trade unions, employer organisations and collective agreements that are 'sector-related' in terms of any of the following four patterns (see Figure 1 and Table 2):

- congruence – the domain of the organisation or purview of the collective agreement is identical to the NACE demarcation;
- sectionalism – the domain or purview covers only a certain part of the sector as demarcated by the NACE classification, while no group outside the sector is covered;
- overlap – the domain or purview covers the entire sector together with (parts of) one or more other sectors. However, it is important to note that the study does not include general associations that do not deal with sector-specific matters;
- sectional overlap – the domain or purview covers part of the sector plus (parts of) one or more other sectors.

Figure 1: Sector-relatedness of social partner organisations: Four possible domain patterns

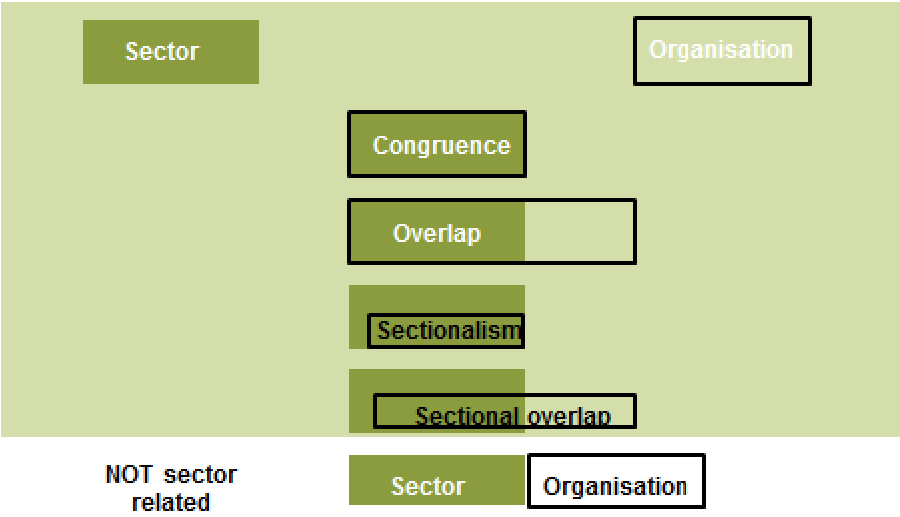


Table 2: Domain pattern and purview of the organisation's domain

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

[1] It should be noted that this class also excludes business activities that focus on the sale and distribution of shoes (commerce activities), as well as shoe repair activities.

European sectoral social dialogue committee

At European level, the European sectoral social dialogue committee (ESSDC) for the footwear industry was set up in 1999 further to a joint request by the then European Trade Union Federation of Textiles, Clothing and Leather (ETUF:TCL), the predecessor organisation of the current IndustriAll European Trade Union (IndustriAll Europe), on the employees' side and the European Confederation of the Footwear Industry (CEC) on the employers' side.

In line with the conceptualisation of this study as outlined above, affiliation to one of these two European organisations (IndustriAll Europe or CEC) is a sufficient criterion for classifying a national association of one of the 25 EU Member States examined in this study as a relevant social partner organisation for the purpose of this study. However, it should be noted that the constituent criterion is one of sector-related membership. This is important, in particular, in the case of IndustriAll Europe due to its sector-overlapping membership domain. Thus, the study will include only those affiliates to IndustriAll Europe whose domain relates to the footwear sector.

Collection of data

The collection of quantitative data, such as membership figures, is essential for investigating the representativeness of the social partner organisations. Unless cited otherwise, this study draws on country reports provided by Eurofound's Network of European Correspondents. These national industrial relations experts complete a standard questionnaire by contacting the sector-related social partner organisations in their countries. The contact is generally made via telephone interviews in the first place, but in certain cases might also be via email. In cases where no representative is available, the national correspondents are asked to fill out the relevant questionnaire based on secondary sources, such as information given on the social partner's website or derived from previous research studies.

For various reasons, it is often difficult to find precise quantitative data. Frequently, the social partner organisations do not hold sectoral membership data themselves or are unwilling to provide them. In such cases, Eurofound's correspondents are requested to provide rough estimates rather than leaving a question blank, given the practical and political relevance of this study. However, if there is any doubt over the reliability of an estimate, this is noted in this report.

In principle, quantitative data may stem from three sources:

- official statistics and representative survey studies;
- administrative data, such as membership figures provided by the respective organisations, which are used to calculate the density rate on the basis of available statistical figures on the potential membership of the organisation;
- personal estimates made by representatives of the respective organisations or by Eurofound's Network of European Correspondents (on the basis of own research or other secondary sources).

While the data sources of the economic figures cited in the report are generally official statistics, the figures in respect of the organisations are usually either administrative data or estimates. Furthermore, several country studies also present data on trade unions and business associations that do not meet the definition given above of a sector-related social partner organisation, in order to give a complete picture of the sector's associational 'landscape'. For the above substantive reasons, as well as for methodological reasons of cross-national comparability, such trade unions and business associations are not considered in this overview report. However, information on these organisations can be found in the national contributions available on demand from Eurofound. Tables 22 and 23 in Annex 1 list all those national associations not considered in this study for methodological reasons.

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 with the bottom-up approach, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by Eurofound’s Network of European 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.

These (revised) national contributions were then sent to the European social partners to allow their affiliates to double check and comment on the information provided. In addition, the national members of the Eurofound Governing Board were asked to check the consistency of the information in the national contributions to ensure that the bottom-up approach had completely reflected the situation, including whether it had included all the relevant sector-related organisations. This process can be considered as a mutual recognition exercise. Different trade unions can see the reported information of other trade union organisations in the same country and, if necessary, comment on the credibility or correctness of the information of other rival organisations. This is the same for the employer organisations, as well as the recognition aspect between trade unions and employer organisations. Feedback received from the sector-related organisations is taken into account provided it is in line with the study’s methodology.

An overview report was then drafted. After checking with Eurofound, the draft was sent to the European social partners and to the European Commission for feedback and comments.

The final report, taking into account these comments, was then evaluated by the European-level sectoral social partners and Eurofound’s Advisory Committee on Industrial Relations, which consists of representatives of both sides of industry, governments and the European Commission. After being adopted, the report was edited and published on the Eurofound website.

Structure of report

The report consists of three main parts, beginning with a brief summary of the sector’s economic background. It then analyses the relevant social partner organisations in all EU Member States, with the exception of Ireland, Luxembourg and Malta, where the sector is virtually non-existent. The third part considers the representative associations at European level. The second and third parts each contain a brief introduction explaining the concept of representativeness in greater detail, followed by the study findings. As representativeness is a complex issue, it requires separate consideration at national and European levels for two reasons. Firstly, the method applied by national regulations and practices to capture representativeness has to be taken into account (Eurofound, 2016). Secondly, the national and European organisations differ in their tasks and scope of activities. The concept of representativeness must therefore be suited to these differences.

Finally, it is important to note the difference between the research and political aspects of this study. While providing data on the representativeness of the organisations under consideration, the report assesses only the representativeness of the European social partner organisations and their national affiliates, without coming to a definite conclusion on whether their representativeness is sufficient for admission to the European social dialogue. The reason for this is that defining criteria for adequate representativeness is, at the end of the day, a matter for political decision rather than an issue for research analysis. The findings presented in this study can furthermore provide guidance to initiatives to strengthen the capacity of European social partner organisations, be it in terms of their membership-based representativeness or their capacity to commit and negotiate on behalf of their members.

1 Economic background

The European footwear sector (including the manufacture of footwear components), as defined by the NACE (15.20), employs around 300,000 workers, including employees, self-employed and agency workers, in more than 20,000 companies (Eurostat, 2017). It is, therefore, a relatively small business sector. Business activities are unevenly distributed across Member States, while in Ireland, Luxembourg and Malta, no significant manufacturing activities in the sector can be found. Approximately two-thirds of the total footwear production in the EU is concentrated in three countries, namely Italy, Spain and Portugal. Italy alone produces around half of the total European output (European Commission, 2017).

Table 3: EU Member States with largest footwear production and employment (> 5,000) in 2014

Country	Turnover in € (000s)	Proportion of EU turnover	Employment	Proportion of EU employment in the sector
IT	14,253.1	53%	79,948	27%
RO	1,001.5	4%	52,591	18%
PT	2,412.5	9%	46,140	16%
ES	3,125.0	12%	29,493	10%
PL	698.6	3%	18,643	6%
BG	139.4	<1%	13,570	5%
DE	2,161.6	8%	9,405	3%
SK	535.1	2%	8,900	3%
HU	231.7	1%	7,242	2%
FR	961.3	4%	5,498	2%
HR	109.9[a]	<1%	5,820[a]	2%
UK	615.4	2%	5,060	2%

[a] Reference year is 2011.

Note: Percentages are rounded.

Source: Eurostat, Structural business statistics database [sbs_na_ind_r2] (2017) and authors' calculations

In 2013, five countries, namely Italy, Spain, Portugal, Romania and Poland, made up 85% of European footwear and components enterprises, with the lion's share of companies being concentrated within specialised industrial and regional clusters (CEC and IndustriAll Europe, 2014). According to the country reports, such regional clusters can be found in several Member States, such as Bulgaria, France, Italy and Spain. The European footwear industry is characterised by a high proportion of small enterprises, employing between 10 and 15 workers on average (RPA, 2012), albeit with considerable variations across countries (see Table 4 below).

The sector has undergone a period of transition since the early 1990s. Since then, 'EU manufacturers have maintained their competitiveness by offshoring the most costly production processes from their home countries to cheaper locations, both within and outside the EU, and introducing cost cutting measures which have included a reduction in employment within the sector' (RPA, 2012, p. *i*). Overall, globalisation and the liberalisation of world trade has had a significant impact on the European footwear industry over the last few decades, in that the European market has markedly contracted in terms of the number of companies and workers and the volume of output. From the mid-1990s up to about 2010, ongoing restructuring of the EU footwear industry (such as delocalisation of production, mergers and acquisitions, and the closures of footwear companies) resulted in steady reductions in production, the number of enterprises and employment (RPA, 2012). Whereas EU footwear production declined sharply in 2009 due to short-term effects related to the global economic crisis (sectoral employment in the EU fell from over 330,000 in 2008 to around 296,000 in 2009), it appears that the sector has been stabilising in the EU since (CEC and IndustriALL, Europe 2014).

Since footwear manufacturing is a labour-intensive industry, relocation of activities to lower-cost countries can be observed in the sector since the 1960s (Dispan and Stieler, 2015). Globalisation, in turn, has heightened competition, in particular between manufacturers in the EU and Asia (namely China and Vietnam). China, with its relatively low labour costs, is by far the predominant shoe-exporting country in the world, accounting for 73% of the total of exported shoes worldwide in 2010 (RPA, 2012). Since European producers cannot compete with Asian producers on labour costs, they have been seeking to compete on quality and innovation for many years.

Modernisation of production processes, streamlining production management, innovation in equipment to enhance flexibility, innovation in design, rapid response to fashion trends, targeting niche markets and reorganising sales channels (such as manufacturers opening their own stores and internet retailing) have proved viable and promising avenues for European producers to remain internationally competitive in recent years. In particular, according to the respective national reports, countries such as Austria, Belgium, Estonia, Finland, France, Sweden and the UK rely on highly specialised manufacture in niche markets. By international standards, European shoes stand out in terms of quality, design and style, and are highly sought after, both within the EU and globally. This is indicated by the fact that 10 out of the top 15 exporters worldwide are EU countries (CEC, undated). According to CEC, EU exports to third countries increased by 39% in terms of quantity and 83% in terms of value from 2009 to 2015. The EU footwear industry’s competitive advantages can thus be found in the high quality of production in terms of technology, design and fashion, as well as the establishment of popular brands with a strong image.

Nevertheless, European footwear manufacturing still faces significant obstacles, notably difficulties in recruiting highly skilled workers (a situation that is likely to worsen in the future due to the sector’s ageing workforce and its low attractiveness to young people); the sector’s business structure (with a clear prevalence of SMEs) in connection with frequent lack of access to finance and the rising costs of raw materials; existing tariff and non-tariff barriers to strategic markets, such as Brazil, China, Russia and Japan; as well as challenges related to threats to intellectual property rights, counterfeiting and piracy. Since European footwear manufacturers are – compared to their non-European competitors – at the forefront of quality production and ecological and social sustainability in their production and supply chains, they have a strong interest in mandatory origin labelling in order to remain distinct to the discerning customer (CEC and IndustriAll Europe, 2014).

With regard to the sector’s business structure, around 95% of businesses are SMEs and more than two-thirds are micro-companies employing fewer than 10 people. SMEs face a number of particular challenges in the footwear sector, including growing difficulties in accessing finance for investment, difficulties in recruitment and retention of (young) skilled labour, limited access to (information) technology necessary for production planning and e-commerce, as well as the growing costs of raw materials (leather) related to unfavourable payment terms of suppliers (RPA, 2012).

Table 4: Economic and employment characteristics of the footwear sector, EU Member States, 2014

Country	Turnover in € (000s)	Employment	Number of companies	Average employment per company
AT	443.9	1,446	84	17.2
BE	44.5	262	44	6.0
BG	139.4	13,570	368	36.9
CY	2.0	39	17	2.3
CZ	61.0	2,251	194	11.6
DE	2,161.6	9,405	513	18.3

DK	14.8	59	18	3.3
EE	21.3	750	22	34.1
EL	61.9	1,708	723	2.4
ES	3,125.0	29,493	3,203	9.2
FI	192.7	1,145	49	23.4
FR	961.3	5,498	384	14.3
HR	109.9[a]	5,820[a]	104	56.0
HU	231.7	7,242	246	29.4
IE	0	0	0	-
IT	14,253.1	79,948	8,301	9.6
LT	10.0	443	49	9.0
LU	0	0	0	-
LV	3.3	225	18	12.5
MT	0	0	0	-
NL	n.a.	703	131	5.4
PL	698.6	18,643	1,935	9.6
PT	2,412.5	46,140	2,730	16.9
RO	1,001.5	52,591	1,230	42.8
SI	124.6	1,427	81	17.6
SK	535.1	8,900	227	39.2
SE	41.9[b]	272[b]	94[b]	2.9[b]
UK	615.4	5,060	182	27.8

[a] Reference year is 2011; [b] reference year is 2013.

Note: n.a. = not available.

Source: Eurostat, Structural business statistics database [sbs_na_ind_r2] (2017) and authors' calculations

Employment characteristics

The footwear sector is characterised by a clear majority of female workers; about 60% of the labour force are women. Data on the age breakdown of sectoral workers exist only for a few countries, indicating that the majority of workers are within the 36–55 years age category (clearly exceeding the category aged 35 years and under) in all countries for which related data are available (CEC and IndustriAll Europe, 2014). With regard to educational attainment, data for people employed in the footwear sector are poor; those data that are available for a few countries illustrate that the majority of workers are drawn from International Standard Classification of Education (ISCED) levels 1 and 2 (Italy, Poland and Portugal) and levels 3 and 4 (Romania). In terms of the distribution of jobs across worker categories, survey data (covering only a few countries) indicate that blue-collar workers applying technical and production-oriented skills clearly prevail in the sector. While immigrant workers are (apparently) scarcely present in the sector, the overwhelming majority of employees seem to benefit from a permanent employment contract on a full-time basis.

