



Representativeness of the

European social partner organisations:

Temporary agency work sector

This study provides information designed to aid sectoral social dialogue in the temporary agency work sector. The study is divided into three parts: a summary of the sector's economic and employment background; an analysis of the relevant social partner organisations in all EU Member States, including their membership, role in collective bargaining, social dialogue and public policy, and national and European affiliations; and an overview of relevant European organisations, particularly their membership composition and their capacity to negotiate. The aim of Eurofound's series of 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 comes from the European Commission's aim to recognise the representative social partner organisations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU).

Introduction

Objectives, concept and methodology

The aim of this representativeness study is to identify the relevant national and supranational social partner organisations – the trade unions and employer organisations – in the temporary agency work sector, and to show how these actors relate to the sector's European interest associations of labour and business. The impetus for this study arises from the aim of the European Commission to identify the representative social partner associations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU). Hence, this study seeks to provide basic information needed to support sectoral social dialogue. The effectiveness of European social dialogue depends on whether its participants are sufficiently representative in terms of the sector's relevant national actors across the EU Member States. Only associations which meet this precondition will be admitted to European social dialogue.

To accomplish these aims, the study first identifies the relevant national social partner organisations in the temporary agency work sector by means of both a top-down approach (listing the members of the European affiliations) and a bottom-up approach (through Eurofound's Network of European correspondents). This involves clarifying the unit of analysis at both the national and European level of interest representation. The study includes only organisations whose membership domain is 'sector-related'.

A European association is considered to be a relevant sector-related interest association if:

- it is on the European Commission's list of interest organisations to be consulted on behalf of the sector under Article 154 TFEU;
- and/or it participates in the sector-related European Social Dialogue;
- and/or it has requested to be consulted under Article 154 TFEU.

A national association is considered a relevant sector-related interest association if it meets both criteria A and B:

A. The association's domain relates to the sector.

B. The association is:

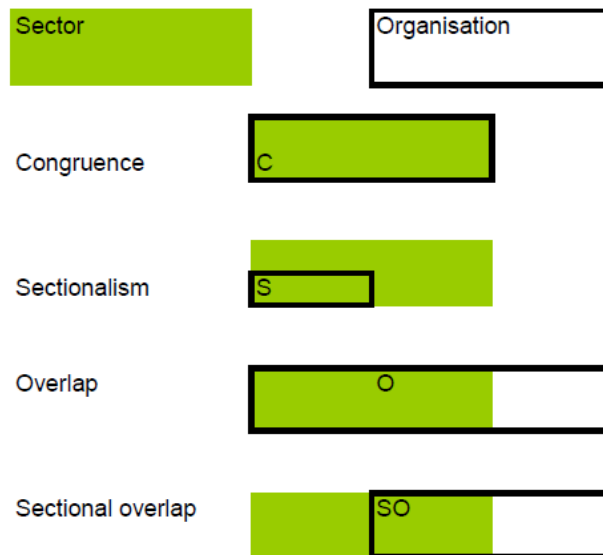
- (1) either regularly involved in sector-related collective bargaining,
- (2) and/or affiliated to any relevant European interest association.

Social partner organisations are considered 'sector related' if their membership domain relates to the sector in one of the ways displayed in Figure 1. The domains of the trade unions and employer organisations as well as the purview of collective agreements are likely to be not congruent with the NACE classification (78.2 'Temporary employment agency activities') employed in this representativeness study (see comments on temporary agency work activities in

the section below on sectoral properties). Hence, we include all trade unions, employer organisations and collective agreements which are ‘sector-related’. Being sector-related in the strict sense of NACE 78.2 applies to the following four patterns:

- Congruence: the domain is identical with the NACE classification;
- Sectionalism: the domain covers only a certain part of the sector as demarcated by NACE classification, while no group outside the sector is covered;
- Overlap: the domain covers the entire sector plus (parts of) one or more other sectors;
- Sectional overlap: the domain covers part of the sector plus (parts of) one or more other sector.

Figure 1: Sector-relatedness of social partner organisations: Domain patterns



Source: Eurofound.

As regards criterion B.2 (affiliation to European level interest association), it must be said that taking affiliation to a European social partner organisation as sufficient to determine a national association as a social partner does not necessarily imply that the association is involved in industrial relations in its own country. Although this selection criterion may seem odd at first glance, a national association that is a member of a European social partner organisation will become involved in industrial relations matters through its membership of the European organisation. Furthermore, it is important to assess whether the national affiliates to the European social partner organisations 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 they are the two constituent mechanisms that can systematically connect the national and European levels.

Sectoral properties

Sector relatedness (criterion A) is defined in terms of the Statistical Classification of Economic Activities in the European Community (NACE) to ensure the cross-national comparability of the findings. More specifically, the temporary agency work sector is defined as embracing the following NACE (Rev. 2) activity: 78.2 – Temporary employment agency activities. This NACE code is defined as follows:

This class includes the activities of supplying workers to clients' businesses for limited periods of time to temporarily replace or

supplement the working force of the client, where the individuals provided are employees of the temporary help service unit. However, units classified here do not provide direct supervision of their employees at the clients' work sites.

(Eurostat)

According to this NACE based definition of the sector, the organisations listed by the European Commission as a social partner organisation consulted under Article 154 of the TFEU are, on the employee side, UNI Europa and, on the employer side, Eurociett.

[Directive 2008/104/EC on temporary agency work](#) defines a temporary work agency as:

any natural or legal person who, in compliance with national law, concludes contracts of employment or employment relationships with temporary agency workers in order to assign them to user undertakings to work there temporarily under their supervision and direction.

(Article 3.1b)

The directive defines a temporary agency worker as:

a worker with a contract of employment or an employment relationship with a temporary-work agency with a view to being assigned to a user undertaking to work temporarily under its supervision and direction.

(Article 3.1c)

Due to the specificities of temporary agency work and the 'triangular' employment relationship of agency work, at a kick-off meeting of this representativeness study, representatives of the European Commission, the cross-sector and sectoral social partners agreed that the traditional NACE based approach should be combined with a broader bottom-up approach of analysing temporary agency work as a form of employment that cuts across all economic sectors. It was therefore agreed that this study should apply a combined approach of analysing the relevant interest representation organisations consisting of:

- a top-down screening, starting with the reference to the sector-related European interest associations and looking at the affiliations of national associations to them;
- a bottom-up screening, starting with the reference to the national organisations involved in sector-related collective bargaining (that is, NACE 78.2 or broader definition) and the collection of data on their affiliation to any European organisation.

Consequently, this report also aims to identify in the bottom-up approach affiliates of European associations that have members in user sectors of temporary agency work activities, but not temporary agency work activities in the strict sense (that is, NACE 78.2).

As this approach could basically cover all national sectoral social partner organisations, as all are potential users of temporary agency activities, the study had to define certain selection criteria. For this purpose, the study focused on the most relevant organisations in terms of membership of temporary work agencies and temporary agency workers as well as involvement in collective bargaining and bipartite and/or tripartite consultation in regard to temporary agency work.

Collection of data and quality control

The collection of quantitative data is essential for investigating the representativeness of the social partner organisations. It is carried out in a two-fold approach involving a bottom-up (Eurofound's Network of European correspondents) and a top-down (a list of members of European Social Partners at national level) check. Unless otherwise cited, this study draws on country studies provided by the Eurofound Network of Correspondents, consisting of national industrial relations experts, based on a standard questionnaire (available on the Eurofound website), which they completed by contacting the sector-related social partner organisations in their countries.

Contact was generally made via telephone interviews in the first place, but might also have been established via email. In the case of non-availability of any representative, the national correspondents were asked to fill out the relevant questionnaires based on secondary sources, such as information given on the social partner's website, or derived from previous research studies.

It is often difficult to find precise quantitative data. In such cases, the correspondents are requested to provide rough estimates rather than leaving a question blank, given the practical and political relevance of this study. However, if there is any doubt over the reliability of an estimate, this will be noted.

In principle, quantitative data may stem from three sources:

- official statistics and representative survey studies;
- administrative data, such as membership figures provided by the respective organisations, which are 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.

In order to ensure the quality of the information gathered, several verification procedures and feedback loops are used in the Eurofound representativeness studies:

First, the external expert entrusted with the elaboration of the representativeness study, in collaboration with Eurofound, checks the consistency of the national contributions.

Second, Eurofound sends the national contributions to both the national members of its governing board, as well as to the European-level sector-related social partner organisations. The peak-level organisations then ask their affiliates to verify the information. Feedback received from the sector-related organisations is then taken into account, if it is in line with the methodology of the study.

Finally, the complete study is evaluated by the European-level sectoral social partners and Eurofound's Advisory Committee on Industrial Relations, which consists of representatives from both sides of industry, governments and the European Commission.

Employment and economic trends

Economic characteristics and trends

Temporary agency work is a specific form of employment that is characterised by a triangular relationship between workers, intermediary agencies and user companies.

The temporary agency work sector in some countries was among the fastest growing employment segments both before (for example, in Austria, Germany, Italy, Spain) as well as after the 2008 economic crisis (in Hungary, Poland, Romania) according to a series of comparative studies by:

- Eurofound ([Temporary agency work in the European Union](#), [Temporary agency work in an enlarged European Union](#) and [Temporary agency work and collective bargaining in the EU](#));

- the European Parliament ([The impact of new forms of labour on industrial relations and the evolution of labour law in the European Union](#));
- the International Labour Organization (ILO) ([Private employment agencies, promotion of decent work and improving the functioning of labour markets in private services sectors](#));
- the Institute for the Study of Labour (IZA) ([The role and activities of employment agencies](#));
- IDEA Consult for Eurociett and UNI Europa ([The role of temporary agency work for labour market transitions in Europe: Institutional frameworks, empirical evidence, good practice and the impact of social dialogue](#)).

However, the average share of the temporary agency work in the EU15 workforce was estimated at only 2.5% in 2012 according to the [IDEA Consult report \(PDF 3.12MB\)](#) for Eurociett and UNI Europa.

The growth in the temporary agency work sector also results from the fact that, in many EU countries, temporary agency work is a form of employment that became legally regulated only during the past two decades. At EU level it was only in 2008 that Directive 2008/104/EC was adopted, on the basis of Article 153 TFEU that allows the EU to regulate the employment conditions of temporary agency workers.

According to the [2015 edition of the Economic Report](#) of the International Confederation of Private Employment Services (Ciett), about 8.7 million people in 2013 had worked as an agency worker at some point during the year in Europe. This was an increase of about 9% on the previous year.

Both supply and demand side factors have fostered the increasing role of temporary agency work in the European economy and on the labour market:

On the demand side, temporary agency work enables user companies to make relatively easy labour adjustments and offers transaction cost savings by outsourcing some responsibility for recruitment and administration. It also generates a group of workers from which candidates can be selected for any permanent post.

On the supply side, there is evidence of that temporary agency work is a way of testing different kinds of work/employers and gaining work experience. Under certain labour market conditions, it can be a stepping stone into direct employment. Temporary agency work might also suit the interest of specific groups of workers to be more flexible or supplement other income.

As the development of temporary work activities and employment during the past years has shown, the dynamic of the temporary agency work sector is very pro-cyclical. As a [recent report by IDEA Consult commissioned by Eurociett and UNI Europa \(PDF 3.12MB\)](#) illustrates, agency work relatively directly follows developments in gross domestic product (GDP) and its workforce is first to adapt to economic conditions. As temporary agency work in user companies functions as a buffer or flexible layer, the increase as well as reduction of agency workers often prefigures developments of permanent employment.

This pattern was particularly strong in the context of the 2008 crisis when the temporary agency work sector in Europe experienced a decline in employment that was much stronger than overall employment. At the same time, agency employment started to increase again – with differences between EU countries – earlier than direct employment and more strongly than employment in general.

Table 1 illustrates the change in the number of companies in the temporary agency work sector between 2009 and 2013–2014 as gathered by Eurofound national correspondents in the context of this study on the basis of national statistics. It shows that, in particular, in the central and eastern European (CEE) region and with few exceptions (for example, the Czech Republic and Slovenia), the number of temporary agency work companies increased significantly until 2014 (or the year with the latest available figures). In western Europe, however, the development was much more

diverse, that is, relatively stable in countries such as Belgium, Finland, France and the Netherlands, declining in some others (Denmark, Spain, UK) or reporting a relatively strong increase as in Austria, Germany and Sweden.

Table 1: Number of temporary agency work companies in 2009 and 2013–2014

	2009	2013–2014
AT	779	>1,062
BE	140	257
BG	36	40*
CY	6	13
CZ	2,214	1,588
DE	5,714	6,593
DK	739	512*
EE	316	462
EL	n.a.	9
ES	333	261
FI	995	1,098
FR	1,500	1,500
HR	27	71
HU	916	1,016
IE	n.a.	166
IT	76	78
LT	75	92*
LU	41	46
LV	50	163
MT	8	6
NL	6,345	6,170
PL	2,947	5,157
PT	540	514
RO	42	389
SE	1,675	2,321
SI	152	98
SK	144	186
UK	15,130	10,535

*Notes: n.a. = not available; * Refers to 2012. For a detailed description of sources, please refer to the national reports.*

Source: Eurofound's Network of European correspondents (2015).

Employment characteristics and trends

Due to the specific nature of temporary agency work (the triangular contractual relationship with the agency as well as the user companies) and, related to this, different national concepts of counting agency workers (see below), it is extremely difficult to gather employment data on agency work on a comparative basis. As the method of gathering data on temporary agency employment differs between countries, any comparative review faces several uncertainties, for example, on the absolute number of employees or with view on structural characteristics.

The differences in the availability and quality of data on the temporary agency work sector are noted in the Eurofound comparative study, [Temporary agency work and collective bargaining in the EU](#), published in 2009. This issue had been highlighted by previous Eurofound research on temporary agency work, with a [study in 2002](#) describing in detail the problems of calculating employment figures. This was confirmed by the 2009 comparative study which asked national correspondents to assess the availability and quality of national statistical data. The result was that only very few national correspondents were satisfied with the data available (see Table 2 of the 2009 report).

Following the revision of NACE, Eurostat's [Structural Business Statistics](#) (SBS) employment data are available from 2008 onwards. In 2011, according to Eurostat data, 3.9 million people were employed by temporary employment agencies in the EU (no data were available for Croatia, Greece, Ireland and Malta). 2012 data are available, but these contain significant gaps, for example, there are no data for France. If measured in full-time equivalents (FTEs), the overall employment figure would be only 2.5 million in 2011 (with even more countries without any data).

In contrast to Eurostat figures, the temporary agency employer organisation Ciett estimates the number of temporary agency workers as much higher on the basis of reports from national members. However, Ciett calculates the 'daily average number of agency workers' (headcount). Translated into FTEs, the Ciett figure for 2011 was around 4 million agency workers in the EU according to its [agency work business indicator for September 2014](#) which was roughly the same as for 2013.

As Table 2 illustrates, data from the Eurostat SBS database for code 78.2 and Ciett differ quite significantly when single countries are compared. Due to differences in the mode of calculation, the Ciett figures are, sometimes significantly, higher than Eurostat data in around half of all EU Member States, while there are also countries where the opposite is the case.

The [final report for the joint Eurociett and UNI Europa project](#) 'Temporary agency work and transitions in the labour market' provides reasons for the stark differences for some countries (Belgium, France, Germany, Italy, Netherlands, UK). With regard to the UK, for example, a representative of the Department for Business, Innovation and Skill (BIS) stated in a comment for this study that the Office for National Statistics (ONS) Labour Force Survey (LFS) data underestimate the levels of agency workers. Thus, care should be taken when using LFS data to make comparisons on the levels and proportions of agency workers with the rest of the population. The BIS representative also mentioned that BIS and ONS are working closely to obtain more robust estimates of agency workers.

