



European Foundation for the Improvement of Living and Working Conditions

Representativeness of the social partners: Telecommunications sector

Objectives of study

Economic background

National level of interest representation

European level of interest representation

Commentary

Annex: List of abbreviations

This report is available in electronic format only.

This report examines the operations of social partner organisations and collective bargaining in the telecommunications sector. The first section gives an outline of the economic background of the sector. The second section describes the social partner organisations in all EU Member States except Sweden, focusing in particular on membership levels, role in collective bargaining and public policy, and national and European affiliations. The final part looks at the relevant European organisations, particularly their membership composition and their capacity to negotiate.

The aim of the EIRO series of studies on representativeness is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. The impetus of these studies arises from the European Commission objective to recognise the representative social partner organisations to be consulted under the EC Treaty provisions. Hence, this study is designed to provide the basic information needed to establish sectoral social dialogue. The first objective of the study is to pinpoint the relevant national associations on both sides of industry. In this context, relevant associations are understood as sector-related social partner organisations in the sense that their membership domain includes the sector, and that they are either involved in sector-related collective bargaining or affiliated to a sector-related European organisation. The second objective is to examine the sector's relevant European organisations.

Objectives of study

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

Against this background, this study will first identify the relevant national social partner organisations and then analyse the structure of the sector's relevant European organisations, in particular their membership composition. This requires clarifying the unit of analysis at both the national and European level of interest representation. This study includes only organisations whose membership domain is 'sector related' (see below). At both national and European level, a multiplicity of associations exist which are not social partner organisations in the sense that they essentially deal with industrial relations. Thus, there is a need for clear-cut criteria which enable analysis to differentiate the social partner organisations from other associations.

As regards the national level associations, classification as a sector-related social partner organisation implies fulfilling one of two criteria: the associations must be either a party to sector-related **collective bargaining** or a member of a sector-related European association of business or labour on the Commission's list of European social partner organisations consulted under Article 138 of the EC Treaty. Affiliation to such a European organisation and involvement in national collective bargaining are of the utmost importance to the European social dialogue.

Following the criteria for the national organisations, this study includes those European organisations that are on the Commission's list of consultation. In addition, this report considers any other sector-related European association with sector-related national social partner

organisations under its umbrella. Hence, the plan to identify the sector-related national and European social partner organisations is both ‘top-down’ and ‘bottom-up’.

Definitions

For the purpose of this study, the sector is defined in terms of the classification of economic activities in the European Community (NACE) to ensure cross-national comparability of the research findings. More specifically, telecommunications is defined as encompassing NACE 64.20 with the exception of cable TV and radio activities. The latter two activities are excluded because their problems and related interests are distinct from telecommunications in the genuine sense, with the consequence that their associational system also tends to differ from ‘mainstream’ telecommunications.

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

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

At European level, two sector-related associations are currently on the Commission’s list of European social partner organisations consulted under Article 138 of the EC Treaty: [UNI Europa](#), with its telecom section UNI Telecom, and the [European Telecommunications Network Operators’ Association \(ETNO\)](#). Hence, affiliation to either UNI Telecom or ETNO is one sufficient criterion for classifying a national association as a social partner organisation. It should be noted, however, that the constituent criterion is one of sector-related membership. This is important in the case of UNI Europa due to its multi-sectoral domain. This study will include only UNI Telecom’s affiliated organisations, provided that their domain is sector related.

Collection of data

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

In principle, quantitative data may stem from three sources, namely:

- official statistics and representative survey studies;
- administrative data, such as membership figures provided by the respective organisation which are then used to calculate the density or coverage rate on the basis of available statistical figures on the potential membership of the organisation;

- personal estimates made by representatives of the respective organisation.

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

Report structure

The study consists of three main parts, starting with a very brief summary of the economic background of the sector. The report then analyses the social partner organisations in all EU Member States except Sweden – including Bulgaria and Romania, which acceded to the EU on 1 January 2007. In other words, the study covers 26 European countries. The third part considers the representative associations at European level. Each section will contain a brief introduction explaining the concept of representativeness in greater detail, followed by the study findings. This is because representativeness is a complex matter that requires separate consideration at national and European level for two reasons. On the one hand, the method applied by national regulations and practices to capture representativeness has to be taken into account. On the other hand, the national and European organisations differ in their tasks and scope of activities. The concept of representativeness must be suited to this difference.

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

Economic background

Since the early 1990s, telecommunications has undergone a process of profound **restructuring** in the EU Member States. Originally organised as a form of state monopoly, telecommunications has been transformed into a business sector as a result of deregulation of market entry and liberalisation of services, often accompanied by full or partial privatisation of the former monopoly provider. This restructuring also affected labour relations in that the employment relationship shifted from public sector regulations to private law status. However, in several countries, such as Austria, Belgium and France, where the employees of the state monopolies were employed as civil servants, the employees could maintain this status even after restructuring measures. In these circumstances, both public and private employment regulations may be found in the sector. Indeed, public law regulations continue to be important, since the former monopoly providers are usually by far the largest companies in terms of employees and retain a strong market position especially in the area of fixed line communications.

Tables 1 and 2 give an overview of the development from the early 1990s to the early 2000s, presenting a few indicators which are important to industrial relations and social dialogue. In all Member States, the number of companies increased, reflecting the opening up of the telecommunications market. Likewise, both total employment and also the number of employees usually increased. Total employment includes employees in addition to workers hired on other forms of contract or self-employed persons. However, some countries record a decrease in employment, namely the Czech Republic, Germany, Romania and Slovakia. Greece is a

borderline case, as total employment moderately expanded, while the number of employees slightly decreased; the discrepancy between the two figures comprises the employment of workers on contracts other than standard employee contracts.

In most countries, the number of employees comes close to the total employment level. This indicates that the sector is characterised by relatively large companies as well as by standard employment relationships, although a notable number of small companies also exist, mainly in the area of internet services. In this respect, Bulgaria is an unusual case, as the country's total employment is considerably higher than the number of employees. Male employment is more prominent in the sector in almost all countries. Again, Bulgaria is a distinct example of a country with a majority of female employment in telecommunications. In Lithuania and Romania, the proportion of female employment amounts to almost 50% of total employment in the sector.

Moreover, Tables 1 and 2 reveal that the sector is rather small. Its share in both total employment and number of employees is below 1% in the majority of countries, and this proportion is always lower than 2% in the remaining countries.

