European Foundation for the Improvement of Living and Working Conditions

Representativeness of the European social partner organisations: Steel industry

Objectives of study

Economic background

National level of interest representation

European level of interest representation

Commentary

References

Annex: List of abbreviations

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This report sets out to provide the necessary information for evaluating sectoral social dialogue in the steel industry. The report first outlines the industry's economic background and then examines the social partner organisations in all of the EU Member States (with the exception of Ireland), exploring membership levels, collective bargaining and public policy, and national and European affiliations. Finally,the report analyses the relevant European organisations, focusing in particular on membership composition and their capacity to negotiate. The aim of the EIRO representativeness studies is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. The impetus for these studies arises from the goal of the European Commission to recognise the representative social partner organisations to be consulted under the EC Treaty provisions. Hence, this study is designed to provide the basic information required to establish and evaluate sectoral social dialogue.

Objectives of study

The goal of this **representativeness** study is to identify the relevant national and supranational associational actors – that is, the **trade unions** and **employer organisations** – in the field of industrial relations in the steel industry, and to show how these actors relate to the industry's European interest associations of labour and business. The impetus of this study and similar studies in other sectors arises from the aim of the **European Commission** to identify the representative social partner organisations to be consulted under the EC Treaty provisions. Hence, this study seeks to provide basic information needed to set up sectoral **social dialogue**. The effectiveness of the European social dialogue depends on whether its participants are sufficiently representative in terms of the sector's relevant national industrial relations actors across the EU Member States. Therefore, only European organisations that meet this precondition of representativeness will be admitted to the European social dialogue.

Against this background, the study will first identify the relevant national social partner organisations in the steel industry, subsequently analysing the structure of the industry's relevant European organisations, in particular their membership composition. This requires that the unit of analysis be clarified at both the national and European level of interest representation. The study includes only organisations whose membership domain is 'sector related' (see below). At both national and European levels, a multiplicity of associations exists, which are not considered as social partner organisations as they do not essentially deal with industrial relations. This creates a need for clear-cut criteria that will enable analysis to distinguish the social partner organisations from other associations.

As regards the national-level associations, classification as a sector-related social partner organisation implies fulfilling one of two definitional criteria: the associations must be either a party to 'sector-related' **collective bargaining** or a member of a 'sector-related' European association of business or labour that is on the Commission's list of European social partner organisations consulted under Article 138 of the EC Treaty, and/or that participates in the sector-related European social dialogue; the association may also have requested to be included on the Commission's list to be consulted under Article 138. Taking affiliation to a European association as a sufficient criterion for regarding a national organisation as a relevant actor implies that such an organisation may not be involved in industrial relations in its own country. Hence, this selection criterion may look odd at first glance. However, if a national organisation is a member of a European association, it may become involved in industrial relations matters through its membership of this association. Aside from this, it is important to know whether the national affiliates to the European associations are engaged in industrial relations in their respective country. Affiliation to a European social partner organisation and/or involvement in national collective bargaining are of utmost importance to the European social dialogue, since these are the two constituent mechanisms that can systematically connect the national and European level.

As far as the selection criteria for the European organisations are concerned, any other sector-related European association that has sector-related national actors of relevance (as defined above) under its umbrella are considered; this is in addition to the European organisations in the above narrow sense. Hence, the aim of identifying the relevant sector-related national and European social partner organisations involves both a 'top-down' and 'bottom-up' approach.

Definitions

For the purpose of this study, the steel industry is defined in terms of the Statistical Classification of Economic Activities in the European Community (*Nomenclature statistique des activités économiques dans la Communauté européenne*, NACE) (revision 1.1), to ensure the cross-national comparability of the findings. More specifically, steel manufacturing is defined as embracing NACE 27.1 (manufacture of basic iron, steel and ferro-alloys), 27.2 (manufacture of tubes), and 27.3 (other first processing of iron and steel). These categories all fall under the broader metal and machinery sector.

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

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

At European level, the European Commission established a European Social Dialogue Committee for the steel industry in 2006. The European Coal and Steel Community (ECSC), set up in 1951 and dissolved in 2002, can be seen as the predecessor of the European social dialogue for the steel industry, since it was an important milestone in the development of European social partnership (see **EU0606059I**). Hence, the steel industry helped to pioneer social dialogue in Europe. The European Metalworkers' Federation (EMF) on the employee side and the European Confederation of Iron and Steel Industries (Eurofer) on the employer side participate in European social dialogue for the steel industry. These two European organisations are the reference associations for analysing the European level, and affiliation to either of these European organisations is a sufficient criterion for classifying a national association as a relevant social partner organisation. However, it should be noted that the constituent criterion is one of sector-related membership. This is particularly important in the case of EMF due to its multi-sectoral domain. Thus, this study will include only those organisations affiliated to EMF whose domain relates to the steel industry.

Collection of data

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

In principle, quantitative data may stem from three sources:

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

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

Structure of report

The report consists of three main parts, beginning with a brief summary of the steel industry's economic background. The report then analyses the relevant social partner organisations in all the EU Member States, with the exception of Ireland, which is excluded from consideration as no business activities are reported within the area of the steel industry as demarcated above. The study therefore covers 26 European countries in total. The third part of the analysis considers the representative associations at European level. Each section will contain a brief introduction explaining the concept of representativeness in greater detail, followed by the study findings. As representativeness is a complex issue, it requires separate consideration at national and European level for two reasons. Firstly, the method applied by national regulations and practices to capture representativeness has to be taken into account. Secondly, the national and European organisations differ in their tasks and scope of activities. The concept of representativeness must therefore be suited to this difference.

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

Economic background

From its beginnings in the middle of the 19th century, the iron and steel industry developed into a prime driver of industrialisation. This originated from its function as a producer of important intermediate products for many other industries – a factor which still gives the industry a key role in the economy of several countries. The economic characteristics of steel manufacturing include high capital requirements, a strong vertical integration of the distinct production steps, and the importance of economies of scale for efficiency. Historically, this also paved the way for backward integration into mining and other raw materials industries. This dependence on natural resources explains why the steel industry is still spread rather unevenly across the regions of

Europe. However, modern transport systems have since altered this dependence. The characteristics of steel production have also resulted in a high and continued process of economic concentration in the industry. The properties of the workforce mirror the archetype of industrial manufacturing: the steel industry is predominantly comprised of blue-collar male workers; this is mainly due to the heavy nature of the production work (see **TN0412101S**).

In recent decades, the European steel industry has undergone considerable restructuring, caused by privatisation, internationalisation, continued concentration and technological changes. This process has led to considerable job losses in the industry. Tables 1 and 2 give an overview of the industry's development from the mid-1990s to the mid-2000s, presenting a number of indicators that are significant to industrial relations and social dialogue. The figures confirm the aforementioned trends and characteristics. In general, employment has declined – albeit with notable differences in the pace of decline across countries. Whereas employment in the industry remained almost stable in Finland and even increased in Latvia, it dropped by more than two thirds in Poland. Available data suggest that the employment composition by gender usually changed to the disadvantage of women. In the period 1995–2007, an example of this change can be seen in Poland, where women's share of total employment in the industry fell from about 23% to approximately 16%. France is the only country that saw a substantial growth in female employment: in 2006, the level of female employment in the industry stood at around 24% in France, compared with less than 5% in Spain and 17% in Denmark and Sweden. Table 2 also underlines the considerable differences in the relative weight of the industry across countries. In 2006, sectoral employment as a percentage of total employment ranged from approximately 1% in countries such as Malta and Slovakia to 0.06% or lower in countries such as Cyprus, Estonia and Portugal.

Table 1: Total employment in steel industry, 1995 and 2006

	Number of employers		Total employment		Male employment		Female employment	
	1995	2006	1995	2006	1995	2006	1995	2006
AT	n.a.	50[a]	n.a.	20,638	n.a.	18,503	n.a.	1,719
BE	n.a.	15	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
BG	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CY	1	1[c]	45	23[c]	37	18[c]	8	5[c]
CZ	139[k]	259[k]	87,300[k]	50,100[k]	66,300[k]	41,300[k]	21,000[k]	8,800[k]
DE	n.a.	1,673[c]	n.a.	139,000	n.a.	122,000	n.a.	10,000
DK	n.a.	83	5,360	2,723	4,572	2,274	788	449
EE	n.a.	3	n.a.	140[d]	n.a.	n.a.	n.a.	n.a.
EL	n.a.	162	n.a.	9,016	n.a.	8,119	n.a.	1,059
ES	426	517	38,026	37,528	n.a.	26,140	n.a.	1,290
FI	56[a]	68[a]	9,357	9,326	7,770	7,825	1,587	1,501
FR	83	86	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
HU[e]	n.a.	46	n.a.	8,671	n.a.	n.a.	n.a.	n.a.

	Number of employers		Total employment		Male employment		Female employment	
	1995	2006	1995	2006	1995	2006	1995	2006
IT	n.a.	1,356[a]	n.a.	76,588[f]	n.a.	70,896[f]	n.a.	5,692[f]
LT	n.a.	37[g,h]	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LU	9	4[g]	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LV	3[g]	11[a]	5,349[g]	8,766	n.a.	n.a.	n.a.	n.a.
MT	n.a.	≤10[g]	n.a.	1,910[g]	n.a.	1,890[g]	n.a.	20[g]
NL	n.a.	90[a]	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
PL	24	30[g]	93,217	24,284[g]	71,991	24,284[g]	21,226	4,755[g]
PT	n.a.	n.a.	5,260[l]	2,866[f]	4,739[l]	2,336[f]	521[l]	530[f]
RO	n.a.	127[a]	n.a.	43,134	n.a.	n.a.	n.a.	n.a.
SE	171	145	28,554	24,368	24,295	20,346	4,259	4,022
SI	n.a.	22	5,898	3,360	4,913	2,853	985	507
SK	18[b]	122	22,215[b]	21,183	n.a.	n.a.	n.a.	n.a.
UK	n.a.	287[i,j]	n.a.	67,506[i]	n.a.	60,594[i]	n.a.	6,912[i]