Table 2: Temporary agency work employment in the EU

	Eurostat (SBS): temporary employment agency activities/ number of employees in FTEs, 2013	Ciett: daily average number of agency workers in FTEs, 2013
AT	58,127	74,000*
BE	97,188	83,000
BG	2,643	10,000
CY	635	n.a.
CZ	44,132	46,000
DE	708,612	839,000
DK	16,655	17,000
EE	5,913	4,000
EL	584**	5,000
ES	145,285	81,000
FI	34,128	28,000
FR	n.a.***	510,000
HR	4,441	8,000
HU	44,789	74,000
IE	n.a.	26,000
IT	176,362	277,000
LT	2,848	2,000**
LU	8,767	6,000
LV	765	200**
MT	n.a.	n.a.
NL	381,202	211,000
PL	59,725	185,000
PT	66,116	80,000
RO	19,666	20,000
SE	51,756	70,000
SK	5,671	19,000**
SL	n.a.	5,000*
UK	612,434	1,156,000****

Notes: n.a. = not available; * 2011 data; ** 2012 data; *** The FTE data on temporary agency workers for France as provided by Eurostat are obviously not correct: For 2013, Eurostat reports a number of employees (FTEs) of 42,940. Compared with other sources and an overall employment figure produced by Eurostat for the same year (718,392), the FTE data are hardly likely; **** Data refer to the number of agency workers 'on any given day'.

Source: Eurostat's SBS (annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) extracted 11 December 2015) and Ciett's Economic report 2015, p. 31.

These differences between data provided by Eurostat based on the European LFS and the figures provided by Ciett based on self-reporting should be kept in mind when turning to the more recent employment figures, trends and characteristics gathered in the context of this study which are based on data by national statistical offices. Table 3 presents employment figures for 2009 and 2013–2014 (or the latest available). As highlighted previously, there are significant national varieties in calculating temporary agency workers and employment. There are not only differences between countries in regard to calculating temporary agency workers but also within countries, as the example of the UK described below illustrates.

The Eurofound national correspondent in the UK pointed out that temporary agency work arrangements in the UK can be complex, making it hard to assess the employment status of the workers concerned and their sectoral classification. Notably, agency workers may be:

- employed directly by the temporary work agency on the basis of an employment contract, with full entitlements as employees of the agency under employment law;
- engaged by the temporary work agency on the basis of a contract for services – such 'PAYE temps' are not considered to be employees of the agency but are generally deemed to be 'workers' in employment law terms, which means that they have certain entitlements in areas such as minimum wages, working time and equality;
- supplied by the temporary work agency to the user undertaking via an intermediary 'umbrella company', which employs the employees on the basis of an employment contract;
- self-employed and supplied by the temporary work agency to the user undertaking through the worker's own 'personal service company'.

Table 3: Development of temporary agency work employment since 2009

	2009		2013–2014		Proportion of agency workers in total workforce (%)	
	Total employment	FTE employment	Total employment	FTE employment	2009	2013–2014
AT	56,882	51,185	65,327	63,450**	1.6	1.8
BE	77,957*	n.a.	82,854	n.a.	2.1	2.3
BG	999	988	2,772	2,699	0.04	0.12
CY	90	90	413	413	0.0	0.1
CZ	n.a.	n.a.	223,808	n.a.	n.a.	4.2 (est.)
DE	632,377	n.a.	814,580	n.a.	1.5	1.9
DK	17,863	15,312	22,477	18,040	0.6	1.0

	2009		2013–2014		Proportion of agency workers in total workforce (%)	
	Total employment	FTE employment	Total employment	FTE employment	2009	2013–2014
EE	2,696	2,602	6,218	5,913	0.7	1.5
EL	n.a.	n.a.	12-13,000	6,000	n.a.	0.1–0.2
ES	428,564	82,435	495,675	95,343	0.43	0.55
FI	n.a.	28,052	n.a.	34,616	1.0	1.3
FR	2,000,000	527,147	2,000,000	509,885	1.86	1.78
HR	3,500 (est.)	3,450 (est.)	6,000 (est.)	5,910	0.3	0.4
HU	79,085	n.a.	120,704	102,900	2.1	3.1
IE	6,400	n.a.	6,200	n.a.	0.3	0.3
IT	220,273	164,141	192,479	167,316	1.0	0.9
LT	1,314	1,208	2,545	2,376	0.1	0.2
LU	5,884	4,592	6,226	4,934	1.76	1.65
LV	402	334	1,036	812	0.0	0.1
MT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
NL	711,274	134,400	700,711	119,000	2.6	3.3
PL	377,100	n.a.	559,500	209,000 (est.)	0.4	1.2
PT	2,549***	2,549 ***	9,425*	9,425*	0.1	0.3
RO	29,926*	13,965*	52,214	16,207	0.5	0.9
SE	51,470	n.a.	60,768	n.a.	1.26	1.4
SI	n.a.	n.a.	12,331	n.a.	n.a.	1.5
SK	37,074	n.a.	49,993	n.a.	1.9	2.5
UK ****	237,300	n.a.	327,700	n.a.	0.9	1.2

Notes: n.a. = not available; * 2010–2011; ** 2012; *** 2001;**** Figures and percentages are from the ONS LFS survey and indicate the number of employees across the UK who reported that their job was temporary because they were 'agency temping' (2009) or 'working for an employment agency' (2014).

Source: Eurofound's Network of European correspondents (2015).

Though the reliability of the employment features is quite weak, the figures at least indicate certain patterns and trends. With view on the share of agency workers in the total workforce, there is a clear difference between western and in particular north-western European countries on the one hand and most parts of the CEE and southern European region on the other. The highest shares in 2013–2014 are reported for countries such as the Netherlands (3.3%), Belgium (2.3%) and Germany, France and Luxembourg (all more than 1.5%). Although the data for the UK are based on a different way of calculation (permanent staff of temporary work agencies), the

proportion of agency workers in the total workforce would be the highest in Europe if the share was based on the Eurostat employment figures.

In some countries that joined the EU only during the past decade and where the first-time regulation of temporary agency work has been quite recent, the number and respective share of agency workers in the total workforce has increased very fast between 2009 and 2013–2014, for example, in the Czech Republic (4.2% estimated), Hungary (3.1%), Slovakia (2.5%), Estonia and Slovenia (both 1.5%) and Poland (1.2%).

In contrast, other countries in the CEE region as well as in southern Europe (Bulgaria, Cyprus, Croatia, Latvia, Lithuania, Portugal) the ‘penetration’ (Ciett) rates are well below 1.0%. Northern European countries as well as Italy and Spain occupy a position in the middle, for example, Denmark and Italy at around 1.0%, Finland at 1.3% and Sweden with 1.4%.

With regard to the growth in temporary agency work employment between 2009 and 2013–2014, the strongest absolute increases were reported for Germany and Poland amounting to an increase of around 29% and 48%, respectively. In addition, Hungary (41,600 agency jobs or 53%) and Romania (22,000 agency jobs or 74.5%) and Slovakia (13,000 agency jobs or 34%) show quite strong increases during the study period. Apart from Germany, Denmark (25%) Austria (15%), Sweden (18%) and Belgium (6%) are the only western European countries that reported an increase of jobs between 2009–2010 and 2013–2014. While in France and Spain there were no significant changes, the number of agency workers decreased in Italy (by 12%), Ireland (3%) and, slightly, in the Netherlands (1.5%). However, agency employment in 2009 in many countries was quite low due to the 2008 crisis effect. Thus, the strong pro-cyclical nature of temporary agency employment means that the choice of reference years will have a strong influence on the overall trends. With view on Germany, for example, the [latest report of the Federal Labour Agency on agency work \(in German, PDF 358KB\)](#) from July 2015 highlights that the number of agency workers more than doubled during the 10-year period up to 2014. However, the size of the agency workforce is fairly stable if the number of agency workers in 2014 is compared with the situation in 2007.

These differences in temporary agency work employment changes may reflect evolution patterns of regulation, but also different economic development contexts and national differences in the role of temporary agency work for user companies. In countries such as Austria, Denmark and Germany, there seems to be a trend of temporary agency work being used by companies not only as a temporary/buffer instrument but as an integral part of the workforce so as to increase external flexibility permanently. In contrast, recent labour market reforms in Italy have sought to reduce this structural usage of temporary agency work in favour of direct employment. Finally, in the Netherlands, the dynamic of temporary agency work during the past five years has to be seen against the background of a generally high share in total employment and the emergence of new forms of employment that provide alternative options for companies (for example, contract work or freelancing). For further details see the [recent report by IDEA Consult for Eurociett and UNI Europa \(PDF 3.12MB\)](#).

As highlighted by previous comparative studies, it is extremely difficult to gather comparative data on employment features and characteristics such as age, qualification and occupational background on temporary agency employment. It has, at least, been possible to present data in this report on gender characteristics and the proportion of female employees as reported by the statistical offices in a number of EU Member States (Table 4). Apart from Germany, Portugal, Romania and Spain, where the share of women in agency work is higher than that of men, most EU countries have a female share of between 30% and 50%. The lowest rates of below 30% are reported for Austria, France and Luxembourg, likely indicating a strong role for male agency jobs, for example, in manufacturing.

Table 4: Share of female temporary agency workers, 2013–2014

	Countries
Above 50%	DE, ES, PT, RO
40–50%	BG, DK, EL, HR, HU, LV, PL, UK
30–40%	BE, IT, NL, SI, SK
Below 30%	AT, FR, LU

Note: No data available for Cyprus, the Czech Republic, Estonia, Finland, Ireland, Lithuania, Malta and Sweden.

Source: Eurofound Network of European correspondents (2015).

National level of interest representation

In many EU countries, statutory regulations on the representativeness of social partner organisations exist and become important when assigning certain rights of interest representation, collective bargaining or in public policymaking. Representativeness is normally measured by the membership strength of the organisations.

For a sectoral study such as this, measures of membership strength of both the trade unions and employer organisations also have to take into account how the membership domains relate to the sector. Furthermore, the representativeness of the national social partner organisations is important for the European umbrella organisations to participate in the European social dialogue. Therefore, and apart from organisational strength, the role of the national actors in collective bargaining and public policymaking are two further important aspects of representativeness. This is based on research evidence that the effectiveness of the European social dialogue tends to increase with the growing ability of the national affiliates of the European organisations to regulate employment terms and to influence national public policies affecting the sector.

Thus, representativeness is a multidimensional concept that involves three basic elements:

- the membership domain of social partner organisations and membership strength, measured by organisational density;
- the role of social partner organisations in collective bargaining;
- their role in public policymaking.

As in other Eurofound representativeness studies, the following analysis of national level interest representation in the temporary agency work sector thus focuses on these three aspects. In this context, the specific nature of temporary agency work as both a sector demarcated according to the specific NACE classification as well as a form of employment that cuts across all economic sectors has to be taken into account. This has important effects on the three dimensions of representativeness mentioned above as is shown in the following sections.

Membership domain and strength

This study has collected quantitative data on membership and organisational strength/density through the Eurofound Network of Correspondents along the indicators listed in Table 5.

Table 5: Definition of membership and organisational strength/density

	Membership	Organisational Strength/Density
Trade unions	<ul style="list-style-type: none"> • Number of active members in employment • Number of active members 	<ul style="list-style-type: none"> • Sectoral density: Number of active members in employment in the sector divided by total number of employees in

	Membership	Organisational Strength/Density
	in employment in the sector	the sector
Employer organisations	<ul style="list-style-type: none"> • Number of member companies • Number of employees working in member companies • Number of member companies in the sector • Number of employees working in member companies in the sector 	<ul style="list-style-type: none"> • Sectoral density (companies): Number of member companies in the sector divided by the total number of companies in the sector • Sectoral density (employees): Number of employees working in member companies in the sector divided by total number of employees in the sector

Source: Eurofound Network of European correspondents (2015).

In the following sections we first present data on trade unions and employer organisations in terms of:

- domain patterns;
- membership and organisational strength;
- collective bargaining;
- participation in public policy.

Domain patterns

Trade unions

Detailed data and information on employee organisations, membership domains, strength and affiliation to EU level trade unions are presented in Tables A1, A2 and A3. Given the cross-cutting nature of agency work, however, potentially all trade unions may organise temporary agency workers on the basis of the work they are conducting in user companies. Thus, and in line with the broader approach of this study, national correspondents were asked to identify the three most important social partner organisations that not only organise temporary agency workers in the strict sense but also through user companies' sectoral domains.

As a result, Eurofound national correspondents have identified a total of 62 trade union organisations in 22 EU Member States where trade union domains relate to the sector. The names and abbreviations of these trade unions are given in Table A9.

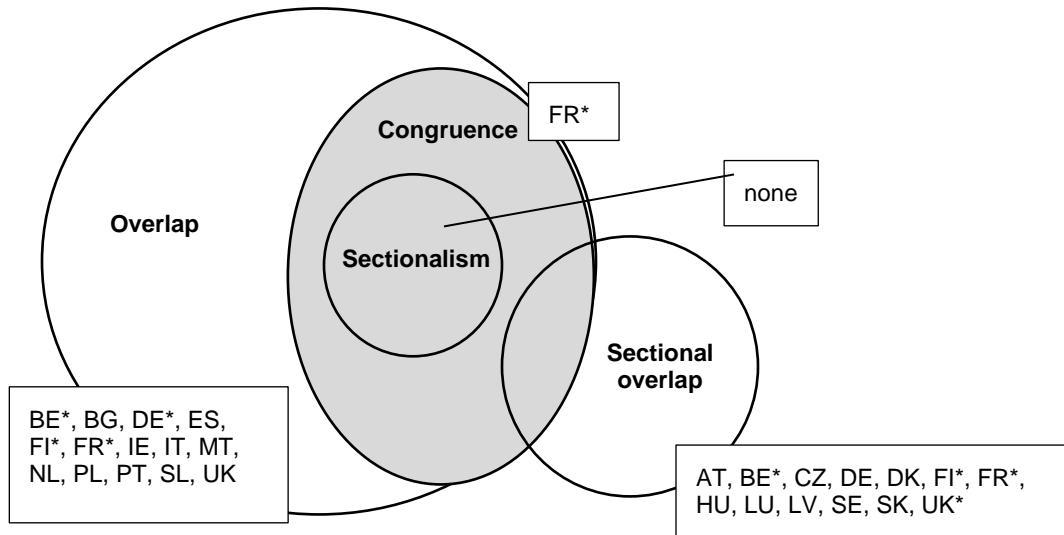
In six Member States (Croatia, Cyprus, Estonia, Greece, Lithuania, Romania), no trade union could be identified which organises any temporary agency workers. Both Cyprus and Romania have several thousands of agency workers, making this a quite remarkable result and one that perhaps also illustrates the fact that temporary agency work in these countries is a recent phenomenon which is only now becoming an issue for trade unions and recruitment.

In a number of countries, sectoral domain patterns are not totally clear. In particular in countries where trade unions are organised on sectoral/industry domain patterns and not as occupational or general unions, it is often not clear whether all agency workers fall within the domain of a trade union or only those who are working in a specific sector. Thus we found a number of countries (Belgium, Finland, France, Germany, UK) where different domain patterns exist. The only country where a domain pattern of congruence exists is France. Here, specific trade union organisations, affiliated to the large national union federations, have been established for temporary agency workers. A similar pattern exists in Italy but in this case, the unions do not

focus just on agency workers but also other workers such as freelancers, dependent solo self-employed or contract workers.

What clearly results from our study is that the two main domain patterns are overlap (in countries where general unions are the most important pattern of union organisation) and sectional overlap (in those countries where unions are organised on the industry principle, thus reflecting the cross-cutting nature of temporary agency work). All in all, however, quite a pluralistic picture emerges with several countries following a mix of domain patterns as shown in Figure 2.