Table 1: Total employment in telecommunications

Total employment in telecommunications

	No. companies		Total employment*		Male employment		Female employment	
	1993	2004	1993	2004	1993	2004	1993	2004
AT	1	~ 600 ^a	n.a.	~20,000 ^a	n.a.	n.a.	n.a.	n.a.
BE	333	520	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
BG	n.a.	903	42,600	52,100	16,600	23,100	26,000	29,100
CY	3 ^b	34 ^c	2,419 ^b	2,825 ^c	1,946 ^b	2,082 ^c	473 ^b	743 ^c
CZ	n.a.	942 ^d	36,300	31,300 ^d	22,400	22,200 ^d	13,900	9,100 ^d
DE	n.a.	1,344 ^c	246,000 ^{b,g}	218,000 ^{e,g}	168,000 ^{b,g}	142,000 ^{e,g}	78,000 ^{b,g}	76,000 ^{e,g}
DK	45	244	16,048	20,705	n.a.	n.a.	n.a.	n.a.
EE	n.a.	94	n.a.	2,865	n.a.	1,900	n.a.	1,000
EL^f	n.a.	70	30,296	32,135	24,135	23,223	6,161	8,912
ES	n.a.	69	n.a.	65,221	n.a.	44,837	n.a.	20,384
FI	128	198	n.a.	20,330	n.a.	11,838	n.a.	8,492
FR	n.a.	426	n.a.	147,627	n.a.	n.a.	n.a.	n.a.
HU	n.a.	864	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
IE	n.a.	55	n.a.	14,400	n.a.	n.a.	n.a.	n.a.
IT	212 ^h	782 ⁱ	107,303 ^h	113,340 ⁱ	n.a.	76,865 ⁱ	n.a.	32,612 ⁱ
LT	n.a.	297 ^d	n.a.	6,706 ^d	n.a.	3,468 ^d	n.a.	3,238 ^d
LU	36 ^b	69 ^k	423 ^b	958 ^k	2,418 ^j	2,897 ^k	1,169 ^j	1,282 ^k
LV	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

	No. companies		Total employment*		Male employment		Female employment	
	1993	2004	1993	2004	1993	2004	1993	2004
MT	n.a.	32 ^e	n.a.	1,950 ^e	n.a.	1,545 ^e	n.a.	405 ^e
NL	685	1,385	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
PL	240 ^l	278 ^d	206 ^{l,m}	3,630 ^{d,n}	n.a.	n.a.	n.a.	n.a.
PT	n.a.	n.a.	30,653 ^h	40,745 ⁱ	20,788 ^h	25,218 ⁱ	9,865 ^h	15,527 ⁱ
RO	148	2,216	94,914	57,943	n.a.	n.a.	n.a.	n.a.
SI	21 ^b	117 ^d	1,634 ^b	4,635 ^d	1,091 ^b	3,154 ^d	544 ^b	1,481 ^d
SK	103 ^o	99 ^d	13,831 ^o	9,413 ^d	n.a.	n.a.	n.a.	n.a.
UK	n.a.	9,722	167,624	264,215	124,616	185,534	43,008	78,681

Notes: * Total employment includes employees and other workers. n.a. = not available, ^a = 2006, ^b = 1995, ^c = 2000, ^d = 2005, ^e = 2003, ^f = including postal services, ^g = including cable TV and radio activities, ^h = 1991, ⁱ = 2001, ^j = 1998, ^k = 2002, ^l = 1994, ^m = companies with more than five employees, ⁿ = companies with more than nine employees, ^o = 1996.

Source: EIRO national centres, 2006

Table 2: Total employees in telecommunications

Total employees in telecommunications	Total employees (excluding other workers)		Male employees		Female employees		Total sectoral employees as % of total employment in economy		Total sectoral employees as % of total employees in economy	
	1993	2004	1993	2004	1993	2004	1993	2004	1993	2004
AT	n.a.	~ 20,000	n.a.	n.a.	n.a.	n.a.	n.a.	0.5%	n.a.	0.6%
BE	27,404	30,424	21,498	21,724	5,906	8,700	n.a.	n.a.	0.95%	0.93%
BG	n.a.	32,357	n.a.	15,538	n.a.	16,819	n.a.	n.a.	n.a.	n.a.
CY	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CZ	35,500	29,400 ^d	21,600	20,900 ^d	13,900	8,500 ^d	0.74%	0.66% ^d	0.84%	0.74% ^d
DE	n.a.	78,603 ^d	n.a.	54,618 ^d	n.a.	23,985 ^d	0.7% ^b	0.6% ^c	n.a.	0.2% ^d
DK	~16,000	~20,650	n.a.	n.a.	n.a.	n.a.	0.6%	0.8%	0.8%	0.8%
EE	n.a.	2,848	n.a.	1,900	n.a.	1,000	n.a.	0.68%	n.a.	0.67%
EL ^f	29,995	29,714	23,928	21,336	6,607	8,378	1.2%	1.1%	2.3%	1.1%
ES	n.a.	64,751	n.a.	44,418	n.a.	20,333	n.a.	0.36%	0.35%	0.354%
FI	15,326 ^b	19,832	9,952 ^b	11,766	5,375 ^b	8,066	n.a.	0.86%	0.85%	0.96%
FR	n.a.	~ 170,000	n.a.	96,873	n.a.	60,149	n.a.	0.56%	n.a.	0.67%
HU	n.a.	19,131	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.74%
IE	n.a.	14,400	n.a.	n.a.	n.a.	n.a.	n.a.	0.72%	n.a.	n.a.
IT	106,903 ^b	108,523 ⁱ	n.a.	76,097 ⁱ	n.a.	32,426	0.74% ^b	0.69% ⁱ	1.13% ^b	1.06% ⁱ
LT	n.a.	6,483 ^d	n.a.	3,245 ^d	n.a.	3,238 ^d	n.a.	0.45% ^d	n.a.	0.53% ^d
LU	414 ^b	948 ^k	n.a.	n.a.	n.a.	n.a.	0.19% ^b	0.33% ^k	0.20% ^b	0.35% ^k