Note: [a] companies; [b] 1996; [c] 2005; [d] NACE 27.2-27.4; [e] companies with at least 5 employees; [f] 2001; [g] 2007; [h] basic metals; [i] 2008; [j] companies with at least 2 employees; [k] NACE 27; [l] 1991

n.a. = not available

Source: EIRO national centres, 2008

Table 2: Total employees in steel industry, 1995 and 2006

	Total employees		Male employees		Female employees		Total sectoral employment as % of total employment in economy		Total sectoral employees as % of total employees in economy	
	1995	2006	1995	2006	1995	2006	1995	2006	1995	2006
AT	n.a.	20,627	n.a.	18,496	n.a.	1,712	n.a.	0.50	n.a.	0.61
BE	23,268[a]	18,287	n.a.	17,194	n.a.	1,093	n.a.	0.50	n.a.	0.6
BG	19,077	11,917	13,362	8,917	3,715	3,000	n.a.	n.a.	1.0	0.52
CY	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.02	0.01[b]	n.a.	n.a.
CZ	87,100[g]	49,300[g]	66,200[g]	40,500[g]	20,900[g]	8,800[g]	1.76[g]	1.04[g]	2.04[g]	1.22[g]
DE	n.a.	158,570	n.a.	140,721	n.a.	17,849	n.a.	0.4	n.a.	0.6
DK	5,341	2,700	4,556	2,251	785	449	0.2	0.1	0.3	0.1

	Total employees		Male employees		Female employees		Total sectoral employment as % of total employment in economy		Total sectoral employees as % of total employees in economy	
	1995	2006	1995	2006	1995	2006	1995	2006	1995	2006
EE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.02	n.a.	n.a.
EL	n.a.	8,891	n.a.	7,832	n.a.	1,059	n.a.	0.2	n.a.	0.3
ES	22,400	26,180	n.a.	24,930	n.a.	1,250	0.27	0.19	n.a.	n.a.
FI	9,353	9,309	7,766	7,810	1,587	1,499	0.5	0.6	0.4	0.5
FR	68,137	61,995	60,453	47,359	7,684	14,636	n.a.	n.a.	0.34	0.23
HU[c]	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.3	n.a.	n.a.
IT	n.a.	74,538[d]	n.a.	69,246[d]	n.a.	5,292[d]	n.a.	0.33	n.a.	0.45
LT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LU	7,131	4,770	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	3.61	1.5
LV	5,217[e]	8,706	n.a.	n.a.	n.a.	n.a.	0.69[e]	0.91	0.68[e]	0.9
MT	n.a.	1,900[e]	n.a.	1,880[e]	n.a.	20[e]	n.a.	1.2	n.a.	1.4
NL	n.a.	12,700	n.a.	11,800	n.a.	900	n.a.	n.a.	n.a.	n.a.
PL	93,185	29,013[e]	71,960	24,266[e]	21,225	4,747[e]	0.6	0.2[e]	0.9	0.3[e]
PT	5,033[h]	2,713[d]	4,531[h]	2,220[d]	502[h]	493[d]	0.13[h]	0.06[d]	0.16[h]	0.07[d]
RO	n.a.	43,107	n.a.	n.a.	n.a.	n.a.	n.a.	0.5	n.a.	0.9
SE	28,554	24,368	24,295	20,346	4,259	4,022	0.74	0.56	0.74	0.56
SI	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.80	0.42	0.8	0.42
SK	22,132[a]	20,900	17,998[a]	17,058	4,134[a]	3,842	1.05[a]	0.96	1.12[a]	1.0
UK	n.a.	64,645[f]	n.a.	57,733[f]	n.a.	6,912[f]	n.a.	0.23[f]	n.a.	0.26[f]

Note: [a] 1996; [b] 2005; [c] companies with at least 5 employees; [d] 2001; [e] 2007; [f] 2008; [g] NACE 27; [h] 1991

n.a. = not available

Source: EIRO national centres, 2008

National level of interest representation

In many of the EU Member States, statutory regulations explicitly refer to the concept of representativeness when allotting certain rights of interest representation and public governance to trade unions and/or employer organisations. The most important rights addressed by such regulations include the formal recognition as a party to collective bargaining, the extension of the scope of a multi-employer collective agreement to employers not affiliated to the signatory employer organisation, and participation in public policy and tripartite bodies of social dialogue. Under these circumstances, representativeness is normally captured as the organisations' membership strength. For instance, statutory extension provisions usually allow for extending a collective agreement to unaffiliated employers only when the signatory trade union and employer organisation represent – in other words organise – 50% or more of the employees within the agreement's domain (see Institut des Sciences du Travail (IST), 2001).

As outlined above, the representativeness of the national social partner organisations is of interest here in terms of the capacity of their European umbrella organisations for participation in the European social dialogue. Hence, the role of the national actors in collective bargaining and public policymaking constitutes another important component of representativeness. The effectiveness of the European social dialogue tends to increase with the growing ability of the national affiliates of the European organisations to regulate the employment terms and to influence national public policies affecting the sector. As cross-national comparative analysis shows, there is generally a positive correlation between the bargaining role of the social partners and their involvement in public policy (see Traxler, 2004). Social partner organisations that are engaged in multi-employer bargaining are incorporated in state policies to a significantly greater extent than their counterparts in countries where multi-employer bargaining is lacking. The explanation for this is that only multi-employer agreements matter in macroeconomic terms, in terms of setting an incentive for governments to persistently seek cooperation with 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 consequence, the basis for generalised tripartite policy concertation will be absent.

The upshot of these considerations is that representativeness is a multi-dimensional concept that embraces three basic elements:

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

Membership domains and strength

The membership domain of an organisation, as formally established by its constitution or name, distinguishes its potential members from other groups that the organisation does not claim to represent. As already explained, this report considers only organisations whose domain relates to the steel industry. However, there is insufficient room in this report to delineate the domain demarcations of all of 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. As regards membership strength, a differentiation exists between strength in terms of the absolute number of members and strength in relative terms. The research usually refers to relative membership strength as the density – that is, the ratio of actual to potential members.

Furthermore, a difference also arises between trade unions and employer organisations in relation to measuring membership strength. Trade union membership simply means the number of unionised persons. In addition to taking the total membership of a trade union as an indicator of its strength, it is also reasonable to break down this membership total according to gender. However, measuring the membership strength of employer organisations is more complex since they organise collective entities, namely companies that employ employees. In this case, two possible measures of membership strength may be used – one referring to the companies themselves, and the other to the employees working in the member companies of an employer organisation.

For a sectoral study such as this, measures of membership strength of both the trade unions and employer organisations also have to consider how the membership domains relate to the sector. If a domain is not congruent with the sector demarcation, the organisation's total density (the density referring to its overall domain) may differ from its sector-specific density (the organisation's density referring to the sector). As a result, three measures of density should be distinguished. Firstly, domain density refers to the ratio of the total membership to potential membership, as demarcated by the membership domain. Secondly, sector density measures sectoral membership relative to the total number of employees or companies in the sector. Thirdly, sectoral domain density captures sectoral membership in relation to potential membership within the sector, as demarcated by the domain. The second measure of density differs from the third if the domain of an organisation includes only a certain part of the sector in question. This report will first present the data on the domains and membership strength of the trade unions and will then consider those of the employer organisations.

Trade unions

Table 3 presents the data on the trade unions' domains and membership strength. The table lists all of the trade unions meeting at least one of the two criteria for classification of a sector-related social partner organisation, as defined earlier. Of the 86 trade unions listed in Table 3, overlapping domains account for 50 of the unions, while sectionalist overlaps pertain to 34 of the unions and sectionalism to two of those listed. There is no trade union with a domain congruent with the sector definition. This underlines the fact that statistical definitions of business activities differ somewhat from the lines along which employees identify common interests and group together in trade unions.

The standard case of an overlapping domain is represented by an industrial trade union that embraces the steel industry in the broad sense. Sectionalist overlaps emanate from specialisation in certain employee groups of cross-sectoral incidence, which are then usually organised by the respective trade unions also across sectors. Typical examples of sectionalist overlaps are trade unions that specifically represent white-collar employees or blue-collar employees. Sectionalist overlaps based on specialisation in certain occupations – such as those of engineers – are rather rare and can be found only in the Nordic countries. In comparison to many other sectors, the trade union systems are highly concentrated in the steel industry. In 10 of the 26 countries under consideration, there are no more than two sector-related trade unions. As a result of this high degree of concentration, the trade unions cooperate rather than compete in countries where a multi-union system exists. In matters of collective bargaining and participation in public policy, rivalries are reported in Hungary, Poland, Portugal, Romania and Spain.

Table 3: Interest representation of trade unions in steel industry, 2006–2007

Country	Type of membership [a]	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	*National* and European affiliations [c]
			Members	Members in sector	Female membership (% of total membership) [b]	Domain	Sector (sectoral domain)			
AT										
GMTN	Vol.	SO	220,000[d]	11,000	14.5%[d]	n.a.	55% (75%)	Yes	Yes	*ÖGB*, EFFAT, EMCEF, EMF, ETUF:

Country	Type of membership [a]	Domain coverage	Membership			Density (%)		Collective bargaining	Con-sultation	*National* and European affiliations [c]
			Members	Members in sector	Female member-ship (% of total member-ship) [b]	Dom-ain	Sector (sectoral domain)			
										TCL
GPA-DJP	Vol.	SO	249,500[d]	n.a.	43.2%[d]	20%	n.a. (n.a.)	Yes	Yes	*ÖGB*, UNI-Europa, EFFAT, EMCEF, EPSU, Euro-cadres,
BE										
ABVV-Metaal	Vol.	SO	90,000	2,500	n.a.	n.a.	17% (17%)	Yes	Yes	*ABVV-FGTB*, EMF
MWB-FGTB	Vol.	SO	n.a.	n.a.	n.a.	n.a.	n.a. (n.a.)	Yes	Yes	*ABVV-FGTB*, EMF
ACV/ CSC-Metaal	Vol.	SO	190,000	n.a.	n.a.	n.a.	n.a. (n.a.)	Yes	Yes	*ACV-CSC*, EMF
SETCa-BBTK	Vol.	SO	360,000	n.a.	n.a.	n.a.	n.a. (n.a.)	Yes	Yes	*ABVV-FGTB*, EMF
LBC-NVK	Vol.	SO	300,000	1,300	59%	n.a.	7.5% (7.5%)	Yes	Yes	*ACV-CSC*, EMF
CNE-GNC	Vol.	SO	150,000	n.a.	n.a.	n.a.	n.a. (n.a.)	Yes	Yes	*ACV-CSC*, EMF
ACLVB-CGSLB	Vol.	O	220,000	600	n.a.	n.a.	7.5% (7.5%)	Yes	Yes	EMF
BG										
Metalizy	Vol.	O	7,387	4,092	80%	n.a.	34.3% (34.3%)	Yes	No	*CITUB*, EMF
Metallurgy	Vol.	O	3,516	2,751	30%	n.a.	23.1% (23.1%)	Yes	No	*CL Pod-krepa*, EMF
TUFOEMI	Vol.	O	2,169	50	15%	n.a.	0.4% (57.8%)	Yes	No	*CITUB*, EMF
CY										
OBIEK	Vol.	O	8,875	n.a.	30%	n.a.	n.a.	Yes	No	*SEK*,