Figure 2: Domain coverage of trade unions in the temporary agency work sector



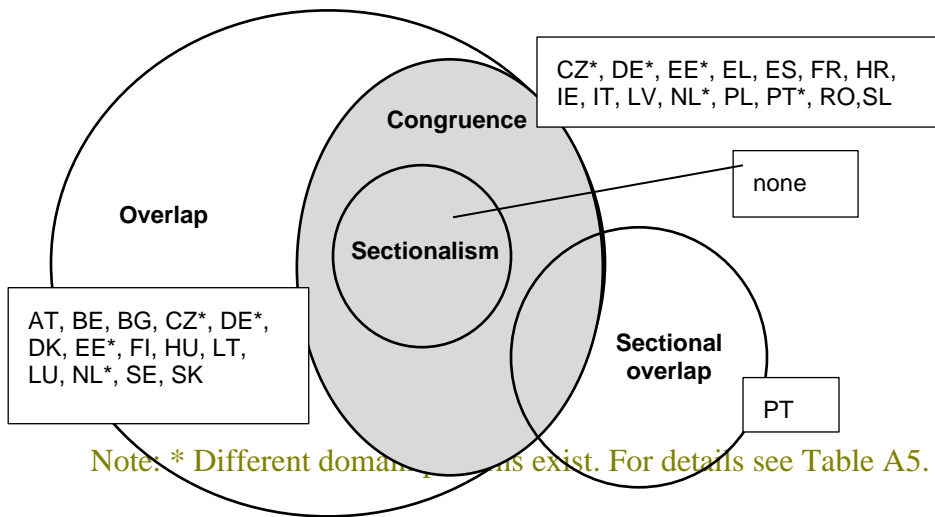
Note: * Different domain patterns exist. For details see Table A1.

Employer organisations

The structure of employer organisations in the temporary agency work sector in the EU differs quite significantly from the trade union structures. In total, our study identified 41 organisations as relevant and so interest representation is much less fragmented compared with workers' interest representation. While there are only two countries where there is no employer organisation for the temporary agency work sector, in 15 countries the companies in this sector are organised by only one organisation and, in most of the others, only two organisations exist. The names and abbreviations of the 41 employer organisations are given in Table A9.

Domain patterns of sectoral relatedness also differ from those of trade unions: The pattern of congruence is much more widespread as shown in Figure 3. Furthermore, and in strong contrast to trade unions, no case of sectional overlap was found. A quite dominant domain pattern is overlap; in most cases this results from the principle of employer associations organising not only temporary work agencies but also private enterprises involved in job placement activities, recruitment or other human resource activities.

Figure 3: Domain coverage of employer organisations in the temporary agency work sector



Membership figures and organisational strength

Trade unions

A key finding of this study is that there is a significant lack of information regarding membership figures and the organisational strength of trade unions. As shown in Table A1, there are only a minority of EU Member States where trade unions were able to report figures of temporary agency workers being a member of the organisation. Thirty out of the total of 62 trade union organisations identified in our study were not able to provide any figures or estimates on the number of agency workers organised in the respective organisation. Furthermore, three organisations (in Latvia and Malta) reported a membership figure of zero.

This lack of data may also reflect the peculiarity of temporary agency employment (including an employment relationship with the agency as well as with user companies, transitional character, frequency of changes and breaks in careers) that contrasts to traditional trade union organisational principles.

Thus, those countries where trade unions provided figures are those where either agency workers are organised in specific, status-related trade union organisations or specific sections (in particular in France and Italy) or in trade unions that register agency workers as a specific category of members (Finland, Hungary, Netherlands, Portugal, Sweden, UK). Table 6 lists those national trade unions that appear to organise the largest known numbers of temporary agency workers.

Table 6: Trade unions reporting the highest number of temporary agency workers, 2014–2015

	Organisation	Total members (active and non-active)	Members within the sector (NACE 78.2 or broader definition)
FI	PAM-liitto	160,000	2,000–3,000
FI	Metalliliitto	140,000	7,000 (est.)
FR	USI GCT	3,000	3,000
HU	VASAS	20,417	2,175
IT	Nidil – Cgil	67,632*	14,953*
IT	Felsa – Cisl	50,000 (est.)	40,000 (est.)
NL	FNV	1.1 million	5,500
NL	CNV	300,000	1,000
NL	LBV	12,500	1,250
PT	SINTTAV	8,530	3,150
PT	SINDETELCO	7,789	1,632
SE	LO (member unions)	1,200,000	20,000
SE	Unionen	500,000	11,000
SE	Akademikerförbunden	350,000	4,000
SE	SLF	33,600	1,000
SE	Byggnads	76,517	2,000
UK	CWU	201,729*	2,107
UK	Unite	1,200,000	15,000

Note: * 2013.

Source: Eurofound Network of correspondents (2015).

Given these patchy and weak data on sectoral union membership, it is extremely difficult and too vague to try to estimate any organisational density rates. A further problem arises from the uncertainties in the calculation of the national temporary agency workforces. This certainly explains the large differences and somewhat surprising results of calculating membership density rates for those countries where a sufficient basis of information is available.

In Finland, a total temporary agency workforce (FTE) of 34,000 (national sources for 2013–2014) and a union membership in the sector of approximately 12,000 would equate a membership density of about 35%. According to surveys carried out by the employer organisation, HPL, and the Ministry of the Economy and Employment the trade union density is even higher (about 50–60%).

In Italy, the total temporary agency workforce (FTE) is 167,000 (national sources for 2013–2014) and the reported union membership (without the largest organisation, Uiltemp) of approximately 55,000 would equate to a density rate of nearly 33%.

In the Netherlands, the total temporary agency workforce (FTE) is 119,000 based on national sources for 2013–2014. However, a figure of 218,000 from the temporary agency work employer

organisations and a union membership (without De Unie) of about 7,750 would mean that only 6.5 or 3.5% of all agency workers are organised in a trade union.

In Sweden, the total temporary agency workforce is 65,000 (only business figures on membership are available for FTE). With a union membership of approximately 40,000, this would result in a very high membership rate of around 61%.

In UK, the union density rate would be as low as 1.8% if the Ciett figures of around 1 million agency workers on a full-time basis are taken as the reference.

Employer organisations

Again in contrast to trade unions, the quantitative data on the number of member companies as well as the number of employees in these member companies as reported by the 41 employer organisations in the temporary agency work sector identified in this study are much more comprehensive and exist for all EU countries where employer organisations exist in the sector (for details see Table A5).

However, and with a view to the density of employer organisations, there are some gaps in the availability of figures. For example, for France and the UK, figures are only available for permanent staff in the member companies in the agency business enterprises.

For those countries where figures are available, employer organisations in several countries report large number of employees in member companies within the temporary agency work sector. Compared with the total national temporary agency work employment, the coverage seems to be particularly high in those countries such as Austria, Belgium, Finland, Germany and Sweden that generally have a high organisational density rate of employer organisations at sector level. However, as shown in Table 7, the numbers of employees in member organisations within the temporary agency work sector as reported by employer organisations in countries such as Poland, Romania and Slovakia are remarkably high and indicate a high organisational density rate of employer organisations in the temporary agency work sector in these countries. Another result for these three countries is that the temporary agency work workforce seems to be concentrated in a very few but very large companies if the number of member companies within the temporary agency work sector is compared with the number of employees working in these member companies.

Table 7: Employer organisations reporting the highest number of temporary agency workers in member companies, 2014–2015

	Organisation	Number of members in the TAW sector*	Total number of employees in member companies within the TAW sector*
AT	FVGD	2,400	65,000–75,000
BE	Federgon	124	87,000 (est.)
DE	BAP	n.a.	320,000 (est.)
DE	iGZ	2,850	300,000
FI	HPL	290 (est.)	33,000
FR	Prisme	600	459,000**
PL	Forum HR	21	254,000 (est.)
PL	SAZ	9	150,000 (est.)
RO	ARAMT	20	42,000

	Organisation	Number of members in the TAW sector*	Total number of employees in member companies within the TAW sector*
SE	Bemanningsföretagen	550	75,000–80,000
SK	APAS	15	15,000
UK	REC	n.a.	96,000***

Notes: n.a. = not available; * NACE 78.2 or broader definition; ** According to Prisme, its member companies employ around 90% of the total temporary agency work workforce; *** Employees working in the 'recruitment profession' according to REC. For more details and other countries see Table A5.

Source: Eurofound Network of correspondents (2015).

Collective bargaining

In terms of collective bargaining practice and coverage, the situation in the EU temporary agency work sector is very heterogeneous and significantly polarised. High bargaining coverage rates of 90–100% are reported in countries with a strong practice of sectoral bargaining and extension practices (Austria, Belgium, Finland, France, Germany, Italy, Luxembourg, Netherlands, Sweden), while in countries where bargaining takes place at company level, bargaining coverage rates are low (Bulgaria, Czech Republic, UK).

An important result from this study is that no collective bargaining is taking place in 11 EU Member States in relation to the temporary agency work sector. That is, it is either carried out within the temporary agency work sector or in other sectors where the collective agreement also covers temporary agency workers.

As shown in Table 8, multi-employer bargaining at cross-sector and sector level only is carried out by trade unions in some western European countries. In the entire CEE region and the two Anglo-Saxon Member States (Ireland, UK), as well as in southern Europe, collective bargaining in most cases is totally absent even at the company level.

Table 8: Collective bargaining and bargaining levels of trade union organisations in the temporary agency work sector, 2014

Form/level of bargaining	Countries
Multi-employer bargaining at inter-sectoral and sectoral level	AT, DE, LU, NL, PT*, SE
Single and multi-employer bargaining	BE, DE, DK, ES, FI, FR, IT, NL
Only bargaining at plant and company	BG, CZ, IE, MT, UK
No collective bargaining	CY**, EE**, EL**, HR**, HU, LT**, LV, PL, RO**, SL**, SK**

Notes: * No agreements signed so far; ** No trade unions exist that would cover the temporary agency work sector. For further details, see Table A4.

Source: Eurofound Network of correspondents (2015).

The trade union involvement in collective bargaining reflects the pattern of employer organisations and their involvement or non-involvement in bargaining processes. The collective bargaining practices of the employer organisations identified by this study reflect a western European versus eastern European/Anglo-Saxon contrast.

As shown in Table 9, only in 10 EU Member States do employer organisations have the capacity or competence to conduct collective agreements at multi-employer, sectoral or branch level (Austria, Denmark, Germany, Finland, France, Italy, Netherlands, Portugal, Spain, Sweden). All of these countries have industrial relations patterns and traditions characterised by a strong multi-level system of bargaining at branch level. Portugal is a peculiar case as here the social partners and employers are involved in collective bargaining but no agreements have so far been signed. An agreement covering temporary agency work dating back to 1989 (and extended in 1995 is, in principle, still in force but according to social partners in the sector it is actually not implemented. Initiatives to sign new agreements at sectoral level in 2009 and 2011 both failed.

In Ireland and the UK, as well as in the CEE countries, collective bargaining at either level is totally absent. In 17 out of the 28 EU Member States collective bargaining does not take place and 19 out of 41 sector-related employer organisations are not engaged in collective bargaining. This confirms previous studies which showed that, in 15 out of 27 EU Member States, employer organisations in the temporary agency work sector have no mandate for collective bargaining at sector level; see, for example, the [overview of good practice cases \(PDF 2.84MB\)](#) in an annex of the report by IDEA Consult for Eurociett and UNI Europa.

Table 9: Collective bargaining practices of employer organisations in the temporary agency work sector

Type	Organisations by country
Involved in collective bargaining at multi-employer and sector/branch level	Austria: FVGD Belgium: Federgon Denmark: Dansk Erhverv/VB, DI Germany: BAP, iGZ Spain: ASEMPELO Finland: HPL, PALTA France: Prism'emploi Italy: Assolavoro, Assosomm Luxembourg: FEDIL Netherlands: ABU, NBBU Sweden: Bemanningsföretagen, Medieföretagen, BI
Involved in collective bargaining but no agreements signed	Portugal: APESPE, APCC
Not involved in collective bargaining	Austria: VZA Bulgaria: BG Staffing Croatia: CPEA Czech Republic: APPS Estonia: EPREL Greece: ENIDEA Hungary: SZTMSZ Ireland: NRF Lithuania: LIIA Latvia: LPDAA Poland: Forum HR, SAZ, OKAP Romania: ARAMT

Type	Organisations by country
	Slovakia: APAS, APAS,* APSZ Slovenia: ZAZ UK: REC
No sector-related employer organisations	Cyprus and Malta

Note: No information on FEDETT (Spain).

Source: Eurofound Network of correspondents (2015).

Participation in public policy

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

Here, not only is the participation in tripartite or bipartite consultation (either on a regular or ad hoc basis) relevant but also the existence of bipartite or tripartite bodies and institutions established in the temporary agency work sector as these often play an important role in public policies regarding regulatory and other frameworks in the sector.

Tripartite and bipartite consultation

In most EU Member States, social partners related to the temporary agency work sector are also consulted on sector-related matters by public authorities (Table 10). This is the case for 84% of all trade union organisations (52 out of 62 organisations) and for 77.5% of all employer organisations analysed by our study (31 out of 40 organisations). In most cases, consultation by public authorities is reported to take place on an ad hoc basis.

However, there are a number of EU Member States where no sector-related trade union and employer organisations exist and thus consultation does not take place. There are six countries with no trade union structures (Croatia, Cyprus, Estonia, Greece, Lithuania, Romania) and two countries without any employer organisation related to the temporary agency work sector (Cyprus, Malta).

The participation of employer organisations in public policy consultation is stronger than in the case of trade unions. Apart from Cyprus and Malta, where no sector-related organisations exist, only employer organisations in Bulgaria, Greece and Sweden (here only one out of three) report that they are not being consulted; however, no information is available for Hungary, Portugal and Slovakia.

In contrast, trade union organisations in the Czech Republic, Hungary, Latvia and Portugal report that they are not consulted by public authorities. If we add these countries to the six countries with no sector-related trade union organisations, then trade unions are not consulted by public authorities about temporary agency work matters in 10 out of the 28 EU Member States.

However, the question of whether or not consultation of trade union organisations (most likely at cross-sector-level) took place in the past or on an ad hoc basis by public authorities (for example, in the context of regulatory reforms of temporary agency work) in these countries was out of the scope of this representativeness study and has not been addressed specifically.

But as practices reported in the Czech Republic show, tripartite and also bipartite social dialogue and consultation is happening and, at least in this country, seems to be an emerging issue. Since 2008, the tripartite Council of Economic and Social Agreement (RHSD ČR) has addressed issues related to temporary agency work through a working group. However, this working group includes only one of the two employer organisations (APPS), government representatives and as

representatives from the Czech-Moravian Confederation of Trade Unions (ČMKOS). In March 2015, the RHSD and the working group discussed, for example, a new legislative proposal by the government on work agencies that included provisions to limit the maximum share of agency workers at company level (15%) and the equality of working conditions of agency workers and directly employed employees. APPS, together with the Confederation of Industry of the Czech Republic (SP ČR), has also been involved in bipartite dialogue with trade unions, for example, on fighting illegal practices by work agencies. Furthermore, APPS has reached an agreement with the Czech Metalworkers' Federation (OS KOVO) on general cooperation, improving working conditions in the temporary agency work sector and combatting illegal forms of employment.

In other countries, however, social partners differ in regard to the assessment of the quality of consultation as the case of Bulgaria illustrates. According to information given to this study by a representative of the Confederation of Independent Trade Unions in Bulgaria (CITUB), the organisation has not received information from the Ministry of Labour and Social Policy on the status of the implementation of Directive 2008/104/EC as well as on suggestions made by CITUB in regard to legislative changes. However, this was not confirmed by a Ministry representative who stated that CITUB had been involved in the directive's implementation in the context of the consultation of the National Tripartite Council; for further details, see the national report for Bulgaria for this study).

Table 10: Participation of trade unions and employer organisations in public policies

Practice	Trade unions	Employer organisations
Social partners involved in consultation on a regular basis	AT, DE*, FR*, NL*, SE*, UK*	AT*, CZ, ES*, FI*, FR, HR, NL, SE, UK
Social partners involved in consultation on an ad hoc basis	BE, DE, DK, ES, FI, FR, IE, IT, LU, MT, NL, PL, SL, SK, UK	AT**, BE, CZ**, DE, DK, EE, FI**, IT, LT, LU, LV, PL, RO, SL
No consultation	CZ, HU, LV, PT	BG, EL, SE**
No consultation as no sector-related organisation exist	CY, EE, EL, HR, LT, RO	CY, MT
No information available	BG, FR***, IE***, PT***, SE***	ES***, HU, PT***, SK

*Notes: * Trade unions: USI GCT (France); DGB (Germany); FNV, CNV (Netherlands); LO, Unionen, Akademikerförbunden (Sweden); Unite (UK). Employer organisations: VZA (Austria); APPS (Czech Republic); HPL (Finland); ASEMPLEO (Spain); ** Employer organisations: FVGD (Austria); APA (Czech Republic); PALTA (Finland); Medieföretagen (Sweden); *** Trade unions: CFTC-CSVF (France); SIPTU (Ireland); FETESE (Portugal); SEKO (Sweden). Employer organisations: APESPE, APCC (Portugal); FEDETT (Spain). For further details see Tables A4 and A8.*

Source: Eurofound's Network of European correspondents (2015).