Total employees in telecommunications	Total employees (excluding other workers)		Male employees		Female employees		Total sectoral employees as % of total employment in economy		Total sectoral employees as % of total employees in economy	
	1993	2004	1993	2004	1993	2004	1993	2004	1993	2004
LV	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
MT	n.a.	1,942 ^e	n.a.	1,537 ^e	n.a.	405 ^e	n.a.	1.3% ^c	n.a.	1.5% ^c
NL	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
PL	77,442 ^{l,m}	55,787 ^{d,n}	40,379 ^{l,m}	32,949 ^{d,n}	37,063 ^{l,m}	22,838 ^{d,n}	0.5–0.6% ^l	0.41% ^d	0.8% ^l	0.5% ^d
PT	29,641 ^h	38,856 ⁱ	20,064 ^h	23,977 ⁱ	9,577 ^h	14,879 ⁱ	0.74% ^h	0.88% ⁱ	0.94% ^h	1.02% ⁱ
RO	89,315	46,354	46,355	24,058	42,960	22,296	0.94%	0.71%	1.34%	1.04%
SI	1,627 ^b	4,612 ^d	1,075 ^b	3,120 ^d	542 ^b	1,478 ^d	0.002% ^b	0.005% ^d	0.002% ^b	0.006% ^d
SK	13,813 ^o	9,396 ^d	8,421 ^o	5,815 ^d	5,392 ^o	3,581 ^d	0.62% ^o	0.43% ^d	0.68% ^o	0.45% ^d
UK	164,873	260,477	122,204	182,243	42,669	78,234	0.68%	0.93%	0.79%	1.07%

Notes: n.a. = not available, ^a = 2006, ^b = 1995, ^c = 2000, ^d = 2005, ^e = 2003, ^f = including postal services, ^g = including cable TV and radio activities, ^h = 1991, ⁱ = 2001, ^j = 1998, ^k = 2002, ^l = 1994, ^m = companies with more than five employees, ⁿ = companies with more than nine employees, ^o = 1996.

Source: EIRO national centres, 2006

National level of interest representation

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

As outlined above, the representativeness of the national social partner organisations is of interest to this study in connection with the capacity of their European umbrella organisations for participation in the European social dialogue. Hence, the role of the national actors in collective bargaining and public policymaking constitutes another important component of representativeness. The effectiveness of the European social dialogue tends to increase with the greater ability of the national affiliates of the European organisations to regulate employment terms and to influence national public policies affecting the sector.

As cross-national comparative analysis shows (see Traxler, F., 'The metamorphoses of corporatism', *European Journal of Political Research*, Vol. 43, No. 4, 2004, pp. 571–598), generally a positive correlation emerges between the bargaining role of the social partners and their involvement in public policy. Social partner organisations that are engaged in multi-employer bargaining are incorporated in state policies to a significantly greater extent than their counterparts in countries where multi-employer bargaining is lacking. The explanation for this finding is that only multi-employer agreements matter in macroeconomic terms, and they set an incentive for the governments to persistently seek the cooperation of the social partner organisations. If single-employer bargaining prevails in a country, none of the collective

agreements will have a noticeable effect on the economy, due to their limited scope. As a result, the basis for generalised tripartite policy concertation will be absent.

In summary, representativeness is a multi-dimensional concept that embraces three basic elements: 1) the membership domain and membership strength of the social partner organisations; 2) their role in collective bargaining; and 3) their role in public policymaking.

Membership domain and strength

The membership domain of an organisation, as formally established by its constitution or name, demarcates its potential members from other groups which the organisation does not claim to represent. As explained above, this study considers only organisations whose domain relates to the telecommunications sector. For reasons of space, it is impossible to outline in detail the domain demarcations of all of the organisations. Instead, this report notes how they relate to the sector by classifying them according to the four patterns of ‘sector-relatedness’, as specified earlier. Regarding membership strength, a differentiation exists between strength in terms of the absolute number of members and strength in relative terms. Research usually refers to relative membership strength as density, in other words the ratio of actual to potential members.

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

For a sectoral study such as this, measures of membership strength of both the trade unions and employer organisations also have to consider how the membership domains relate to the sector. If a domain is not congruent with the sector demarcation, the organisation’s total density, that is density referring to its overall domain, may differ from sector-specific density, that is density referring to the particular sector. This report will first present the data on the domains and membership strength of the trade unions and will then consider the employer organisations.

Trade unions

Table 3 outlines the trade union data on domains and also on membership strength; the table lists all trade unions meeting the two criteria for classification of a sector-related social partner organisation, as set out earlier. Only one of these trade unions has demarcated its domain in a way which is congruent with the sector definition. This emphasises the fact that statistical definitions of business activities tend to differ from the lines along which employees identify common interests and join together in unions. Domain demarcations resulting in overlap or sectional overlap are most common. Overlap arises from somewhat differing modes of demarcation that range from general – in other words, cross-sectoral – domains to domains which cover telecommunications in a broad sense. Domains which embrace both telecommunications and postal services are also widespread, for example, the Austrian Post and Telecommunications Workers’ Union ([Gewerkschaft für Post und Fernmeldebedienstete](#), GPF), affiliated to the Austrian Federation of Trade Unions ([Österreichischer Gewerkschaftsbund](#), ÖGB). Sometimes, post and telecommunications may be organised in combination with newspapers and other media, such as the Czech Trade Union of Employees in Postal, Telecommunications and Newspaper Services ([Odborový svaz zaměstnanců poštovních, telekomunikačních a novinových služeb](#), OSZPTNS) and ESTAL of Estonia.

Sectional overlap usually emanates from domain demarcations that focus on certain categories of employees which are then organised across several or all sectors. Employee categories are specified according to various parameters such as: high qualifications, for example, managers and other professionals, see the British [Connect](#); distinct occupations, for instance, electricians, see the Danish Union of Electricians ([Dansk El-Forbund, DEF](#)); and employment status, for example, white-collar employees, as is the case of the Union of Salaried Employees ([Gewerkschaft der Privatangestellten, GPA](#)) of Austria and Denmark's [HK Privat](#).

Public law employment is another criterion of employment status that has caused a form of sectional overlap which is rather specific to the sector. As mentioned above, telecommunications was part of the state sector for a long time and those telecommunications employees already employed before restructuring managed to maintain their public law status in several cases. Therefore, trade unions that are specialised in the public sector, such as the [Centrale générale des services publics \(CGSP\)](#) of Belgium, and the [Civil Public and Services Union \(CPSU\)](#) and the [Public Service Executive Union \(PSEU\)](#) of Ireland, also represent sections of telecommunications.