As a high-end industry, the European footwear sector faces difficulties in recruiting and retaining highly skilled workers – a situation which is likely to worsen in the near future given the large ageing workforce and the difficulties of attracting young workers. To tackle the 'risk of losing the current skills and savoir faire of the profession' (CEC and IndustriAll, 2015, p. 2), a European project titled

Learn2Work has been launched, funded by the Erasmus+ programme. This project aims to provide an innovative training methodology to attract young people in order to equip them with the technical and soft skills necessary to work and prove successful in the footwear sector. It specifically targets the so-called NEET category: those young people who are not in education, employment or training (CEC, 2017).

Employment trends since 2008

Tables 12 and 13 in Annex 1 give an overview of the developments in the sector from about 2009 to 2015. They present data from both national sources and Eurostat on the number of companies and employees in the sector, the proportion of female employees and how the sector relates to the national economy.

Table 5 shows trends in the number of companies and employment between 2009 and 2015. In 9 of the 25 Member States for which data are available, the number of companies more or less increased. In the 16 other countries, numbers declined, although in at least one country (such as Estonia), one-person companies are not considered, and for some countries (Germany, Greece, Hungary and Slovakia) the reliability of the data appears to be questionable. Nevertheless, a tendency of falling numbers of companies or business units can be observed in most countries. The decrease, in relative terms, is remarkable in countries such as Croatia, Cyprus, Denmark, Greece and Slovakia, where the number of companies dropped by more than 30% (in Cyprus by more than 50% and in Greece by 86%, although the latter figure is questionable) within the six-year period.

Seven of the 21 countries with available data (Croatia, the Czech Republic, Hungary, Latvia, Slovakia, Spain and the UK) recorded a gain in overall employment within the sector in the six-year period between 2009 and 2014–2015. In 13 countries (Austria, Belgium, Bulgaria, Cyprus, Denmark, Estonia, Finland, Greece, Italy, Lithuania, Poland, Romania and Slovenia), employment fell. In Germany, employment figures remained relatively stable between 2009 and 2014. Losses in employment, in relative terms, were most noticeable in Cyprus, Denmark and Greece, where more than half (Denmark) or around three-quarters (Cyprus and Greece) of the sectoral jobs were made redundant (see Table 5).

Interestingly, in a number of Member States, the number of companies fell while employment grew: Croatia, the Czech Republic, Slovakia, Spain and the UK. This may be explained by the fact that in these countries restructuring has resulted in both market adjustment (such as mergers and acquisitions, closures and delocalisation) and consolidation effects. By way of contrast, there are three countries (Austria, Estonia and Lithuania) where the number of companies grew between 2009 and 2014–2015, while sectoral employment decreased. In these countries, one or more significant players may have disappeared from the market while some smaller companies (including one-person companies) emerged. In terms of the number of sectoral employees, 11 countries recorded an increase and 12 a decrease during the period of observance, while for 2 countries no comparable data are available.

Table 5: Trends in the numbers of companies and employment (% differences), EU Member States, 2009–2015

Country	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR
Change in number of companies	1	-25	-12	-57	-14	-13	-31	10	-86	-4	-29	14	-38
Change in employment	-9	-24	-11	-75	6	0	-56	-6	-74	23	-31	n.a.	13

Country	HU	IT	LT	LV	NL	PL	PT	RO	SE	SI	SK	UK
Change in number of companies	16	-8	48	20	14	-15	11	-11	9	-13	-34	-12
Change in employment	7	-7	-29	67	n.a.	-11	n.a.	-2	n.a.	-21	76	58

Notes: Periods of observation may deviate from 2009 to 2015 in some countries. For a detailed description of sources, please refer to the national contributions. Figures/developments for Germany, Greece, Hungary and Slovakia appear to be questionable. n.a. = not available.

Source: Eurofound's Network of European Correspondents, national statistics

In most countries with available data on both measures, the number of employees with a contractual relationship only slightly lags behind the total number of employment. Only in Belgium and Germany (in the latter country, the data being questionable) is the difference between the two measures significant. These findings indicate that, overall, in the European footwear sector the incidence of both self-employment and temporary agency work is low.

Tables 12 and 13 also corroborate the finding outlined above, according to which women represent the majority of workers in the footwear sector. In 10 out of 13 countries with available data, female employment/employees clearly outnumber male employment/employees. Men represent the majority of workers in only three countries (France, Germany and the Netherlands). The tables also indicate that the sector is very small. In terms of employment shares, the sector proved quite dynamic between 2009 and 2014–2015 in some of the countries with available data. Four countries showed an upward trend and nine countries showed a downward trend in the share of sectoral employment to total employment in the national economy, while in seven countries this share remained largely unchanged over the six-year period.

The sector's share of aggregate employment (comprising employees, self-employed, agency workers, etc.) ranges from 0.002% in Denmark to 0.6% in Romania and 0.7% in Slovakia (the data for the latter country being questionable), while for some countries no related data for 2015 or thereabouts have been reported. In terms of absolute numbers of sectoral workers, four countries record around 30,000 people or more who were gainfully employed in the sector in 2013–2014 (more recent figures are not available): Italy stands out with around 80,000 workers (or 0.4% of total employment); Romania has around 52,000 workers (or 0.6% of aggregate employment); Portugal around 38,000 workers (or 0.9% of total employment in 2009); and Spain slightly fewer than 30,000 workers (the share of aggregate employment in the national economy has not been provided).

More detailed and country-specific reference to Eurostat data showing the development of employment by quarter is problematic in the case of the footwear sector, since Eurostat's EU Labour Force Survey provides employment data only for the entire 'Manufacture of leather and related products' sector, NACE (Rev. 2) 15, of which footwear forms only a part (NACE 15.20). The authors' own estimates on the basis of both national and Eurostat data suggest that employment in the footwear sector accounts for around 60% of total employment in the entire Manufacture of leather and related products sector, comprising slightly more than half a million workers. Since the whole Manufacture of leather and related products sector is composed of very diverse business activities (aside from footwear manufacturing), such as tanning and dressing of leather, dressing and dyeing of fur as well as manufacture of luggage, handbags, saddlery and harness, it is advisable to not use the Eurostat database in the case of this representativeness study.

2 National level of interest representation

The method for conducting the representativeness studies combines a top-down and a bottom-up approach to identify national-level sector-related organisations in the footwear sector defined by NACE code 15.20. The top-down approach includes all the sector-related affiliates of the European associations CEC and IndustriAll Europe, while the bottom-up approach includes all other associations with a sector-related membership domain involved in sector-related collective bargaining.

A total of 48 sector-related trade unions were identified in 24 EU Member States and a total of 28 sector-related employer organisations were identified in 17 Member States (see Table 6).

Table 6: Number of sector-related organisations per country in 25 Member States, 2016–2017

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

Source: Eurofound's Network of European Correspondents

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

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

Under these circumstances, representativeness is normally measured by the membership strength of the organisation. For instance, in many countries, recognition of trade unions and employer organisations as a social partner organisation is contingent on membership strength. For example, a threshold of 10% of possible members at peak, sector, regional or workplace level must be reached in countries such as the Czech Republic, Hungary, Poland, Slovenia and Spain.

In several other countries, statutory extension provisions allow for the extension of collective agreements to unaffiliated employers only when the signatory trade union and/or employer association represent 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).

[2] In some of these countries, such as Bulgaria, the Czech Republic, Denmark, Latvia and Lithuania, one or two employer/business organisations with a reference to the footwear sector have been identified. However, these associations either no longer organise member companies in the footwear sector or are not affiliated to CEC and not involved in sector-related collective bargaining, such that they do not meet one of the necessary criteria for inclusion in the study (see Table 23 in Annex 1).

As outlined previously, the representativeness of the national social partner organisations is of interest to this study in terms of the capacity of their European umbrella organisations to participate in European social dialogue. Hence, the role of the national actors in collective bargaining and public policymaking constitutes another important component of representativeness. The relevance of European sectoral social dialogue tends to increase with the growing ability of the national affiliates of the European organisations to regulate the employment terms and influence national public policies affecting the sector (Perin and Léonard, 2011).

A cross-national comparative analysis shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy (Traxler, 2004). Social partner organisations that are engaged in multiemployer bargaining are involved in state policymaking to a significantly greater extent than their counterparts in countries where multiemployer bargaining is lacking. This can be attributed to the fact that only multiemployer agreements matter in macroeconomic terms; this in turn gives governments an incentive to persistently seek the cooperation of the social partner organisations. If single-employer bargaining prevails in a country, none of the collective agreements will have a noticeable effect on the economy due to their limited scope. As a result, the basis for generalised tripartite policy concertation will be limited.

In the footwear sectors of most countries with collective bargaining practices, multiemployer bargaining as the predominant or exclusive mode of employment regulation prevails, in accord with the high incidence of small and micro companies. Single-employer bargaining as the prevalent (and only!) mode of employment regulation can be found in Bulgaria, Croatia, the Czech Republic, Hungary, Romania and Slovakia (where multiemployer bargaining is absent).

In summary, representativeness is a multidimensional concept that embraces three basic elements:

- the membership domain and strength of the social partner organisations;
- their role in collective bargaining;
- their role in public policymaking.

These elements are discussed below.

Membership domains and strength

The membership domain of an organisation, as formally established by its constitution or name, distinguishes its potential members from other groups that the organisation does not claim to represent. This study considers only organisations whose domain relates to the footwear sector. However, there is insufficient room in this report to describe the domain demarcations of all the organisations in detail. Instead, the report notes how they relate to the sector by classifying them according to the four patterns of ‘sector-relatedness’, as specified earlier. A more detailed description of how an organisation may relate to the sector can be found in Figure 1 above.

There is a difference between strength in terms of the absolute number of members and strength in relative terms. Research usually refers to relative membership strength as the density; in other words, as regards the trade union side, the ratio of trade union members (in a sector) to all employees (in the sector).

A difference also arises between trade unions and employer organisations in relation to measuring membership strength. Trade union membership simply means the number of unionised persons. Measuring the membership strength of employer organisations is more complex since they organise collective entities, namely companies that employ employees. In this case, there are two possible measures of membership strength – one referring to the companies themselves and the other to the employees working in the member companies of an employer organisation.

For a sector study such as this, measures of the membership strength of trade unions and employer organisations generally also have to consider how the membership domains relate to the sector. If a domain is not identical to the sector demarcation, the organisation’s total density (that is, the density referring to its overall domain) may differ from its sector-specific density (that is, the organisation’s density referring to the sector).

This report first presents data on the domains and membership strength of the trade unions and then considers those of the employer organisations. As far as sectoral membership numbers are concerned, sectoral densities can be calculated provided the number of employees within the sector is given.

Trade unions

Table 14 in Annex 1 presents data on trade union domains and membership strength. It lists all trade unions that meet at least one of the two criteria for classification of a sector-related social partner organisation as defined above.

Out of the 25 Member States considered in this study, 24 record at least one sector-related trade union (the exception being Latvia, which records slightly more than 200 employees in the sector). This fact indicates that, overall, trade union presence tends to be relatively strong in this small sector.

In total, 48 sector-related trade unions were identified, and information on their membership domain pattern relative to the footwear sector is available. Only FOSIL of Bulgaria has a domain demarcation largely congruent to the sector as defined above. This is not a surprise, given the small size of the sector, which makes it unlikely for sector-related unions to organise only footwear workers while disregarding workers of the contiguous textiles, leather and clothing industries.

About two-thirds of the trade unions (a total of 31) organise a broader range of activities and thus ‘overlap’ the sector. Overlap by and large arises from three different modes of demarcation:

- general or at least cross-sectoral (covering several business sectors of the economy) domains – as is the case of CGSLB-ACLVB in Belgium; OVIEK-SEK in Cyprus; FS-CFDT in France; FNV-PI and CNV in the Netherlands; Sindeq, CESP and SITESE in Portugal; UGT-FICA and CCOO de Industria in Spain; and Community in the UK;
- domains covering the broader leather, clothing and textiles sector or the so-called light industry business segment – as is the case of FLI Podkrepa in Bulgaria; Sindikat TOKG in Croatia; THC-CGT and CFE-CGC in France; OEKIDE in Greece; LPS Solidarumas in Lithuania; FNSZZPL in Poland; FESETE in Portugal; CONFPELTEX in Romania; and STUPIS in Slovenia;
- domains including activities that are not directly related to the footwear sector, such as:
  - mining, energy and chemical industries – as in the case of ETTAF in Estonia; CFTC-CMTE in France; IG BCE in Germany; BDSZ in Hungary; FILCTEM-CGIL, FEMCA CISL and UILTEC-UIL in Italy;
  - the pharmacy and medical sectors – as in the case of CGT-FO PCH in France;
  - the metal industry – as in the case of SIMA in Portugal;
  - the construction and transport industries – as in the case of IOZ in Slovakia.

Sectional overlaps occur in 15 cases (almost one-third of the cases). This mode usually emanates from domain demarcations that focus on certain categories of employees or employees of a particular region, which are then organised across several or all sectors. Employee categories are specified by various parameters, such as:

- employment status – for example, white-collar workers (as is the case of GPA-djp in Austria; CNE-LBC and SETCa-BBTK in Belgium; Pro in Finland; and Unionen in Sweden) or blue-collar workers (as is the case of PRO-GE in Austria; FGTB-ABVV and CSC-ACV in Belgium; OS TOK in the Czech Republic; 3F in Denmark; TEAM in Finland; and IF Metall in Sweden);
- distinct occupations – for example, managers and executives (as is the case of SETCa-BBTK in Belgium and Ledarna in Sweden);
- geographic region – for example, Spain’s ELA IE organising only workers in the Basque region.

There is also another trade union (PF in Romania) whose domain covers only part of the footwear sector in terms of business activities (rather than in terms of employee categories) in addition to other sectors. While PF does not organise workers performing activities in the manufacture of parts of footwear (such as uppers, soles and heels), it does represent workers in the leather and clothing sectors.

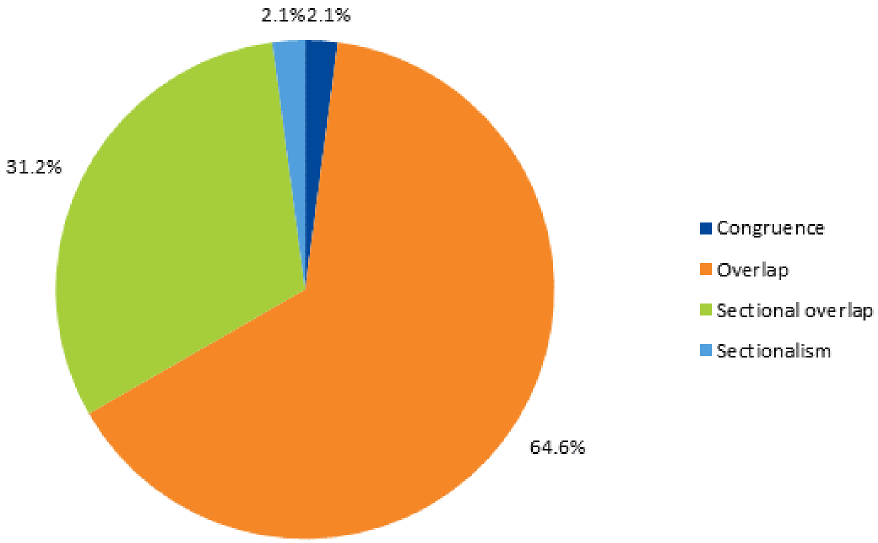
Lastly, only one case of a trade union with a domain that is sectionalist relative to the sector can be found, that is OOPOP Prabos in the Czech Republic. This union organises and represents only workers employed by the Prabos shoe manufacturer and does not claim to organise workers of other companies.