Country	Type of membership [a]	Domain coverage	Membership			Density (%)		Collective bargaining	Con-sultation	*National* and European affiliations [c]
			Members	Members in sector	Female member-ship (% of total member-ship) [b]	Dom-ain	Sector (sectoral domain)			
							(n.a.)			EMF
SEMMHK	Vol.	O	3,665	n.a.	10%	n.a.	n.a. (n.a.)	Yes	No	*PEO*
CZ										
OS KOVO	Vol.	O	171,250	17,370	n.a.	37%	37% (37%)	Yes	Yes	*ČMKOS*, EMF
DE										
IG Metall	Vol.	O	2,306,283	80,120[e]	n.a.	n.a.	n.a. (n.a.)	Yes	Yes	*DGB*, EMF
DK										
3F	Vol.	SO	341,672	n.a.	33.2%	75%	70% (100%)	Yes	No	*LO*, EFBWW, EFFAT, ETF, UNI-Europa, EPSU, EMF[e]
Dansk Metal	Vol.	O	132,113	600	4.7%	80%	82% (82%)	Yes	No	*LO*, EFBWW, ETF, UNI-Europa, EPSU, EMF[e]
DEF	Vol.	SO (OC)	29,769	200	0.9%	70%	7.4% (80%)	Yes	No	*LO*, EMCEF, EFBWW, UNI-Europa, EMF[e]
HK	Vol.	SO	329,679	n.a.	74.2%	50%	<10% (45%–50%)	Yes	No	*LO*, ETF, UNI-Europa, EMF[e]
TL	Vol.	SO (OC)	27,700	n.a.	44.5%	n.a.	<5% (n.a.)	Yes	No	*LO*, UNI-Europa, EPSU, EMF[e]
IDA	Vol.	SO (OC)	43,475	71	17.5%	60%	26% (58%)	No	No	EMF
EE										

Country	Type of membership [a]	Domain coverage	Membership			Density (%)		Collective bargaining	Con-sultation	*National* and European affiliations [c]
			Members	Members in sector	Female member-ship (% of total member-ship) [b]	Dom-ain	Sector (sectoral domain)			
EMAF	Vol.	O	2,050	n.a.	30%	6%	n.a. (n.a.)	Yes	Yes	*EAKL*
EL										
POEM	Vol.	O	30,000	n.a.	10%	25%	30.7% (n.a.)	Yes	No	*GCLG*, EMF
ES										
CC.OO-FM	Vol.	O	166,370	n.a.	9.75%	11.46%	n.a. (n.a.)	Yes	Yes	*CC.OO*, EMF
MCA-UGT	Vol.	O	138,000	n.a.	n.a.	9.3%	n.a. (n.a.)	Yes	Yes	*UGT*, EMF
ELA-Metala	Vol.	SO	31,203	n.a.	16%	19%	n.a. (n.a.)	Yes	Yes	*ELA-STV*, EMF
USO	Vol.	O	121,389	n.a.	n.a.	n.a.	n.a. (n.a.)	Yes	Yes	
CIG-Metal	Vol.	SO	n.a.	n.a.	n.a.	n.a.	n.a. (n.a.)	Yes	Yes	*CIG*
LAB-FI	Vol.	O	13,450	n.a.	n.a.	n.a.	n.a. (n.a.)	Yes	Yes	*LAB*
FI										
TEK	Vol.	SO (OC)	68,000	700	19%	70%	8% (70%)	Yes[g]	No	*AKAVA*, EMF, EMCEF, UNI-Europa
SA	Vol.	SO (OC)	32,200	400	4%	88%	4% (98%)	Yes	No	*SAK*, EMF, EMCEF, UNI-Europa, BWI, EFBWW
UIL	Vol.	SO (OC)	73,000	1,200	14%	70%	13% (70%)	Yes[f]	No	*AKAVA*, EMF, EMCEF, UNI-Europa
MLM	Vol.	O	167,300	6,000	20%	88%	95% (95%)	Yes	Yes	*SAK*, EMF
TU	Vol.	SO	125,000	900	49%	79%	10% (82%)	Yes	No	*STTK*, EFFAT,

Country	Type of membership [a]	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	*National* and European affiliations [c]
			Members	Members in sector	Female membership (% of total membership) [b]	Domain	Sector (sectoral domain)			
										EMF, EMCEF, ETF, ETUF: TCL, UNI-Europa, EFBWW
FR										
FTM-CGT	Vol.	O	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	*CGT*, EMF
FO Metaux	Vol.	O	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	*FO*, EMF
FM-CFTC	Vol.	O	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	*CFTC*, EMF
FNTE-CGT	Vol.	SO	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	*CGT*, EMF
FO Défense	Vol.	SO	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	*FO*, EMF
FGMM-CFDT	Vol.	O	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	*CFDT*, EMF
CFDT-FEAE	Vol.	SO	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	*CFDT*, EMF
CFE-CGC	Vol.	SO	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	*CGC*
HU	–	–	–	–	–	–	–	–	–	–
VASAS	Vol.	O	22,775	3,598	n.a.	10%	41.5% (n.a.)	Yes	Yes	*MSZOSZ*, EMF
FGMOS	Vol.	O	6,995	310	n.a.	3.1%	3.5% (n.a.)	Yes	Yes	*MOSZ*
LIGA VFS	Vol.	O	11,286	196	n.a.	4.9%	2.3% (n.a.)	Yes	Yes	*LIGA*
IT										
FIOM	Vol.	O	363,326	n.a.	n.a.	14.6%	n.a. (n.a.)	Yes	Yes	*CGIL*, EMF
FIM	Vol.	O	200,848	6,336	16.5%	8.1%	8.5% (n.a.)	Yes	Yes	*CISL*, EMF
Uilm	Vol.	O	100,000	10,000	32%	4%	13.4% (n.a.)	Yes	Yes	*UIL*, EMF
LT										

Country	Type of membership [a]	Domain coverage	Membership			Density (%)		Collective bargaining	Con-sultation	*National* and European affiliations [c]
			Members	Members in sector	Female membership (% of total membership) [b]	Domain	Sector (sectoral domain)			
MPPSS	Vol.	O	500	100	32%	2.5%	5% (5%)	Yes	No	*LDF*
LMPSS	Vol.	O	1,760	400	50%	9%	20% (20%)	Yes	No	*LPSK*
LU										
OGB-L	Vol.	O	61,000	n.a.	33%	n.a.	n.a. (n.a.)	Yes	Yes	EMF
LCGB	Vol.	O	n.a.	n.a.	n.a.	n.a.	n.a. (n.a.)	Yes	n.a.	EMF
LV										
LMA	Vol.	O	797	n.a.	54.1%	2.7%	n.a. (n.a.)	Yes	Yes	*LBAS*
MWTUoL	Vol.	S	1,831	1,831	30.9%	20.9%	20.9% (70.9%)	Yes	Yes	*LBAS*
MT										
GWU	Vol.	O	45,993	n.a.	17.5%	30%	100% (100%)	Yes	No	ETUF: TCL, EMCEF, SCECBU, FERPA, EURO WEA, EMF, ETF, UNI-Europa, Euro-cadres, EPSU, EFFAT
NL										
Bond-genoten	Vol.	O	470,000[d]	3,800	21.5%	27%–28%	40% (40%)	Yes	Yes	*FNV*, EMF
Bedrijven-bond	Vol.	O	85,000[d]	380	n.a.	n.a.	4% (4%)	Yes	Yes	*CNV*, EMF
De Unie	Vol.	SO	n.a.	300	n.a.	n.a.	3.1% (n.a.)	Yes	Yes	*MHP*, EMF
VHP Corus	Vol.	S	n.a.	280	n.a.	n.a.	2.9% (29%)	Yes	Yes	*MHP*
VHP Metalektro	Vol.	SO	n.a.	n.a.	n.a.	n.a.	n.a. (n.a.)	Yes	Yes	*CMHF*, EMF
PL										

Country	Type of membership [a]	Domain coverage	Membership			Density (%)		Collective bargaining	Con-sultation	*National* and European affiliations[c]
			Members	Members in sector	Female member-ship (% of total member-ship) [b]	Dom-ain	Sector (sectoral domain)			
Metal NSZZ Solidarność	Vol.	O	60,000	12,500	<10%	n.a.	40% (n.a.)	Yes	Yes	*NSZZ Solidar-ność*, EMF
Metal OPZZ	Vol.	O	16,500	10,000	<10%	n.a.	33% (n.a.)	Yes	Yes	*OPZZ*, EMF
Metal PZZ Kadra	Vol.	SO	16,000	~10,000	<10%	n.a.	3% (n.a.)	Yes	Yes	*FZZ*, CEC European Managers, EMCEF
Metal FZZ	Vol.	SO	3,000	~1,500	<10%	n.a.	5% (n.a.)	Yes	Yes	*FZZ*
Metal ZZIT	Vol.	SO	n.a.	~700	<10%	n.a.	2% (n.a.)	Yes	Yes	*FZZ*
PT										
STIMMS	Vol.	SO	~5,000	~530	n.a.	>30%	n.a. (n.a.)	Yes	No	*CGTP-IN*, EMF[e]
STIMMN	Vol.	SO	~10,000	~270	n.a.	>30%	n.a. (n.a.)	Yes	No	*CGTP-IN*, EMF[e]
SINDEL	Vol.	O	12,000	137	11%	14%	5% (5%)	Yes	No	*UGT*, EMCEF, EPSU
SITESE	Vol.	SO	11,000	120	n.a.	n.a.	5% (n.a.)	Yes	No	*UGT*, UNI-Europa
SIMA	Vol.	O	5,000	70	n.a.	0.1%	6% (6%)	Yes	No	EMF
RO										
FSS Metarom	Vol.	O	22,500	21,300	28.4%	65%	81% (81%)	Yes	Yes	*Cartel Alfa*, EMF
SMETAL	Vol.	O	10,000	8,000	n.a.	18%	20% (20%)	(Yes)[d]	Yes	*BNS*, EMF
SE										
IF Metall	Vol.	SO	440,000	23,000	25%	85%–90%	96% (100%)	Yes	Yes	*LO*, EMF, EMCEF, ETUF: TCL