Finally, sectionalism ensues from the existence of company unions in several countries, such as Denmark, Spain and Estonia. Company unionism is even more widespread than Table 3 suggests. In Poland and Slovenia, top-level organisations of company unions are listed, whose total domain overlaps the sector. The sector's company unions often centre on the former monopoly providers; see, for instance, the sector's company unions in Denmark and Spain. The former monopoly structure of the sector is one reason why company unionism tends to be more widespread in telecommunications than in most other sectors of activity across Europe. As long as telecommunications was a state monopoly, a trade union specialising in this sector was actually a company union. Nowadays, company unionism as well as company-centred bargaining (see below) is fostered by the fact that the former monopoly providers still retain a dominant position in the sector, especially in terms of employment and unionisation (see below). For instance, around half of the sector's employees work in these companies in Austria, Bulgaria, Greece, Ireland, Poland and Slovenia. In Denmark and France, an employment share of even more than 70% and 90%, respectively, is reported in the former state monopoly.

Table 3: Interest representation of trade unions (2004–2005)

Interest representation of trade unions

Country	Domain cover-age	Membership		Density		Collective bargaining	Consul-tation	National and European affiliations ^b
		Members	Female membership ^a	Domain	Sector			
AT								
- GPA*	SO	277,015 (2005)	43.7%	18.6%	n.a.	Yes	Yes	ÖGB, UNI, Eurocadres
- GPF*	O	62,558 (2005)	24.2%	80%	85%	Yes	Yes	ÖGB, ETF, UNI
BE								
- CGSP Telecom-Aviation	SO	n.a.	24.5%	n.a.	n.a.	Yes	No	FGTB, UNI
- CSC Transcom Telecoms	SO	4,500	20%	35%	14.8%	Yes	No	CSC-ACV, UNI, EUROFEDOP
- SLFP-	SO	n.a.	n.a.	n.a.	n.a.	Yes	No	CGSLB,

Country	Domain cover-age	Membership		Density		Collective bargaining	Consul-tation	National and European affiliations ^o
		Members	Female membership ^a	Domain	Sector			
Groupe Belgacom								UNI, EPSU
- CNE	SO	120,000	> 50%	n.a.	n.a.	Yes	No	CSC-ACV, UNI
- LBC	SO	297,000	> 50%	n.a.	n.a.	Yes	No	CSC-ACV, UNI
- SETCa	SO	343,420	53%	n.a.	n.a.	Yes	No	FGTB, UNI, EMF
- CGSLB	O	220,000	n.a.	n.a.	n.a.	Yes	No	CGSLB, UNI
BG								
- TUFC*	O	3,062	n.a.	n.a.	n.a.	Yes	n.a.	CITUB, UNI
- FC 'Podkrepa'	O	2,315	n.a.	n.a.	n.a.	Yes	n.a.	CL Podkrepa, UNI
- DTUC*	O	754	n.a.	n.a.	n.a.	Yes	n.a.	ADTU
- TUC*	O	84	n.a.	n.a.	n.a.	Yes	n.a.	ITD
- NTUAC Promania	S	48	n.a.	n.a.	n.a.	Yes	n.a.	—
CY								
- EPOET	O	1,470	n.a.	n.a.	n.a.	Yes	No	SEK, UNI
- SIDIKEK	O	490	n.a.	n.a.	n.a.	Yes	No	PEO
- PIEU	O	340	n.a.	n.a.	n.a.	Yes	No	—
CZ								
- OS ZPTNS*	O	~ 3,700	28.3%	14.8%	12.24%	Yes	Yes	UNI
- OOPR*	SO	312	n.a.	n.a.	1.1%	Yes	Yes	—
DE								
- ver.di *	O	n.a.	~ 32%	n.a.	n.a.	Yes	Yes	DGB, EPSU, UNI
- IG Metall*	O	n.a.	n.a.	n.a.	n.a.	Yes	Yes	DGB, EMF
- IG BCE*	O	n.a.	~ 44%	n.a.	n.a.	Yes	Yes	DGB, EMCEF
- Transnet*	O	2,700	~ 17%	n.a.	n.a.	Yes	Yes	DGB, ETF
- CGPT*	O	n.a.	n.a.	n.a.	n.a.	Yes	Yes	CGB
DK								
- Dansk Metal*	O	139,000	5%	80%	75%	Yes	Yes	CO-industri, LO, UNI
- HK Privat*	SO	160,000	75%	~ 50%	40%	Yes	Yes	CO-industri, LO, UNI
- AC-Tele*	S	n.a.	31%	n.a.	100%	Yes	Yes	AC
- Lederforening en i TDC*	S	> 1,800	44%	78%	100%	Yes	Yes	FTF
- DEF*	SO	30,000	1%	80%	75%	Yes	Yes	CO-industri, LO, UNI

Country	Domain cover-age	Membership		Density		Collective bargaining	Consul-tation	National and European affiliations ^o
		Members	Female membership ^a	Domain	Sector			
EE								
- ESTAL*	O	2,000	60%	26%	25%	Yes	Yes	EAKL, UNI
- Eitel trade union*	S	83	5%	16%	2%	Yes	No	—
- Elion trade union*	S	306	40%	18%	10.7%	Yes	No	—
EL								
- OME-OTE	n.a.	16,302	19.6%	100%	n.a.	Yes	No	UNI
ES								
- FCT CC.OO*	O	n.a.	n.a.	n.a.	n.a.	Yes	Yes	CC.OO, UNI
- FTCM-UGT*	O	n.a.	n.a.	n.a.	n.a.	Yes	Yes	UGT, UNI
- ELA	SO	106,025	35.2%	n.a.	n.a.	n.a.	0	UNI
- STC*	O	n.a.	n.a.	n.a.	n.a.	Yes	No	—
- COBAS*	SO	n.a.	n.a.	n.a.	n.a.	Yes	No	—
- AST*	S	n.a.	n.a.	n.a.	n.a.	Yes	No	—
- APLI*	S	n.a.	n.a.	n.a.	n.a.	Yes	No	—
- UTS*	S	n.a.	n.a.	n.a.	n.a.	Yes	No	—
FI								
- YTN (with IL, SEFE and TEK)*	SO	110,000	~ 25%	75%	70%	Yes	No	AKAVA, UNI, Eurocadres
- TU*	SO	125,722	45.5%	79%	55%	Yes	No	STTK, UNI, EMF, EMCEF, EFBWW, ETUF-TCL, EFFAT, ETF
- Sähköalan ammattiliitto*	SO	31,301	~ 4%	88%	80%	Yes	No	SAK, UNI, EMF, EMCEF, EFBWW
- Metallityöväen Liitto*	SO	167,400	20%	88%	95%	Yes	No	SAK, UNI, EMF
FR								
- CGT-PTT*	O	~ 15,000	33%	n.a.	n.a.	Yes	No	CGT, UNI
- CGT-FO-COM*	O	~ 15,000	40%	n.a.	n.a.	Yes	No	CGT-FO, UNI
- CFTC-PTT*	O	n.a.	n.a.	n.a.	n.a.	Yes	No	CFTC, EUROFEDOP
- F3C-CFDT*	O	n.a.	n.a.	n.a.	n.a.	Yes	No	CFDT, UNI
- SNT-CFE-CGC*	O	n.a.	n.a.	n.a.	n.a.	Yes	No	CGC, CEC-Media@managers