The 16 trade unions whose membership domain does not cover the entire footwear sector have delimited their domain primarily in terms of occupations rather than economic activities, (legal) form/size of enterprise and region. Twelve out of the 16 trade unions with a domain that is sectionalist or sectionally overlapping relative to the sector have a domain that does not cover all occupations within the sector. Only Spain records a trade union (ELA IE) whose membership domain is confined to the Basque region. However, since OOPOP Prabos organises only workers of the Prabos company, it has a membership domain that is de facto demarcated geographically. Membership domains demarcated in terms of economic activities occur only in the cases of the Czech Republic’s OS TOK and OOPOP Prabos (which do not organise workers in the manufacture of gaiters and leggings segment) and Romania’s PF (whose domain does not cover business activities such as the manufacture of leather parts of footwear and of gaiters and leggings). All other sector-related trade unions organise sectoral workers of all economic subactivities. This is due to the small size of the sector, such that trade union membership demarcations in terms of economic activities within the sector are – for practical reasons of interest representation – most unlikely.

Of the sector-related trade unions, 32 of the 48 (67%) have a domain that includes the entire sector (congruence and overlap) and 46 (96%) have a domain overlapping relative to the sector (having either an overlap or sectional overlap pattern). In all of the Member States with the largest workforces in the sector (those countries recording at least 5,000 employees according to the Eurostat Structural business statistics database, 2017), at least one trade union exists with a domain that includes the entire footwear sector. There are many sector-related trade unions that also cover – aside from footwear activities – the broader leather, clothing and textiles sector, but also mining, energy-related and chemical activities. Overlaps also arise due to cross-sectoral (general) domains of trade unions. Sectionalism, in most instances, means that trade unions largely organise the entire footwear sector in terms of business activities but do not represent a particular employee group. Nevertheless, despite these findings (see Figure 2 and Table 14), it cannot be concluded that, overall, the sector-related unions’ domains tend to be relatively broad. This is because the evidence suggests that many trade unions’ domains extend beyond a very narrowly defined sector. Only five trade unions (CGSLB-ACLVB in Belgium, OVIEK-SEK in Cyprus, CNV in the Netherlands, CCOO de Industria in Spain and Community in the UK) can be identified with a largely general membership domain. So despite the fact that almost two-thirds of the trade unions have a domain overlapping with regard to the sector, the domains of most of these unions tend not to be very broad.

Membership of the sector-related trade unions is voluntary in all cases.

Figure 2: Distribution of membership domain patterns of sector-related trade unions in the footwear sector, 2016–2017



Notes: N = 48. Percentages are rounded.
Source: Eurofound's Network of European Correspondents

Looking at the sector-related trade unions, absolute numbers of members (within their overall membership domain) show a considerable variation, ranging from 1.5 million (in the case of Belgium's CSC-ACV) to less than 500 (in the case of Estonia's ETTAF) or only slightly more than 100 (in the case of the company union OOPOP Prabos of the Czech Republic). This variation reflects differences in the size of the economy and the comprehensiveness of the membership domain, rather than the ability to attract members. Hence, density is the measure of membership strength that is more appropriate to a comparative analysis.[3] Therefore this report considers densities referring to the sector (sectoral density), given that both a trade union's membership within the sector and the number of employees in the sector are provided. Sectoral density figures refer to net ratios, which means that they are calculated on the basis of active employees only, rather than taking all union members (those in work and those who are not) into account. This is mainly because research usually considers net union densities as more informative than gross densities, since the former measure tends to reflect actual union power and unionisation trends among the active workforce more accurately than the latter. Only the active workforce is capable of taking industrial action, and active members tend to pay higher membership fees than retirees, unemployed workers and students (Traxler et al, 2001, p. 80; Vernon, 2006).

Around 63% of the 35 trade unions with available data record a sectoral density (calculated as the ratio of the number of members within the sector to the total number of employees within the sector) lower than 10%. The rest of the trade unions (around 34%) record a sectoral density between 10% and 50%, with the exception of TEAM in Finland, which has a sectoral density higher than 50%. Hence, overall, the sectoral densities of the sector-related trade unions do not tend to be high.

There are two possible explanations for the overall relatively moderate sectoral densities of the sector-related trade unions:

- low densities with regard to the unions' sectoral domain;[4]

[3] This holds true despite the fact that the density figures gathered and calculated for the purpose of this study may (in some cases) be unreliable.

[4] The sectoral domain density (in contrast to the sectoral density) is the density referring only to that part of the sector as covered by the union's membership domain.

- their generally small size (in terms of sectoral membership domain) in relation to the sector.

While no information is available for the former, the latter appears to apply to part of the sector-related trade unions. This is indicated by two interrelated facts:

- one-third of the unions have a membership domain that is sectionalist or sectionally overlapping relative to the sector and thus covers only part of the sector;
- a total of 48 sector-related trade unions could be identified, with 12 Member States recording a pluralist associational system on the side of organised labour in the sector.

Sectoral densities of individual associations tend to fall with the emergence and growing numbers of sectoral competitors, thus becoming a less significant measure for individual organisational strength relative to the sector. Correspondingly, the generally low density figures for the unions in countries with a pluralist/fragmented associational system in the sector (such as France, Portugal, Sweden and Spain) support this connection. Overall, since for almost one-third of the 48 sector-related trade unions sectoral density data cannot be calculated, conclusions from the available figures on sectoral density have to be drawn with the utmost caution.

In conclusion, in the footwear sector, a number of occupational trade unions exist, whereas the incidence of trade unions with general/multisector domain demarcations is significantly lower. This means that most of the unions may pursue a fairly particularistic representation of collective interests on behalf of small professional groups – a strategy generally deemed to be favourable for member recruitment (Müller-Jentsch, 1988, pp. 177–178). Nevertheless, neither the quantitative data gathered in this study nor anecdotal evidence drawn from the national contributions suggests high unionisation rates in the sector. This may partially be due to the lack of data available and shortcomings in the existing data set. Moreover, relatively low densities within the sector appear to be plausible and can be explained by several factors, in particular the small size of the companies (on average), which often do not meet the criteria for setting up workplace representation. This aside, the relatively poor qualification levels and the predominance of women in the sector may serve as explanations for moderate unionisation rates, although gender effects on union density are highly disputed (Schnabel, 2013). Non-standard and atypical work is – with the possible exception of Poland – not a major issue in the sector and thus does not account for low density rates.

Employer organisations

Tables 16 and 17a in Annex 1 present the membership data for the employer/business organisations in the footwear sector. Overall, 28 sector-related employer/business organisations were identified – less than the number of sector-related trade unions (48).

In 17 of the 25 Member States considered in this study, at least one sector-related employer organisation was found. No employer organisation matching at least one of the two criteria for inclusion in this study (see the Introduction) could be found in eight countries, namely Bulgaria, Cyprus, the Czech Republic, Denmark, Estonia, Latvia, Lithuania and Slovakia (see Table 6), despite the fact that in some of these countries – Bulgaria, the Czech Republic and Slovakia – a considerable number of sectoral workers exist (see Tables 4 and 12). In 10 countries (Belgium, Croatia, Finland, Germany, Hungary, the Netherlands, Poland, Portugal, Slovenia and the UK), only one sector-related employer organisation matching at least one of the two criteria for inclusion was identified. In the remaining seven countries, pluralist associational systems exist, meaning that at least two sector-related employer/business organisations can be found. Thus, the number of countries with pluralist associational systems is lower on the employer side than on the labour side (with 12 Member States). This corresponds to the greater number of sector-related trade unions across the Member States compared to the number of sector-related employer/business associations. Overall, the employer/business organisations are relatively evenly distributed among the Member States: in 16 of the 17 countries, only one or two sector-related employer/business organisations were recorded. Italy is the outlier, with six sector-related organisations on the business side.

Four Member States each record one employer/business organisation that is not a party to collective bargaining – Hungary, Poland, Romania and Sweden (see Table 17b in Annex 1). These associations not involved in sector-related collective bargaining are classified as social partner organisations in this report only due to their affiliation to the sector-related European-level employer organisation CEC.

Conversely, in 15 Member States at least one organisation is engaged in sector-related collective bargaining (this includes Greece, where both sector-related employer organisations, ELSEVIE and OVYE, are currently not engaged in collective bargaining since these activities have been suspended since 2009, but are in principle prepared to resume bargaining in the sector). All associations that are not involved in collective bargaining according to Table 17b are regarded as trade associations[5] in their country. Due to the decision to include all national affiliates to a recognised European social partner (CEC), they are included in this study. Overall, there are 11 employer/business organisations in 11 Member States that are directly or indirectly (via a lower-order unit as in the case of Hungary's MKSZ) affiliated to CEC.

The membership domains of employer/business organisations' tend to be slightly narrower than those of the trade unions. In contrast to organised labour, where membership domains that are overlapping relative to the sector prevail and covering almost two-thirds of the unions, this mode is significantly less frequent compared to the labour side, although it is the most common among the employer organisations, with around 46% of the cases. Moreover, one-quarter of the associations rest on sectionally overlapping domains relative to the sector. Cases of domain overlaps (in the case of organisations with domains either overlapping or sectionally overlapping relative to the sector) are caused by domains covering:

- the entire textiles, clothing and leather branch of the economy, including footwear, as is the case of HUP UTKI in Croatia, AFLSI in Finland, HDS/L in Germany, MKSZ in Hungary, CM in Italy, PIPS in Poland, FEPAIUS in Romania and ZDS-STU in Slovenia;
- part of the footwear sector plus (part of) the broader textiles, clothing and leather branch, as is the case of FV TBSL and BIG in Austria, and Uniontessile Confapi and CNA Federmoda in Italy;
- SMEs and/or (part of) the crafts segment of the economy, as can be found with BIG in Austria, and CNA Federmoda, Casartigiani and CLAAI in Italy;
- part of the footwear sector plus (parts of) other sectors, such as wholesale (FEBIC in Belgium and FICE in Spain), retail (APPICAPS in Portugal and BFA in the UK), manufacture of footwear machinery (AEC in Spain) and chemical industry (IKEM in Sweden).

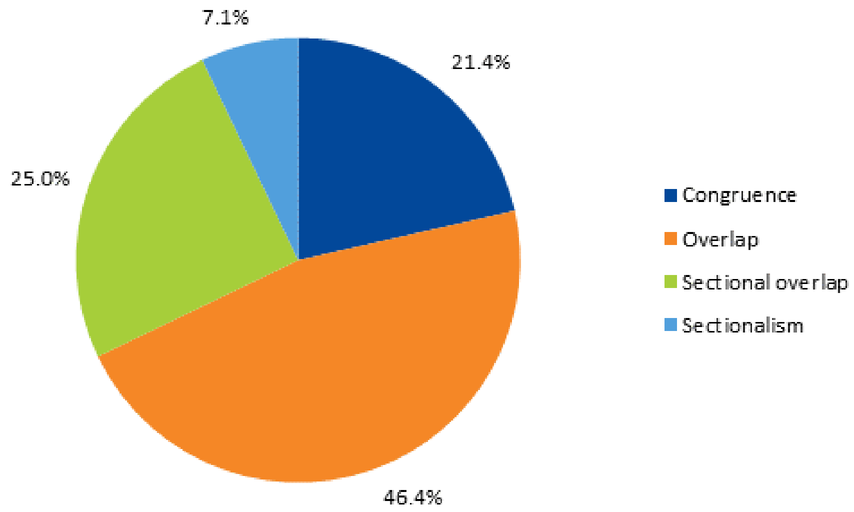
Interestingly, no employer/business organisation with a cross-sectoral or general domain is engaged in the sector.

Sectionalism occurs in only two cases and is caused by domain demarcations that either focus on a particular subsegment of the footwear industry (such as boots in the case of CSNB in France) or include the entire sector with the exception of only a very small segment of specialised production (such as the manufacture of slippers in the case of SFFI in Sweden), without covering areas of business activity outside the sector.

Finally, 21% of the associations show a membership domain that is more or less congruent with the sector definition. This means that the domain of these organisations largely focuses on the footwear sector as defined for the purpose of this study and does not cover business areas outside the sector.

[5] Put very simply, trade associations' main reference is the 'product' market (where business has interests in relation to customers and suppliers) rather than the labour market.

Figure 3: Distribution of membership domain patterns of sector-related employer organisations in the footwear sector, 2016–2017



Notes: N=28. Percentages are rounded.
Source: Eurofound's Network of European Correspondents

Due to the small size of the footwear industry, relatively few employer/business organisations (around 32%) can be identified whose membership domain covers only part of the sector, in terms of either business activities or type of companies (which have a domain that is sectionalist or are sectionally overlapping with regard to the sector). In some of these cases, the sectoral employers have established specific employer/business organisations as a particular voice for narrow and clearly distinct business activities within the footwear sector. Overall, only 3 out of the 28 employer/business organisations have delimited their domain in terms of business activities, in that they do not cover all activities within the footwear sector. Six of the 28 organisations do not represent all legal forms or size classes of companies in the sector (in most cases focusing on SMEs and small-scale craft enterprises), while domain demarcations in terms of territorial coverage do not occur at all. Around 68% of the employer/business organisations have a membership domain covering the entire footwear sector (relying on a domain congruent to or overlapping with the sector).

In 10 of the 12 Member States with more than 5,000 workers in the sector, according to the Eurostat Structural business statistics database (2017), at least one employer/business organisation with a domain covering the entire sector can be found (the 2 other countries are Bulgaria and Slovakia, which do not record a sector-related employer organisation). However, in the case of organisations with overlapping domains (which amount to 46% of all cases), the membership domains do not tend to be broad; rather, they mostly focus on the relatively small textiles, clothing and leather sector (including footwear) and sometimes extend to contiguous economic branches such as commerce (sales) or the chemical industry. Organisations with very broad, cross-industry membership domains are not present in the sector. Hence, in most countries with sector-related employer/business associations, their domains tend to be tailor-made for the footwear sector or – in some cases of domains that are sectionalist with regard to the sector – a particular subgroup of employers and businesses within the sector. This may enable these associations to perform a sector-specific or particularistic interest representation on behalf of their members, although their membership strength may vary from one organisation to the other. However, it is important to reiterate that for 8 out of the 25 countries considered in this study, no employer organisation active in the sector has been identified.