Bodies dealing with sector-specific public policies

There are eight EU member states where social partners in the temporary agency work sector are actively involved in the regulation of working conditions and other issues of the sector. Important topics and areas addressed by joint bodies are:

- provision of (further) social support and benefits (for example, old age pensions and bridging spells of non-employment);

- support for further training and labour market transitions for jobseekers into agency work;
- monitoring compliance with the requirements of legal or sectoral collective agreements;
- health and safety provisions.

The overview in Table 11 shows that a strong system of collective bargaining is a key precondition in most of the countries where such joint bodies exist. With the only exception being the UK, in all countries these bodies have been established by the social partners, have a bipartite character and are based on collective agreements. As reported by some trade union organisations in the context of this study (for example, from the Netherlands) and documented in other comparative research (the recent [IDEA Consult report for Eurociett and UNI Europa \(PDF 2.84MB\)](#)), an important motivation of social partners (namely trade unions involved in the establishment of joint social and other funds) has been to improve not only the financial situation of temporary agency workers but also to improve their employment security, in particular by providing further training and career support activities. A further motivation was highlighted in trade unions responses from Belgium and the Netherlands which report the need to monitor the compliance with collective agreements and particularly the equal pay principle.

Further comment is necessary on the scope of joint bodies and institutions. Whereas in Sweden and the UK this is limited to licensing functions, the various funds in Austria, Belgium and Luxembourg (see Table 11) focus entirely on social and training support measures. In contrast, the joint bodies in France, Italy and the Netherlands have a broader scope; most notably in France and the Netherlands, a relatively large number of funds and bodies have been set up to address a broad scope of topics.

Finally, in Spain there is a statutory tripartite working group on temporary agency work. The sector-related social partners are not involved in it. Instead the peak-level trade union organisations, the General Workers' Union (UGT) and the Trade Union Confederation of Workers' Commissions (CCOO), and employer organisations, the Spanish Confederation of Employers' Organisations (CEOE) and the Spanish Confederation of Small and Medium Businesses (CEPYME), provide representatives.

Table 11: Bodies dealing with sector-specific public policies in 2014

	Name of body and scope of activity	Character	Basis
AT	Social and further training fund	Bipartite, supervised by government	Statutory based on agreement
BE	Social fund Training fund Health and safety fund*	Bipartite	Agreement*
ES	Working group on Temporary Agency Workers. Health and Safety on Work Commission	Tripartite	Statutory
FR	Social fund Fund for employment and skills forecasting Fund for financing professional training Fund for supporting jobseekers access to temporary agency workers Fund for providing financial support for agency workers between two work spells Fund to provide social and financial support for	Bipartite	Agreement

	Name of body and scope of activity	Character	Basis
	temporary agency workers Bipartite commission for collective bargaining in the temporary agency work sector Bipartite body for welfare and pension Bipartite body for research		
IT	E.bi.temp Fontemp Forma.Temp	Bipartite	Statutory based on agreement
LU	Fund for social benefits, social assistance and training	Bipartite	Agreement
NL	Three sectoral funds for financing and supporting education and training, health and safety and providing social support for agency workers Pension fund for temporary agency workers Certification body for temporary work agencies Body monitoring the compliance with the collective agreements	Bipartite	Agreement
SE	Authorisation Board	Bipartite	Agreement
UK	Licensing authority for temporary work agencies	Tripartite	Statutory

Notes: * Statutory. For further details see Table A12.

Source: Eurofound's Network of correspondents (2015).

European level of interest representation

At European level, [eligibility for consultation and participation in social dialogue are linked to three criteria](#) defined in the European Commission's Communication on adapting and promoting social dialogue at Community level (COM/98/0322 final). Accordingly, a social partner must:

(a) ... relate to a specific sector or categories and be organized at European level;

(b) ... consist of organizations which are themselves an integral and recognized part of Member States' social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States;

(c) ... have adequate structures to ensure their effective participation in the work of the Committees.' *(Article 1)*

In terms of social dialogue, the constituent feature is the ability of such organisations to negotiate on behalf of their members and to conclude binding agreements. This section on the European associations in the temporary agency sector therefore analyses:

- the membership domains of these organisations;
- the composition of their membership;
- their ability to negotiate.

Two sector-related European associations – the employee association, UNI Europa, and the European Confederation of Private Employment Services (Eurociett) – are particularly significant for the temporary agency work sector as they are listed by the European Commission as social partner organisations consulted under Article 154 TFEU. Since 2000, these two organisations have been engaged in the Social Dialogue Committee for the temporary agency work sector. The following analysis concentrates first on these organisations before providing supplementary information on the relevance of other EU level organisations that are linked to the sector’s national social partners.

Membership domain and composition

UNI Europa is the European regional organisation of Union Network International (UNI) with offices in Brussels and in Nyon in Switzerland. UNI Europa is affiliated to the European Trade Union Confederation (ETUC) and represents 7 million workers in 330 European trade unions. As the European trade union federation for services and communication, it is responsible for social dialogue with the corresponding employer organisations in numerous areas of activity in the service sector, including temporary agency work for which it has a specific section. UNI Europa has members in all EU countries.

Eurociett is the regional confederation of the International Confederation of Private Employment Agencies (Ciett) and has members within the EU, the European Economic Area (EEA) and the European Free Trade Association (EFTA) areas and other countries located within the territory of geographical Europe. According to its constitution:

Eurociett is the European representative body of the private employment agencies industry in particular and job market intermediaries in general. As such, Eurociett is the natural contact for European-wide industry consultation ...
(Article 6)

Eurociett’s offices are located in Brussels. Apart from national employer federations representing the private employment agency sector at large, Eurociett also has multinational corporate members. Eurociett has members in all EU Member States except in Cyprus and Malta.

Trade unions

As seen in the screening of national level trade unions and employer organisations, industrial relations in the temporary agency work sector have a peculiar character that stems from the triangular relationship of this form of work. As detailed below, this results in quite different patterns of organisational principles in trade unions and employer organisations. While temporary work agencies and companies in the overwhelming number of cases are organised in national interest organisations that are also affiliated to the EU peak level organisation Eurociett, the situation of trade union organisation is quite different. Here, agency workers may be organised on the basis of the specific employment status as agency workers (narrower definition) or on the basis of their affiliation to specific user sectors and branches. Against this background, the question ‘who represents agency workers?’ is neither easy to answer nor are there general rules that could be found across the EU. As explained above the landscape of organisational principles is very pluralistic and heterogeneous.

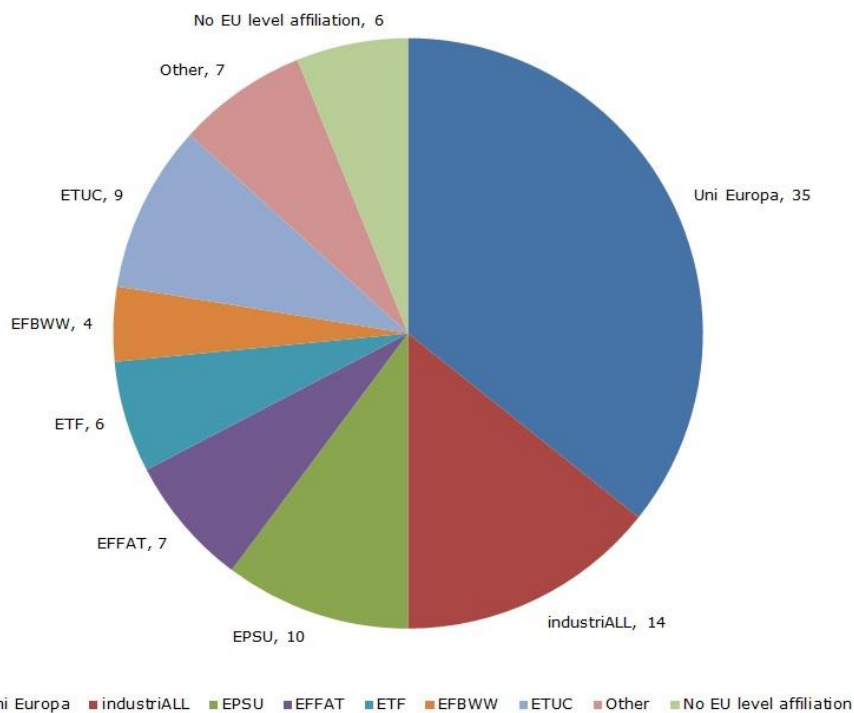
There is a further difficulty in particular with regard to trade unions arising from this study. As sector-specific trade unions exist only in a few Member States (France, Italy), temporary agency workers in most EU countries may join any union that matches their respective professional or occupational background, or organises employees in user companies. Against this, there was a need for this study to focus on the most important organisations, whereby the criteria were the standard criteria used by Eurofound in representativeness studies (sector-relatedness of the

organisations domain, involvement in sector-related collective bargaining and/or affiliated to any relevant European organisation). This resulted in significant differences in the number of trade union organisations regarded as relevant and important by national correspondents ranging zero or just one (Bulgaria, Czech Republic, Hungary, Latvia, Slovenia, Slovakia) to eight (Sweden) (see Table A1).

Screening of the European affiliations of the 62 trade union organisations in the 22 EU Member States (no sector-related trade unions could be identified in Croatia, Cyprus, Estonia, Greece, Lithuania and Romania), shows that there is quite a pluralistic pattern of affiliation. Nearly 10% (six out of 62) of the trade union organisations are currently not affiliated to any EU level union organisations. The overwhelming majority (42 out of 62) organisations, representing a share of around 68% of the trade union organisations, are only affiliated to one EU level union. However, 22.5% (14) of the sector-related trade union organisations are affiliated to at least two EU level trade union organisations.

Our analysis identified six sectoral European trade union organisations as relevant as they represent national organisations with a link to the temporary agency work sector. Apart from UNI Europa these are industriALL, the European Federation of Public Service Unions (EPSU), the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT), the European Transport Workers' Federation (ETF) and the European Federation of Building and Woodworkers (EFBWW). Each of these organisations represents national affiliates in at least three countries. With more than half of the 62 organisations (56.5%), the largest share of national trade union organisations are affiliated to UNI Europa, followed by the manufacturing union industriALL (22.5%) and the public service union EPSU (16%). Furthermore, 14.5% of the national trade union organisations are affiliated to the cross-sectoral ETUC which represents national union confederations and is also the umbrella organisations of the EU level sectoral trade union federations (Figure 4).

Figure 4: European affiliation of trade union organisations in the temporary agency work sector



Notes: N = 62 trade union organisations in 22 EU Member States. There are no sector-related unions in Croatia, Cyprus, Greece, Latvia, Lithuania and Romania. For further details see Table A3.

Source: Eurofound Network of European correspondents (2015).

Table 12 presents an overview of different patterns of EU level affiliation and coverage of countries by UNI Europa. In five EU Member States (Bulgaria, Czech Republic, Slovakia, Slovenia), no national trade union(s) are affiliated to UNI Europa. As those countries where there are no sector relevant trade unions at all (that is, Croatia, Cyprus, Estonia, Greece, Lithuania, Romania) have to be added to this list, there is currently quite a significant group of 11 EU Member States where no UNI Europa affiliates exists.

Table 12: European affiliation of sector-relevant trade unions

EU level affiliation	Countries
Countries where trade unions are only affiliated to UNI Europa	BE, ES, IT, LU, LV, PT, UK
Countries with sector-related trade unions affiliated to UNI Europa and other EU level trade union organisations	AT, DE, DK, FI, FR, IE, MT, NL, PL*, SE
Countries where sector-relevant trade unions are not affiliated to UNI Europa	BG, CZ, HU (industriALL), SI (ETUC), SK (industriALL, EPSU)
Countries where no sector related trade union exists that is affiliated to an EU level organisation	BG, CZ

Countries where no sector-relevant trade union organisations exist	CY, EE, EL, HR, LT, RO
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*Notes: * Only the Bank, Commerce and Insurance Workers branch of NSZZ Solidarność is affiliated to UNI Europa. For further details, see Table A3.*

Source: Eurofound's Network of correspondents (2015).

Affiliation to other EU level sectoral trade union federations again reflects the triangular relationship and cross-sectoral nature of temporary agency employment. This study has shown that five European level trade union federations have national affiliates which are related to the temporary agency work sector. By far the most important of these trade union federations is industriALL, which has manufacturing-related national affiliates in 10 EU Member States, followed by the public service union federation, EPSU, which has sector-related members in six countries (Austria, Denmark, Malta, Slovakia, Sweden, UK), EFFAT in five countries (Austria, Denmark, Malta, Sweden, UK), ETF in four countries (Germany, Malta, Sweden, UK) and EFBWW in three countries (Denmark, Sweden, UK). Furthermore, and reflecting also the cross-sectoral structure of temporary work, ETUC is a relevant trade union organisation as national members in six countries report an affiliation to the ETUC (Germany, Ireland, Malta, Poland, Slovenia, Sweden).

Against this, and in terms of the coverage of additional organisations and countries, we found that only industriALL and ETUC would be able to increase the number of countries represented by EU level organisations as all other European federations only have members in countries that are already covered by UNI Europa.

- industriALL could add eight more national trade union organisations (ones not already affiliated to UNI Europa) in seven countries, including Hungary and Slovakia where no trade union organisations exist that are affiliated to another EU level organisation.
- ETUC could also add eight more national cross-sectoral unions not affiliated to UNI Europa in five countries, including Slovenia that is currently not covered by another EU level organisation.

A further aspect of representativeness should be mentioned in this context given the cross-sectoral nature of temporary agency work. The eight additional industriALL affiliates represent temporary agency workers in the manufacturing sector in Austria, Denmark, Finland, Germany, Hungary, Netherlands and Slovakia; most of these affiliates (Pro-GE in Austria; 3F and Metal in Denmark; Metallitito in Finland; IG Metall and IG BCE in Germany; VASAS in Hungary; De Unie in the Netherlands; and OS Kovo in Slovakia) are among the largest national sectoral union organisations and are actively involved in collective bargaining on behalf of temporary agency workers. This also applies to ETUC affiliates in regard to cross-sectoral matters and the involvement of union confederations in public consultation on matters relating to temporary agency work. In countries such as Germany and Sweden, ETUC affiliates are also involved in collective bargaining covering the whole temporary agency work sector. The ETUC affiliates relevant in this context are: DGB in Germany; SIPTU in Ireland; NSZZ Solidarność, OPZZ and FZZ in Poland; ZSSS in Slovenia; and LO in Sweden.

Against this, and considering the organisational strength and coverage of UNI Europa, industriALL and ETUC, the coverage of the temporary agency work sector could increase significantly both in quantitative as well as qualitative terms (that is, collective bargaining and involvement in public consultation). These three trade union organisations would represent, by affiliation, 50 out of the 62 identified union organisations which is a share of 83%; if only the 56 national organisations affiliated to EU level organisations are taken into account, the share would be 89%. Furthermore, the number of countries covered by EU level organisations would increase

from 17 to 20 out of a total of 22 EU countries where there are trade unions related to the temporary agency work sector.

Our analysis shows that UNI Europa is clearly the biggest and most representative organisation in the temporary agency work sector. However, the analysis also identified deficits with respect to the coverage of national organisations related to the sector as well as the coverage of EU Member States which should be taken into account.