Country	Type of membership [a]	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	*National* and European affiliations [c]
			Members	Members in sector	Female membership (% of total membership) [b]	Domain	Sector (sectoral domain)			
SI	Vol.	SO (OC)	115,500	2,750	22%	50%	10% (n.a.)	Yes	Yes	*SACO*, EMF, EMCEF, Eurocadres, FEANI, UNI-Europa
Unionen	Vol.	SO	500,000	6,000	45%	80%–85%	24% (100%)	Yes	Yes	*TCO*, Eurocadres, EMF
SI										
SKEI	Vol.	O	42,000	13,000	55%	40%	40% (40%)	Yes	No	*ZSSS*, EMF
SKEM	Vol.	O	10,000	3,000	50%	n.a.	n.a.	Yes	No	*KNSS*
NSS-SKI	Vol.	O	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	
SKEIE	Vol.	O	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	*KS90*
SK										
OZ KOVO	Vol.	O	48,000	6,000	47%	25%	29% (29%)	Yes	No	*KOZ SR*, EMF
OZ Metalurg	Vol.	O	13,198	11,091	15%	5%–10%	53% (53%)	Yes	No	*KOZ SR*
OZ KOVO Metal	Vol.	O	150	100	5%–7%	n.a.	0.5% (0.5%)	Yes	No	*NKOS*
UK										
GMB	Vol.	O	590,069	n.a.	44.76%	2.33%	n.a. (n.a.)	Yes	No	*TUC*, *STUC*, *ICTU*, EPSU, UNI-Europa, EMCEF, EMF, EFFAT, ETF, EFBWW
Unite	Vol.	O	1,892,491	n.a.	22.55%	7.47%	n.a. (n.a.)	Yes	No	*TUC*, ETF, EPSU, EMCEF, EMF,

Country	Type of membership [a]	Domain coverage	Membership			Density (%)		Collective bargaining	Consultation	*National* and European affiliations [c]
			Members	Members in sector	Female membership (% of total membership) [b]	Domain	Sector (sectoral domain)			
										EFFAT, EFBWW
Community	Vol.	O	31,886	17,000	16.98%	n.a.	26.3% (n.a.)	Yes	No	*TUC*, *STUC*, EMF

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

[a] *Vol. = voluntary*

[b] *As a percentage of total trade union membership*

[c] *National affiliations appear in italics; for the national level, only cross-sectoral (i.e. peak-level) associations are listed; for the European level, sectoral associations are listed only*

[d] *2008*

[e] *Indirect affiliation via higher-level or lower-level affiliates*

[f] *Indirect involvement via higher-level affiliation*

[*] *Domain overlap*

O = Overlap; SO = Sectional overlap; S = Sectionalism; C = Congruence; OC = Occupational union

n.a. = not available

Source: EIRO national centres, 2008

Turning to the membership data of the trade unions, it emerges that female membership as a proportion of total trade union membership is usually low. In the majority of the trade unions for which data are available, women account for less than 20% of members. This reflects the low proportion of female employment in the sector. The few trade unions that record a female membership level of over 50% all overlap with the sector in one way or another. Although a breakdown of gender-specific membership percentages by sector are not available, there is good reason to assume that this high female proportion results from areas of the membership domain other than the steel industry.

The absolute numbers of trade union members differ markedly. The figures range from over two million members, as recorded in the case of the German Metalworkers' Union (Industriegewerkschaft Metall, IG Metall), to fewer than 500 members, as observed in the case of the Slovak Metal Trade Union Association (Odborový zväz KOVO, OZ KOVO). This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the trade unions' ability to attract members.

Since density corrects for differences in country size, the measure of membership strength is more appropriate for a comparative analysis. Sectoral domain density indicates the quantitative importance of the trade unions as the voice of workers in the sector. Once again, significant differences emerge between the trade unions. For instance, the General Workers' Union (GWU) in Malta and the Union of Metalworkers (IF Metall) in Sweden register a sectoral density of 100% and 96% respectively; in contrast, the corresponding figure for OZ KOVO is only 0.5%. In the case of domain density, these differences are less pronounced but nevertheless considerable.

A comparison between domain density and sectoral domain density gives an indication of the relative strength of the trade union in the steel industry compared with its membership domain in general. In almost all of the cases where data on both density measures are documented, sectoral domain density is higher than domain density. This means that the steel industry is a stronghold of unionisation. These data confirm earlier studies which have shown that the steel industry registers levels of trade union density that are clearly above country averages (see **TN0412101S**).

Employer organisations

Tables 4 and 5 present the membership data on the employer organisations. In total, 22 of the 26 countries under consideration register employer organisations. Of these countries, six have more than one employer organisation in the sector. In four countries – Estonia, Lithuania, Luxembourg and Malta – there is no association that meets the definition of a sector-related social partner organisation, as defined earlier. This does not mean, however, that business has remained unorganised. Generally, business interest organisations may also deal with interests other than those related to industrial relations. Organisations specialised in matters other than industrial relations are commonly designated as trade associations (see **TN0311101S**). Sector-level trade associations usually outnumber sector-level employer organisations (see Traxler, 1993). In line with this, Table 4 includes several associations that are not engaged in collective bargaining, with their profile resembling a trade association rather than an employer organisation. Regardless of this, they are covered by this study as a result of their affiliation to Eurofer.

As regards domain demarcation, only a few cases of sectionalism are evident among the employer organisations. Almost 45% of the organisations listed in Table 4 have demarcated their domain in a way that overlaps with the sector. Sectionalist overlaps and congruent membership demarcations both account for approximately 22% and 27% of the total number of organisations respectively. Overlaps typically ensue from domains that encompass broader areas of the metal industry. Sectionalist overlaps are most frequently based on differentiation by company size combined with a broader domain in terms of business activity. In particular, this pattern – which equips small and medium-sized enterprises (SMEs) with separate associations – has given rise to a comparatively large number of organisations in Italy. If there is more than one employer organisation in a country, these organisations usually manage to foster non-competing relationships. Their activities are complementary to each other as a result of inter-associational differentiation by either membership demarcation or functions and tasks. Thus, no case of inter-associational rivalry is recorded in any of the country studies.

As the figures on density show (Table 4), membership strength in terms of companies varies somewhat with regard to both the membership domain in general and the sector-related densities. Far less convergence is evident as regards density in terms of employees. The densities of companies tend to be lower than the densities of employees – this indicates a higher propensity of the larger companies to associate, compared with their smaller counterparts. Regardless of domain density, sectoral density and sectoral domain density, few of the organisations register a density of less than 50% of the employees. In Italy, relatively low densities characterise several organisations of the SMEs. This is attributed not only to the reduced willingness of small companies to gather in associations but also to the high degree of fragmentation of the associational system, in particular with regard to the representation of SMEs. This situation contrasts with the large number of organisations in other countries that register densities of 70% or more of the employees, even amounting to 100% in several cases of voluntary membership. Overall, there is little difference between the density of domains and the sector-related densities. In the case of both companies and employees, high levels of domain density usually extend to sectoral density and sectoral domain density. It can be inferred from these figures that the employers are highly organised in the steel industry. In particular, this applies to density in terms of employees.

Table 4: Domain coverage, membership and density of employer organisations in steel industry, 2006–2007

Country	Domain coverage	Membership					Density (%)			
		Type[a]	Companies	Companies in sector	Employees	Employees in sector	Companies		Employees	
							Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
AT										
FBS	SO	oblig.	30	15	16,131	15,271	100%	30% (100%)	100%	74% (100%)
FMMI	SO	oblig.	902	n.a.	117,966	n.a.	100%	n.a. (100%)	100%	n.a. (100%)
BE										
GSV	C	vol.	15	15	16,960	16,960	100%	100% (100%)	100%	100% (100%)
BG										
BAMI	O	vol.	41	6	15,000	9,093	n.a.	n.a. (n.a.)	n.a.	76.3% (76.3%)
CY										
SYMEBIK	O	vol.	60	n.a.	4,000	23	n.a.	100% (100%)	n.a.	100% (100%)
CZ										
OSHŽ	C	vol.	13	13	22,000[b]	22,000[b]	5%	5% (5%)	47%	47% (47%)
DE										
AGV Stahl	~C	vol.	74	n.a.	83,000	n.a.	90%	n.a. (n.a.)	90%	n.a. (n.a.)
WV Stahl	~C	vol.	100	~100	92,000	~92,000	99%	99% (99%)	99%	99% (99%)
E-V	S	vol.	40	n.a.	25,000	n.a.	n.a.	n.a. (n.a.)	n.a.	n.a. (n.a.)
DK										
DI	O	vol.	11,000	27	500,000	~1,900	n.a.	33% (33%)	n.a.	65%–75% (65%–75%)
EE	–	–	–	–	–	–	–	–	–	–
EL										

Country	Domain coverage	Membership					Density (%)			
		Type[a]	Companies	Companies in sector	Employees	Employees in sector	Companies		Employees	
							Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
EN.E.EPE.M	O	vol.	65	n.a.	9,500	n.a.	43.3%	n.a.	59%	n.a. (n.a.)
POVAS	SO	vol.	4,000	n.a.	10,000	n.a.	44.4%	n.a.	33.3%	n.a. (n.a.)
HSMU	C	vol.	3	3	n.a.	n.a.	100%	n.a. (100%)	100%	n.a. (100%)
ES										
UNESID	C	vol.	190	190	27,330	27,330	95%	95% (95%)	96%	96% (96%)
FI										
Metallinja-lostajat (Teknologia-teollisuus)	O	vol.	1,470	n.a.	250,000	11,600	13%	4% (4%)	82%	95% (95%)
FR										
GESIM	O	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
SPAS	S	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
FFA	C	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
HU										
MVAE	O	vol.	14	6	13,000	7,000	15.2%	13% (13%)	92.5%	80.1% (80.1%)
IT										
Federmec-canica	O	vol.	12,000	n.a.	900,000	n.a.	20%	11.1% (11.1%)	55.4%	52.3% (52.3%)
Federacciai	~C	vol.	150	n.a.	39,000	n.a.	11.1%	11.1% (11.1%)	52.3%	52.3% (52.3%)
Union Meccanica	SO	vol.	20,000	n.a.	n.a.	n.a.	n.a.	n.a. (n.a.)	n.a.	n.a. (n.a.)
Confarti-gianato–MDP	SO	vol.	30,000	n.a.	84,000	n.a.	30%	8.9% (30%)	30%	0.5% (17.8%)
CNA-Produzione	SO	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a. (n.a.)	n.a.	n.a. (n.a.)
CLAAI	SO	vol.	115,976	n.a.	48,749	n.a.	8%	n.a. (n.a.)	8%	n.a. (n.a.)
Casartigiani	SO	vol.	84,663	n.a.	35,587	n.a.	5.8%	n.a. (n.a.)	5.8%	n.a. (n.a.)