Table 7: Distribution of membership domain patterns of sector-related organisations with regard to the footwear sector, 2016–2017

	Congruence	Overlap	Sectionalism	Sectional overlap
Trade unions	2.1%	64.6%	2.1%	31.2%
Employer organisations	21.4%	46.4%	7.1%	25.0%

Source: Eurofound's Network of European Correspondents

A comparison of the distribution of membership domain patterns of the sector-related employer organisations with that of the trade unions (Table 7) indicates that the employer organisations are more frequently congruent (21.4%) with the sector definition than the trade unions (2.1%). The proportion of organisations covering the entire sector (congruence + overlap) is almost equal for both (66.7% of trade unions and 67.8% of employer organisations). The same is true for the proportion of organisations not covering the entire sector. By contrast, the proportion of organisations with domains overlapping with regard to the sector is much higher for trade unions (95.5%) than for employer organisations (71.4%). This indicates that, overall, the membership domains of the sector-related employer organisations tend to be narrower than those of the sector-related trade unions.

As subunits of the Austrian Federal Economic Chambers (WKO), both FV TBSL and BIG in Austria rely on compulsory membership. All other sector-related employer/business organisations are voluntary associations.

As the figures on membership totals (see Table 16 in Annex 1) and density (see Table 17a in Annex 1) indicate, membership strength in terms of both companies and employees varies widely with regard to both the membership domain in general and the sector. Again, as outlined earlier in the context of the trade unions, density figures rather than absolute membership numbers are informative in terms of membership strength. In the case of the sector-related employer/business organisations, sectoral densities in terms of both companies and employees (employed by these companies) can be calculated. However, due to a lack of absolute numbers of sectoral members in terms of both companies and employees in the case of many associations (and due to a lack of sectoral company and employment data in some countries), sectoral densities can be calculated only for a relatively small proportion of them. According to the figures available, 50% and around 14%, respectively, of the employer/business organisations record a sectoral density in terms of companies and employees of 10% or below; around 43% of the employer/business organisations with available data record a sectoral density in terms of employees of 50% or higher. Whereas the median of the organisations' sectoral densities in terms of companies lies at 11%, the corresponding median in terms of employees stands at 46%. This does not indicate overall low densities of the sector-related employer/business organisations and corresponds to the relatively low level of associational pluralism/fragmentation in the sector. Higher sectoral densities in terms of employees compared to those in terms of companies indicate a higher propensity of the larger companies to associate, as compared to their smaller counterparts.

Collective bargaining and its actors

The data presented in Table 18 in Annex 1 provide an overview of the system of sector-related collective bargaining in the 25 Member States. The importance of collective bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (Traxler et al, 2001). Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

Table 8: Distribution of Member States by size of workforce and collective bargaining coverage rate in footwear, 2016–2017

	Collective bargaining coverage of 60%–100%	Collective bargaining coverage of 10%–50%	Collective bargaining coverage below 10%
Member States with more than 5,000 workers in the sector*	DE, ES, FR, IT, PT	HU, HR, RO, SK, UK	BG, PL
Member States with 1,000–2,500 workers in the sector*	AT, FI, SI	CZ	EL
Member States with fewer than 1,000 workers in the sector*	BE, NL, SE	---	CY, EE, LV, LT

** According to the Eurostat Structural Business Statistics database (2017).*

Notes: No collective bargaining coverage rate available for DK. There are no Member States with 2,500-5,000 workers in the sector.

Source: Eurostat, Eurostat Structural business statistics database [sbs_na_ind_r2] and Eurofound's Network of European Correspondents.

To delineate the bargaining system, two further indicators are used. The first indicator refers to the relevance of multiemployer bargaining compared with single-employer bargaining. Multiemployer bargaining is defined as bargaining conducted by an employer organisation on behalf of the employer side. In the case of single-employer bargaining, the company (or its divisions) is the party to the agreement. This includes the cases where two or more companies jointly negotiate an agreement. The relative importance of multiemployer bargaining, measured as a percentage of the total number of employees covered by a collective agreement, therefore provides an indication of the impact of the employer organisations on the overall collective bargaining process.

The second indicator considers whether statutory extension schemes have been applied to the sector. For reasons of brevity, this analysis is confined to extension schemes that widen the scope of a collective agreement to employers not affiliated to the signatory employer organisation; extension regulations targeting the employees are therefore not included in the research. Regulations concerning the employees are not significant to this analysis for two reasons. First, extending a collective agreement to those employees who are not unionised in the company covered by the collective agreement is standard in most European countries. Secondly, employers have good reasons to extend a collective agreement concluded by them, even when they are not formally obliged to do so, else they would provide an incentive for their workforce to unionise.

Schemes that target the employers are significant for the strength of collective bargaining in general and multiemployer bargaining in particular. As the employers are capable of refraining from joining an employer organisation and entering single-employer bargaining in the context of a purely voluntaristic system, employer-related extension practices increase the coverage of multiemployer bargaining. Moreover, when it is pervasive, an extension agreement may encourage more employers to join the controlling employer organisation; such a move enables them to participate in the bargaining process and to benefit from the organisation's related services in a situation where the collective agreement will bind them in any case (Traxler et al, 2001).

Collective bargaining coverage

In terms of the footwear sector's collective bargaining coverage, 9 of the 24 countries with available data (Austria, Belgium, Finland, France, Germany, Italy, Portugal, Slovenia and Spain) record coverage of 80% and more (see Table 18 in Annex 1). All these countries, apart from Germany and Portugal, register a coverage rate of (almost) 100%.

A total of six countries with no collective bargaining in the sector have been identified, namely Cyprus, Estonia, Greece, Latvia, Lithuania and Poland, while Bulgaria, Croatia, the Czech Republic, Hungary, Romania and Slovakia record very low rates of 25%. A small group of countries record medium to higher-range rates of between 50% and 70%, namely the Netherlands and Sweden – and perhaps the UK (where different sources indicate coverage rates ranging from 20% to 53%). For Denmark, no data have been provided. Overall, like most other sectors of the economy, the footwear sector is characterised by a high polarisation of countries with regard to collective bargaining across the EU. High collective bargaining rates are concentrated – with the only exception of Slovenia – among older, pre-2004 Member States, while very low rates or a lack of sector-related collective bargaining can only be found – with the notable exception of Greece – among countries that have joined the EU since 2004.

In a number of countries (such as Cyprus, Estonia, Germany, Greece, Hungary, the Netherlands, Poland, Portugal, Romania, Slovakia and Sweden), sectoral collective bargaining coverage significantly decreased or completely disappeared in the period 2007–2008 (the reference date of the 2010 predecessor representativeness study on the footwear sector) to the mid-2010s (the reference date of this study). This is due to shrinkage of the sector and – often as a consequence – the disappearance of representative organisations of collective interest representation on at least one side of the industry where effective multiemployer bargaining has been severely disrupted. Cases of vanishing or liquidated social partner organisations were reported in Cyprus, the Czech Republic, Denmark, Hungary, Romania, Slovakia and Sweden. In parallel, core labour law provisions and collective bargaining regulations have been, in the context of the Great Recession and far-reaching measures to balance the budget, curtailed and replaced by less binding regulations in Cyprus, Greece, Portugal and Romania, with direct implications on the collective bargaining coverage rate in the footwear sector (along with other sectors).

In Cyprus, for instance, the last sectoral multiemployer agreement was concluded in 2009 – when the only sector-related employer organisation, the Footwear, Leather Goods and Accessories Manufacturers' Association, was dissolved – and expired at the end of 2011.

In Greece, the sectoral social partners concluded a multiemployer collective agreement up until 2009. Since then, due to the economic crisis and as a direct result of the new regulations on collective bargaining that led to the abolition of the existing collective agreement in the footwear sector, collective bargaining is at a standstill. [6] Currently, no sectoral collective agreement is in force, so the sector's employees are covered only by the National General Collective Agreement that regulates a range of qualitative matters (such as health and safety and anti-discrimination issues), as well as legislative provisions on minimum wages and working time regulations.

In Romania, the entire sector was covered by a multiemployer collective agreement concluded at branch level up until 2011. With the Social Dialogue Act of 2011, restrictive thresholds for recognition of social partners as representative parties to collective bargaining were introduced. As a consequence, the sectoral social partners lost recognition as representative social actors and, consequently, their capacity to conclude multiemployer collective agreements. Since 2011, only enterprise-level collective agreements have been signed in the footwear sector. Collective bargaining coverage dropped from (almost) 100% in 2011 to around 25% in 2015.

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[6] With the introduction of the Economic Stability Mechanism and the First and Second Memoranda of Understanding 2011 and 2012 agreed with the so-called 'Troika' (the IMF, the ECB and the European Commission) (Eurofound, 2012) a package of measures curtailing labour law in general and overturning all valid collective agreements in particular was implemented.

In most of the countries with available information, several factors – which usually interact with each other – account for higher coverage rates:

- the predominance of multiemployer bargaining (see Table 18 in Annex 1);
- the presence of (relatively) strong sector-related trade unions and employer/business organisations;
- the existence of pervasive extension practices (Table 18).

The group of Member States where sector-related multiemployer bargaining is completely absent consists of the six countries without any collective bargaining in the sector (see above) and Bulgaria, Croatia, the Czech Republic, Hungary, Romania and Slovakia, where coverage tends to be low and is based exclusively on company-level arrangements. This group of countries – with the exception of Greece – consists exclusively of 'new' Member States. Due to the lack of strong, encompassing social partners at least on one of the two sides of industry (however, mostly on the employer side) within the sector in virtually all of these countries, sectoral industrial relations tend to be poorly developed or fully absent.

However, there is a group of 12 countries with exclusive or prevailing multiemployer arrangements in the sector, most of which record very high or even full collective bargaining coverage rates in the sector. It is only in the Netherlands, Sweden and the UK that exclusive multiemployer arrangements in the sector do not prevent significant parts (30% or more of the employees) of the sector from remaining uncovered. This results from the lack of extension procedures in the sector rather than the main industrial relations actors' lacking comprehensiveness in terms of membership domain relative to the sector in these three countries.

Taking the collective bargaining coverage rate and the share of multiemployer bargaining as indicators for the effectiveness and strength of sectoral industrial relations structures, it can be inferred from these findings that the sector's industrial relations structures are quite well-established in around half of the 25 countries under consideration. In two countries, France and Slovenia, a multilevel bargaining system is established, which combines more or less comprehensive multiemployer bargaining with single-employer agreements. In such cases, the single-employer settlements either complement the multiemployer agreements in matters not regulated by the latter or contain more favourable employment terms than the multiemployer agreements.

The prevalence of multiemployer settlements in the sector is in some countries backed by a significant use of extension practices. Pervasive extension practices in the footwear sector are reported for Belgium, Finland, France, Portugal, Slovenia and Spain (see Table 18 in Annex 1). As the aim of extension provisions is to make multiemployer agreements generally binding, the provisions for an obligatory membership in the chamber system of Austria should also be noted. Obligatory membership creates an extension effect, since WKÖ and its subunits are parties to multiemployer bargaining. Another functional equivalent to statutory extension schemes can be found in Italy. According to the country's Constitution, minimum conditions of employment must apply to all employees. The country's labour court rulings relate this principle to the multiemployer agreements, to the extent that they are regarded as generally binding (Vatta, 2007, p. 208).

Participation in public policymaking

Interest associations may partake in public policy in two basic ways. Firstly, they may be consulted by the authorities on matters affecting their members, and secondly, they may be represented on 'corporatist', in other words tripartite, committees and boards of policy concertation. This study considers only cases of consultation and corporatist participation that explicitly relate to sector-specific matters. Consultation processes are not necessarily institutionalised and, therefore, the organisations consulted by the authorities may vary according to the issues to be addressed and also over time, depending on changes in government. Moreover, the authorities may initiate a consultation process on occasional rather than a regular basis. Given this variability, Tables 15 and 17b in Annex 1 flag only those sector-related trade unions and employer organisations that are usually consulted.

Trade unions

In 14 of the 24 Member States that record at least one sector-related trade union, at least some of the sector-related trade unions are usually (that is, on a regular or occasional basis) consulted by the authorities. In total, 62% of the sector-related trade unions for which information is available are consulted through participation in existing tripartite structures and/or in the form of unilateral consultation by the authorities. For around 25% of those trade unions for which related information has been provided, consultation is carried out on a regular basis (generally at least once a year); 75% are consulted occasionally.

Since 12 out of the 24 Member States with sector-related trade unions have a multi-union system, the possibility that the authorities may favour certain trade unions over others or that the unions compete for participation rights cannot be ruled out. In at least 4 of these 12 countries (Belgium, Italy, the Netherlands and Romania), any of the existing trade unions may take part in the consultation process. In contrast, in at least two countries (Finland and France) only some of the sector-related trade unions are usually consulted and at least another union is not. For Austria, Portugal and Sweden, no conclusions on equal, or possibly unequal, consultation practices can be drawn due to a lack of information for at least one trade union. In the pluralist cases of Bulgaria, the Czech Republic and Spain, none of the sector-related trade unions is usually consulted by the authorities.

Employer organisations

A clear majority (two-thirds) of sector-related employer/business organisations for which related information is available are involved in consultation procedures. In terms of consultation frequency, about 38% of the employer/business organisations for which information is available are consulted on a regular basis, while about 62% are consulted on occasion. As outlined above, seven countries with a multi-organisation system on the employer side in the sector have been identified. No country with a multi-organisation system could be identified (where related data of all employer/business organisations are available) in which all of the sector’s organisations are consulted or none of them is consulted.

Four countries with a pluralist associational system with unequal consultation practices were found: France, Greece, Spain and Sweden. In each one organisation is consulted by the authorities, while another is not. However, for some countries with a pluralist system of employer representation – Austria, Italy and Romania – no information about consultation practices is available for one organisation, such that it remains unclear whether consultation rights are being accorded to the national organisations in a selective manner or not. Overall, in at least 13 of the 17 Member States recording at least one sector-related employer/business organisation, at least one organisation is usually consulted.

As far as information is provided, in 11 countries that record sector-related associations of interest representation on both sides of industry, consultation rights are symmetrically accorded to organised labour and business, in that at least one organisation on each side is consulted. This situation applies to Austria, Finland, France, Italy, the Netherlands, Poland, Portugal, Romania, Slovenia, Sweden and the UK. In two countries (Greece and Spain), consultation rights are accorded to only one side, while on the other side no organisation is consulted. For Belgium, however, no evidence can be provided in this respect due to a lack of information for one interest organisation on the employer side (FEBIC).

Tripartite participation

The findings reveal that genuine sector-specific tripartite bodies have been established in two countries, namely Croatia and Finland. Table 19 in Annex 1 lists a total of three bodies – one in Croatia and two in Finland. The legal basis of these tripartite bodies is either a statute or an agreement between the parties involved. Although their role is not fully clear in all cases, it largely comprises advising and consulting administrative bodies dealing with a broad range of matters.

In terms of their scope of activities, Finland’s Occupational Safety Sector Group of the Centre for Occupational Safety for the Textiles and Shoe Industry plans and executes training and information campaigns on safety issues in the broader textiles, clothes and leather (including footwear) industries. Another Finnish body, the National Education and Training Committee for the Textile and Clothing

Industry, monitors and evaluates sector-specific education and training programmes on behalf of the relevant authorities. In the case of the Sectoral Council for the Textiles, Footwear, Leather and Rubber Industries of Croatia, no specification of activities has been provided. The fact that only three sector-specific tripartite bodies can be found is likely to result from two main characteristics of the footwear sector:

- its small size in terms of both companies and employees;
- the poorly developed industrial relations structures in most of the 'new' Member States.