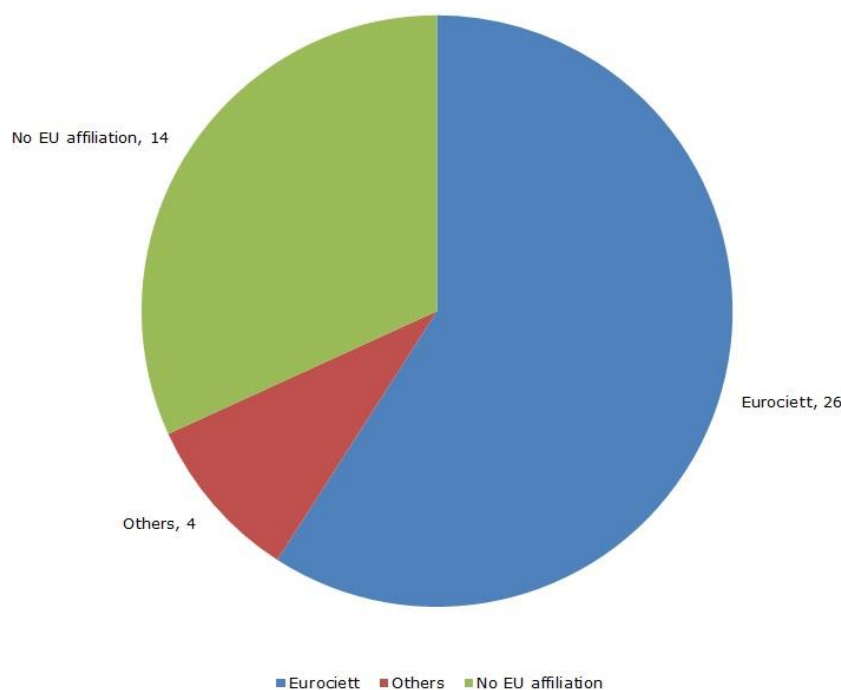
Employer organisations

The European membership pattern of national employer organisations in the temporary agency work sector is dominated by Eurociett as the most representative organisation in terms of membership.

As a specific business sector, respective employer organisations with domain patterns that either are congruent or overlap with other private employment agency activities (for example, recruitment, outplacement) exist in all but two countries. Only in two countries (Poland, Sweden) are there more than two relevant employer organisations.

As a result, 63% of the 41 employer organisations identified by our study are affiliated to Eurociett. Apart from Cyprus and Malta where sector-relevant employer organisations do not exist, at least one employer organisation in each of the remaining 26 EU Member States is a member of Eurociett. In contrast to the multiple affiliation patterns of many trade union organisations, there are only four national organisations that are affiliated to EU level employer's organisations other than Eurociett (Figure 5). Thus, Eurociett by far is the most representative EU level employer's organisation in regard to the temporary agency work sector. In this context, it should be mentioned that, according to Eurociett, its policy is to have only federation per country and that should be the most representative in terms of market share and turnover. Eurociett also stated that, among the 41 employer organisations considered, there are some that by their nature cannot be Eurociett members because their focus is broader and does not fit the Eurociett membership criteria.

Figure 5: European affiliation of employer organisations in the temporary agency work sector



Notes: N = 41 employer organisations in 26 EU Member States. There are no sector-related organisations in Cyprus and Malta. For further details, see Table A7.

Source: Eurofound Network of European correspondents (2015).

Capacity to negotiate

The third criterion of representativeness at European level refers to the organisation's capacity to negotiate on behalf of its members and the existence of adequate structures and resources to participate in European social dialogue.

Both UNI Europa and Eurociett have specific procedures to define the positions to be presented within the European social dialogue framework.

Following an inquiry in the context of this study, UNI Europa and Eurociett confirmed that both organisations have been given a statutory mandate to negotiate on behalf of its members. This mandate is defined in the [UNI Europa's statutes](#) and [Eurociett's constitution](#).

As a European trade union federation for services and communication, UNI Europa currently represents 272 national trade unions in 50 countries. UNI Europa's aim is to strengthen the social dialogue in sectors where it already exists and to establish sectoral social dialogue where it does not, so as to build a platform for European industrial relations in each of these areas. Above that UNI Europa supports the activities and priorities of its national affiliates and helps to promote them at national level. As stated in its statutes, UNI Europa seeks to fulfil the objectives by:

- deciding policy and action with respect to the institutions of the European Union to ensure that there is a social and democratic dimension to European integration;

- representing affiliates in European institutions whose activities affect the social, economic and cultural conditions of affiliates and their members.

With regard to its main functions, Eurociett's constitution stipulates that:

Eurociett is involved in all issues that related to the activities of private employment agencies at the European level. As such, its main functions are as follows:

- *represent its members with all of the institutions concerned. Its main activity consists of ensuring that European laws and regulations that affect the members' interests are as compatible as possible with the members' growth and prosperity;*
- *promote the industry's activities, in particular, triangular employment relationships, and attempt to eliminate any discrimination in the industry;*
- *negotiate with European institutions and organisations (for example, in the form of social dialogues) and, if expressly requested by a national member federation, with the government or official organisations of this member's country;*

[...]

(Paragraph II, Article 3)

After a joint application to the EU Commission, since 2000 UNI Europa and Eurociett have been the two social partners involved in the Sectoral Social Dialogue Committee (SSDC) on temporary agency work at the European level. According to the [SSDC's web page](#), it is currently focusing on:

- labour market policies;
- promoting national social dialogue;
- temporary agency work regulation;
- sectoral developments and the economic situation;
- projects on cross -order activities within temporary agency work and on transitions in the labour market.

UNI Europa and Eurociett have carried out a number of joint projects, issued joint declarations on various issues and have drafted joint opinions which illustrate their capacity and resources to negotiate successfully at European level. Examples include:

- joint project on 'How temporary agency work compares with other forms of employment' (2013–2015);
- joint project on temporary agency work and transitions in the labour market (2011–2012);
- promoting sectoral social dialogue on temporary agency work: organisation of a round table events in Bulgaria (2009), Turkey (2010), Croatia (2013) and Serbia (2014);
- joint declaration on vocational training for temporary agency workers: 'Joint actions developed by sectoral social partners play a key role in facilitating skills upgrading' (2009);
- agreement to set up a European observatory on cross-border activities within the temporary agency work sector (2009);

- joint opinions: Eurociett/UNI Europa joint declaration on the directive on working conditions for temporary agency workers (2008) and on flexicurity (2007).

Other EU-level organisations

As final proof of the weight of UNI Europa and Eurociett, it is useful to look at the other European organisations to which the sector-related trade unions and employers' organisations are affiliated. As highlighted in previous sections, there are five European sectoral/industry trade unions federations (industriAll, EPSU, EFFAT, EFBWW and ETF) as well as the cross-sectoral European confederation ETUC that are relevant in the context of temporary agency work. The presence of these organisations reflects the overlapping domains of many trade unions as well as the cross-sectoral nature of temporary agency work. The bottom-up approach of our analysis has clearly shown that only in very few cases are temporary agency workers organised in specific trade union organisations. In most cases, their membership is either linked to the narrower sector definition (that is, NACE 78.2) and those trade unions (in the service sector) representing this specific sector or linked to the user sectors that also reflect their professional and sectoral background.

While this explains the broad variety of possible union representation/membership patterns, our study has shown that UNI Europa is the most representative EU level trade union organisation in terms of the number of countries and national trade unions linked to the temporary agency work sector covered. This confirms the principal status of UNI Europa as the sector's most representative trade union organisation. However, our study has also identified a number of weaknesses in terms of the organisational affiliation of national sector-related union organisations and the number of countries covered by UNI Europa. This not only reflects strong differences between countries in regard to trade union presences, membership density and collective bargaining coverage of the temporary agency work sector but also a variety of different EU affiliation patterns of sector-related trade unions. In this context our study found industriALL as the major manufacturing union organisation as well as the cross-sectoral ETUC as the most relevant EU level organisations.

The situation in regard to employer organisations is quite different as the overwhelming majority of national organisations in the temporary agency work sectors are affiliated to Eurociett. Eurociett is the most important sector-related European organisation since it covers 26 EU Member States.

Conclusions

Given the cross-cutting nature of temporary agency work and the bottom-up approach applied in this representativeness study, it is not surprising that the analysis has identified a pluralistic landscape of social partner organisations and affiliation patterns in the sector, consisting of 103 social partner organisations.

Our study has also shown that organisational pluralism on the employee side is much stronger than on the employer side, with 62 trade unions being identified. Certainly the number would have been much higher without the instruction for the Eurofound national correspondents to analyse only the most relevant social partner organisations in each country. As the study has shown, there is considerable variety with regard to trade union organisations reporting to organise workers in the temporary agency work sector. On the one hand, there are countries where potentially every sector-related trade union organises agency workers; also in some countries, cross-sectoral trade union confederations are the main actor of social dialogue and bargaining processes. On the other hand, we found six countries (Croatia, Cyprus, Estonia, Greece, Lithuania, Romania) where no trade union organisation linked to the sector in terms of membership exists and a further six countries (Bulgaria, Czech Republic, Hungary, Latvia, Slovakia, Slovenia), where only one trade union reported having membership links to the temporary agency work sector.

On the employer side, a much less fragmented system exists. The 41 organisations identified in our study are quite equally spread among the 28 EU Member States with only two countries (Cyprus, Malta) having no employer organisations representing the temporary agency work sector, though the number of agencies and agency workers is very small in both these countries.

Differences between trade unions and employer organisations also appear with regard to their domain demarcation. In the case of trade unions, overlap and sectional overlap are the dominant domain patterns, while in the case of the employer organisations, domains tend to be much narrower and sector-related, that is, congruence and overlap prevail.

With regard to sectoral organisational membership density, an important result of our study is that reliable data were difficult to obtain with more than half of all trade union organisations unable to provide even estimates on numbers of sector-related members. This may also reflect a generally low trade union density among agency workers, something which is confirmed by countries where trade unions report a membership of zero (Latvia, Malta). Against these limitations of available and reliable data, our study indicates that the highest trade union membership rates can be found in countries such as Sweden with around 60% as well as Belgium, Finland or Italy with approximately one-third of the agency workforce organised in trade unions.

For the employer organisations, the quantitative data on membership are much better, though there are some gaps, including for those countries with a high number of temporary agency workers such as France, Italy and the UK. However, our study confirms previous findings that in those countries where temporary agency work had been regulated since the 1970s and 1980s (for example, Belgium, France and the Netherlands), the density rate of employer organisations are much higher than in southern and eastern Europe.

This polarised pattern is even stronger for collective bargaining. While in some countries in western and northern Europe, very high bargaining coverage rates of 90–100% are reported, collective bargaining in the CEE region as well as in a number of southern EU countries takes place in the temporary agency work sector or agency workplaces hardly at all. Our study also confirms the strong differences concerning the role and importance of different bargaining levels, ranging from bargaining at cross-sectoral and/or national level to plant level. The rather polarised and overall fragmented picture of collective bargaining seems to be driven by employer organisations. Only in 10 EU Member States do employer organisations representing the temporary agency work sector have the capacity or competence to conduct collective agreements

at multi-employer, sectoral or branch level; all these cases are in countries characterised by a strong multi-level system of bargaining at branch level.

As far as participation in public policy is concerned, the overwhelming majority of social partners report being consulted by public policymakers on an ad hoc or regular basis in regard to the regulation or other relevant issues of temporary agency work. Generally, public authorities tend to consult employer organisations more frequently than trade unions; we found more trade union organisations reporting a lack of consultation on matters regarding temporary agency work than employer organisations. If those countries where there are no sectoral trade unions representing the sector are included, a total of ten countries emerge where trade unions are not involved in any consultation on the temporary agency work sector compared with only four countries where this is the case from the point of view of employer organisations.

Certainly a peculiarity of the temporary agency work sector is the existence of bipartite funds and bodies in fields such as social security, further training, labour market transitions or compliance and monitoring. There are seven EU member states where social partners in the temporary agency work sector have initiated such practices, all of them in countries where there are strong sector-related social partner organisations and that are characterised by high collective bargaining rates. Furthermore, there are two EU Member States where social partners work together in institutionalised working groups or licensing authorities.

To be eligible to be consulted, European social partners organisations must meet the three criteria defined under Article 1 of Commission Communication COM(1998) 322 final. This study has shown that the two European social partners under consideration, Eurociett and UNI Europa, both fulfil these criteria, including a statutory mandate to negotiate on behalf of their affiliates. However, there are differences between them with regard to sector-relatedness, domain patterns and coverage.

Mapping of individual organisations showed that UNI Europa has 35 direct affiliations (56% of the unions identified in the study) in 17 EU Member States. The second most relevant sector-related union organisation, industriALL, has 14 direct affiliations (around 23% of the unions identified) in 10 EU Member States, out of which eight organisations in seven countries are not also affiliated to UNI Europa. Our study has shown that the cross-sectoral confederation ETUC should also be regarded as relevant in regard to the temporary agency work sector, not only because it has nine direct affiliations (14.5% of all unions identified) but also because eight of these in five countries are not also affiliated to UNI Europa. Furthermore, industriALL and ETUC represent affiliates in three countries (Hungary, Slovakia, Slovenia) that are currently not covered by UNI Europa.

Eurociett has 26 direct affiliations (63.4% of the employer organisations identified in the study) in 26 EU Member States. Moreover, our study could identify no EU level employer organisation that seems sector-relevant and has national affiliates in more than two EU countries.

Thus, the analysis of the temporary agency work sector in the European Union results in the following two general conclusions.

Firstly, Eurociett for the employer side ought to be regarded as the most important EU-wide representative employer organisation within the temporary agency work sector. For trade unions, the conclusion is less clear-cut but UNI Europa should be regarded as the most important EU-wide representatives of the employees within the sector.

Secondly, our bottom-up screening (that is, looking at the most relevant national social partner organisations and analysing them) has identified certain weaknesses and gaps in terms of the coverage of national organisations as well as EU Member States. And in contrast to the employer side and also reflecting the cross-sectoral nature of temporary agency employment, our study has identified a number of further EU level trade union organisations as relevant, with industriALL and ETUC being the most important of these.