Country	Domain cover-age	Membership		Density		Collective bargaining	Consul-tation	National and European affiliations ⁹
		Members	Female membership ⁹	Domain	Sector			
- SUD-PTT*	O	n.a.	n.a.	n.a.	n.a.	Yes	No	Groupe des 10 Solidaires
- UNSA-Télécoms*	O	n.a.	n.a.	n.a.	n.a.	Yes	No	UNSA
HU								
- TÁVSZAK*	S	2,500	n.a.	27%	13%	Yes	No	MSZOSZ
- PHDSZSZ*	O	7,362	n.a.	7.8%	n.a.	Yes	No	SZEF, EUROFEDOP
IE								
- CWU*	O	19,500	n.a.	n.a.	n.a.	Yes	Yes	ICTU, UNI
- CPSU*	SO	n.a.	n.a.	n.a.	n.a.	Yes	Yes	ICTU, EPSU, UNI
- PSEU*	SO	n.a.	n.a.	n.a.	n.a.	Yes	Yes	ICTU, EPSU, UNI
- IMPACT*	SO	n.a.	n.a.	n.a.	n.a.	Yes	Yes	ICTU, EPSU
IT								
- SLC-CGIL*	O	92,564	35%	n.a.	12.5%	Yes	No	CGIL, UNI
- FISTEL-CISL*	O	52,511	n.a.	n.a.	n.a.	Yes	No	CISL, UNI
- UILCOM-UIL	O	37,409	35%	n.a.	14.4% ^c	Yes	No	UIL, UNI
- UGL-COM	O	114,064	30%	n.a.	1.7%	Yes	No	UGL
LT								
- LRDPs	O	4,500	53.5%	41.4%	34.5%	Yes	No	LPSK, UNI
LU								
- FLTL*	O	3,000	n.a.	8.3%	6.2%	Yes	Yes	OGB-L, UNI
- LCGB*	O	n.a.	n.a.	n.a.	n.a.	Yes	Yes	—
- Syndicat des P&T	O	1,900	35%	n.a.	18.5%	No	Yes	CGFP, UNI
LV								
- LSAB*	O	4,072	55%	82%	n.a.	Yes	Yes	LBAS, UNI
MT								
- GWU*	O	46,489	n.a.	n.a.	65%	Yes	No	ETF, EFFAT, EPSU, ETUF-TCL, EMF, EMCEF
- UHM*	O	25,901	n.a.	n.a.	n.a.	Yes	Yes	EUROFEDOP
NL								
- AbvaKabo*	SO	n.a.	n.a.	n.a.	n.a.	Yes	Yes	FNV, UNI
- FNV Bondgenoten*	SO	n.a.	n.a.	n.a.	n.a.	Yes	Yes	FNV

Country	Domain cover-age	Membership		Density		Collective bargaining	Consul-tation	National and European affiliations ^o
		Members	Female membership ^a	Domain	Sector			
- Bond van Telecompers oneel*	C	n.a.	n.a.	n.a.	n.a.	Yes	Yes	—
- CNV Publieke Zaak	SO	n.a.	n.a.	n.a.	n.a.	Yes	Yes	—
- CNV Diensten	SO	n.a.	n.a.	n.a.	n.a.	Yes	Yes	—
- CMMF/VPP	SO	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	—
- De Unie	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	UNI
PL								
- SKPT NSZZ Solidarność	SO	6,000	n.a.	n.a.	10%	Yes	No	NSZZ Solidarność, UNI
- FZZPT	SO	4,000	n.a.	n.a.	7%	Yes	No	OPZZ
- ZzliT	SO	2,000	n.a.	n.a.	2%	Yes	No	FZZ
- KZZPT	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	FZZ
- Council of Federations of In-House Union Organisations *	O	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	—
- ZZ Kontra	O	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	—
PT								
- SINTTAV*	O	~ 7,200	38%	14.2%	15.4%	Yes	Yes	CGTP, CPQTC, UNI
- STPT*	n.a.	4,520	40%	25%	12%	Yes	No	UNI
- SINDETELC O*	O	~ 8,000	47%	7%	5%	Yes	Yes	UGT, UNI
- SNTCT*	O	~ 11,000	n.a.	19%	0.5%	Yes	Yes	CGTP, CPQTC, UNI
- STT* ^d	O	1,400	n.a.	3%	0.3%	Yes	Yes	CGTP
- SERS* ^d	SO	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	UNI
- SITESE* ^d	SO	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	UNI
- FENTCOP* _d	SO	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	n.a.
- SICOMP* ^d	O	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	n.a.
- TENSIQ ^d	S	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	n.a.
- USI* ^d	O	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	n.a.
- SETN* ^d	SO	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	n.a.
- FENSIQ* ^d	SO	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	n.a.
- SNE* ^d	SO	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	n.a.