Other bodies listed in some national contributions have not generally been taken into account in this study because they are bipartite rather than tripartite in terms of composition, or sector-unspecific (in other words, cross-sectoral) tripartite bodies for concertation of economic and social policy. These bodies may also address the sector, depending on the particular circumstances and issues that may arise. Sector-specific bipartite (rather than tripartite) bodies, which are composed of sector-related representatives of the two sides of industry, exist in a few countries and deal with issues such as:

- health and safety (in the UK);
- (vocational) training and education (in France).

3 European level of interest representation

At European level, eligibility for consultation and participation in social dialogue is linked to three criteria, as defined by the *Commission Decision on the establishment of sectoral dialogue committees promoting the dialogue between the social partners at European level* (98/500/EC) (European Commission, 1998).

Accordingly, to be admitted to European sectoral social dialogue, social partner organisations must have the following attributes. They must:

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

In terms of social dialogue, the constituent feature is the ability of such organisations to negotiate on behalf of their members and to conclude binding agreements. This chapter on the European associations of the footwear sector therefore analyses these organisations' membership domain, the composition of their membership and their ability to negotiate.

As explained below, the study presents detailed data on two sector-related European associations:

- IndustriAll Europe on the employee side;
- CEC on the employer side.

Both are listed by the European Commission as a social partner organisation to be consulted under Article 154 of the TFEU. Hence, the analysis below concentrates on these two organisations, while providing supplementary information on others that are linked to the sector's national industrial relations actors.

Membership domains

IndustriAll Europe

IndustriAll Europe is affiliated to the European Trade Union Confederation (ETUC). As the European federation of industry and manufacturing workers, it organises European employees in the manufacturing, mining and energy sectors of the economy. Hence, its membership domain is multisectoral and extends far beyond the small footwear sector, therefore overlapping with regard to the sector under observation.

CEC

On the employers' side, according to its name and web site, CEC represents the interests of national footwear associations and federations of the EU. In terms of business activities, CEC organises the entire footwear industry as demarcated for the purpose of this study; therefore, its membership domain largely coincides with the sector under scrutiny. Moreover, CEC organises employer and business associations only rather than individual companies.

Membership composition

In terms of membership composition, it should be noted that the countries covered by IndustriAll Europe extend beyond the 25 Member States examined in this study. However, this report considers only the members within the 25 Member States. By contrast, CEC organises associations only within the 25 countries considered in this study. With regard to IndustriAll Europe, whose membership domain overlaps relative to the sector under examination, only those members with a domain related to the footwear sector are included in this overview report.

Representativeness of IndustriAll Europe in the footwear sector

Table 20 in Annex 1 lists IndustriAll Europe's sector-related trade union members, drawn from the national contributions.[7] At least one direct affiliation is recorded in 23 of the 25 countries under consideration in this report, the exceptions being Greece and Latvia. In only one Member State (Latvia) is there no sector-related trade union. In Greece, a sector-related trade union can be found but it has no affiliation to IndustriAll. This means that 23 of the 24 Member States with sector-related trade unions are covered through affiliations (see Table 10).

Multiple memberships occur in 11 countries: Austria, Belgium, Bulgaria, Finland, France, Italy, the Netherlands, Portugal, Romania, Spain and Sweden. On aggregate, 40 of the 48 sector-related trade unions at national level are directly affiliated to IndustriAll, while 2 Belgian trade unions are indirectly (via a higher-order unit) affiliated to the European-level federation. Taking the 40 direct and 2 indirect members together, IndustriAll Europe thus covers almost 88% of the trade unions listed in Tables 14 and 15.

All members of IndustriAll Europe except FLI Podkrepa of Bulgaria, OVIEK-SEK of Cyprus, 3F of Denmark, ETTAF of Estonia, LPS Solidarumas of Lithuania, FNSZZ PL of Poland and ELA IE of Spain are involved in collective bargaining related to the footwear sector. Thus, they cover collective bargaining in 18 of the 19 Member States (95%) where there is a sector-related trade union involved in collective bargaining (see Table 10).

Insofar as available data on sectoral membership of the national trade unions provide sufficient information on their relative strength, it may be concluded that IndustriAll Europe tends to cover the sector's most important labour representatives. No cases of uncovered major trade unions in the sector can be identified.

Table 9: EU Member States with largest footwear production and employment (> 5,000), 2014

Country	Employment	At least one trade union affiliated to IndustriAll Europe	At least one IndustriAll Europe affiliate involved in collective bargaining	One employer organisation affiliated to CEC	One CEC affiliate involved in collective bargaining
IT	79,948	Yes	Yes	Yes	Yes
RO	52,591	Yes	Yes	Yes	No
PT	46,140	Yes	Yes	Yes	Yes
ES	29,493	Yes	Yes	Yes	Yes
PL	18,643	Yes	No	Yes	No
BG	13,570	Yes	Yes	No	n.a.
DE	9,405	Yes	Yes	No	n.a.
SK	8,900	Yes	Yes	No	n.a.

[7] The list of sector-related affiliates to IndustriAll Europe compiled on the basis of the national contributions differs greatly from the list of sectoral members provided by the European federation itself. This report includes a number of national trade unions whose domain – according to the national correspondents – is related to the footwear sector, although they were not considered as sector-related members in the initial membership list provided by IndustriAll Europe. These include GPA-djp in Austria; CSC-ACV, CGSLB-ACLVB, CNE-LBC and SETCa-BBTK in Belgium; OS TOK in the Czech Republic; 3F in Denmark; CGT FO PCH and CMTE-CFTC in France; Sindeq in Portugal; ELA IR in Spain; and IF Metall and Unionen in Sweden. However, Latvia's IWTU and Lithuania's LLPPS are not taken into account in this report, even though they are reported to be a sector-related member by IndustriAll Europe, since – according to the national correspondents of Latvia and Lithuania – they do not organise any members in the footwear sector.

HU	7,242	Yes	Yes	Yes*	No*
FR	5,498	Yes	Yes	Yes	Yes
HR	5,820[a]	Yes	Yes	No	n.a.
UK	5,060	Yes	Yes	Yes	Yes

** Indirect affiliation via lower-order unit; [a] reference year 2011.*

Note: n.a.= not available.

Source: Eurofound's Network of European Correspondents (2016–2017)

In all the 12 EU Member States with a workforce larger than 5,000 in the footwear sector at least one trade union affiliated to IndustriAll Europe can be identified. Moreover, in all these countries but Poland there is at least one IndustriAll Europe affiliate that is involved in sector-related collective bargaining. By contrast, on the employer side, affiliations to CEC can be found in only 8 of the 12 countries with the largest workforce in the sector; Bulgaria, Croatia, Germany and Slovakia do not record any affiliation to CEC. Furthermore, the CEC affiliates of Hungary, Poland and Romania do not engage in sector-related collective bargaining, such that CEC affiliates cover collective bargaining only in 5 of the 12 Members States with the largest employment – that is France, Italy, Portugal, Spain and the UK (see Table 9).

Representativeness of CEC in the footwear sector

Members of CEC are listed in Table 21 in Annex 1. CEC has one affiliate in each of 11 EU Member States: Finland, France, Greece, Hungary, Italy, Poland, Portugal, Romania, Spain, Sweden and the UK.[8] Of the larger countries, only Germany is not covered by CEC. In six Member States, that is Austria, Belgium, Croatia, Germany, the Netherlands and Slovenia, sector-related employer organisations exist but none are affiliated to CEC. In eight countries, there are no sector-related employer organisations: Bulgaria, Cyprus, the Czech Republic, Denmark, Estonia, Latvia, Lithuania and Slovakia. Multiple memberships of CEC do not occur.

Table 17a indicates that associations affiliated to CEC and unaffiliated associations coexist in six countries: France, Greece, Italy, Romania, Spain and Sweden. Sectoral membership data on the respective organisations of these countries do not provide a clear indication of whether the most important associations are affiliated.

In Austria, Belgium, Croatia, Germany, the Netherlands and Slovenia, all the sector-related employer organisations are engaged in sector-related collective bargaining, but are not affiliated to CEC. This involves FV TBSL and BIG of Austria, FEBIC of Belgium, HUP UTKI of Croatia, HDS/L of Germany, FNLS of the Netherlands and ZDS-STU of Slovenia.

In almost all countries with a pluralist associational landscape in the sector, where a CEC member organisation coexists with organisations not affiliated to CEC, some important employer organisations that conduct collective bargaining are not affiliated to the European confederation. These include CSNB in France, OVYE in Greece, FEPAIUS in Romania, AEC in Spain and IKEM in Sweden.

In four countries (Hungary, Poland, Romania and Sweden), the CEC affiliate is not engaged in sector-related collective bargaining. In the remaining seven countries with affiliations to CEC (Finland, France, Greece, Italy, Portugal, Spain and the UK), the affiliates are genuine social partner organisations in that they engage in collective bargaining. This means that 7 of the 11 CEC members are involved in sector-related collective bargaining, covering collective bargaining in 7 of the 15 Member States that record an employer organisation involved in sector-related collective bargaining (see Table 10). Nevertheless, as can be seen in Table 17b in Annex 1, as many as 17 sector-related

[8] The initial list of members provided by CEC contains only 10 affiliates. However, in 2016, a new member from Hungary was welcomed – the Association of Hungarian Light Industry (MKSZ) (Footwear Today, 2017). According to the Eurofound correspondent in Hungary, MKSZ is only indirectly affiliated to CEC, via a lower-order unit, the Hungarian Association for Leather and Shoe Industry (BCE). Nevertheless, MKSZ rather than BCE is included in this report, since the latter organisation is not regarded as social partner on its own.

employer organisations across the EU involved in sector-related collective bargaining are not affiliated to CEC. Hence, a significant proportion of the relevant national actors within the sector is not under the umbrella of this European organisation. Affiliations to CEC represent 39% of the total of sector-related employer/business organisations, amongst which – with the notable exception of Sweden's IKEM – appear to be the most important social partner organisations in Member States where affiliations are recorded.

Table 10: Membership structure of IndustriAll Europe and CEC

	Number of organisations	Number of Member States with organisation(s)	Number of Member States with organisation(s) involved in collective bargaining
All sector-related trade unions	48	24	19
Affiliates of IndustriAll Europe (direct and indirect)	42	23	18
% affiliated	88%	96%	95%
All sector-related employer organisations	28	17	15
Affiliates of CEC (direct and indirect)	11	11	7
% affiliated	39%	65%	47%

Note: Percentages are rounded.

Source: Eurofound's Network of European Correspondents (2016–2017)

Table 10 summarises the membership structure of both IndustriAll Europe and CEC with regard to the footwear sector. It indicates that IndustriAll Europe represents a much higher share of sector-related associations on the employee side (88%) than CEC on the employer side (39%). Likewise, the share of countries covered through affiliations from these countries of all Member States with sector-related associations is significantly higher for IndustriAll Europe (96%) than for CEC (65%).

Capacity to negotiate

The third criterion of representativeness at the European level refers to the organisations' capacity to negotiate on behalf of their own members.

On the side of organised labour, IndustriAll Europe is not equipped with an explicit permanent mandate to negotiate on behalf of its members in matters of the 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 the various sectors (IndustriAll, 2016). 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 SSD. 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 SSD shall act in line with the policies and procedures as agreed by the Executive Committee and Congress' as the higher 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, whilst 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.

On the employer side, Article 4 of CEC's by-laws specifies that one of the association's objectives is the 'cooperation and dialogue with other confederations connected to the footwear sector'. Article 10 stipulates that 'all CEC Members form part of the General Assembly, which is the CEC primary body in charge of policy and strategy decisions to be implemented'. The collective interest representation on behalf of the CEC members is exercised by the General Secretary appointed by the Board which, in turn, is elected by the General Assembly. According to Article 12 of the by-laws, one of the General Secretary's tasks is to 'represent the Confederation in front of third parties, both in court and outside' and to execute the decisions of the General Assembly. This implicitly includes negotiations in the framework of the European sectoral social dialogue. Thus, it can be concluded that CEC is not equipped with a permanent or automatic mandate to conduct negotiations in matters of the European social dialogue. Rather, the relevant CEC bodies, in particular the General Secretary, obtain a mandate to negotiate by the General Assembly on a case-by-case basis.

Finally, as a proof of the capacity of the sectoral European social partner organisations to act, IndustriAll Europe and CEC have produced a number of joint texts within the framework of social dialogue. Irrespective of their actual substance and impact on the overall working relations in the sector, the sectoral social partners at European level proved quite productive in launching initiatives and drawing up joint texts of varying commitment up to 2006, when 11 joint texts were produced (see Table 11). After an interruption of sectoral social dialogue activities, the sectoral European social partners restarted these activities in December 2013. For some years now, the sectoral social dialogue committee has been focusing on issues such as skills and qualifications, making the footwear sector attractive to young people, and establishing a level playing field in international trade.

Table 11: List of social dialogue texts jointly drawn up by the European social partners in the footwear sector

Text title	Type of text	Year of signature
The EU must adopt the origin marking of footwear imported from third countries	Declaration	2006
Code of conduct. A charter of the social partners in the footwear sector	Code of conduct	2000
Programme d'action sociale: contribution des partenaires sociaux du secteur de la chaussure (lettre) *(in French only) [Social Action Programme: Contribution of the social partners in the footwear sector (letter)]*	Joint opinion	2000
Sommet de Lisbonne: contribution des partenaires sociaux du secteur de la chaussure *(in French only) [Lisbon Summit: Contribution of the social partners in the footwear sector]*	Joint opinion	2000
Impact des crises financières asiatique et russe sur la filière 'mode' *(in French only) [Impact of the Asian and Russian financial crises on the fashion industry]*	Joint opinion	1999
Suivi du dialogue social sectoriel textile –	Joint opinion	1999

habillement et chaussures *(in French only)* *[Follow-up of the sectoral social dialogue textiles – clothing and footwear*]		
Charter on the employment of children	Code of conduct	1997
Child labour. A charter by European social partners in the footwear sector	Guidelines	1996
Statement on the Essen priorities concerning employment	Joint opinion	1995
Charter on the employment of children	Guidelines	1995
Joint opinion on employment	Joint opinion	1993

Source: European Commission, Social dialogue texts database

Other European associations

To assess the weight of IndustriAll Europe and CEC, it is necessary to look at other European organisations that may represent the sector. This is done by reviewing the other European organisations to which the sector-related trade unions and employer organisations are affiliated.

The affiliations of the trade unions are listed in Table 15 in Annex 1. European organisations other than IndustriAll Europe represent 7 of the 48 sector-related trade unions and thus a relatively small proportion of both unions and countries. Six of these seven trade unions recording one or more affiliations to European organisations other than IndustriAll are simultaneously affiliated also to the latter organisation.

For practical reasons, only those European organisations are mentioned which cover at least three trade unions. This involves three organisations:

- Union Network International (UNI) Europa, with five affiliations covering four countries;
- European Federation of Public Service Unions (EPSU), with three affiliations from three countries;
- European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT) with three affiliations in two countries.

