



Representativeness of the European social partner organisations: Audiovisual sector

Executive summary

Introduction

This study aims to provide the necessary information to encourage sectoral social dialogue in the audiovisual sector. The EIRO series of representativeness studies, carried out at the request of the European Commission, sets out to identify the representative social partner associations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU). The study thus identifies the relevant national social partner organisations in the audiovisual sector via a top-down approach (listing the members of the European affiliations) and a bottom-up approach, using the national correspondents from the European Industrial Relations Observatory (EIRO).

The effectiveness of European social dialogue depends on the representativeness of the sector's relevant national actors – only sufficiently representative associations can be parties to European social dialogue.

A national association is considered to be a relevant sector-related interest association if it meets the following criteria:

- a) the association's domain relates to the sector;
- b) the association is either regularly involved in sector-related collective bargaining and/or affiliated to any relevant European interest association.

A European association is considered to be a relevant sector-related interest association if it is on the Commission's list of interest organisations to be consulted on behalf of the sector under Article 154 of the TFEU and/or participates in sector-related European social dialogue and/or has requested consultation under Article 154.

Defining the sector

For the purpose of this study, the audiovisual sector is defined in terms of the Statistical Classification of Economic Activities in the European Community (NACE) (Rev.2), to ensure the cross-national comparability of the

findings. More specifically, this sector is delineated by NACE Rev. 2 codes J.59 (motion picture, video and television programme production, sound recording and music publishing activities) and J.60 (programming and broadcasting activities).

The specific conditions of the audiovisual sector, which in a number of countries is based primarily on companies providing public broadcasting services, led to the decision to include companies that provide public broadcasting services as employer organisations in the study. In addition, some individual private companies that are affiliated to a 'sector-related' European association are included because of their relevance in the sector.

Economic background

Employment characteristics

According to Eurostat's Labour Force Survey (LFS), the sector employed more than 760,000 people in the EU27 in the second quarter of 2012. Some 60% of the workers are men, with 52% having a high level of educational attainment (compared with 29% of total EU employees) and 21% employed on a temporary contract (compared with 12% of total EU employees). Small and medium-sized enterprises predominate in the sector, which is characterised by high levels of self-employment, part-time work, atypical work and unsocial working time.

Recent developments

According to Eurostat data, the employment level in the audiovisual sector across the EU27 has not been severely affected by the economic recession, with employment growth being relatively stable overall. However, at subsectoral and national level there are significant differences. While the programming and broadcasting industry displayed high levels of employment growth at the beginning of the crisis in 2009, the production sector was in the process of cutting employment. In contrast, when employment

levels in the latter picked up again, employment in the programming industry was adversely affected.

National level of interest representation

Trade unions

In total, 169 sector-related trade unions fulfilling the criteria for inclusion in the representativeness study were identified, reflecting a pluralist system. All 27 countries have at least two sector-related trade unions or employee organisations, and the vast majority of countries have four or more. An exception is France, which has 21 organisations included in the study, a situation that has led the French authorities to ask the social partners to clarify and simplify their collective bargaining system.

The scale of employee organisations differs widely, ranging from more than two million (in the case of Germany's ver.di, though not all in this sector) to only a few dozen. This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the ability to attract members.

Employer organisations

A total of 148 sector-related employer organisations fulfilling the study's criteria were identified; this total includes 47 public broadcasting services. In four countries (Cyprus, Czech Republic, Estonia and Lithuania), the public broadcasting company was the only organisation recorded, and no other sectoral employer organisations falling within the scope of this study were detected.

Only 1 of the 26 countries for which information on the sector-related organisational landscape was given has a single organisation (Malta). Pluralist associational systems thus prevail on the employee and employer sides, though to a greater extent in the former than in the latter.

Collective bargaining

Collective bargaining coverage is highly polarised and weak in most of the countries analysed. In about a quarter of the countries for which related data was available (mainly in those with multi-employer bargaining practices), collective bargaining coverage is high, while at least half of the countries examined have very low coverage rates. Countries with high coverage are mainly the Scandinavian countries (Denmark,

Sweden), together with Austria, Belgium, France and Italy.

Both sides of industry have a certain proportion of member organisations that are not involved in collective bargaining. On the employee side, this varies from a fifth in the case of EURO-MEI to a quarter in the case of EuroFia and FIM, and up to a third in the case of EFJ. On the employer side, two-thirds of AER's member organisations as well as half of FIAPF's organisations are not involved in collective bargaining.

European level of interest representation

The European associations in the audiovisual sector listed by the European Commission as social partner organisations to be consulted under Article 154 of the TFEU are EURO-MEI, EFJ, EuroFIA and FIM, representing employees, and EBU, CEPI, AER and FIAPF, representing employers.

As regards the employee organisations, EURO-MEI has 45 direct affiliations in the 27 countries under consideration, with 40 of them participating in collective bargaining; EFJ has 39 direct affiliations, with 23 participating in collective bargaining; EuroFIA has 32 direct affiliations, with 24 participating in collective bargaining; and FIM has 26 direct affiliations, with 20 participating in collective bargaining.

In terms of employer organisations, EBU has 46 direct affiliations in the 27 countries under consideration, with 44 involved in collective bargaining; CEPI has 15 direct affiliations, with 10 involved in collective bargaining; AER has nine direct affiliations, with three involved in collective bargaining; and FIAPF has 10 direct affiliations, with five involved in collective bargaining.

A significant number of sector-related employer organisations across the EU are not affiliated to any of the European interest organisations considered by this study

Conclusions

Top-down and bottom-up analyses of the audiovisual sector in EU27 countries show that EURO-MEI, EFJ, EuroFIA and FIM on the employee side and EBU, CEPI, AER and FIAPF on the employer side are the most important EU-wide representatives of the audiovisual sector's employers and employees.

Further information

The report *Representativeness of the European social partner organisations: Audiovisual sector* is available at <http://www.eurofound.europa.eu/eiro/studies/tn1202044s/index.htm>

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