Annex: Data tables

Table A1: Domain coverage and membership of trade union organisations*

	Name	Domain coverage	Total members**	Members in the sector	Members in the largest companies
AT	PRO-GE	Sectional overlap	229,776	n.a.	Yes
AT	DPA-djp	Sectional overlap	275,455*	1,000	Yes
BE	ABVV BBTK – FGTB Setca	Sectional overlap	n.a.	n.a.	Yes
BE	ABVV-ACCG / FGTB-CG	Sectional overlap	n.a.	n.a.	Yes
BE	LBC-CNE	Overlap	n.a.	n.a.	Yes
BE	ACLVB – CGSLB	Overlap	n.a.	n.a.	Yes
BG	NFTISI	Overlap	15,956	100 (est.)	Yes
CY	–				
CZ	KOVO MB	Sectional overlap	20,000	2,000	Yes
DE	DGB joint bargaining unit	Overlap	6.18 million	n.a.	Yes
DE	ver.di	Overlap	2.039.931	n.a.	Yes
DE	IG Metall	Sectional overlap	2,269,281	n.a.	Yes
DE	IGBCE	Sectional overlap	657,752	n.a.	n.a.
DE	EVG	Sectional overlap	203,875	n.a.	No
DK	3F	Sectional overlap	253,430	n.a.	Yes
DK	Metal	Sectional overlap	81,130	n.a.	Yes
DK	FOA	Sectional overlap	164,615	800 (est.)	Yes
DK	DSR	Sectional overlap	54,689	370	Yes
EE	–				
EL	–				
ES	FES-UGT	Overlap	140,000	n.a.	Yes
ES	CCOO-SERVICIOS	Overlap	187,301	n.a.	Yes
FI	PAM-liitto	Sectional overlap	160,000	2,000–3,000	Yes
FI	Metalliliitto	Overlap	140,000	7,000 (est.)	Yes
FI	ERTO	Overlap	17,000 (est.)	1,300	Yes
FI	TEAM-liitto	Overlap	36,000	700-800	Yes
FR	USI GCT	Congruence	3,000	3,000	Yes
FR	FEC-FO	Congruence	n.a.	n.a.	Yes

	Name	Domain coverage	Total members**	Members in the sector	Members in the largest companies
FR	CFDT Services	Overlap	11,000	n.a.	Yes
FR	CFTC-CSVF	Overlap	32,000	n.a.	n.a.
FR	FNECS	Overlap	n.a.	n.a.	Yes
HR	–				
HU	VASAS	Sectional overlap	20,417	2,175	Yes
IE	CWU	Overlap	19,550	n.a.	Yes
IE	SIPTU	Overlap	165,000	n.a.	Yes
IT	Nidil – Cgil	Overlap	67,632*	14,953	Yes
IT	Felsa – Cisl	Overlap	50,000	40,000	Yes
IT	Uiltemp	Overlap	70,780	42,000***	Yes
LT	–				
LU	Syndicat Services et Energie de l'OGBL	Overlap	n.a.	n.a.	Yes
LU	LCGB – Services et Commerce	Overlap	n.a.	n.a.	Yes
LV	LKDAF	Sectional overlap	1,934	n.a.	No
MT	GWU	Overlap	39,201	n.a.	Yes
MT	UHM	Overlap	22,502	n.a.	No
NL	FNV	Overlap	1.1 million	5500	Yes
NL	CNV	Overlap	300,000	1000	Yes
NL	LBV	Overlap	12,500*	1,250	Yes
NL	De Unie	Overlap	50,000	n.a.	n.a.
PL	NSZZ Solidarność	Overlap	667,500	n.a.	n.a.
PL	OPZZ	Overlap	792,500	n.a.	n.a.
PL	FZZ	Overlap	408,100	n.a.	n.a.
PT	SINTTAV	Overlap	8,530	3,150	Yes
PT	SINDETELCO	Overlap	7,789	1,632	Yes
PT	FETESE	n.a.	n.a.	n.a.	n.a.
RO	–				
SE	LO	Sectional overlap	1,200,000	20,000	Yes
SE	SEKO	Sectional overlap	80,000	250	Yes
SE	Unionen	Sectional overlap	500 000	11,000	Yes
SE	Akademikerförbunden	Sectional overlap	350,000	4,000	Yes
SE	SLF	Sectional overlap	33,600	1,000	No

	Name	Domain coverage	Total members**	Members in the sector	Members in the largest companies
SE	Vårdförbundet	Sectional overlap	91,300	100–800	Yes
SE	SJF	Sectional overlap	13,000	400 (est.)	Yes
SE	Byggnads	Sectional overlap	76,517	2,000	Yes
SI	ZSSS	Overlap	n.a.	n.a.	Yes
SK	OS Kovo	Overlap	70,000 (est.)	1,000 (est.)	Yes
UK	CWU	Overlap	201,729*	2,107	No
UK	USDAW	Overlap	432,000	1,335	No
UK	Unite	Sectional overlap	1,200,000	15,000	Yes

Notes: n.a. = not available; * Membership of all organisations listed is voluntary; ** The national reports contain the latest available figures for 2013–2015; *** Includes non-active members.

Source: Eurofound's network of European correspondents.

Table A2: Domain description of trade union organisations

	Name	Domain description
AT	PRO-GE	All blue-collar workers, apprentices and retirees in the private sector of the following industries: metalworking, mining, energy, textiles and leather, agriculture, food processing, tobacco, chemicals, glass production, paper, vulcanisation, mineral oil and gas, and temporary agency workers
AT	DPA-djp	All white-collar workers and a few blue-collar workers (in the printing and paper industries) in the private sector
BE	ABVV BBTK – FGTB Setca	All white-collar workers
BE	ABVV-ACCG / FGTB-CG	All blue-collar workers
BE	LBC-CNE	
BE	ACLVB – CGSLB	
BG	NFTISI	
CY	–	
CZ	KOVO MB	ŠKODA AUTO Mladá Boleslav, ŠKODA AUTO Vrchlabí a ŠKODA AUTO Kvasiny
DE	DGB joint bargaining unit	DGB is the largest cross-sectoral trade union federation, covering all sectors by its affiliates
DE	ver.di	Service sector, including temporary agency work sector
DE	IG Metall	Only temporary agency workers employed in agencies in IG Metall's domain and workers sent to work in establishments of IG Metall's domain

	Name	Domain description
DE	IGBCE	Only temporary work agencies forming part of company groups in the chemical, mining and energy sectors and of establishments employing temporary agency workers in these sectors.
DE	EVG	EVG covers the temporary work agency of the Deutsche Bahn group and temporary workers sent to Deutsche Bahn and other transport/railway companies
DK	3F	Only blue-collar, skilled and unskilled workers in the temporary agency work sector and all public as well as private sectors where unskilled and skilled work is performed
DK	Metal	Blue-collar workers only working as metalworkers, and within areas such as information technology (IT), techniques, engineering and mechanics
DK	FOA	Social, healthcare and public sectors
DK	DSR	White-collar nurses only
EE	–	
EL	–	
ES	FES-UGT	Communication, banking and insurance activities, cleaning and private security
	CCOO-SERVICIOS	Commerce, hotels and restaurants, gambling, finance, banking and insurance, engineering and tourism
FI	PAM-liitto	Mainly blue collar-workers in temporary agency work sector; workers in retail trade, property services, security services as well as tourism, restaurant and leisure services
FI	Metalliliitto	Technology industry (for example, engineering, shipbuilding, iron and steel industry, electronic industry, car manufacturing), car repair workshops, clerical employees of car retail, telecommunication industry, mining, electricity and power plants, precious metals sector, sheet metal industry, repair works for mechanical forest industry, civilian workers in Ministry of Defence repair shops
FI	ERTO	IT, transportation and forwarding, advertising, market research, digital media, healthcare and social services, financial management, physical exercise, culture, leisure activities and other special fields
FI	TEAM-liitto	
FR	USI GCT	
FR	FEC-FO	All sectors where temporary workers are employed
FR	CFDT Services	80 branches within the sectors of: retail; textile, leather and clothing products; hotel, tourism and restaurant; business and personal services; legal professions; consular chambers
FR	CFTC-CSVF	
FR	FNECS	

	Name	Domain description
HR	–	
HU	VASAS	Manufacture of basic metals and fabricated metal products; manufacture of machinery and equipment; manufacture of electrical and optical equipment
IE	CWU	CWU is the main union in the telecommunications industry and one of the largest unions in services in general
IE	SIPTU	Largest union in the country representing employees in manufacturing, public administration, health services, retail and other services, construction
IT	Nidil – Cgil	Atypical, and dependent self-employed workers
IT	Felsa – Cisl	Atypical, and dependent self-employed workers
IT	Uiltemp	Atypical, and dependent self-employed workers as well as people looking for a job
LT	–	
LU	Syndicat Services et Energie de l'OGBL	Energy, services
LU	LCGB – Services et Commerce	Services, commerce
LV	LKDAF	Culture, arts and entertainment sectors: music and art schools and colleges, crafts schools, interest and extracurricular education institutions (music, arts), higher education institutions of music and arts, libraries, cultural centres and other institutions, museums, theatres, cinema, video, orchestra, state culture protection institutions, TV companies, radio, concert halls, sports institutions, game grounds, zoo, tourism companies, national archives
MT	GWU	
MT	UHM	
NL	FNV	Nearly all sectors of economic activity
NL	CNV	Nearly all sectors of economic activity
NL	LBV	Nearly all sectors of economic activity
NL	De Unie	Nearly all sectors of economic activity
PL	NSZZ Solidarność	
PL	OPZZ	
PL	FZZ	
PT	SINTTAV	Temporary agency work and telecommunications sector, and so on.
PT	SINDETELCO	Temporary agency work and graphic industries, security, telecommunications, and so on.
PT	FETESE	Several services, manufacturing

	Name	Domain description
RO	–	
SE	LO	All blue-collar workers
SE	SEKO	All blue-collar workers
SE	Unionen	All white-collar workers
SE	Akademikerförbundet	All academics
SE	SLF	All medical doctors
SE	Vårdförbundet	All nurses, midwives, biomedical scientists and radiographers
SE	SJF	All journalists
SE	Byggnads	Blue-collar workers, all construction workers
SI	ZSSS	All the workers in those sectors not covered by the 22 sectoral trade unions in ZSSS
SK	OS Kovo	Metal, steel and electronic industries, road transport, and so on.
UK	CWU	Postal services, telecommunications and financial services
UK	USDAW	Temporary agency workers in retail and distribution, and workers in retail and distribution, food processing and manufacturing, catering, chemical processing, pharmaceuticals, home shopping and call centres
UK	Unite	Whole economy

Source: Eurofound's Network of European correspondents.

Table A3: Trade unions' international, European and national affiliations

	Name	National affiliation	European affiliation	International affiliation
AT	PRO-GE	ÖGB	EFFAT, industriALL Europe	industriALL Global, IUF, TUAC
AT	GPA-djp	ÖGB	EFFAT, EFJ, EPSU, industriALL Europe, UNI Europa	industriALL Global, IFJ, UNI
BE	ABVV BBTK – FGTB Setca	ABVV-FGTB	UNI Europa	n.a.
BE	ABVV-ACCG / FGTB-CG	ABVV-FGTB	UNI Europa	n.a.
BE	LBC-CNE	ACV-CSC	UNI Europa	n.a.
BE	ACLVB – CGSLB	not applicable	UNI Europa	n.a.
BG	NFTISI	CL Podkrepa	–	–
CY	–			
CZ	KOVO MB	–	–	–

	Name	National affiliation	European affiliation	International affiliation
DE	DGB joint bargaining unit	not applicable	ETUC	ITUC
DE	ver.di	DGB	UNI Europa	UNI Global
DE	IG Metall	DGB	industriALL Europe	industriALL Global
DE	IGBCE	DGB	industriALL Europe	industriALL Global
DE	EVG	DGB	ETF	ITF
DK	3F	LO	ETF, industriALL, EFFAT, EFBWW, EPSU	ITF, PSI, UNI-Global, industriALL Global
DK	Metal	LO	UNI Europa, industriALL, EPSU	ITF, UNI-Global, industriALL Global
DK	FOA	LO	EPSU	n.a.
DK	DSR	FTF	EPSU	n.a.
EE	–			
EL	–			
ES	FES-UGT	UGT	UNI Europa	UNI Global
ES	CCOO-SERVICIOS	CCII	UNI Europa	UNI Global
FI	PAM-liitto	SAK, SASK	UNI Europa	UNI Global
FI	Metalliliitto	SAK, SASK	industriALL Europe	industriALL Global, Nordic Industry Workers (IN)
FI	ERTO	STTK	UNI Europa	UNI Global
FI	TEAM-liitto	SAK and others	UNI Europa	UNI Global
FR	USI GCT	CGT	UNI Europa	UNI Global
FR	FEC-FO	CGT-FO	UNI Europa	UNI Global
FR	CFDT Services	CFDT	UNI Europa	UNI Global
FR	CFTC-CSVF	CFTC	–	–
FR	FNECS	CFE-CGC	CEC European Managers	–
HR	–			
HU	VASAS	MSZOSZ	industriALL Europe	industriALL Global
IE	CWU	ICTU	UNI Europa	–
IE	SIPTU	ICTU	ETUC	UNI Global Union, industriALL Global, IUF
IT	Nidil – Cgil	Cgil	UNI Europa	UNI Global

	Name	National affiliation	European affiliation	International affiliation
IT	Felsa – Cisl	Cisl	UNI Europa	UNI Global
IT	Uiltemp	Uil	UNI Europa	UNI Global
LT	–	–	–	–
LU	Syndicat Services et Energie de l'OGBL	OGBL	UNI Europa	UNI Global
LU	LCGB – Services et Commerce	LCGB	UNI Europa (through the confederation LCGB)	–
LV	LKDAF	LBAS	UNI Europa Graphical	International Federation of Actors (FIA), International Federation of Musicians (FIM), UNI Global Media & Entertainment International (UNI-MEI)
MT	GWU	–	ETUC, ETF, EFFAT, EPSU, ETUF-TCL, Eurocadres, industriALL, UNI Europa, European Workers' Education Association, Stockholm in Sweden (EURO WEA), Federation of Europe Retired Personnel Association, Brussels in Belgium (FERPA), European central banks federation (SCECBU)	ITUC, ITF, IUF, industriALL Global, Public Service International (PSI), International Textile, Garment and Leather Workers' Federation (ITGLWF), UNI Global, International Federation of Musicians, International Federation of Workers' Education (IFWEA)
MT	UHM	CMTU	ETUC, EPSU, FERPA	WOW (International Secretariat of the World Organization of Workers)
NL	FNV	not applicable	UNI Europa, ETUC	UNI Global, ITUC
NL	CNV	not applicable	UNI Europa, ETUC	UNI Global, ITUC, WOW
NL	LBV	not applicable	–	–
NL	De Unie	n.a.	industriALL	GIFTED, industriALL Global
PL	NSZZ	not applicable	ETUC	ITUC

	Name	National affiliation	European affiliation	International affiliation
	Solidarność			
PL	OPZZ	not applicable	ETUC	ITUC
PL	FZZ	not applicable	ETUC	–
PT	SINTTAV	CGTP-IN	UNI Europa	UNI Global
PT	SINDETELCO	UGT UGC FETESE ASSOCIAÇÃO AGOSTINHO ROSETA	UNI Europa	UNI Global
PT	FETESE	UGT	n.a.	n.a.
RO	–			
SE	LO	not applicable	ETUC	ITUC
SE	SEKO	LO	UNI Europa, ETF, EFBWW, EPSU	UNI Global, ITF, BWI, PSI
SE	Unionen	TCO	EFFAT, UNI Europa, ETF, industriALL	UNI Global, ITF, industriALL Global
SE	Akademikerför bunden	SACO	–	–
SE	SLF	SACO	Standing Committee of European Doctors (CPME), European Union of Medical Specialists (UEMS)	World Medical Association (WMA)
SE	Vårdförbundet	TCO	EPSU, European Midwives Association (EMA), European Association for Professions in Biomedical Science (EPBS), European Federation of Radiographers Societies (EFRS), European Federation of Nurses' Associations (EFN)	International Confederation of Midwives (ICM), International Federation of Biomedical Laboratory Science (IFBLS), International Society of Radiographers & Radiological Technologists (ISRRT), International Council of Nurses (ICN)
SE	SJF	TCO	European Federation of Journalists (EFJ)	International Federation of Journalists (IFJ), International News Safety Institute (INSI)
SE	Byggnads	LO	EFBWW	BWI

	Name	National affiliation	European affiliation	International affiliation
SI	ZSSS	Association of Free Trade Unions of Slovenia, ZSSS	ETUC	–
SK	OS Kovo	KOZ SR	industriALL Europe, EPSU, EMF.	PSI
UK	CWU	TUC	UNI Europa, ETF	UNI Global, ITF
UK	USDAW	TUC	UNI Europa, EFFAT, ETF, industriALL	UNI Global, industriALL, ITF, IUF
UK	Unite	TUC	UNI Europa, EFBWW, EFFAT, EPSU, ETF, industriALL	UNI Global, BWI, industriALL Global, ITF, IUF, PSI

Note: n.a. = not available.

Source: Eurofound's Network of European correspondents.