Country	Domain coverage	Membership					Density (%)			
		Type[a]	Companies	Companies in sector	Employees	Employees in sector	Companies		Employees	
							Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
LT	–	–	–	–	–	–	–	–	–	–
LU	–	–	–	–	–	–	–	–	–	–
LV										
MASOC	O	vol.	>140	3–5	33,262	>2,600	n.a.	n.a. (n.a.)	n.a.	n.a. (n.a.)
MT	–	–	–	–	–	–	–	–	–	–
NL										
FME-NCW	O	vol.	2,750	20	260,000	n.a.	80%	80%–100% (80%–100%)	n.a.	n.a. (n.a.)
PL										
ZPPH	~C	vol.	31	15	n.a.	27,000	n.a.	n.a. (n.a.)	n.a.	80% (80%)
PT										
AIMMAP	O	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a. (n.a.)	n.a.	n.a. (n.a.)
RO	–	–	–	–	–	–	–	–	–	–
FPM	O	vol.	245	60	48,000	44,000	100%	100% (100%)	100%	100% (100%)
SE										
SMA	O	vol.	200	145	24,000	n.a.	100%	100% (100%)	100%	100% (100%)
Jernkontoret	~C	vol.	19	19	22,850	22,850	n.a.	13% (n.a.)	n.a.	93% (n.a.)
SI										
ZDS	O	vol.	1,409	n.a.	205,000	n.a.	0.45%	n.a. (n.a.)	45%	n.a. (n.a.)
GZS	O	vol.	16,396	77	290,000	n.a.	16.6%	90% (90%)	47.6%	90% (90%)
SK	–	–	–	–	–	–	–	–	–	–
ZHŤPG SR	O	vol.	42	9	26,000	14,000	n.a.	8% (8%)	70%	65% (65%)
UK										
UK Steel	C	vol.	26	26	>18,400	>18,400	90%–95%	90%–95%	n.a.	n.a. (n.a.)

Country	Domain coverage	Membership					Density (%)			
							Companies		Employees	
		Type[a]	Companies	Companies in sector	Employees	Employees in sector	Domain	Sector (sectoral domain)	Domain	Sector (sectoral domain)
								(90%–95%)		

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

[a] vol. = voluntary membership; oblig. = obligatory membership

[b] Indirect affiliation via lower- or higher-level affiliate

[*] Domain overlap

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

n.a. = not available

Source: EIRO national centres, 2008

Table 5: Collective bargaining, consultation and national/European affiliations of employer organisations in steel industry, 2006–2007

Country	Collective bargaining	Consultation	*National* and European affiliations[a]
AT			
FBS	yes	yes	*WKÖ*, Eurofer
FMMI	yes	yes	*WKÖ*
BE			
GSV	yes	no	*FEB/VBO*, Eurofer
BG			
BAMI	yes	no	*BIA*, Eurofer, EuroMetaux
CY			
SYMEBIK	yes	no	–
CZ			
OSHŽ	no	yes	*SP ČR*, *HK ČR*, Eurofer[b]
DE			
AGV Stahl	yes	yes	*BDA*
WV Stahl	no	no	*BDI*, Eurofer
E-V	no	no	Eurofer

Country	Collective bargaining	Consultation	*National* and European affiliations[a]
DK			
DI	yes	no	*DA*
EE	–	–	–
EL			
EN.E.EPE.M	yes	no	*SEV*, Europump
POVAS	yes	no	*GSEVEE*
HSMU	no	yes	Eurofer
ES			
UNESID	yes[c]	yes	*CEOE*, Eurofer
FI			
Metallinja-lostajat (Teknologia-teollisuus)	yes	yes	*EK*, CEEMET, EICTA, Eurofer[b], EuroMetaux
FR			
GESIM	yes	no	*MEDEF*
SPAS	no	no	Eurofer
FFA	no	no	Eurofer
HU			
MVAE	yes	yes	Eurofer
IT			
Federmeccanica	yes	yes	*Confindustria*, CEEMET
Federacciai	no	yes	*Confindustria*, Eurofer
Union Meccanica	yes	yes	*Confapi*
Confartigianato-MDP	yes	yes	*Confindustria*
CNA-Produzione	yes	yes	*CNA*, EMU
CLAAI	yes	yes	–
Casartigiani	yes	yes	–
LT	–	–	–
LU	–	–	–
LV			

Country	Collective bargaining	Consultation	*National* and European affiliations[a]
MASOC	yes	yes	*LDDK*, ORGALIME
MT	–	–	–
NL			
FME-NCW	yes	yes	*VNO-NCW*, CEEMET
PL			
ZPPH	yes	yes	Eurofer
PT			
AIMMAP	yes	no	*CIP*
RO	–	–	–
FPM	yes	yes	*CONPIROM*, Eurofer[b], ESTA
SE			
SMA	yes	yes	*SN*
Jernkontoret	no	no	Eurofer
SI			
ZDS	yes	no	–
GZS	yes	no	EICTA
SK			
ZHŤPG SR	yes	no	*RUZ SR*
UK			
UK Steel	no	no	Eurofer, EEF

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

[a] *National affiliations appear in italics; only affiliations to sectoral European associations are listed*

[b] *Indirect affiliation via lower-level or higher-level affiliate*

[c] *Indirect involvement via higher-level affiliation*

Source: EIRO national centres, 2008

Collective bargaining and its actors

Table 6 gives an overview of the system of sector-related collective bargaining. The standard measure of the importance of collective bargaining as a means of employment regulation is collective bargaining coverage – that is, the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (see Traxler, Blaschke and Kittel, 2001). Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

To delineate the bargaining system, two further indicators are used. The first indicator refers to the relevance of multi-employer bargaining, compared with single-employer bargaining. Multi-employer bargaining is defined as being conducted by an employer organisation on behalf of the employer side. In the case of single-employer bargaining, it is the company or its divisions that is the party to the agreement. This includes instances where two or more companies jointly negotiate an agreement. The relative importance of multi-employer bargaining, measured as a percentage of the total number of employees covered by a collective agreement, therefore indicates 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 not significant to this analysis for two reasons. Firstly, extending a collective agreement to the employees who are not unionised in the company covered by the collective agreement is a standard of the International Labour Organization (ILO), aside from any national legislation. Secondly, employers have good reason to extend a collective agreement concluded by them, even when they are not formally obliged to do so: if they fail to do so, they could provide an incentive for their workforce to unionise.

Compared with employee-related extension procedures, schemes that target the employers are far more significant for the strength of collective bargaining in general and for multi-employer bargaining in particular. This is because employers are capable of refraining from joining an employer organisation and from entering single-employer bargaining in the context of a purely voluntaristic system. Therefore, employer-related extension practices increase the coverage of multi-employer bargaining. Moreover, when it is pervasive, an extension agreement may encourage more employers to join the controlling employer organisation; membership will, in turn, enable them to participate in the bargaining process and to benefit from the organisation's related services in a situation where the respective collective agreement will bind them in any case (see Traxler, Blaschke and Kittel, 2001).

It should be noted that the category of extension practices also covers functional equivalents to these practices. There are two kinds of such equivalents. The first type is obligatory membership, which is legally established in public-law interest associations such as Austria's Association of Mining and Steel Industries (FBS) and the Association of Austrian Machinery and Metalware Industries (Fachverband Maschinen und Metallwaren Industrie, FMMI). The other functional equivalent to statutory extension schemes can be found in Italy. Under the country's constitution, minimum conditions of employment must apply to all employees. The labour court rulings relate this principle to the multi-employer agreements, in the sense that they are seen as being generally binding (see IST, 2001).

Table 6: System of sectoral collective bargaining in steel industry, 2006–2007

Country	Collective bargaining coverage (CBC)	Proportion of multi-employer bargaining (MEB) as % of total CBC	Extension practices[a]
AT	100%	100%	Pervasive
BE	99%	100%[b]	Pervasive
BG	100%	100%[b]	Pervasive
CY	100%	n/a[d]	No practice
CZ	61%	0%	No practice
DE	100%	100%	No practice
DK	85%	90%	No practice
EE	n.a.	0%	No practice
EL	100%	100%	Pervasive
ES	100%	100%[b]	Pervasive
FI	100%	100%	Pervasive
FR	100%	100%	Pervasive
HU	61.7%	0%[e]	No practice
IT	70%	100% [b]	Pervasive
LT	25%	0%	No practice
LU	95%	0%	No practice
LV	100%	100%[b,c]	Pervasive
MT	~100%	0%	No practice
NL	~100%	25%	Pervasive
PL	>90%	80%–90%	No practice
PT	~100%	~55%	Pervasive
RO	100%	100%	Pervasive
SE	100%	100%	No practice
SI	>90%	100% [b]	Pervasive
SK	90%	70%	Limited/exceptional
UK	66%	0%	No practice

Note: Collective bargaining coverage = employees covered as a percentage of the total number of employees in the sector

MEB = multi-employer bargaining relative to single-employer bargaining

[a] = Extension practices include functional equivalents to extension provisions, i.e. obligatory membership and labour court rulings; cases of functional equivalents appear in parentheses.