Country	Domain cover-age	Membership		Density		Collective bargaining	Consul-tation	National and European affiliations ^b
		Members	Female membership ^a	Domain	Sector			
- SNAQ* ^d	SO	n.a.	n.a.	n.a.	n.a.	Yes	n.a.	n.a.
RO								
- FTUT*	O	12,000	68.9%	n.a.	25.9%	Yes	Yes	<i>UFS Atlas, CNSLR Frăția</i>
- FTURC*	O	2,000	43%	n.a.	4.3%	Yes	Yes	<i>UFS Atlas, CNSLR Frăția</i>
- RomTelecom TUF*	O	8,300	56.6%	63.6%	17.9%	Yes	Yes	<i>Cartel ALFA, UNI</i>
SI								
- SDPZ*	O	31,000	30%	n.a.	21.6%	Yes	No	ZSSS
- TS	S	~ 1,500	~ 32%	n.a.	33.9%	Yes	No	UNI
SK								
- SOZ PT*	O	3,550	60%	24.6%	13.9%	Yes	Yes	<i>KOZ SR, Association of Trade Unions in Transport and Communications, EUROFEDOP</i>
- SPOJE*	O	8,476	68.6%	n.a.	12.9%	Yes	Yes	<i>KOZ SR, Association of Trade Unions in Transport and Communications, UNI</i>
UK								
- CWU*	O	258,696	20%	45–50%	40%	Yes	Yes	<i>TUC, UNI</i>
- CONNECT*	SO	19,648	19%	24%	8%	Yes	Yes	<i>TUC, UNI</i>

Notes: See Annex for list of abbreviations and full names of organisations. n.a. = not available. ^a = as a percentage of total union membership, ^b = national affiliations noted in italics; only affiliations to sectoral European associations, ^c = figures inflated, ^d = small unions organising usually no more than 200 employees in the sector. * = inter-union domain overlap, UNI = UNI Telecom. C = congruent, O = overlap, SO = sectional overlap, S = sectionalism.

Source: EIRO national centres, 2006

As the domains of the trade unions often overlap with the demarcation of the sector, they also overlap with one another in most countries. Table 3 also outlines these inter-union domain overlaps, which may be considered as endemic. In the majority of countries, the domain of any sector-related trade union overlaps with the domain of all the other unions in the sector. Depending on the scale of mutual overlap, this results in competition between the unions for members.

Looking at the membership data of the trade unions, it becomes apparent that female employees are among the minority group in most of the unions. Nevertheless, a notable number of unions report a proportion of female members above 50%. At first glance, this is surprising since the

sector's employment is generally dominated by male employees. Closer consideration shows that the domain of all trade unions recording a majority of female members overlaps in relation to the sector. Hence, the predominance of female members in these trade unions is likely to originate in areas of their domains other than telecommunications. At any rate, there is a clear country effect on the gender-related membership composition. A greater proportion of female union members in the sector correlates with certain regions of Europe: the Nordic countries, namely Denmark and Finland; the Baltic countries, namely, Estonia, Latvia and Lithuania; and two countries of central and eastern Europe, namely Romania and Slovakia. Outside these regions, only Belgium registers a majority of female union members. The high female unionisation rates in the Nordic and Baltic countries are in line with corresponding figures on the composition of the cross-sectoral national union confederations ([TN0403105U](#)).

The absolute numbers of the trade unions' members differ widely. Their records range from several hundred thousand members to fewer than one hundred members. This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the ability to attract members. Therefore, density is a more appropriate measure of membership strength for a comparative analysis. Domain density is 50% or higher in more than one third of all trade unions which document figures on density. More than half of the unions for which data are available represent more than 25% of the employees within their domain. Most of the remaining unions record a density of between 15% and 25% of their potential members.

Compared with the density referring to the trade unions' total domain, their density in telecommunications tends to be lower. In accordance with this, the distribution of sectoral density is more polarised than is the case of total density. Sectoral density is 50% or higher in the case of around one quarter of the trade unions for which data are available. Sectoral density of more than half of the unions is lower than 15%, implying that relatively few cases exist of a density between 15% and 25%. The lower sectoral density relative to total density is also evident from those trade unions for which figures on both measures are recorded. In all of these cases, sectoral density is below overall density, with two exceptions: the Portuguese Telecommunications and Audiovisual Workers' Union ([Sindicato Nacional dos Trabalhadores das Telecomunicações e Audiovisual, SINTTAV](#)) and the Finnish Metalworkers' Union ([Metallityöväen Liitto, Metalli](#)) have a higher than average proportion of members in the sector. It may be concluded from these findings that telecommunications is usually not the membership stronghold of the trade unions whose domain includes this sector.

Furthermore, anecdotal evidence from the country reports suggests that unionisation rates vary widely across the sector's companies. The former monopoly providers are usually highly unionised, whereas unionisation is low in the newly established companies. For instance in Spain, 60% of the workforce of the former monopoly provider, [Telefónica](#), is unionised, compared with a density of 20% in telecommunications as a whole. These differences appear to be extremely high in some countries of central and eastern Europe, such as Lithuania and Poland, where no union presence is found in new companies in the sector.

Two factors account for this polarisation of union membership strength in the sector. On the one hand, the high unionisation of the former monopoly providers dates back to the time before restructuring, when they formed part of the public sector, in which the trade unions are well established. On the other hand, it is especially hard for trade unions to achieve a footing in new companies in times when the socioeconomic conditions are generally unfavourable to their advancement, as the negative trend in unionisation across Europe underlines. As will be outlined below, this polarised pattern of unionisation influences the sector's pattern of employer organisation and the system of collective bargaining. In addition to this sector effect on unionisation, a country effect may again be found. The level of both sectoral and overall density

of the sector-related trade unions is particularly high in the two Nordic countries, which are generally noted for their strong trade unions.

Employer organisations

Table 4 presents the membership data on employer organisations. Only 12 of the 26 countries register employer organisations. In the other countries, no association meets the definition of a social partner organisation, as introduced above. This situation does not mean that business has remained unorganised. Generally, business interest organisations may also deal with interests other than those pertaining to industrial relations. Organisations specialised in matters other than industrial relations are commonly designated as trade associations ([TN0311101S](#)). Sector-level trade associations usually outnumber sector-level employer organisations (see Traxler, F., 'Business associations and labour unions in comparison', *British Journal of Sociology*, Vol. 44, No. 4, 1993, pp. 673–691). This also holds true for the telecommunications sector. In the countries where employer organisations have not been formed, sector-related business associations exist which exclusively or primarily perform the task of a trade association. In the telecommunications sector, trade associations mainly represent commercial, technical and product market interests in respect of the authorities and the national regulatory agencies.