Table A4: Collective bargaining and consultation – trade unions

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
AT	PRO-GE	Multi-employer bargaining at sectoral/branch and occupational level	50,000–60,000	Yes	On regular basis
AT	GPA-djp	Multi-employer bargaining at multi-branch and occupational level	14,000	Yes	On regular basis
BE	ABVV BBTK – FGTVB Setca	Single- and multi-employer bargaining	100%	Yes	On ad hoc basis
BE	ABVV-ACCG / FGTVB-CG	Single- and multi-employer bargaining	100%	Yes	On ad hoc basis
BE	LBC-CNE	Single- and multi-employer bargaining	100%	Yes	On ad hoc basis
BE	ACLVB – CGSLB	Single- and multi-employer bargaining	100%	Yes	On ad hoc basis

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
BG	NFTISI	Single- and multi-employer bargaining	345 (est.)	n.a.	n.a.
CY	–				
CZ	KOVO MB	Multi-employer bargaining in one company	2,000 (est.)	No	–
DE	DGB joint bargaining unit	Multi-employer bargaining at sectoral/branch and occupational level	800,000	Yes	On regular basis
DE	ver.di	Single- and multi-employer bargaining	n.a.	Yes	On ad hoc basis
DE	IG Metall	Single- and multi-employer bargaining	n.a.	Yes	On ad hoc basis
DE	IGBCE	Multi-employer bargaining	n.a.	Yes	On ad hoc basis
DE	EVG	Multi-employer bargaining	n.a.	Yes	On ad hoc basis
DK	3F	Single-bargaining at plant/company/group level and multi-employer bargaining at sectoral/branch level	n.a.	Yes	On ad hoc basis
DK	Metal	Single-bargaining at plant/company/group level and multi-employer bargaining at sectoral/branch level	n.a.	Yes	On ad hoc basis
DK	FOA	Single-bargaining at plant/company/group level and multi-employer	n.a.	Yes	On ad hoc basis

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
		bargaining at sectoral/branch level			
DK	DSR	Multi-employer bargaining at sectoral/branch level	370	Yes	On ad hoc basis
EE	–				
EL	–				
ES	FES-UGT	Single- and multi-employer bargaining	10,600	Yes	On ad hoc basis
ES	CCOO-SERVICIOS	Single- and multi-employer bargaining	5,000	Yes	On ad hoc basis
FI	PAM-liitto	Single-bargaining at company level and multi-employer bargaining at sectoral/branch level	2,000–3,000 (est.)	Yes	On ad hoc basis
FI	Metalliliitto	Multi-employer bargaining at sectoral/branch level	7,500 (est.)	Yes	On ad hoc basis
FI	ERTO	Multi-employer bargaining at sectoral/branch level	18,000	Yes	On ad hoc basis
FI	TEAM-liitto	Multi-employer bargaining at sectoral/branch level	700–800 (est.)	Yes	On ad hoc basis
FR	USI GCT	Single-bargaining at plant, company and group level and multi-employer bargaining at branch level	2 million temporary agency workers or 509,855 in FTE. Figure relates to all five unions in France.	Yes	On ad hoc basis
FR	FEC-FO	Single- and	Additionally,	Yes	On ad hoc

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
		multi-employer bargaining	20,000 permanent staff of agencies		basis
FR	CFDT Services	Single- and multi-employer bargaining		Yes	On ad hoc basis
FR	CFTC-CSVF	Single-employer bargaining at plant, company and group level and multi-employer bargaining		n.a.	n.a.
FR	FNECS	Single-employer bargaining at plant, company and group level and multi-employer bargaining		Yes	On ad hoc basis
HR	–				
HU	VASAS	No bargaining	–	No	–
IE	CWU	Single-employer bargaining	n.a.	Yes	On ad hoc basis
IE	SIPTU	No bargaining	–	n.a.	n.a.
IT	Nidil – Cgil	Single- and multi-employer bargaining	560,000 (est.)	Yes	On ad hoc basis
IT	Felsa – Cisl	Single- and multi-employer bargaining	550,000 (est.)	Yes	On ad hoc basis
IT	Uiltemp	Single- and multi-employer bargaining	550,000 (est.)	Yes	On ad hoc basis
LT	–				
LU	Syndicat Services et Energie de l'OGBL	Multi-employer bargaining at sectoral/branch level	6,226	Yes	On ad hoc basis
LU	LCGB – Services et Commerce	Multi-employer bargaining at sectoral/branch level	6,226	Yes	On ad hoc basis

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
LV	LKDAF	No bargaining	–	No	–
MT	GWU	Single-employer bargaining at company level	1,182*	Yes	On ad hoc basis
MT	UHM	Single-employer bargaining at company level	300*	Yes	On ad hoc basis
NL	FNV	Single and multi-employer bargaining	460,000	Yes	On ad hoc basis
NL	CNV	Multi-employer bargaining at sectoral level	460,000	Yes	On ad hoc basis
NL	LBV	Single and multi-employer bargaining	702,700	Yes	On ad hoc basis
NL	De Unie	Multi-employer bargaining at sectoral level	460,000	Yes	On ad hoc basis
PL	NSZZ Solidarność	No bargaining	–	Yes	On ad hoc basis
PL	OPZZ	No bargaining	–	Yes	On ad hoc basis
PL	FZZ	No bargaining	–	Yes	On ad hoc basis
PT	SINTTAV	Multi-employer bargaining at sectoral/branch level	3,150	No	–
PT	SINDETELCO	Multi-employer bargaining at sectoral/branch level	–	No	–
PT	FETESE	Yes, but no further information available	n.a.	n.a.	–
RO	–				
SE	LO	Multi-employer bargaining at cross-sectoral level	25,000–30,000 (FTE, 50,000-60,000 individuals)	Yes	On regular basis

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
SE	SEKO	No, SEKO takes part in the LO agreement	annually)	n.a.	n.a.
SE	Unionen	Multi-employer bargaining at cross-sectoral level	50,000 (est.)	Yes	On regular basis
SE	Akademikerförbunden	Multi-employer bargaining at cross-sectoral level	8,000	Yes	On regular basis
SE	SLF	Multi-employer bargaining at sectoral/branch level	2,000 (est.)	Yes	On ad hoc basis
SE	Vårdförbundet	Multi-employer bargaining at sectoral/branch and single employer level	n.a.	Yes	On ad hoc basis
SE	SJF	Multi-employer bargaining (sectoral/branch) and one single employer agreement	400–500 (est.)	Yes	On regular basis
SE	Byggnads	Multi-employer bargaining at sectoral/branch level	2,000 (est., only agreement with BI)	Yes	On regular basis
SI	ZSSS	No bargaining	–	Yes	On ad hoc basis
SK	OS Kovo	No bargaining	–	Yes	On ad hoc basis
UK	CWU	Single-employer bargaining at sub-company level	2,000 (est.)	Yes	On ad hoc basis
UK	USDAW	Single-employer bargaining at sub-company level	1,335	Yes	On ad hoc basis
UK	Unite	Single-employer bargaining at	n.a.	Yes	On ad hoc and

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
		company and sub-company level			regular basis

Note: n.a. = not available. * Employed in companies engaged in activities similar to temporary agency work agencies and are subcontracted with user companies for long periods.

Source: Eurofound's Network of European correspondents.

Table A5: Domain coverage and membership of employer organisations

	Name	Type	Type of membership	Total members	in sector	Total no. of employees in member companies	Members in largest companies
AT	FVGD	O	Compulsory	135,000	2,400	65,000–75,000	Yes
AT	VZA	O	Voluntary	90	90	n.a.	Yes
BE	Federgon	O	Voluntary	470	124	6,345 ²	Yes
BG	BG Staffing	O	Voluntary	4	4	5,000	Yes
CY	–						
CZ	APPS	O	Voluntary	26	26	90,000–100,000*	Yes
CZ	APA	O	Voluntary	23	23	22,500	No
DE	BAP	O	Voluntary	2,000 (est.)	n.a.	320,000 (est.)	Yes
DE	iGZ	C	Voluntary	2,850	2,850	300,000	n.a.
DK	Dansk Erhverv/VB	O	Voluntary	17,000	100	n.a.	Yes
DK	DI	O	Voluntary	10,000	n.a.	n.a.	Yes
EE	EPREL	C	Voluntary	6	6	3,000	Yes
EL	ENIDEA	C	Voluntary	9	9	12.000–13.000	Yes
ES	ASEMBLEO	C	Voluntary	36	36	5,000	Yes
ES	FEDETT	C	Voluntary	n.a.	n.a.	n.a.	n.a.
FI	HPL	O	Voluntary	300 (est.)	290 (est.)	33,000 (est.)	Yes
FI	PALTA	O	Voluntary	1,725	44	2,568	Yes
FR	Prism'emploi	C	Voluntary	600	600	16,496**	Yes
HR	CPEA	C	Voluntary	6,500	16	4,800 (est.)	Yes

	Name	Type	Type of membership	Total members	in sector	Total no. of employees in member companies	Members in largest companies
HU	SZTMSZ	O	Voluntary	15	n.a.	n.a.	Yes
IE	NRF	C	Voluntary	136	136	4,200	Yes
IT	Assolavoro	C	Voluntary	41	41	n.a.	Yes
IT	Assosomm	C	Voluntary	19	19	n.a.	Yes
LT	LIIA	O	Voluntary	13	13	192**	Yes
LU	FEDIL	O	Voluntary	19	n.a.	n.a.	Yes
LV	LPDAA	C	Voluntary	3	3	300 (est.)	Yes
MT	–						
NL	ABU	C	Voluntary	549	549	n.a.	Yes
NL	NBBU	O	Voluntary	963	n.a.	n.a.	No
PL	Forum HR	C	Voluntary	21	21	254,000 (est.)	Yes
PL	SAZ	C	Voluntary	58	9	150 000 (est.)	Yes
PL	OKAP	C	Voluntary	55	n.a.	8,000 (est.)	Yes
PT	APESPE	C	Voluntary	29 ¹	29 ¹	n.a.	n.a.
PT	APCC	n.a.	Voluntary	48 ¹	n.a.	n.a.	n.a.
RO	ARAMT	C	Voluntary	20	20	42,000	Yes
SE	Bemanning sföretagen	O	Voluntary	550	550	75,000–80,000	Yes
SE	Medieföretagen	O	Voluntary	650	6	400-500	Yes
SE	BI	O	Voluntary	3,200	36	500–1,000 (est.)	No
SI	ZAZ	C	Voluntary	13	13	4,500	Yes
SK	APAS	O	Voluntary	20	15	15,000	Yes
SK	APAS*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
SK	APSZ	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
UK	REC	O	Voluntary	3,500 (est.)	n.a.	96,000***	n.a.

Notes: n.a. = not available. Type of domain coverage: O = overlap; C = congruence.
* Information taken from organisation's website; **Permanent staff of member companies; *** Employees working in the 'recruitment profession' according to REC.
Source: Eurofound's Network of European correspondents.

Table A6: Domain description of employer organisations

	Name	Description
AT	FVGD	Job placement activities; security and investigation activities; guarding activities; forestry activities and so on.
AT	VZA	Job placement activities
BE	Federgon	Human resources (HR) services and staffing
BG	BG Staffing	Broker activities of agencies for employment
CY	–	–
CZ	APPS	Personnel services, recruitment, outsourcing and so on
CZ	APA	
DE	BAP	Temporary agency work sector as well as other activities related to private employment sector
DE	iGZ	Temporary agency work
DK	Dansk Erhverv/VB	Retail, service, IT, transport and knowledge services
DK	DI	Mainly manufacturing industry
EE	EPREL	
EL	ENIDEA	Private employment services
ES	ASEMPLEO	Private employment services
ES	FEDETT	Private employment services
FI	HPL	Employment placement agencies
FI	PALTA	Service sector, logistics, information and communication, service and maintenance, business and professional services, administration and support services and entertainment and recreation
FR	Prism'emploi	
HR	CPEA	Private employment services
HU	SZTMSZ	Recruitment, HR consulting, executive search
IE	NRF	Employment agencies
IT	Assolavoro	Private employment agencies
IT	Assosomm	Private employment agencies
LT	LIIA	HR services (that is, search and selection of employees, outsourcing and payroll, assessment of employees and candidates; career transition planning (outplacement); cost optimisation of personnel management; search and selection of employees in other countries, other services, related to personnel management)
LU	FEDIL	Recruitment sector
LV	LPDAA	
MT	–	–

	Name	Description
NL	ABU	
NL	NBBU	Employment placement agencies
PL	Forum HR	
PL	SAZ	
PL	OKAP	
PT	APESPE	Employment placement agencies
PT	APCC	Employment placement agencies
RO	ARAMT	
SE	Bemanningsföretagen	Employment placement agencies
SE	Medieföretagen	Temporary work agencies in the media sector
SE	BI	Construction sector
SI	ZAZ	
SK	APAS	Recruitment, personal consulting and other staffing services
SK	APAS*	n.a.
SK	APSZ	n.a.
UK	REC	Recruitment agencies

Note: n.a. = not available

Source: Eurofound's Network of European correspondents.

Table A7: National, European and international affiliations of employer organisations

	Name	National affiliation	European affiliation	International affiliation
AT	FVGD	WKÖ	–	–
AT	VZA	WKÖ	Eurociett	Ciett
BE	Federgon	VBO, VOKA, Union Wallonne, BECI	Eurociett, ECSSA	Ciett
BG	BG Staffing	BIA, Association of Industrial Capital in Bulgaria (AICB)	Eurociett	Ciett
CY	–	–	–	–
CZ	APPS	Confederation of Industry of the Czech Republic	Eurociett	Ciett
CZ	APA	AMSP ČR	–	–
DE	BAP	BDA, Federation of German Wholesale, Foreign Trade and Services (BGA), Federal Association	Eurociett	Ciett

	Name	National affiliation	European affiliation	International affiliation
		of the service industry (BDWI)		
DE	iGZ	Several employer or business organisations at regional level	–	–
DK	Dansk Erhverv/VB	DA	Eurociett, EuroCommerce	Ciett
DK	DI	DA	Business Europe	BIAC
EE	EPREL	–	Eurociett	Ciett
EL	ENIDEA	–	Eurociett	Ciett
ES	ASEMPLEO	CEOE and CEPYME	Eurociett	Ciett
ES	FEDETT	CEOE	–	–
FI	HPL	EK	Eurociett	Ciett
FI	PALTA	EK	–	–
FR	Prism'emploi	MEDEF, CGPME	Eurociett	Ciett
HR	CPEA	Croatian Employers Association – Coordination of private employment agencies	Eurociett	Ciett
HU	SZTMSZ	–	Eurociett	Ciett
IE	NRF	–	Eurociett	–
IT	Assolavoro	Confindustria	Eurociett	Ciett
IT	Assosomm	–	–	–
LT	LIIA	LVDK	Eurociett	Ciett
LU	FEDIL Employment Services	FEDIL	Eurociett	–
LV	LPDAA	n.a.	Eurociett	Ciett
MT	–	–	–	–
NL	ABU	VNO-NCW, MKB Nederland, AWWN	Eurociett	Ciett
NL	NBBU	MKB Nederland	–	–
PL	Forum HR	Konfederacja Lewiatan	Eurociett	Ciett
PL	SAZ	Business Centre Club	–	–
PL	OKAP	–	–	–
PT	APESPE	–	Eurociett	–
PT	APCC	–	–	–
RO	ARAMT	–	Eurociett	Ciett

	Name	National affiliation	European affiliation	International affiliation
SE	Bemanningsföretagen	The Confederation of Swedish Enterprises	Eurociett	Ciett
SE	Medieföretagen	The Confederation of Swedish Enterprises	–	–
SE	BI	The Confederation of Swedish Enterprises	European Construction Industry Federation (FIEC)	–
SI	ZAZ	ZDS	Eurociett	Ciett
SK	APAS	RUZ SR	Eurociett	Ciett
SK	APAS*	n.a.	–	–
SK	APSZ	n.a.	–	–
UK	REC	CBI	Eurociett	Ciett

Note: n.a. = not available

Source: Eurofound's Network of European correspondents.