[b] = complementary company bargaining

[c] = until end of 2007

[d] = there is only one company for which the employer organisation acts as signatory party

[e] = last case of MEB dates back to 2002

n.a. = not available

n/a = not applicable

Source: EIRO national centres, 2008

Collective bargaining coverage

Overall, collective bargaining coverage in the steel industry is generally high, with 19 of the 25 countries for which data are available (no data being available for Estonia) registering a very high coverage rate of 90% or more (Table 6). In 14 of these countries, the coverage rate amounts to or comes close to 100%. In the remaining countries, 60% or more of the employees are covered, with the exception of Lithuania, which has a coverage level of 25%; this comparatively low level combines with single-employer bargaining. Depending on national circumstances, several factors, sometimes interacting with each other, account for the generally high coverage rates. In the vast majority of countries in which coverage peaks at 100%, the predominance of multi-employer bargaining coincides with pervasive extension practices. While coverage in countries with prevalent multi-employer bargaining is generally high, much greater variance is evident across countries where single-employer bargaining predominates. In such circumstances, coverage ranges from 25% (Lithuania) to almost 100% (Malta and the Netherlands). Total coverage in single-employer bargaining systems is usually contingent on trade union density, which interacts with the economic concentration of a sector. Unionisation generally increases with company size (see Visser, 1991). The relatively high economic concentration of the steel industry in terms of employment is thus conducive to both unionisation and favourable collective bargaining coverage, and explains why coverage is also high in most cases of predominantly single-employer bargaining.

Despite the strength of collective bargaining, unwilling employers are not completely absent. In the Czech Republic, the Branch Association of the Steel Federation (OSHŽ) – which is indirectly linked to Eurofer through its affiliation to the Steel Federation (Hutnictví železa, HZ) – has refused to enter collective bargaining since 2004. Similarly, large companies in Romania have frequently refused to conclude single-employer agreements (**RO0805029I**, **RO0704039I**).

With the exception of Estonia, a general conclusion can at least be drawn regarding the relative importance of multi-employer bargaining. This type of bargaining prevails in 17 countries, while the remaining eight countries are characterised by the predominance of single-employer bargaining. It should be noted that the distinction between multi-employer and single-employer bargaining does not fully describe the complexity of the bargaining systems. Cyprus represents a borderline case in that the trade unions and employer organisation are signatory parties to an agreement that covers a single company – the only one existing in the sector. While this is a multi-employer agreement in formal terms, it constitutes a single-employer settlement in practice.

In several countries, a multi-level bargaining system is established, which combines multi-employer bargaining with single-employer agreements. In such cases, the single-employer settlements contain more favourable employment terms than the multi-employer agreements. In the Netherlands, a single-employer agreement exists for the largest company, whereas the rest of the sector's companies are covered by multi-employer bargaining.

It is also important to note that the scope of multi-employer agreements varies considerably. In some countries, the sector is covered by a central agreement, as is the case in Bulgaria, or by a multi-industry agreement, as seen in Denmark. In other countries, the multi-employer agreements embrace broader areas of the metal industry, as observed for instance in Austria and Spain. Finally, there are cases where the scope of the agreements largely corresponds with the demarcation of the steel industry (as outlined above); this is the case, for example, in Belgium and Germany. In other cases, for example in Poland, multi-employer agreements of distinct sector-related scope coexist. These sector-related differences in scope mainly reflect the membership domain of the employer organisations. In several countries, the scope of the agreements is also differentiated by employee categories, a factor which reflects the demarcations of trade union domains. Hence, the main line of differentiation refers to the distinction between blue-collar and white-collar employees, as seen for instance in Austria, Finland and Sweden. Finally, multi-employer bargaining is sometimes also differentiated by region – as is the case in Germany and Slovakia.

Participation in public policymaking

Interest associations may partake in public policy in two basic ways: firstly, they may be consulted by the authorities in matters affecting their members; alternatively, they may be represented on 'corporatist', that is tripartite, committees and boards of policy concertation. This study considers only cases of consultation and corporatist participation that explicitly relate to sector-specific matters. Consultation processes are not necessarily institutionalised and, therefore, the organisations consulted by the authorities may vary according to the issues to be addressed and also over time, depending on changes in government. Moreover, the authorities may initiate a consultation process on an ad hoc basis rather than regular basis. Given this variability, Tables 2 and 3 list only those sector-related trade unions and employer organisations that are usually consulted. Depending on country-specific regulations and practices, the sector-related organisations may directly or indirectly participate in public policy. Indirect participation takes place through their affiliation to a peak-level organisation that obtains participatory rights.

The trade unions are usually consulted in 15 of the 26 countries under consideration. If such consultation occurs, this process usually involves all of the existing trade unions. Consultation practices involving organised business mirrors the situation regarding the trade unions: in all of the countries where the trade unions are consulted, organised business associations are also consulted. The only exceptions in this instance are Estonia and Luxembourg, where no sector-related business interest organisation exists. Hence, the general pattern is that each of the two sides of industry is either consulted or not consulted on a regular basis. It is worth noting that in countries without regular consultation practices, the two sides of industry are often consulted on an ad hoc basis – as is the case for example in Denmark and the United Kingdom (UK). In addition to the business associations, large employers may also be directly involved in consultation procedures – particularly when policymaking follows the pattern of a 'company state' rather than that of an 'associative state' (see Grant, 1993). A case in point is Luxembourg, where the largest steel company – ArcelorMittal – is represented on the country's steel committee.

Tripartite participation

Turning to the issue of tripartite participation, it emerges that sector-specific tripartite bodies are established only in Austria, Bulgaria, Estonia, Italy, Latvia, Luxembourg and Poland (Table 7). The legal basis of these tripartite bodies is either a statute or an agreement between the parties involved. Their scope of activities most frequently focuses on restructuring problems and skills-related issues. Some business associations that are represented on the boards are not listed in Tables 4 and 5, since they do not meet the criteria of a social partner organisation, as established in this comparative study.

Several countries such as the Czech Republic, Finland and Romania have sector-unspecific – in other words cross-sectoral – tripartite bodies for concertation of economic and social policy; these may also address the sector, depending on the particular circumstances and issues that may arise.

Table 7: Tripartite sector-specific boards of public policy in steel industry, 2006–2007

Country	Name of body and scope of activity	Origin	Participants	
			Trade unions	Business associations
AT	Stahlstiftung – re-employment scheme	Agreement	GMTN, GPA-DJP	FBS, FMMI, other associations
BG	Council for Social Partnership – sector-related regulations	Statutory	Metalizy, Metallurgy	BAMI
EE	Council for the Engineering and Metal Industry – skill formation	Statutory	EMAF	EML, Estonian Chamber of Commerce and Industry
IT	Observatory for the Monitoring of Productive Activities – industrial policy	Statutory	FIOM, FIM, Uilm	Federmeccanica
LU	Tripartite Steel Sector Committee – sectoral restructuring	Statutory	OGB-L, LCGB	
LV	National Tripartite Cooperation Council – vocational training, labour affairs, social security, environment protection, regional development	Statutory	LMA	Association of Mechanical Engineering and Metalworking Industries
PL	Tripartite Body for the Metal Industry – sectoral restructuring	Statutory	Metalworking unions of NSZZ Solidarność, OPZZ, PZZ, and ZZIT; PZZ Kadra	ZPPH

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

Source: EIRO national centres, 2008

European level of interest representation

At European level, eligibility for consultation and participation in social dialogue is linked to three criteria, as defined by the European Commission (see Commission Decision (34Kb PDF) of 20 May 1998). Accordingly, a social partner organisation must have the following attributes:

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

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

There is one single European association each on the employee and employer side, whose membership domain is sector-related as defined earlier – namely, EMF on the employee side and Eurofer on the employer side. The following analysis will focus on these two associations, while providing supplementary information on other European associations that are linked to the sector's national industrial relations actors through their affiliation to European associations other than EMF and Eurofer.

Membership domain

As regards the demarcation of the membership domain, EMF overlaps in relation to the steel industry, since it organises the metal industry in the broad sense. On the other hand, the membership domain of Eurofer is largely congruent with the sector.

Membership composition

Turning to the membership composition, it should be noted that the countries covered by the associations extend beyond the EU Member States examined in this study to include other countries. However, the report will only consider the members of the EU countries covered in this study. Furthermore, the report will only examine EMF affiliates that are members of the steel industry, as defined earlier.

Following these specifications, Table 8 lists the members of EMF. Accordingly, EMF organises 23 of the 26 EU Member States under consideration; the three Baltic states – Estonia, Latvia and Lithuania – are not covered.

Table 8: Members of EMF, 2008

Country	Members
AT	GMTN
BE	ABVV-Metaal, MWB-FGTB, ACV/CSC-Metaal, BBTK-

Country	Members
	SETCA, LBC-NVK, CNE-GNC, AGLVB-CGSLB
BG	Metalizy, Metallurgy, TUFOEMI
CY	OBIEK
CZ	OS KOVO
DE	IG Metall
DK	Co-Industri (3F, Dansk Metal, DEF, HK, TL), IDA*
EE	–
EL	POEM
ES	CC.OO-FM, MCA-UGT, ELA-Metala
FI	TEK**, SA, UIL**, MLM, TU
FR	FTM-CGT, FO-Metaux, FM-CFTC, FNTE-CGT, FO-Défense, FGMM-CFDT, CFDT-FEAE
HU	VASAS
IT	FIOM, FIM, Uilm
LT	–
LU	OGB-L, LCGB
LV	–
MT	GWU
NL	Bondgenoten, Bedrijvenbond, De Unie, VHP Metalektro
PL	Metal-NSZZ S, Metal-OPZZ
PT	Fiequimetal (STIMMS, STIMMN), SIMA
RO	FSS Metarom, SMETAL
SE	IF Metall, SI, Unionen
SI	SKEI
SK	OZ KOVO
UK	GMB, Unite, Community

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

The negotiating mandate for EMF is a general mandate conferred by the members.

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

Associations that appear in parentheses are sector-related trade unions listed in Table 3 which are indirectly affiliated via national higher-order associations or lower-level affiliates.

** Not involved in collective bargaining*

*** Indirectly involved in collective bargaining via higher-level or lower-level affiliations*

Source: EIRO national centres, 2008

The membership of Eurofer is mixed (Table 9), as companies as well as associations are eligible for regular membership. A special case is the Czech organisation HZ. Eurofer lists HZ as an association because it performs associational tasks. However, HZ is a joint stock company in formal terms; therefore, it is subsumed under the list of companies in Table 9, which gives basic data on the members of Eurofer. Overall, 14 of the countries are covered by associations; company members are present in 16 of the countries. In eight of countries in question, Eurofer records both associations and companies as members. Overall, associations and companies that are affiliated to Eurofer can be found in 22 of the 26 countries under consideration. No members are recorded for Cyprus, Estonia, Lithuania and Malta.