Table 4: Interest representation of employer organisations (2004–2005)

Interest representation of employer organisations

Country	Domain coverage	Membership			Density				Collective bargaining	Consultation	National and European affiliations ^a
		Type	Companies	Employees	Companies		Employees				
					Domain	Sector	Domain	Sector			
AT											
- FTR	O	No	~ 600	~ 20,000	100%	100%	100%	100%	Yes	Yes	WKÖ, ICMCI, FEACO
BE											
- FEB-VBO	SO	Yes	30,000	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	No	—
- Agoria	SO	Yes	1,400	~ 300,000	n.a.	n.a.	n.a.	n.a.	Yes	No	FEB-VBO
BG	—	—	—	—	—	—	—	—	—	—	—
CY	—	—	—	—	—	—	—	—	—	—	—
CZ											
- CUPTP	O	Yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	—
DE	—	—	—	—	—	—	—	—	—	—	—
DK											
- DI	O	Yes	6,500	~ 325,000 ^b	35%	9%	70%	90%	Yes	Yes	DA
EE	—	—	—	—	—	—	—	—	—	—	—
EL	—	—	—	—	—	—	—	—	—	—	—
ES	—	—	—	—	—	—	—	—	—	—	—
FI											
- TIKLI	O	Yes	191	55,000	70%	~ 30%	90%	70%	Yes	No	EK
FR											
- UNETEL-RST	SO	Yes	80	61,770	n.a.	19% ^c	n.a.	90% ^c	Yes	No	—
HU	—	—	—	—	—	—	—	—	—	—	—
IE											

Country	Domain coverage	Membership			Density				Collective bargaining	Consultation	National and European affiliations ^a
		Type	Companies	Employees	Companies		Employees				
					Domain	Sector	Domain	Sector			
- IBEC-TIF	O	Yes	n.a.	n.a.	n.a.	~40%	n.a.	51%	Yes	Yes	—
IT											
- ASSTEL	C	Yes	28	89,600 ^b	63.6%	3%	n.a.	n.a.	Yes	No	<i>Feder-comin, Conf-industria</i>
LT	—	—	—	—	—	—	—	—	—	—	—
LU	—	—	—	—	—	—	—	—	—	—	—
LV	—	—	—	—	—	—	—	—	—	—	—
MT	—	—	—	—	—	—	—	—	—	—	—
NL											
- ICT-Office*	O	Yes	60	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes	—
PL	—	—	—	—	—	—	—	—	—	—	—
PT	—	—	—	—	—	—	—	—	—	—	—
RO											
- Communications Employer Organisation	O	Yes	27,597	n.a.	n.a.	n.a.	n.a.	n.a.	Yes ^d	Yes	<i>CNPR</i>
SI											
- ZDS	O	Yes	10	~ 3,000	n.a.	10%	n.a.	65%	Yes	No	—
- GZS	O	0	~ 200	100	100%	100%	100%	100%	Yes	No	EICTA
SK											
- Employers Association of Transport, Post and Telecommunications	O	Yes	30	~ 70,000	n.a.	2%	n.a.	72%	Yes	Yes	<i>RUZ SR, CEEP</i>
UK	—	—	—	—	—	—	—	—	—	—	—

Notes: See Annex for list of abbreviations and full names of organisations. C = congruent, O = overlap, S = sectionalism, * = inter-associational domain overlap, n.a. = not available. ^a = national affiliations noted in italics; only affiliations to sectoral European associations, ^b = full-time equivalents, ^c = public sector employees excluded, ^d = indirect involvement in bargaining via higher-order confederation.

Source: EIRO national centres, 2006

The existing sector-related employer organisations usually retain a monopoly-like status, since only one employer organisation is established in most countries, except for Belgium and Slovenia. In most cases, their domains are rather encompassing, implying overlaps with the sector. The domains of the [Irish Business and Employers Confederation \(IBEC\)](#) and the two Slovenian associations, the Association of Employers of Slovenia ([Združenje delodajalcev Slovenije, ZDS](#)) and the Chamber of Commerce and Industry of Slovenia ([Gospodarska zbornica Slovenije, GZS](#)), are general. The Confederation of Danish Industries ([Dansk Industri, DI](#)) covers the entire industry, understood in the broad sense. The other organisations embrace such areas as information technologies (IT), television and radio activities, postal services and/or transport in general, in addition to telecommunications. The Association of Italian telecom operators ([Assotelecomunicazioni, Asstel](#)) covers a domain which is reasonably congruent with the sector.

In several countries, the presence of the general association emanates from the fact that either no sector-specific employer organisation exists, such as in Belgium, or the general associations conduct collective bargaining at central level that includes the sector, as in the case of Belgium, Ireland and Slovenia. While all the trade unions listed in Table 3 are voluntary, two employer organisations have obligatory membership due to their public law status as chambers: the Austrian Federal Economic Chamber ([Wirtschaftskammer Österreich, WKÖ](#)) Organisation of Telecommunications and Broadcasting Companies ([Fachverband Telekommunikations- und Rundfunkunternehmen, FTR](#)), and the GZS in Slovenia. However, in Slovenia, recent legislation stipulates that obligatory organisations are entitled to conclude collective agreements for no longer than a transitory period of three years.

In relation to FTR and GZS, density of both companies and employees is set at 100% by law. Density is relatively high also in the case of the voluntary associations. This especially holds true for density of employees covered. All organisations for which data on employee density of their domain or the sector are available cover at least 50% of employees. Even organisations recording a sector-related company density of 10% or lower, namely the Danish DI, the Slovenian ZDS and the Slovakian Employer Association of Transport, Postal Services and Telecommunications, cover 50% or more of the sector's employees.

The density ratio of the employees is higher than the density of the companies with regard to both the overall domain and the sector-related domain. This indicates a generally higher propensity of the larger companies to join an association. Since usually one very large company or a few large companies exist in the telecommunications sector, a rather low density of companies nevertheless combines with a very high density of employees in the sector. Only two voluntary associations – the Danish DI and the Finnish Employers' Association TIKLI ([Tieto- ja tekniikka-alojen työnantajaliitto, TIKLI](#)) – make available all measures of density. As the total density of the organisations is higher than their sector-related counterparts in both cases, this suggests that the telecommunications sector is problematic in terms of member recruitment for employer organisations, as is the case among the trade unions.

Due to the unusually highly concentrated economic structure of the sector, an employer organisation can nevertheless arrive at a sector-related density of employees that is higher than the overall density of employees, as the case of DI underlines. Hence, the key question is whether the sector's employers band together in employer organisations at all. Complete absence of sector-related employer organisations in the majority of the 26 countries indicates the sector-specific obstacles in terms of increasing employer membership more strikingly than the lower sector-related density relative to overall density does.