Although the affiliations listed in Table 15 are likely not to be exhaustive, this overview emphasises the principal status of IndustriAll Europe as the sector's labour representative at European level. This is not only due to the relatively low numbers of affiliations per organisation other than IndustriAll Europe, but also because the presence of these organisations usually results from the multisector domains of the respective trade unions.

A similar review of the membership of the national employer/business associations can be derived from Table 17a in Annex 1. Most of them have no or relatively few affiliations to European associations other than CEC. Overall, only one alternative European association with more than one affiliation can be identified, namely the European Apparel and Textile Confederation (EURATEX), with two affiliations covering two countries. Its membership domain covers – in terms of business activities – the textile and clothing industry and thus may partially overlap with regard to the footwear sector. EURATEX is the recognised European social partner organisation on the employer side in the textile and clothing sector under the provisions of Article 154 of the TFEU. There are no indications that this organisation claims to represent those businesses whose core activities are related to the footwear sector rather than the textile and clothing sector and thus would contest the principal status of CEC in the footwear sector. Moreover, EURATEX (or any other European organisation) does not challenge the position of CEC in terms of the number of affiliations and territorial coverage.

4 Conclusions

The European footwear industry is a relatively small sector that has undergone several phases of contraction in terms of both the number of companies and employees and the volume of output for several decades. As a labour-intensive industry, restructuring measures, including delocalisation of production to lower-wage countries, have often been the only avenue for EU footwear companies in addressing the growing challenge of cheap competition in less-developed economies, in particular in Asia (China and Vietnam). Another core feature of the sector is the high proportion of small companies and micro-companies, as well as its high concentration in a few countries, such as Italy, Portugal and Spain. In terms of the labour market, the vast majority of the sector's workforce enjoys standard employment relationships with permanent contracts; female and blue-collar workers clearly prevail in the industry. Moreover, the sector is characterised by an ageing workforce, while at the same time facing severe difficulties in recruiting young and highly skilled people.

All these economic and labour market characteristics also shape the sector's industrial relations. Relatively low unionisation rates in the footwear industry are attributable to the relatively low levels of educational qualifications among the sector's workforce, on average, as well as the small size of most establishments (which consequently often do not meet the criteria for setting up workplace representation). Low unionisation rates may partially be reflected by the membership domains of the sector-related trade unions, which in almost all cases (sectionally) overlap relative to the footwear sector. This implies – as the 2010 representativeness study on the European social partners in the footwear sector argues – that the trade unions' organisational structures are not tailored to the specific interests of the footwear workers, which may impede a very particular trade union representation on behalf of the sector's employees. However, a more detailed analysis of the trade unions' membership domains with regard to the sector suggests that – despite the clear predominance of (sectionally) overlapping domain patterns – overall, the domains tend not to be particularly broad. This is because the trade unions' domains often just exceed the very narrowly demarcated footwear sector and as well as covering the broader leather, textile and clothing sector, without being 'general' or 'cross-sectoral'. On the employer side, the predominance of SMEs and micro-enterprises that are traditionally less inclined to gather in associations, compared to larger companies, is considered to be the main reason for modest densities in terms of employer representation in some countries. However, overall – as far as data are available – density rates among employer organisations tend to be fairly high.

In about half of the 25 Member States, the sector's industrial relations are poorly organised, as no or only very moderate sector-related collective bargaining activities can be found in these countries. This group of countries consists of the 2004, 2007 and 2013 accession countries except for Slovenia. In these countries, representative social partner organisations are lacking on at least one side of the industry. However, there is a group of countries with high or even full coverage rates, consisting of the 'old' Member States, except for Greece, plus Slovenia.

The volume of production/turnover or the size of the sector in terms of employment, however, does not matter with regard to the organisation of industrial relations in the sector. Accordingly, industrial relations in the group of the 12 Member States with sectoral employment larger than 5,000 workers reflect the same polarisation along geographical and political boundaries as those of the 25 Member States considered in this study. Compared with the findings of the 2010 representativeness study on the footwear sector, the share of countries with well-established industrial relations in the sector has somewhat diminished. This is because in some countries, such as Cyprus, the Czech Republic, Denmark, Hungary, Romania, Slovakia and Sweden, social partner organisations have lost their representativeness or have vanished as a result of the sector's decrease in terms of companies and employees, such that effective (multiemployer) bargaining has been severely disrupted.

Comparatively high levels of collective bargaining coverage in the sector occur in those countries where multiemployer bargaining prevails and where extension practices are applied. Exclusive single-employer bargaining, in turn, only leads to low coverage rates, due to the absence of large companies and the limited extent of economic concentration and unionisation in the sector.

With regard to the European-level social partner organisations, IndustriAll Europe and also CEC tend to organise the most important national actors in the sector. Through their affiliations, they cover 23 and 11 of the Member States, respectively; they represent almost 90% of the sector-related trade unions and almost 40% of the sector-related employer/business organisations.

Other European organisations challenging the position of IndustriAll Europe on the employee side and CEC on the employer side as the sector's unmatched representatives in social matters do not exist. Other European organisations may represent some individual sector-related trade unions and employer/business organisations due to the latter's membership domains extending beyond the footwear sector. However, such 'other' organisations do not claim to represent employees or businesses of the footwear sector as such, and they clearly fall short in terms of the number of affiliations and territorial coverage of both IndustriAll Europe and CEC.

Thus, both IndustriAll Europe and CEC can be regarded as the main and hitherto unchallenged EU-wide representatives of the sector's workforce and businesses, as no other European organisations exist that can compare with them in terms of organising relevant sector-related trade unions and employer/business organisations across the EU Member States. In this respect, the findings of this study corroborate those of the 2010 representativeness study on the European social partners in the footwear sector.

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Annex 1: Additional tables

Table 12: Total companies and employment in footwear, 2009–2015 (approximately)

	Year	Number of companies	Year	Total employment	Female employment	Female employment as % of total employment	Total sectoral employment as % of total employment in economy
AT	2009	83	2009	1,592	957	60%	0.04
	2015	84	2014	1,446	870	60%	0.04
BE	2009	120[a]	2009	281	124	44%	0.006
	2015	90[a]	2015	214	101	47%	0.004
BG	2009	415	2009	14,937	12,126	81%	0.6
	2014	364	2014	13,339	10,588	79%	0.5
CY	2009	37	2009	145	n.a.	n.a.	0.04
	2015	16	2014	36	n.a.	n.a.	0.01
CZ	2009	234[a]	2009	3,060	n.a.	n.a.	0.08
	2014	202[a]	2014	3,250	n.a.	n.a.	0.08
DE	2009	515	2009	17,000	8,000	47%	0.04
	2013	449	2014	17,000	8,000	47%	0.04
DK	2009	26	2009	165	75	45%	0.006
	2014	18	2014	72	37	51%	0.002
EE	2009	20[b]	2009	794	n.a.	n.a.	0.19
	2014	22[b]	2014	750	n.a.	n.a.	0.17
EL	2009	1,110	2009	3,052	1,148	38%	0.078
	2015	159	2015	796	796	100%	0.025
ES	2009	3,347	2009	23,956	n.a.	n.a.	n.a.
	2014	3,203	2014	29,493	n.a.	n.a.	n.a.
FI	2009	68	2009	1,311	n.a.	n.a.	0.06
	2015	48	2015	908	n.a.	n.a.	0.05
FR	2009	221	2009	n.a.	n.a.	n.a.	n.a.
	2015	252	2015	n.a.	n.a.	n.a.	n.a.
HR	2009	168	2009	5,649	n.a.	n.a.	0.5
	2014	104	2014	6,368	n.a.	n.a.	0.5

HU	2009	311	2009	6,785	n.a.	n.a.	0.16
	2015	360	2014	7,242	n.a.	n.a.	0.17
IE	No	---	---	---	---	---	---
	No	---	---	---	---	---	---
IT	2009	9,025	2009	86,232	n.a.	n.a.	0.4
	2014	8,301	2014	79,948	n.a.	n.a.	0.4
LT	2009	33	2009	624	n.a.	n.a.	0.05
	2014	49	2014	443	n.a.	n.a.	0.03
LU	No	---	---	---	---	---	---
	No	---	---	---	---	---	---
LV	2009	15	2009	135	95	70%	0.02
	2014	18	2014	225	180	80%	0.04
MT	No	---	---	---	---	---	---
	No	---	---	---	---	---	---
NL	2009	110	2009	n.a.	n.a.	n.a.	n.a.
	2015	125	2015	n.a.	n.a.	n.a.	n.a.
PL	2009	2,019	2009	19,741	n.a.	n.a.	0.1
	2015	1,724	2015	17,665	n.a.	n.a.	0.1
PT	2009	2,460	2011	38,288	22,795	60%	0.9
	2014	2,730	2015	n.a.	n.a.	n.a.	n.a.
RO	2009	1,382	2009	53,457	n.a.	n.a.	0.6
	2014	1,230	2014	52,409	n.a.	n.a.	0.6
SE	2009	33	2009	n.a.	n.a.	n.a.	n.a.
	2015	36	2015	n.a.	n.a.	n.a.	n.a.
SI	2009	72	2009	1,596	1,002	63%	0.19
	2015	63	2015	1,254	749	60%	0.15
SK	2009	363	2009	9,500	7,800	82%	0.4
	2015	239	2015	16,700	11,100	66%	0.7
UK	2009	215	2009	2,400	1,000	42%	0.008
	2015	190	2015	3,800	2,000	53%	0.012

[a] Most of these companies are self-employed persons/one-person enterprises; [b] one-person companies are not included.

Note: n.a. = not available.

Source: Eurofound's Network of European Correspondents (2016–2017), national statistics. For detailed description of sources please refer to the national contributions.

Table 13: Total employees in footwear, 2009–2015 (approximately)

	Year	Total number of employees	Number of female employees	Female employees as % of total employees	Total sectoral employees as % of total employees in economy
AT	2009	1,539	947	62%	0.04
	2014	1,383	856	62%	0.03
BE	2009	180	103	57%	0.004
	2015	139	85	61%	0.003
BG	2009	13,925	11,464	82%	0.6
	2014	12,530	10,106	81%	0.6
CY	2009	n.a.	n.a.	n.a.	n.a.
	2015	n.a.	n.a.	n.a.	n.a.
CZ	2009	2,898	n.a.	n.a.	0.07
	2014	3,087	n.a.	n.a.	0.07
DE	2009	8,466	4,763	56%	0.03
	2015	8,559	3,868	45%	0.03
DK	2009	137	64	47%	0.005
	2014	51	31	61%	0.002
EE	2009	794	n.a.	n.a.	0.20
	2014	748	n.a.	n.a.	0.18
EL	2009	2,574	978	38%	0.056
	2015	796	796	100%	0.022
ES	2009	22,203	n.a.	n.a.	n.a.
	2014	27,333	n.a.	n.a.	n.a.
FI	2009	n.a.	n.a.	n.a.	n.a.
	2015	n.a.	n.a.	n.a.	n.a.
FR	2009	8,194	4,942	60%	0.03
	2015	12,419	4,870	39%	0.05
HR	2009	5,336	n.a.	n.a.	0.5
	2014	6,289	n.a.	n.a.	0.5
HU	2009	6,591	n.a.	n.a.	0.18
	2014	7,085	n.a.	n.a.	0.16
IE	No	---	---	---	---
	No	---	---	---	---
IT	2009	74,570	n.a.	n.a.	0.5
	2014	69,394	n.a.	n.a.	0.4
LT	2009	606	n.a.	n.a.	0.05
	2014	419	n.a.	n.a.	0.04

LU	No	---	---	---	---
	No	---	---	---	---
LV	2009	131	92	70%	0.02
	2014	223	178	80%	0.04
MT	No	---	---	---	---
	No	---	---	---	---
NL	2009	700	300	43%	0.009
	2015	600[a]	n.a.	n.a.	0.006
PL	2009	17,391	n.a.	n.a.	0.1
	2014	16,503	n.a.	n.a.	0.1
PT	2011	34,749	21,360	61%	1.0
	2013	36,889	n.a.	n.a.	n.a.
RO	2009	53,239	n.a.	n.a.	1.1
	2014	52,400	n.a.	n.a.	1.1
SE	2009	221	n.a.	n.a.	0.0
	2013	256	n.a.	n.a.	0.0
SI	2009	1,555	994	64%	0.20
	2015	1,219	741	61%	0.17
SK	2009	9,500	7,800	82%	0.5
	2015	16,700	11,100	66%	0.8
UK	2009	2,200	1,000	55%	0.009
	2015	3,800	2,000	53%	0.014

[a] 390 according to the social partners.

Notes: n.a. = not available.

Source: Eurofound's Network of European Correspondents (2016–2017); for detailed description of sources please refer to the national contributions.

Table 14: Domain coverage, membership and density of trade unions in footwear, 2015–2017

	Trade union	Type of membership	Domain coverage*	Membership		Density	Members in largest companies
				Members active	Members sector active	Sector density (%)	
AT	PRO-GE	Voluntary	SO	230,127[a]	230	17%	Yes
	GPA-djp	Voluntary	SO	276,632[a]	n.a.	n.a.	n.a.
BE	FGTB-ABVV	Voluntary	SO	43,0000	66	47%	Yes
	CSC-ACV	Voluntary	SO	1,500,000	n.a.	n.a.	Yes
	CGSLB-ACLVB	Voluntary	O	300,000	30	22%	Yes

	CNE-LBC	Voluntary	SO	163,000	n.a.	n.a.	Yes
	SETCa/BBTK	Voluntary	SO	425,000	n.a.	n.a.	Yes
BG	FOSIL	Voluntary	C	n.a.	n.a.	n.a.	n.a.
	FLI Podkrepa	Voluntary	O	2,160	13	0%	n.a.
CY	OVIEK-SEK	Voluntary	O	5,854	n.a.	n.a.	n.a.
CZ	OS TOK	Voluntary	SO	5,091	144	5%	No
	OOPOP Prabos Plus	Voluntary	S	110	110	4%	No
DE	IGBCE	Voluntary	O	651,181[a]	2,000	23%	Yes
DK	3F	Voluntary	SO	244,218	n.a.	n.a.	n.a.
EE	ETTAF	Voluntary	O	467	15	2%	n.a.
EL	OEKIDE	Voluntary	O	n.a.	n.a.	n.a.	Yes
ES	FICA-UGT	Voluntary	O	250,000	2,000	7%	Yes
	CCOO de Industria	Voluntary	O	134,303	<1,500	<5%	Yes
	ELA IE	Voluntary	SO	42,000	n.a.	n.a.	No
FI	TEAM	Voluntary	SO	29,100	630	At least 69%	Yes
	Pro	Voluntary	SO	100,000	260	At least 24%	Yes
FR	FS CFDT	Voluntary	O	80,000	<150	1%	Yes
	CGT-THC	Voluntary	O	4,000	<100	<1%	Yes
	CGT FO PCH	Voluntary	O	n.a.	<50	<1%	n.a.
	CMTE CFTC	Voluntary	O	n.a.	<50	<1%	n.a.
	CFE-CGC	Voluntary	O	n.a.	<50	<1%	n.a.
HR	Sindikat TOKG	Voluntary	O	5,000	1,100	17%	Yes
HU	BDSZ	Voluntary	O	4,100	290	4%	Yes
IE	No	---	---	---	---	---	---
IT	FILCTEM-CGIL	Voluntary	O	216,000	n.a.	n.a.	Yes
	FEMCA-CISL	Voluntary	O	126,585[b]	n.a.	n.a.	Yes
	UILTEC-UIL	Voluntary	O	111,000	2,500	4%	Yes
LT	LPIPS Solidarumas	Voluntary	O	784	60	14%	Yes
LU	No	---	---	---	---	---	---
LV	No	---	---	---	---	---	---
MT	No	---	---	---	---	---	---
NL	FNV-PI	Voluntary	O	33,000	34	9%	Yes
	CNV	Voluntary	O	160,000	44	11%	Yes
PL	FNSZZ PL	Voluntary	O	5,500	20	<1%	No

PT	FESETE	Voluntary	O	35,000	9,000	24%	Yes
	Sindeq	Voluntary	O	6,500	650	2%	No
	CESP	Voluntary	O	n.a.	n.a.	n.a.	n.a.
	SIMA	Voluntary	O	n.a.	620	2%	n.a.
	SITESE	Voluntary	O	10,000	n.a.	n.a.	n.a.
RO	CONFPELTEX	Voluntary	O	3,500	800	2%	Yes
	PF	Voluntary	SO	1,750	65	0%	No
SE	IF Metall	Voluntary	SO	250,500	55	21%	Yes
	Unionen	Voluntary	SO	510,000	16	6%	Yes
	Ledarna	Voluntary	SO	92,000	5	2%	Yes
SI	STUPIS	Voluntary	O	n.a.	449	37%	Yes
SK	IOZ	Voluntary	O	10,159	666	4%	Yes
UK	Community	Voluntary	O	27,266[a]	1,200	32%	Yes

** Domain coverage; [a] including non-active member; [b] reference year is 2013.*

Notes: C = congruence; O = overlap; SO = sectional overlap; S = sectionalism (for details, see Table 2); n.a. = not available.