Table 9: Members of Eurofer, 2008

Country	Members	
	Associations	Number of company members
AT	FBS	3
BE	GSV	0
BG	BAMI	0
CY	–	0
CZ	–	4** (OSHŽ*+)
DE	WV Stahl*, E-V*	8
DK	–	1
EE	–	0
EL	HSMU*	3
ES	UNESID	2
FI	Metallinjalostajat (Teknologiateollisuus)	2
FR	SPAS*, FFA*	0
HU	MVAE*	1**
IT	Federacciai*	4
LT	–	0

Country	Members	
	Associations	Number of company members
LU	–	1**
LV	–	1
MT	–	0
NL	–	1
PL	ZPPH	0
PT	–	1**
RO	Uniromsider (FPM)	0
SE	Jernkontoret*	0
SI	–	2
SK	–	1**
UK	UK Steel*	1

Notes: Membership list is confined to the sector-related associations of the countries under consideration. The negotiating mandate for Eurofer is an ad hoc mandate conferred by the members on a case-by-case basis. Associations in parentheses are sector-related organisations listed in Table 5 that are indirectly affiliated via national higher-order organisations or lower-level affiliates.

+ Members refuse to recognise trade unions and to enter collective bargaining.

** Not involved in collective bargaining.*

*** Company members from the respective country are party to collective agreements of major importance.*

Source: EIRO national centres, 2008

Involvement in collective bargaining and membership strength

In addition to the territorial remit of the European associations, the weight of their affiliates in the national industrial relations systems is another criterion for evaluating their membership structure. This weight can be measured in two ways – by involvement of the national affiliates in collective bargaining or by their membership strength. Table 8 also summarises the bargaining role of the affiliates of EMF. Almost all member unions of EMF conduct collective bargaining, such that they have a bargaining role in the countries covered by EMF.

Table 9 indicates whether the members of Eurofer are a signatory party to a collective agreement of major importance to the national bargaining systems. In half of the countries for which associational members are registered, the members are party to collective bargaining. In five of the countries, Eurofer has company members that conclude single-employer agreements of major importance to the sector. Either associational members or company members of Eurofer are thus engaged in collective bargaining in almost half of the 26 countries.

In terms of the membership strength of the national affiliates, the appropriate measures of such strength are the number of members in the sector and the sectoral domain density. For the trade unions, this measure is documented in Table 3. As far as available data on membership of the national trade unions provide sufficient information on their relative strength (Table 3), it can be concluded that EMF tends to organise the largest national trade unions of the sector in the EU Member States. The only exception is Slovakia, where the major trade union is not under the umbrella of EMF. In 13 of the 23 countries covered by EMF, any of the existing sector-related unions is under the umbrella of EMF. It is evident from these data that EMF represents the vast majority of the sector's unionised employees across Europe.

In half of the 14 countries covered by associational members of Eurofer, the national affiliate is the only voice of business that covers the majority of employees in the sector (Table 5). In the Czech Republic, the Eurofer member association also holds a somewhat monopolistic position, but represents fewer than half of the employees in the sector. Of the countries where more than one business association exists, the Eurofer affiliate records a sectoral domain density of over 50% of the employees in both Austria and Italy. For the remaining countries with associational members – France, Germany, Greece and the UK – data on sector-related membership strength are lacking.

Capacity to negotiate

The third criterion of representativeness at the European level refers to the capacity of an organisation to negotiate on behalf of its own members. Tables 8 and 9 present the data on this issue for the trade unions and business associations respectively. EMF has a general negotiating mandate, while Eurofer can be equipped by its members with a negotiating mandate on a case-by-case basis.

As final proof of the sector-related significance of EMF and Eurofer, it is worth making a comparison with other European associations that may be important representatives of the sector. This can be done by reviewing the membership of national organisations affiliated to sector-specific European associations. For the trade unions, these affiliations are listed in Table 3. As a consequence of the multiplicity of trade unions listed in Table 3, numerous affiliations to European organisations other than EMF are also evident. For brevity, only those European organisations that cover at least three countries are mentioned here:

- the European Mine, Chemical and Energy Workers' Federation (EMCEF), which covers 14 affiliated trade unions in eight countries;
- UNI-Europa, with 14 affiliations in seven countries;
- the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT) and the European Federation of Public Service Unions (EPSU), which each covers eight trade union affiliations in five countries;
- the European Transport Workers' Federation (ETF), with seven members in four countries;
- the European Trade Union Federation – Textiles, Clothing and Leather (ETUF:TCL), with four members in four countries;
- the European Federation of Building and Woodworkers (EFBWW), with seven affiliations in three countries;
- the Council of European Professional and Managerial Staff (Eurocadres), with four affiliations in three countries.

These affiliations do not necessarily relate to the sector. In principle, this relationship depends on how the national trade unions demarcate their domain. In many cases, the affiliations to European associations other than EMF result from overlapping and rather broadly defined membership domains of the national trade unions, therefore involving member groups outside of the steel industry. Links to the steel industry are most plausible in the case of UNI-Europa, EPSU and Eurocadres, since their domains cross-cut sectoral demarcations and thus include certain parts of the sector. At any rate, each of these European associations covers only a minority of the 26 countries. Even though the list of affiliations in Table 3 may be incomplete, this overview clearly confirms that the sector-related national trade unions are most frequently affiliated to EMF.

An analogous review of the memberships of the national employer associations can be derived from Table 5. Most of the organisations have few affiliations to European associations. Only one European association comprises three members from three countries – namely, the Council of European Employers of the Metal, Engineering and Technology-based Industries (CEEMET). However, in terms of both the number of affiliations as well as territorial coverage, CEEMET lags far behind Eurofer.

In conclusion, therefore, EMF and Eurofer emerge as the most important sector-related European organisations in the steel industry.

Commentary

Compared with other sectors, industrial relations are strongly organised in the steel industry. This characteristic is manifested by the high degree of unionisation, the strong presence of employer organisations which also have a high density, and the high level of collective bargaining coverage.

As a comparison between the figures on cross-sectoral collective bargaining coverage in the 25 EU Member States (the EU25, prior to the accession of Bulgaria and Romania) indicates, the steel industry's bargaining coverage is higher than the country average in 18 of the 19 countries for which comparable data are available (see Marginson and Traxler, 2005). Industrial relations are also strongly organised as a result of the prevalence of large-scale manufacturing in the sector. This translates into substantial economic concentration and the predominance of blue-collar employment, both of which foster unionisation. In contrast to other sectors, economic concentration has not marginalised employer organisations and multi-employer bargaining. This can be attributed to the capital-intensive production of intermediate goods, which has made the steel industry particularly sensitive to the business cycle. At the same time, it has made restructuring an endemic problem in this industry. This in turn has stimulated associational action on the employer side as well as its cooperation with organised labour. Such a tendency applies not only to labour matters but also in relation to coping with restructuring. It is also reflected at the European level, where the steel industry has been at the forefront in terms of developing social partnership relations.

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Annex: List of abbreviations

Country	Abbreviation	Full name of organisation
Austria (AT)	FBS	Association of Mining and Steel Industries
	FMMI	Association of Austrian Machinery and Metalware Industries
	GMTN	Metalworking, Textiles, Agriculture and Food-processing Union
	GPA-DJP	Union of Salaried Employees, Graphical Workers and Journalists
	ÖGB	Austrian Trade Union Federation
	WKÖ	Austrian Federal Economic Chamber
Belgium (BE)	ABVV/FGTB	Belgian General Federation of Labour
	ABVV-Metaal	Belgian General Federation of Metal
	ACLVB/CGSLB	Federation of Liberal Trade Unions of Belgium
	ACV/CSC	General Christian Trade Union
	ACV/CSC Metaal	General Christian Trade Union – Metal
	CNE-GNC	National Federation of White-collar Workers
	FEB/VBO	Belgian Federation of Employers
	GSV	Steel Industry Federation
	LBC/NVK	Federation of White-collar Workers and Managers
	MWB-FGTB	Metalworkers' Wallonnie Brussels – Belgian General Federation of Labour
	SETCa/BBTK	Belgian Union of White-collar, Technical and Executive Employees
Bulgaria (BG)	BAMI	Bulgarian Association of the Metallurgical Industry
	BIA	Bulgarian Industrial Association
	CITUB	Confederation of Independent Trade Unions in Bulgaria
	CL Podkrepa	Confederation of Labour 'Podkrepa'

Country	Abbreviation	Full name of organisation
	Metalizy	‘Metalizy’ Trade Union
	Metallurgy	National Federation ‘Metallurgy’
	TUFOEMI	Confederation of Independent Trade Unions in Bulgaria
Cyprus (CY)	OBIEK	Federation of Industrial Workers of Cyprus
	SEK	Cyprus Workers’ Confederation
	SEMMHK/PEO	Cyprus Metalworkers, Mechanics and Electricians Trade Union – Pancyprian Federation of Labour
	SYMEBIK	Cyprus Metalworking Industry Employers’ Association
Czech Republic (CZ)	ČMKOS	Czech-Moravian Confederation of Trade Unions
	HK ČR	Czech Chamber of Commerce
	HŽ	Steel Federation
	OS KOVO	Czech Metalworkers’ Federation KOVO
	OSHŽ	Branch Association of the Steel Industry
	SP ČR	Czech Confederation of Industry
Denmark (DK)	3F	United Federation of Danish Workers
	CO-Industri	Central Organisation of Industrial Employees in Denmark
	DA	Confederation of Danish Employers
	Dansk Metal	Danish Metalworkers’ Union
	DEF	Danish Union of Electricians
	DI	Confederation of Danish Industries
	HK	Union of Commercial and Clerical Employees in Denmark
	IDA	Danish Society of Engineers
	LO	Danish Confederation of Trade Unions
	TL	Danish Association of Professional Technicians
Estonia (EE)	EAKL	Confederation of Estonian Trade Unions
	EMAF	Estonian Metalworkers’ Trade Union Federation
Finland (FI)	AKAVA	Confederation of Unions for Academic Professionals
	EK	Confederation of Finnish Industries