Table A8: Collective bargaining and consultation – employer organisations

	Name	Form/level of bargaining	Number of employees covered by bargaining	Consultation	Consultation pattern
AT	FVGD	Multi-employer bargaining at multi-branch, sectoral and occupational level	65,000–70,000	Yes	On an ad hoc basis
AT	VZA	No bargaining	–	Yes	On a regular basis
BE	Federgon	Multi-employer bargaining at sectoral level	100%	Yes	On an ad hoc basis
BG	BG Staffing	No bargaining	–	No	–
CY	–	–	–	–	–
CZ	APPS	No bargaining	–	Yes	On a regular basis
CZ	APA	No bargaining	–	Yes	On a regular basis
DE	BAP	Multi-employer bargaining at sectoral/branch level	460,000 (2014)	Yes	On an ad hoc basis
DE	iGZ	Multi-employer bargaining at	300,000°	Yes	On an ad hoc basis

	Name	Form/level of bargaining	Number of employees covered by bargaining	Consultation	Consultation pattern
		sectoral/branch level			
DK	Dansk Erhverv/VB	Multi-employer bargaining at sectoral/branch level and single-employer bargaining	n.a.	Yes	On an ad hoc basis
DK	DI	Single-bargaining at plant/company/group level and multi-employer bargaining at sectoral/branch level	6,495	Yes	On an ad hoc basis
EE	EPREL	No	–	Yes	On an ad hoc basis
EL	ENIDEA	No bargaining	–	No	–
ES	ASEMPLEO	Multi-employer bargaining at sectoral/branch level	8,000	Yes	On a regular basis and ad hoc
ES	FEDETT	n.a.	n.a.	n.a.	n.a.
FI	HPL	Multi-employer bargaining at sectoral/branch level	18,000 (est.)	Yes	On a regular basis
FI	PALTA	Multi-employer bargaining at sectoral/branch level	n.a	Yes	On an ad hoc basis
FR	Prism'emploi	Multi-employer bargaining at sectoral/branch level	2.020,000	Yes	On a regular basis and ad hoc basis
HR	CPEA	No bargaining	–	Yes	On a regular basis
HU	SZTMSZ	No bargaining	–	n.a.	n.a.
IE	NRF	No bargaining	–	Yes	On an ad hoc basis
IT	Assolavoro	Multi-employer bargaining at sectoral/branch level	480,000	Yes	On an ad hoc basis
IT	Assosomm	Joint agreements as Assolavoro	Same as Assolavoro	Yes	On an ad hoc basis
LT	LIIA	No bargaining	–	Yes	On an ad hoc basis
LU	FEDIL Employment	Multi-employer bargaining at	6,226	Yes	On an ad hoc basis

	Name	Form/level of bargaining	Number of employees covered by bargaining	Consultation	Consultation pattern
	Services	sectoral/branch level			
LV	LPDAA	No bargaining	–	Yes	On an ad hoc basis
MT	–	–	–	–	–
NL	ABU	Multi-employer bargaining at sectoral level	460,000	Yes	On a regular basis
NL	NBBU	Multi-employer bargaining at sectoral level	174,700	Yes	On a regular basis
PL	Forum HR	No bargaining	–	Yes	On an ad hoc basis
PL	SAZ	No bargaining	–	Yes	On an ad hoc basis
PL	OKAP	No bargaining	–	Yes	On an ad hoc basis
PT	APESPE	Multi-employer bargaining at sectoral/branch) level	No agreement signed	n.a.	n.a.
PT	APCC	Multi-employer bargaining at sectoral/branch level	n.a.	n.a.	n.a.
RO	ARAMT	No bargaining	–	Yes	On an ad hoc basis
SE	Bemanningsföretagen	Multi-employer bargaining at cross-sectoral level	75,000	Yes	On a regular basis
SE	Medieföretagen	Multi-employer bargaining at sectoral/branch level	400–500 (est.)	No	–
SE	BI	Multi-employer bargaining at sectoral/branch level	500–1000 (est.)	Yes	On a regular basis
SI	ZAZ	No bargaining	–	Yes	On an ad hoc basis
SK	APAS	No bargaining	–	Yes	On an ad hoc basis
SK	APAS*	No bargaining	–	n.a.	n.a.
SK	APSZ	No bargaining	–	n.a.	n.a.
UK	REC	No bargaining	–	Yes	On a regular basis

Note: n.a. = not available

Source: Eurofound's Network of European correspondents.

Table A9: Organisation names and abbreviations – trade unions

	Abbreviation	Full name in English
AT	PRO-GE	Production Trade Union
AT	DPA-djp	Union of Salaried Employees, Graphical Workers and Journalists
BE	ABVV BBTK – FGTB Setca	Trade Union for Employees, Technicians and Staff – Socialist Union
BE	ABVV-ACCG / FGTB-CG	General Centre – Socialist Union
BE	LBC-CNE	National White Collars Centre
BE	ACLVB – CGSLB	Liberal Trade Union
BG	NFTISI	National Federation Technical Industry, Science, Informatics
CY	–	–
CZ	KOVO MB	Trade union KOVO MB
DE	DGB joint bargaining unit	Negotiation Body of the German Confederations of Trade Unions
DE	ver.di	United Services Union
DE	IG Metall	German Metalworkers' Union
DE	IGBCE	Chemical, Energy and Mining Workers' Union
DE	EVG	Railway and Transport Workers' Union
DK	3F	United Federation of Danish Workers
DK	Metal	Danish Metalworkers' Union
DK	FOA	Trade and Labour [public sector union]
DK	DSR	Danish Nurses' Organisation
EE	–	–
EL	–	–
ES	FES-UGT	Service Federation of the General Workers' Confederation
ES	CCOO-SERVICIOS	Services Federation of the Trade Union Confederation of Workers' Commissions
FI	PAM-liitto	Service Union United PAM
FI	Metalliliitto	The Finnish Metalworkers' Union
FI	ERTO	Federation of Special Service and Clerical Employees ERTO
FI	TEAM-liitto	Industrial Union TEAM
FR	USI GCT	Temporary Work Union CGT
FR	FEC-FO	Federation of Employees and Managers (CGT-FO)

	Abbreviation	Full name in English
FR	CFDT Services	CFDT Services
FR	CFTC-CSVF	Retail and Sales Forces' Federation
FR	FNECS	National Federation of Retail and Services' Managers
HR	–	–
HU	VASAS	Hungarian Metalworkers' Federation
IE	CWU	Communications Workers' Union
IE	SIPTU	Services Industry Professionals and Technicians' Union
IT	Nidil – Cgil	New Identities of Work
IT	Felsa – Cisl	Federation of Autonomous, Atypical, and Temporary Agency Workers
IT	Uiltemp	National Federation of Temporary, Autonomous, Atypical, and Economically Dependent Workers
LT	–	–
LU	Syndicat Services et Energie de l'OGBL	Services and Energy Union of OGBL
LU	LCGB – Services et Commerce	LCGB – Services and Retail
LV	LKDAF	Latvian Trade Union Federation for People Engaged in Cultural Activities
MT	GWU	General Workers' Union
MT	UHM	Malta Workers' Union
NL	FNV	Federation of Dutch Trade Unions
NL	CNV	National Federation of Christian Trade Unions
NL	LBV	National Interest Association
NL	De Unie	The Union
PL	NSZZ Solidarność	Independent and Self-Governing Trade Union Solidarność
PL	OPZZ	All-Poland Alliance of Trade Unions
PL	FZZ	Trade Unions; Forum
PT	SINTTAV	National Union of Telecommunications and Audiovisual Workers
PT	SINDETELCO	Democratic Union of Workers of Communications and Media
PT	FETESE	Federation of Unions of Manufacturing and Services
RO	–	–
SE	LO	The Swedish Trade Union Confederation
SE	SEKO	The Union of Service and Communication Employees
SE	Unionen	Unionen
SE	Akademikerförbunde	Academics Union in Trade and Service

	Abbreviation	Full name in English
	n	
SE	SLF	The Swedish Medical Association
SE	Vårdförbundet	The Swedish Association of Health Professionals
SE	SJF	Swedish Union of Journalists
SE	Byggnads	Swedish Building Workers' Union
SI	ZSSS	The Free Trade Union of Slovenia
SK	OS Kovo	Metal Trade Union Association
UK	CWU	Communication Workers' Union
UK	USDAW	Union of Shop, Distributive and Allied Workers
UK	Unite	Unite the Union

Source: Eurofound's Network of European correspondents.

Table A10: Organisation names and abbreviations – employer organisations

	Name	Full name in English
AT	FVGD	Association of the Commercial Service Providers
AT	VZA	Austrian Association of Employment and Placement Agencies
BE	Federgon	Federgon
BG	BG Staffing	BG Staffing
CY	–	–
CZ	APPS	Association of Personnel Services Providers
CZ	APA	Association of Work Agencies
DE	BAP	Federal Employer Association for Personnel Service Companies and Private Employment Agencies
DE	iGZ	Association of German Temporary Employment Agencies
DK	Dansk Erhverv/VB	Danish Chamber of Commerce/ Federation of Staffing Agencies in Denmark
DK	DI	Confederation of Danish Industry
EE	EPREL	Estonian Staffing Agency
EL	ENIDEA	Association of Private Employment Services
ES	ASEMPLEO	ASEMPLEO
ES	FEDETT	Association of Temporary Agency Companies
FI	HPL	The Private Employment Agencies Association HPL
FI	PALTA	n.a.
FR	Prism'emploi	Prism'emploi
HR	CPEA	The Croatian Employers' Association (CEA) – Coordination

	Name	Full name in English
		for Agency Work and Mediating by Employment
HU	SZTMSZ	Hungarian Association of Personnel Consultants
IE	NRF	National Recruitment Federation
IT	Assolavoro	National Association of Employment Agencies
IT	Assosomm	Italian Association of Employment Agencies
LT	LIIA	Association of Lithuanian Employment Agencies
LU	FEDIL	FEDIL Employment Services
LV	LPDAA	Temporary Employment Agencies Association of Latvia
MT	–	–
NL	ABU	Dutch Federation of Private Employment Agencies
NL	NBBU	Dutch Association of Recruitment and Temporary Employment Enterprises
PL	Forum HR	Polish Human Resources Forum
PL	SAZ	Association of Employment Agencies
PL	OKAP	Employment Agencies Nationwide Convention
PT	APESPE	Portuguese Association of Private Employment
PT	APCC	Portuguese Association of Contact Centres
RO	ARAMT	The Romanian Association of Temporary Work Agents
SE	Bemanningsföretagen	Swedish Staffing Agencies
SE	Medieföretagen	Media Industries Employers Association
SE	BI	The Swedish Construction Federation
SI	ZAZ	Association of Temporary Work Agencies
SK	APAS	Association of Staffing Agencies of Slovakia
SK	APAS*	Alliance of Staffing Agencies of Slovakia
SK	APSZ	Association of Employment Services
UK	REC	Recruitment and Employment Confederation

Note: n.a. = not available

Source: Eurofound's Network of European correspondents.

Table A11: Collective bargaining patterns in the temporary agency work sector, EU28, 2014

	Collective bargaining levels				Extensions	Collective bargaining coverage rate (% of total employees in the sector)
	Multi-employer	Single and multi-employer	Company level only	No collective bargaining		
AT	X				No	100%
BE	X				No	100%
BG		X			Yes	5–7%
CY				X	–	–
CZ			X*		No	0.9%
DE	X				Yes	100%
DK		X			No	61%
EE				X	–	–
EL				X	–	–
ES	X				Yes	n.a.
FI	X				Yes	90% (est.)
FR	X				Yes	100%
HR				X		
HU				X		
IE			X		No	n.a.
IT	X				No	
LT				X		
LU	X				Yes	100%
LV				X		
MT				X		
NL		X			Yes	100%**
PL				X		
PT				X		
RO				X		
SE	x				No	97%
SI				X		
SK				X		

UK			X		No	9–23% (est.)
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Notes: * Only Skoda Auto Mladá Boleslav; ** According to estimates, around 10% of companies do not comply with the agreement.

Source: Eurofound's Network of European correspondents and other sources

Table A12: Bipartite and tripartite bodies in the temporary agency work sector, 2014

	Name and scope of activity	Character	Origin	Trade union organisations represented	Employer organisations represented
AT	Sozial- und Weiterbildungsfonds (Social and Further Training Fund)	Bipartite*	Statutory	PRO-GE, GPA-djp	FVGD
BE	Sociaal Fonds voor de uitzendkrachten – Fonds Social pour les Intérimaires	Bipartite	Agreement	BBTK-SETCA , ACCG , LBC-CNE , ACLVB-CGSLB	Federgon
BE	Vormingsfonds voor uitzendkrachten (VFU)/ Fonds de Formation pour les Intérimaires (FFI)	Bipartite	Agreement	BBTK-SETCA , ACCG , LBC-CNE , ACLVB-CGSLB	Federgon
BE	Preventie en Interim/ Prévention et Intérim (PI)	Bipartite	Statutory	ABVV , ACV , ACLVB , ACV , Algemene Centrale ABVV	Federgon
ES	Working Group on Temporary Agency Workers, Health and Safety on Work Commission	Tripartite	Statutory	UGT , CCOO	CEOE and CEPYME
FR	Fonds d'action sociale du travail temporaire (FASTT) – non-profit organisation set up to provide social and financial supports to temporary workers	Bipartite	Agreement	CFDT, CFTC, USI-CGT, FO, CFE-CGC	Prism'emploi
FR	Observatoire des Métiers et de l'Emploi (OME) – forecast of employment and skills	Bipartite	Agreement	CFDT, CFTC, USI-CGT, FO, CFE-CGC	Prism'emploi
FR	FAF-TT (Fonds d'assurance Formation du travail)	Bipartite	Agreement	CFDT, CFTC, USI-CGT, FO, CFE-CGC	Prism'emploi

	Name and scope of activity	Character	Origin	Trade union organisations represented	Employer organisations represented
	temporaire) – financing of professional training				
FR	FPE-TT (Fonds professionnel pour l'emploi du travail temporaire) – financing access of jobseekers to temporary work	Bipartite	Agreement	CFDT, CFTC, USI-CGT, FO, CFE-CGC	Prism'emploi
FR	FSPI (Fonds de sécurisation des parcours des intérimaires) – financing temporary workers employed with a permanent employment contract between two occupations	Bipartite	Agreement	CFDT, CFTC, USI-CGT, FO, CFE-CGC	Prism'emploi
FR	Commission paritaire nationale professionnelle pour le travail temporaire (collective bargaining)	Bipartite	Agreement	CFDT, CFTC, USI-CGT, FO, CFE-CGC	Prism'emploi
IT	E.bi.temp	Bipartite	Agreement	Nidil – Cgil Felsa – Cisl Uiltemp – Uil	Assolavoro Assosomm
IT	Fontemp	Bipartite	Agreement	Nidil – Cgil Felsa – Cisl Uiltemp – Uil	Assolavoro Assosomm
IT	Forma.Temp	Bipartite	Statutory	Nidil – Cgil Felsa – Cisl Uiltemp – Uil	Assolavoro Assosomm
LU	Fonds de formation sectoriel pour l'intérim – FSI (social benefits, social assistance and training)	Bipartite	Agreement	OGBL, LCGB	Fedil Employment Services
NL	SFU: sectoral social fund financing projects in the sector with respect to education and training, health and safety, and proper	Bipartite	Agreement	FNV, CNV, De Unie, LBV	ABU, NBBU

	Name and scope of activity	Character	Origin	Trade union organisations represented	Employer organisations represented
	implementation of collective agreements				
NL	SNA: certification body for temporary work agencies	Tripartite**	Agreement	FNV, CNV	ABU, NBBU, COV, LTO, OSB
NL	SNCU: body falling under the SFU for the enforcement of collective agreements	Bipartite	Agreement	FNV, CNV, De Unie, LBV	ABU, NBBU
NL	SNF: association for registration and certification of providers of housing for temporary workers	Bipartite***	Agreement	FNV	ABU, NBBU, LTO, COV
NL	STAF: body falling under the SFU for health and safety issues	Bipartite	Agreement	FNV, CNV, De Unie, LBV	ABU, NBBU
NL	STOOF: body falling under the SFU for education and training	Bipartite	Agreement	FNV, CNV, De Unie, LBV	ABU, NBBU
NL	Stipp: pension fund for temporary agency workers	Bipartite	Agreement	FNV, CNV, De Unie	ABU, NBBU, VPO
SE	Authorisation Board (Auktorisationsnämnden) – authorises temporary work agencies (the authorisations are not legally binding)	Bipartite	Agreement	Unionen, LO, Akademikerförbunden	Bemanningsföretagen
UK	Gangmasters Licensing Authority (GLA) – licenses businesses that provide workers – on a temporary or permanent basis – in certain sectors	Tripartite	Statutory	Unite (plus the Trades Union Congress)	REC and others****

*Notes: * Supervised by the Ministry.*

*** Tripartite in input, although technically it is a private, independent certification system.*

**** Bipartite in input, although technically it is a private association.*

***** Association of Labour Providers, British Retail Consortium, Food and Drink Federation, National Farmers' Union, National Farmers' Union of Scotland and Shellfish Association of Great Britain*

Source: Eurofound's network of European correspondents.

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