Source: Eurofound's Network of European Correspondents (2016–2017), administrative data and estimates

Table 15: Collective bargaining, consultation and affiliations of trade unions in footwear, 2015–2017

	Trade union	Collective bargaining*	Collective bargaining coverage (total)**	Consultation /frequency	National and European affiliations***
AT	PRO-GE	M	1,000	Regularly	*ÖGB*; IndustriALL, EFFAT
	GPA-djp	M	350–400	n.a.	*ÖGB*; IndustriALL, EPSU, EFFAT, EFJ, UNI-Europa
BE	FGTB-ABVV	M	81	Ad-hoc	IndustriALL
	CSC-ACV	M	139	Regularly	IndustriALL
	CGSLB-ACLVB	M	139	Regularly	IndustriALL
	CNE-LBC	M	n.a.	Regularly	*CSC-ACV*; (IndustriALL), UNI-Europa, EPSU, ETF
	SETCa/BBTK	M	n.a.	Regularly	FGTB-ABVV; (IndustriALL), UNI-Europa
BG	FOSIL	S	240	Ad-hoc	*CITUB*; IndustriALL
	FLI Podkrepa	No	0	No	*CL Podkrepa*; IndustriALL
CY	OVIEK-SEK	No	0	No	*SEK*; IndustriALL

	OS TOK	S	144	No	*CMKOS*; IndustriAll
	OOPOP Prabos Plus	S	210	No	
DE	IGBCE	M	n.a.	No	*DGB*; IndustriALL
DK	3F	No	0	No	*LO*; IndustriALL, ETF, EFFAT, UNI Europa, EFBWW
EE	ETTAF	No	0	No	*EAKL, AEITU*; IndustriALL
EL	OEKIDE	M[a]	0	No	*GSEE*
ES	FICA-UGT	M	<30,000	No	*UGT*; IndustriALL
	CCOO de Industria	M	<30,000	No	*CCOO*; IndustriALL
	ELA IE	No	0	No	IndustriALL
FI	TEAM	M	700	No	*SAK, TP*; IndustriALL
FI	Pro	M	260	Ad-hoc	*STTK, SASK, TP*; IndustriALL
FR	FS CFDT	M+S	7,681	Ad-hoc	*CFDT*; IndustriALL, UNI-Europa
FR	CGT-THC	M+S	7,681	Ad-hoc	*CGT*; IndustriALL
FR	CGT FO PCH	M+S	7,681	Ad-hoc	*CGT FO*; IndustriALL
FR	CMTE CFTC	M+S	7,681	No	*CFTC*; IndustriALL
FR	CFE-CGC	M+S	2,267	No	*CGE-CGC*
HR	Sindikat TOKG	S	1,230	No	*NHS*; IndustriALL
HU	BDSZ	S	850	No	*MASZSZ*; IndustriALL
IE	No	---	---	---	---
IT	FILCTEM-CGIL	M	69,500	Ad-hoc	*CGIL*; IndustriALL, EPSU
IT	FEMCA-CISL	M	69,500	Ad-hoc	*CISL*; IndustriALL
IT	UILTEC-UIL	M	69,500	Ad-hoc	*UIL*; IndustriALL
LT	LPIPS Solidarumas	No	0	Ad-hoc	*LTU Solidarumas*; IndustriALL
LU	No	---	---	---	---
LV	No	---	---	---	---
MT	No	---	---	---	---
NL	FNV-PI	M	390	Ad-hoc	*FNV*; IndustriALL
NL	CNV	M	390	Ad-hoc	*CNV*; IndustriALL
PL	FNSZZ PL	No	0	Ad-hoc	*OPZZ*; IndustriALL
PT	FESETE	M	28,416	Ad-hoc	*CGTP-IN*; IndustriALL
PT	Sindeq	M	1,215	Ad-hoc	*UGT*; IndustriALL
PT	CESP	M	8,700	n.a.	*CGTP-IN*

PT	SIMA	M	620	n.a.	IndustriALL
PT	SITESE	M	n.a.	n.a.	*UGT*; UNI-Europa
RO	CONFPELTEX	(S)	500	Yes	*CNS Cartel Alfa*; IndustriALL
RO	PF	(S)	65	Yes	*CNSLR Fratia*; IndustriALL
SE	IF Metall	M	120	Ad-hoc	*LO*; IndustriALL
	Unionen	M	50	n.a.	*TCO*; IndustriALL
	Ledarna	M	50	n.a.	CEC
SI	STUPIS	M	1,219	Ad-hoc	*ZSSS*; IndustriALL
SK	IOZ	S	2,233	Regularly	*KOZ SR*; IndustriALL
UK	Community	M	2,000	Ad-hoc	*TUC, GFTU*; IndustriALL

** Collective bargaining involvement; [a] collective bargaining involvement until 2009; in case sectoral collective bargaining is to be resumed, OEKIDE will probably be a party to it again; ** number of employees covered by collective agreements concluded by the union within the footwear sector; *** national affiliations are in italics.*

Notes: S = single-employer bargaining; M = multiemployer bargaining; (S) = indirect single-employer bargaining involvement via lower-level units (company unions). For the national level, only cross-sectoral (for example, peak-level) associations are listed; for the European level, sectoral associations only; affiliation in parenthesis means indirect affiliation via higher-order unit. n.a. = not available.

Source: Eurofound's Network of European Correspondents (2016–2017), administrative data and estimates

Table 16: Domain coverage and membership of employer/business organisations in footwear, 2015–2017

	Employer organisation	Domain coverage*	Membership				
			Type	Companies	Companies in sector	Employees	Employees in sector
AT	FV TBSL	SO	Obligatory	447	24	17,644	1140
	BIG	SO	Obligatory	2,648	60	9,469	200-300
BE	FEBIC	O	Voluntary	n.a.	n.a.	n.a.	n.a.
BG	No	---	---	---	---	---	---
CY	No	---	---	---	---	---	---
CZ	No	---	---	---	---	---	---
DE	HDS/L	O	Voluntary	135	86	15,000	n.a.
DK	No	---	---	---	---	---	---
EE	No	---	---	---	---	---	---
EL	ELSEVIE	C	Voluntary	80	80	1,200	1,200
	OVYE	C	Voluntary	190	190	450	450

ES	FICE	O	Voluntary	500	500	12,000	12,000
	AEC	SO	Voluntary	300	n.a.	5,000	n.a.
FI	AFLSI	O	Voluntary	24	20	>1000	1,000
FR	FFC	C	Voluntary	120	120	6,000	6,000
	CSNB	S	Voluntary	20	20	60	60
HR	HUP UTKI	O	Voluntary	60	6	500	300
HU	MKSZ	O	Voluntary	8	1	n.a.	n.a.
IE	No	---	---	---	---	---	---
IT	Assocalzaturifici	C	Voluntary	605	605	20,000	20,000
	Uniontessile Confapi	SO	Voluntary	n.a.	n.a.	n.a.	n.a.
	CM	O	Voluntary	n.a.	n.a.	n.a.	n.a.
	CNA Federmoda	SO	Voluntary	n.a.	n.a.	n.a.	n.a.
	Casartigiani	SO	Voluntary	n.a.	n.a.	n.a.	n.a.
	CLAAI	SO	Voluntary	n.a.	n.a.	n.a.	n.a.
LT	No	---	---	---	---	---	---
LU	No	---	---	---	---	---	---
LV	No	---	---	---	---	---	---
MT	No	---	---	---	---	---	---
NL	FNLS	C	Voluntary	35	35	225	225
PL	PIPS	O	Voluntary	61	58	5,173	4,934
PT	APICCAPS	O	Voluntary	422	380	25,000	21,000
RO	FEPAIUS	O	Voluntary	192	25	25,014	n.a.
	Sfera Factor	C	Voluntary	65	65	n.a.	n.a.
SE	SFFI	S	Voluntary	1	1	42	42
	IKEM	O	Voluntary	1,200	3	75,000	200
SI	ZDS-STU	O	Voluntary	n.a.	n.a.	n.a.	n.a.
SK	No	---	---	---	---	---	---
UK	BFA	O	Voluntary	145	29	9,000	2,000

** Domain coverage*

Notes: C = congruence; O = overlap; SO = sectional overlap; S = sectionalism; n.a. = not available (for details, see Table 2).

Source: Eurofound's Network of European Correspondents (2016–2017), administrative data and estimates

Table 17a: Density of employer/business organisations in footwear, 2015–2017

	Employer organisation	Density in sector		Members in largest companies
		Companies	Employees	
AT	FV TBSL	29%	82%	Yes
	BIG	71%	18%	No
BE	FEBIC	n.a.	n.a.	n.a.
BG	No	---	---	---
CY	No	---		---
CZ	No	---		
DE	HDS/L	19%	n.a.	Yes
DK	No	---		
EE	No	---		
EL	ELSEVIE	n.a.	n.a.	Yes
	OVYE	n.a.	n.a.	No
ES	FICE	16%	44%	Yes
	AEC	n.a.	n.a.	Yes
FI	AFLSI	41%	at least 94%	Yes
FR	FFC	48%	48%	Yes
	CSNB	7%	1%	No
HR	HUP UTKI	6%	5%	Yes
HU	MKSZ	<1%	n.a.	No
IE	No	---	---	
IT	Assocalzaturifici	7%	29%	Yes
	Uniontessile Confapi	n.a.	n.a.	No
	CM	n.a.	n.a.	No
	CNA Federmoda	n.a.	n.a.	No
	Casartigiani	n.a.	n.a.	No
	CLAAI	n.a.	n.a.	No
LT	No	---	---	---
LU	No	---	---	---
LV	No	---	---	---
MT	No	---	---	---
NL	FNLS	28%	58%	Yes
PL	PIPS	3%	30%	Yes
PT	APICCAPS	14%	57%	Yes

RO	FEPAIUS	2%	n.a.	Yes
	Sfera Factor	5%	n.a.	Yes
SE	SFFI	3%	16%	Yes
	IKEM	8%	78%	Yes
SI	ZDS-STU	n.a.	n.a.	Yes
SK	No	---	---	---
UK	BFA	15%	53%	Yes

Table 17b: Collective bargaining, consultation and affiliations of employer/business organisations in footwear 2015–2017

	Employer organisation	Collective bargaining*	Collective bargaining coverage**		Consultation /frequency	*National and European affiliations* ***
			Companies	Employees		
AT	FV TBSL	M	24	1,140	n.a.	*WKO*
	BIG	M	60	200-300	Regularly	*WKO*
BE	FEBIC	M	~10	139	n.a.	*VBO-FEB*
BG	No	---	---	---	---	---
CY	No	---	---	---	---	---
CZ	No	---	---	---	---	---
DE	HDS/L	M	n.a.	n.a.	No	---
DK	No	---	---	---	---	---
EE	No	---	---	---	---	---
EL	ELSEVIE	M[a]	0	0	Regularly	CEC
	OVYE	M[a]	0	0	No	*GSEVEE*
ES	FICE	M	3,203	<30,000	Regularly	*CEOE, CEPYME*; CEC
ES	AEC	M	3,203	<30,000	No	---
FI	AFLSI	M	49	>1,000	Ad-hoc	*EK*; CEC
FR	FFC	M	289	7,681	Ad-hoc	*MEDEF*; CEC
FR	CSNB	M	289	7,681	No	---
HR	HUP UTKI	S	6	300	No	*GIC*; EURATEX
HU	MKSZ	No	0	0	No	*MGYOSZ*; (CEC)
IE	No	---	---	---	---	---
IT	Assocalzaturifici	M	n.a.	77,000	Ad-hoc	*Confindustria*; CEC

	Uniontessile Confapi	M	n.a.	n.a.	Yes	*CONFAPI*
	CM	M	n.a.	n.a.	n.a.	*Confartigianato*
	CNA Federmoda	M	n.a.	n.a.	n.a.	*CNA*; ACTE
	Casartigiani	M	n.a.	n.a.	n.a.	---
	CLAAI	M	n.a.	n.a.	n.a.	---
LT	No	---	---	---	---	---
LU	No	---	---	---	---	---
LV	No	---	---	---	---	---
MT	No	---	---	---	---	---
NL	FNLS	M	35	225	Ad-hoc	COTANCE
PL	PIPS	No	0	0	Ad-hoc	CEC
PT	APICCAPS	M	>420	>30,000	Ad-hoc	*CIP*; CEC
RO	FEPAIUS	S	n.a.	530	Regularly	*CNPR*; EURATEX
	Sfera Factor	No	0	0	n.a.	CEC
SE	SFFI	No	0	0	No	*(SN)*; CEC
	IKEM	M	3	170	Ad-hoc	*SN*; Cefic, ECEG
SI	ZDS-STU	M	63	1,219	Ad-hoc	---
SK	No	---	---	---	---	---
UK	BFA	M	26	2,000	Regularly	CEC

** Collective bargaining involvement;** number of companies/employees covered by collective agreements concluded by the employer organisation within the footwear sector; *** national affiliations in italic; [a] collective bargaining involvement until 2009; in case sectoral collective bargaining is to be resumed, this organisation will probably be a party again.*

Notes: S = single-employer bargaining; M = multiemployer bargaining. For the national level, only cross-sectoral (for example, peak-level) associations are listed; for the European level, sectoral associations only. Affiliation in parenthesis means indirect affiliation via higher- or lower-order unit; n.a. = not available.