Country	Abbreviation	Full name of organisation
	Metallinjalostajat	Association of Finnish Steel and Metal Producers
	MLM	Finnish Metalworkers’ Union
	SA	Finnish Electrical Workers’ Union
	SAK	Central Organisation of Finnish Trade Unions
	STTK	Finnish Confederation of Salaried Employees
	TEK	Finnish Association of Graduate Engineers
	TU	Union of Salaried Employees
	UIL	Union of Professional Engineers in Finland
France (FR)	CFDT	French Democratic Confederation of Labour
	CFDT-FEAE	French Democratic Confederation of Labour – Public Sector Defence Workers’ Federation
	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
	FFA	French Steel Federation
	FGMM-CFDT	Metalworking and Mining Workers’ Federation – French Democratic Confederation of Labour
	FM-CFTC	National Trade Union Federation for the Metalworking Industry and Related Activites – French Christian Workers’ Confederation
	FNTE-CGT	State Employees’ Federation – General Confederation of Labour
	FO	*Force Ouvrière*
	FO Défense	*Force Ouvrière* – Defence
	FO Metaux	*Force Ouvrière* – Metal
	FTM-CGT	Metalworkers’ Federation – General Confederation of Labour
	GESIM	Steel and Metallurgy Industry Employers’ Group
	MEDEF	Movement of French Enterprises
	SPAS	Fine Grain and Special Steel Association
Germany (DE)	AGV Stahl	Steel Employers’ Association
	BDA	German Confederation of Employers’ Associations
	BDI	Federation of German Industries

Country	Abbreviation	Full name of organisation
	DGB	Confederation of German Trade Unions
	E-V	Special Steel Association
	IG Metall	German Metalworkers' Union
	WV Stahl	German Steel Federation
Greece (EL)	EN.E.EPE.M	Association of Metal Processing Companies
	GCLG	General Confederation of Labour of Greece
	GSEVEE	Hellenic Confederation of Professionals, Craftsmen and Merchants
	HSMU	Hellenic Steelmakers' Union
	POEM	Hellenic Federation of Metalworkers
	POVAS	National Federation of Aluminium and Steel Small Industry Manufacturers
	SEV	Hellenic Federation of Enterprises
Hungary (HU)	FGMOS	National Association of Workers' Councils in Metal and Machinery Industries
	LIGA	Democratic League of Independent Trade Unions
	LIGA VFS	LIGA Metal and Iron Industry Association
	MOSZ	National Federation of Workers' Councils
	MSZOSZ	Association of Hungarian Trade Unions
	MVAE	Association of the Hungarian Steel Industry
	VASAS	Metalworkers' Union
Italy (IT)	Casartigiani	Autonomous Confederation of Artisan Unions
	CGIL	General Confederation of Italian Workers
	CLAAI	Confederation of Free Italian Artisan Associations
	CNA	National Confederation of Artisans and of the Small and Medium-sized Enterprises
	CNA-Produzione	National Confederation of Artisans and of the Small and Medium-sized Enterprises – Production
	CONFAPI	Italian Confederation of Small and Medium-sized Enterprises
	Confartigianato-MDP	General Italian Confederation of Artisans – Metalworking Production
	Confindustria	General Confederation of Italian Industry
	Federacciai	Federation of the Italian Steel Companies

Country	Abbreviation	Full name of organisation
	Federmeccanica	Metalworking Employers' Federation
	FIM	Italian Federation of Metalworkers
	FIOM	Federation of Metallurgical Employees and Workers
	UIL	Union of Italian Workers
	UILM	Italian Metalworkers' Union
	Union Meccanica	National Union of Small and Medium-sized Metalworking Enterprises
Latvia (LV)	LBAS	Free Trade Union Confederation of Latvia
	LDDK	Latvian Employers' Confederation
	LMA	Metalworkers' Trade Union
	MASOC	Association of Mechanical Engineering and Metalworking Industries in Latvia
	MWTUoL	Metallurgic Workers' Trade Union of Liepaja
Lithuania (LT)	LDF	Lithuanian Labour Federation
	LMPSS	Union of Lithuania Metalworkers' Trade Unions
	LPSK	Lithuanian Trade Union Confederation
	MPPSS	Union of Metal Industry Trade Unions
Luxembourg (LU)	OGB-L	Independent Trade Union Confederation of Luxembourg
	LCGB	Luxembourg Christian Trade Union Confederation
Malta (MT)	GWU	General Workers' Union
Netherlands (NL)	CNV Bedrijvenbond	Industry, Food and Transport Workers' Union
	CNV	Christian Trade Union Federation
	CMHF	Federation of Intermediate and Higher Personnel
	De Unie	Union of Intermediate and Higher Personnel
	FME-NCW	Federation for the Metal and Electrical Industry – Contact Group of Employers in the Metal Industry
	FNV	Dutch Trade Union Federation
	FNV Bondgenoten	Federation of Dutch Trade Unions Allied Unions
	MHP	Federation of Managerial and Professional Staff Unions
	VHP Corus	Union for Higher Personnel at Corus
	VHP Metalektro	Union for Higher Personnel in the Metal and Electrical Engineering Sector

Country	Abbreviation	Full name of organisation
	VNO-NCW	Confederation of Netherlands Industries and Employers
Poland (PL)	FZZ	Trade Union Forum
	Metal FZZ	All-Poland Association of Continuous Operation Employee Trade Unions – National Metalworking Section
	Metal NSZZ Solidarność	National Metalworking Section – Metalworkers' Secretariat of the Independent and Self-Governing Trade Union 'Solidarity'
	Metal OPPZ	Federation of Metalworking Trade Unions in Poland – All-Poland Alliance of Trade Unions
	Metal PZZ Kadra	Metalworking Section of the KADRA Trade Union Agreement
	Metal ZZIT	National Metalworking Section of the Trade Union of Engineers and Technicians
	NSZZ Solidarność	Independent and Self-Governing Trade Union 'Solidarity'
	OPZZ	All-Poland Alliance of Trade Unions
	ZPPH	Polish Steel Association
Portugal (PT)	AIMMAP	Association of Metal, Metalmechanic and Related Industries of Portugal
	CGTP-IN	General Confederation of Portuguese Workers
	CIP	Confederation of Portuguese Industry
	Fiequimetal	Federation of Metalworking, Mining, Chemical, Pharmaceutical, Petroleum and Gas Workers' Unions
	SIMA	Union of Metal Industries and Correlative Industries and Services
	SINDEL	National Industry and Energy Trade Union
	SITESE	Union of Service Workers and Technicians
	STIMMN	Union of Metal and Metal-Mechanic Workers of the North
	STIMMS	Union of Metal and Metal-Mechanic Workers of the South
	UGT	General Workers' Confederation
Romania (RO)	BNS	National Trade Union Bloc
	Cartel Alfa	National Trade Union Confederation 'Cartel Alfa'
	CONPIROM	Romanian Industry Employer Confederation

Country	Abbreviation	Full name of organisation
	FPM	Metalurgia Employers’ Federation
	FSS Metarom	Ferrous Metallurgy Trade Union Federation ‘Metarom’
	SMETAL	FNS Solidaritatea Metal
	Uniromsider	Steel Manufacturers’ Organisation
Slovakia (SK)	KOZ SR	Confederation of Trade Unions
	NKOS	Independent Christian Trade Unions of Slovakia
	OZ KOVO	Metal Trade Union Association
	OZ KOVO Metal	Metal Trade Union Association KOVO
	OZ Metalurg	Metallurgy Trade Union Association
	RUZ SR	National Employer Association
	ZHŤPG SR	Association of Employers in Metallurgy, the Mining Industry and Geology
Slovenia (SI)	GZS	Chamber of Commerce and Industry of Slovenia
	KNSS	Independent Confederation of New Trade Unions of Slovenia
	KS90	Confederation of Trade Unions ‘90 of Slovenia
	NSS-SKI	Independent Trade Union of Slovenia – Trade Union of the Metal Industry
	SKEI	Trade Union of the Metal and Electro-industry of Slovenia
	SKEIE	Trade Union of the Metal, Electro and Electronic Industry
	SKEM	Metal, Electro and Metallurgy Industries Trade Union
	ZDS	Slovenian Employers’ Association
	ZSSS	Confederation of Free Trade Unions of Slovenia
Spain (ES)	CC.OO	Trade Union Confederation of Workers’ Commissions
	CC.OO-FM	Trade Union Confederation of Workers’ Commissions – Federation of Mining and Metallurgy
	CEOE	Spanish Federation of Employer Organisations
	CIG	Inter-union Galician Confederation
	CIG Metal	Inter-union Galician Confederation – Metal Federation
	ELA-STV	Solidarity Federation of Basque Workers
	ELA-Metala	Solidarity Federation of Basque Workers – Metal

Country	Abbreviation	Full name of organisation
		Federation
	LAB-FI	LAB Industry Federation
	UGT	General Workers' Confederation
	MCA-UGT	Metal, Construction and Allied Workers' Federation – General Workers' Confederation
	UNESID	Association of Steel Companies
	USO	Workers' Trade Union Confederation
Sweden (SE)	IF Metall	Union of Metalworkers
	Jernkontoret	Swedish Steel Producers' Association
	LO	Swedish Trade Union Confederation
	SACO	Swedish Confederation of Professional Associations
	SI	Swedish Association of Graduate Engineers
	SMA	Steel and Metal Employers' Association
	SN	Confederation of Swedish Enterprises
	TCO	Swedish Confederation of Professional Employees
	Unionen	Union of White-collar Workers
United Kingdom (UK)	Community	General Trade Union
	STUC	Scottish Trades Union Congress
	TUC	Trades Union Congress
	UK Steel	Trade Association for the UK Steel Industry
	Unite	Unite the Union
Europe	BWI	Building and Wood Workers International
	CEC	European Confederation of Executives and Managerial Staff
	CEEMET	Council of European Employers of the Metal, Engineering and Technology-based Industries
	ECSC	European Coal and Steel Community
	EEF	Engineering Employers' Federation
	EFBWW	European Federation of Building and Woodworkers
	EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions
	EICTA	European Information, Communications and

Country	Abbreviation	Full name of organisation
		Consumer Electronics Industry Technology Association
	EMCEF	European Mine, Chemical and Energy Workers' Federation
	EMF	European Metalworkers' Federation
	EMU	European Metal Union
	EPSU	European Federation of Public Service Unions
	ESTA	European Steel Tube Association
	ETF	European Transport Workers' Federation
	ETUF:TCL	European Trade Union Federation: Textiles, Clothing and Leather
	Eurocadres	Council of European Professional and Managerial Staff
	Eurofer	European Confederation of Iron and Steel Industries
	EuroMetaux	European Association of Metals
	Europump	European Committee of Pump Manufacturers
	EURO-WEA	European Workers' Educational Association
	FEANI	European Federation of National Engineering Associations
	FERPA	European Federation of Retired and Older Persons
	ORGALIME	European Engineering Industries' Association
	SCECBU	Standing Committee of European Central Bank Unions
	UNI-Europa	Union Network International – Europe

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