Source: Eurofound's Network of European Correspondents (2016–2017), administrative data and estimates

Table 18: The system of sectoral collective bargaining, 2016–2017

	Collective bargaining coverage (estimates)	Share of multiemployer bargaining (MEB) in total collective bargaining coverage (estimates)	Extension practices[a]
AT	100%	100%	(2)
BE	100%	100%	2
BG	2%	0%	0
CY	0%	n/a	n/a
CZ	11%	0%	0
DE	>80%	100%	1
DK	n.a.	n.a.	0
EE	0%	n/a	n/a
EL	0%[b]	n/a	n/a
ES	100%	100%	2
FI	100%	100%	2
FR	100%	MEB prevailing	2
HR	20%	0%	0
HU	12%	0%	0
IE	---	---	---
IT	100%	100%	(2)
LT	0%	n/a	n/a
LU	---	---	---
LV	0%	n/a	n/a
MT	---	---	---
NL	60%	100%	0
PL	0%	n/a	n/a
PT	85–90%	100%	2
RO	25%	0%	0
SE	70%	100%	0
SI	100%	100%[c]	2
SK	13%	0%	0
UK	20%–-53%	100%	0

[a] 0 = no practice; 1 = limited/exceptional; 2 = pervasive. Cases of functional equivalents are put in parentheses; [b] sectoral employees are covered only by the provisions of the National General Collective Agreement; [c] = complemented by single-employer bargaining,

Notes: Employees covered as a percentage of the total number of employees in the sector. Extension practices (including functional equivalents to extension provisions, for example obligatory membership and labour court rulings); n.a. = not available, n/a = not applicable.

Source: Eurofound's Network of European Correspondents (2016–2017), administrative data and estimates

Table 19: Tripartite sector-specific boards of public policy (2016–2017)

	Name of the body and scope of activity	Origin	Trade unions participating	Business associations participating
FI	Occupational Safety Sector Group of the Centre for Occupational Safety for the Textile and Shoe Industry – plans and executes training and information campaigns concerning occupational safety in the textile, clothing, leather and footwear industries	Agreement	JHL, TEAM, PRO	YTL, AFLSI, FTF
	National Education and Training Committee for the Textile and Clothing Industry – monitors and evaluates sector-specific education and training and makes development proposals to authorities	Statutory	TEAM, PRO, OAJ	FTF, AFLSI, SY
HR	Sectoral Council for Textile, Footwear, Leather and Rubber Sectors	Agreement	Sindikat TOKG	HUP UTKI

Source: Eurofound's Network of European Correspondents (2016–2017)

Table 20: IndustriAll Europe membership, 2017†

Country	Membership
AT	PRO-GE*, GPA-djp*
BE	FGTB-ABVV*, CSC-ACV*, CGSLB-ACLVB*, (CNE-LBC*), (SETCa-BBTK*)
BG	FOSIL*, FLI Podkrepa
CY	OVIEK-SEK
CZ	OS TOK*
DE	IGBCE*
DK	3F
EE	ETTAF
EL	---
ES	FICA-UGT*, CCOO Industria*, ELA IE
FI	TEAM*, PRO*
FR	FS CFDT*, CGT-THC*, CGT FO PCH*, CMTE CFTC*
HR	Sindikat TOKG*
HU	BDSZ*
IE	---
IT	FILCTEM-CGIL*, FEMCA-CISL*, UILTEC-UIL*
LT	LPIPS SOLIDARUMAS
LU	---
LV	---
MT	---

NL	FNV PI*, CNV*
PL	FNSZZ PL
PT	FESETE*, Sindeq*, SIMA*
RO	CONFPELTEX*, PF*
SE	IF Metall*, Unionen*
SI	STUPIS*
SK	IOZ*
UK	Community*

*† Membership list confined to the sector-related associations of the countries under consideration; affiliation in parentheses means indirect affiliation via higher-order unit; * involved in sector-related collective bargaining.*

Source: Eurofound's Network of European Correspondents (2016–2017).

Table 21: CEC Membership, 2017†

Country	CEC
AT	---
BE	---
BG	---
CY	---
CZ	---
DE	---
DK	---
EE	---
EL	ELSEVIE*
ES	FICE*
FI	AFLSI*
FR	FFC*
HR	---
HU	(MKSZ)
IE	---
IT	Assocalzaturifici*
LT	---
LU	---
LV	---
MT	---
NL	---
PL	PIPS
PT	APICCAPS*
RO	Sfera Factor
SE	SFFI

SI	---
SK	---
UK	BFA*

*[†] Affiliation in parentheses means indirect affiliation via lower-order unit; * involved in sector-related collective bargaining.*

Source: Eurofound's Network of European Correspondents (2016–2017)

Table 22: Trade unions listed in the national reports but not included in this study

Country	Trade union	Reason for non-inclusion
CY	SEVETTYK-PEO – Cyprus Union of Workers in Industry, Trade, Press and Printing and General Services	Neither affiliated to IndustriAll Europe nor involved in sector-related collective bargaining
LV	LIA – Latvian Industrial Workers Trade Union	No members in the footwear sector
LT	LLPPS – Lithuanian Trade Union of Manufacturing Workers	No members in the footwear sector

Table 23: Employer organisations listed in the national reports but not included in this study

Country	Employer organisation	Reason for non-inclusion
BG	BULFFHI – Branch Association of Leather, Furriers, Footwear and Haberdashery Industries	Neither affiliated to CEC nor involved in sector-related collective bargaining
CZ	COKA – Czech Footwear and Leather Association	Neither affiliated to CEC nor involved in sector-related collective bargaining
CZ	ATOK – Association of Textile, Clothing and Leather Industries	No members in the footwear sector
DK	DS – Shoemakers' Guild in Denmark	Neither affiliated to CEC nor involved in sector-related collective bargaining
LV	VRUA – Association of Textile and Clothing Industry	No members in the footwear sector
LT	LATIA – Lithuanian Apparel and Textile Industry Association	Neither affiliated to CEC nor involved in sector-related collective bargaining

Table 24: Contributors from Eurofound's Network of European Correspondents

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Annex 2: List of abbreviations and organisations

Country	Abbreviation	Full Name
AT	BIG	Federal Guild of Health Professions
	FV TBSL	Austrian Association of the Textile, Clothing, Shoe and Leather Industry
	GPA-djp	Union of Salaried Employees, Graphical Workers and Journalists
	ÖGB	Austrian Trade Union Federation
	PRO-GE	Production Trade Union
	WKO	Austrian Federal Economic Chamber
BE	CGSLB-ALCVB	Federation of Liberal Trade Unions of Belgium
	CNE-LBC	National Federation of White-Collar Workers
	CSC-ACV	Confederation of Christian Trade Unions
	FEBIC	Belgian Federation of the Footwear Industry
	FGTB-ABVV	Belgian General Federation of Labour
	SETCa-BBTK	Belgian Union of White-collar, Technical and Executive Employees
	VBO-FEB	Belgian Federation of Employers
BG	CITUB	Confederation of Independent Trade Unions in Bulgaria
	CL Podkrepa	Confederation of Labour ‘Podkrepa’
	FLI Podkrepa	Federation of Light Industry ‘Podkrepa’
	FOSIL	Federation of the Independent Trade Union Organisations in Light Industry
CY	OVIEK	Federation of Industrial Workers of Cyprus
	SEK	Cyprus Workers’ Federation
CZ	CMKOS	Czech-Moravian Confederation of Trade Unions
	OOPOP Prabos	Trade Union Organisation of Footwear Industry Workers on Prabos Plus
	OS TOK	Trade Union of Workers in Textile, Clothing and Leather Industry of Bohemia and Moravia
DE	DGB	Confederation of German Trade Unions
	HDS/L	Federal Association of the Footwear and Leather Goods Industry
	IGBCE	Mining, Chemicals and Energy Industrial Union
DK	3F	Confederation of Danish Employers
	LO	Danish Confederation of Trade Unions
EE	AEITU	Association of Estonian Industry Trade Unions
	EAKL	Confederation of Estonian Trade Unions
	ETTAF	Federation of Estonian Industry Workers’ Trade Unions
EL	ELSEVIE	Hellenic Association of Footwear Manufacturers and Exporters
	GSEE	Greek General Confederation of Labour
	GSEVEE	General Confederation of Greek Small Businesses and Trades

	OEKIDE	Federation of Workers in the Textile, Clothing and Leather Industry
	OVYE	Federation of Footwear Manufacturers of Greece
ES	AEC	Spanish Association of the Footwear Components Industry
	CCOO	Trade Union Confederation of Workers' Commissions
	CCOO Industria	Trade Union Confederation of Workers' Commissions –
	CEOE	Spanish Federation of Employer Organisations
	CEPYME	Spanish Confederation of Small and Medium-sized Enterprises
	ELA IE	Basque Workers' Solidarity
	FICA-UGT	Industry Federation and Agricultural Workers of the General Workers' Confederation
	FICE	Spanish Federation of the Footwear Industry
	UGT	General Workers' Confederation
FI	AFLSI	Association of Finnish Leather and Shoe Industry
	EK	Confederation of Finnish Industries
	PRO	Trade Union PRO
	SAK	Central Organisation of Finnish Trade Unions
	SASK	Trade Union Solidarity Centre of Finland
	STTK	Finnish Confederation of Professionals
	TEAM	Industrial Union TEAM
	TP	Industrial Employees
FR	CFDT	French Democratic Confederation of Labour
	CFE-CGC	French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	CFTC	French Christian Workers' Confederation
	CGT	General Confederation of Labour
	CGT-FO	General Confederation of Labour – Force ouvrière
	CGT-FO PCH	Federation of Pharmacy Trades and Laboratories of Analysis and Medical Biology, Leather and Clothing of the General Confederation of Labour – Force ouvrière
	CGT-THC	Textile, Clothing and Leather Federation of the General Confederation of Labour
	CMTE CFTC	Chemicals, Mining, Textiles and Energy Federation of the French Christian Workers' Confederation
	CFE-CGC	Tanning and Leather Union of the French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	CSNB	National Federation of Bootmakers
	FFC	French Federation of the Footwear Industry
	FS-CFDT	Services Federation of the French Democratic Confederation of Labour
	MEDEF	French Business Confederation

HR	GIC	Global Impact Croatia
	HUP UTKI	Croatian Employers' Association of the Textile and Leather Industry
	NHS	Independent Trade Union of Croatia
	Sindikat TOGK	Trade Union of Textile, Footwear, Leather and Rubber Sectors of Croatia
HU	BDSZ	Mining, Energy and Industry Workers' Trade Union Confederation
	MASZSZ	Hungarian Trade Union Confederation
	MGYOSZ	Confederation of Hungarian Employers and Industrialists
	MKSZ	Association of the Hungarian Light Industry
IE	---	---
IT	Assocalzaturifici	Italian Footwear Association
	Casartigiani	Autonomous Confederation of Artisan Unions
	CGIL	General Confederation of Italian Workers
	CISL	Italian Confederation of Workers' Unions
	CLAAI	Confederation of Free Italian Artisan Associations
	CM	National Federation of Artisans in the Fashion Sector
	CNA	National Confederation of Artisans and Small and Medium-sized Enterprises
	CNA Federmoda	National Confederation of Artisans and Small and Medium-sized Enterprises – Federmoda
	CONFAPI	Italian Confederation of Private Small and Medium Enterprises
	Confartigianato	General Italian Confederation of Artisans
	Confindustria	General Confederation of Italian Industry
	FEMCA-CISL	Federation of Energy, Fashion, Chemical and Related Sector Workers
	FILCTEM-CGIL	Italian Federation of the Chemical, Textile, Energy and Manufacturing Workers
	UIL	Union of Italian Workers
	UILTEC-UIL	Italian Union of Textile, Energy and Chemical Workers
	Uniontessile Confapi	National Union of Small and Medium Enterprises in the Textiles and Clothing Industry
LT	LPIPS Solidarumas	Lithuanian Trade Union of Industry Workers 'Solidarity'
	LTU Solidarumas	Lithuania Trade Union 'Solidarity'
LU	---	---
LV	---	---
MT	---	---
NL	CNV	Christian Trade Union Federation
	FNV	Federation of Dutch Trade Unions
	FNV PI	Federation of Dutch Trade Unions Processing Industry
	FNLS	Federation for Leather Products and Shoes

PL	FNSZZ PL	Federation of Independent Self-governing Trade Unions of the Light Industry
	OPZZ	All-Poland Alliance of Trade Unions
	PIPS	Polish Chamber of Shoe and Leather Industry
PT	APICCAPS	Portuguese Footwear, Components and Leather Goods Manufacturers’ Association
	CESP	Union of Commerce, Office and Service Workers of Portugal
	CGTP-IN	General Confederation of Portuguese Workers
	FESETE	Federation of Service Workers’ and Technicians’ Unions
	SIMA	Union of Metal and Allied Industries
	Sindeq	Democratic Union of Energy, Chemical, Textile and Other Industries
	SITESE	Union of Workers and Qualified Staff in Services
	UGT	General Union of Workers
RO	CNPR	National Confederation of Romanian Employers
	CNS Cartel Alfa	National Trade Union Confederation Cartel Alfa
	CNSLR Fratia	National Confederation of Free Trade Union Fraternity of Romania
	CONFPELTEX	Federation of Workers of the Light Industry
	FEPAIUS	Textile, Clothing and Leather Employers’ Federation
	PF	Federation Peltricontex-Fratia
	Sfera Factor	Romanian Leather Manufacturers’ Association
SE	IF Metall	Union of Metalworkers
	IKEM	Innovation and Chemical Industries in Sweden
	Ledarna	Confederation of Executives and Managerial Staff
	LO	Swedish Trade Union Confederation
	SFFI	Swedish Federation of the Footwear Industry
	SN	Confederation of Swedish Enterprise
	TCO	Swedish Confederation of Professional Employees
	Unionen	Union of White-collar Workers
SI	STUPIS	Slovenian Trade Union of Textile and Leather Processing Industries
	ZDS-STU	Slovenian Employers’ Association – Section for the Textile and Leather Industry
	ZSSS	Association of Free Trade Unions of Slovenia
SK	IOZ	Integrated Trade Union Association
	KOZ SR	Central Confederation of Trade Unions
UK	BFA	British Footwear Association
	Community	General Trade Union
	GFTU	General Federation of Trade Unions
	TUC	Trades Union Congress
EU	ACTE	European Textile Collectivities Association

	CEC	European Confederation of the Footwear Industry
	CEFIC	European Chemical Industry Council
	COTANCE	European Confederation of National Associations of Tanners and Dressers
	ECEG	European Chemical Employers Group
	EFBWW	European Federation of Building and Woodworkers
	EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions
	EFJ	European Federation of Journalists
	EPSU	European Federation of Public Service Unions
	ETF	European Transport Workers' Federation
	EURATEX	European Apparel and Textile Organisation
	Eurocadres	Council of European Professional and Managerial Staff
	IndustriAll Europe	IndustriAll European Trade Union
	UNI Europa	Union Network International – Europe

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