Collective bargaining and its actors

Trade unions

Table 3 lists all of the trade unions engaged in sector-related collective bargaining. As already noted above, their bargaining activities are often company-centred, leading to a relatively high proportion of employees being covered by single-employer bargaining in several countries, as compared with multi-employer bargaining. Despite the numerous cases of inter-union domain overlap, relatively few cases emerge of inter-union competition for bargaining rights: in France, the French Democratic Confederation of Labour ([Confédération française démocratique du travail, CFDT](#)), the General Confederation of Labour ([Confédération générale du travail, CGT](#)) and the National Federation of Independent Unions ([Union nationale des syndicats autonomes, UNSA](#)) have called for a reform of labour law, in order to privilege the majority collective agreements at all levels. In Germany, Poland and Romania, the trade unions compete to persuade

the companies to recognise them as a party to collective bargaining, something which tends generally to block collective negotiations in the Polish case. In Austria, a conflict arose between the sector's traditional labour representative, GPF, and the private-sector white-collar union, GPA, when the latter entered the sector after a period of restructuring. The conflict was settled so that the two unions jointly negotiate the sector-level collective agreement. Likewise, rivalries over bargaining rights and participation in public policy are reported among the sector's principal trade unions in Portugal, namely SINTTAV, the Workers' Union of the Portugal Telecom Group ([Sindicato do Trabalhadores do Grupo Portugal Telecom, STPT](#)) and the Democratic Union of Communication and Media Workers ([Sindicato Democrático dos Trabalhadores das Comunicações e dos Média, SINDETELCO](#)). However, they also cooperate in matters of bargaining.

Overall, cooperation prevails. In numerous countries – namely Austria, Belgium, Bulgaria, the Czech Republic, Denmark, Spain, Finland, Italy, Luxembourg, Malta, Poland, Portugal and Slovakia – some or even all of the trade unions in the sector have joined forces, forming bargaining cartels to negotiate with the employer side. One sector-specific reason for this is that the former monopoly providers are the hub of organised industrial relations. This sets an incentive for the trade unions to cooperate when it comes to negotiating with these companies. Otherwise, the trade unions run the risk that some of them – or even most of them apart from one single union which may be preferred by the employer – could be excluded from the bargaining process.

This situation applies to the predominant telecommunications provider of Romania, where the [Federation of Trade Unions in Telecommunications](#) (FTUT) is not recognised. In France and Spain, statutory regulations exclude sector-related trade unions from the bargaining process if they lack the legal recognition of being representative. For example, in France, trade unions not enjoying the legal status of being representative are not allowed to conduct collective bargaining. By law, this status applies to CFDT, CGT, the French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff ([Confédération française de l'encadrement – Confédération générale des cadres, CFE-CGC](#)), the French Christian Workers' Confederation ([Confédération française des travailleurs chrétiens, CFTC](#)), the General Confederation of Labour – *Force ouvrière* ([Confédération générale du travail – Force ouvrière, CGT-FO](#)) and their affiliated organisations. Other trade unions can apply to the courts for recognition as a representative organisation. For the sector's employees under the terms of private law, only the affiliates to those confederations that possess this status by law are representative when it comes to sector-level bargaining. For the public sector, including the sector's employees under public law, distinct criteria are in operation according to which CFDT, CGT, CGT-FO and UNSA are representative. Regardless of this, the government also admits CFTC, CFE-CGC and the Unitary Union Federation ([Fédération Syndicale Unitaire, FSU](#)) as parties to the public sector bargaining rounds.

In Spain, only trade unions that have elected delegates to a company's workers' committee can engage in single-employer bargaining. In the case of Telefónica, this holds true for the Trade Union Confederation of Workers' Commissions ([Confederación Sindical de Comisiones Obreras, CC.OO](#)), the General Workers' Confederation ([Unión General de Trabajadores, UGT](#)), the General Confederation of Labour ([Confederación General del Trabajo, CGT](#)), the Telefónica Trade Union ([Unión Telefónica Sindical, UTS](#)), the Alternative Trade Union for Telefónica Workers ([Alternativa Sindical de Trabajadores de Telefónica, AST](#)) and the Trade Union for Communications Workers ([Sindicato de Trabajadores de Comunicaciones, STC](#)), with 4, 4, 2, 1, 1 and 1 delegate(s), respectively. As regards sector-level bargaining, only trade unions that record more than 10% of all delegates to workers' committees across the sector's companies are admitted as bargaining parties, which includes CC.OO and UGT for the telecommunications

sector. However, trade unions not meeting the criterion for representativeness can join an agreement by signing it.

Employer organisations

In less than half of the countries, employer organisations may be found conducting sector-related collective bargaining (Table 4). Since only two of the countries, namely Belgium and Slovenia, count more than one employer organisation, issues of inter-associational relations recede into the background. However, it is worth mentioning that in the case of both the Netherlands and Slovenia the domains of the two established sector-related employer organisations overlap with each other. Nevertheless, no evidence appears of inter-associational rivalries. This may change in Slovenia when the legal capacity of the obligatory organisations to conclude collective agreements expires within three years according to the new law on collective agreements.

System of collective bargaining

Table 5 gives an overview of the system of sector-related collective bargaining in the 26 countries under consideration. The standard measure of the importance of collective bargaining as a means of employment regulation calculates the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (see Traxler, F., Blaschke, S. and Kittel, B., *National labour relations in internationalised markets*, Oxford University Press, 2001). Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

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

The second indicator considers whether statutory extension schemes are applied to the sector. For reasons of brevity, this analysis is confined to extension schemes designed to extend the scope of a collective agreement to employers not affiliated to the signatory employer organisation; extension regulations targeting the employees are thus not included in the research. Regulations concerning the employees are not significant to this analysis for two reasons. First, extending a collective agreement to employees who are not unionised in the company covered by the collective agreement is a standard of the [International Labour Organisation \(ILO\)](#), aside from any national legislation. Secondly, employers have good reason to extend a collective agreement concluded by them even when they are not formally obliged to do so. Otherwise, they would set an incentive for their workforce to unionise.

In comparison with employee-related extension procedures, schemes that target employers are far more important to the strength of collective bargaining in general and multi-employer bargaining in particular. This is because employers are capable of refraining both from joining an employer organisation and also from entering single-employer bargaining in the context of a purely voluntary system. Therefore, employer-related extension practices increase the coverage of multi-employer bargaining. Moreover, when it is pervasive, an extension agreement may encourage more employers to join the controlling employer organisation; such a move then enables them to participate in the bargaining process and to benefit from the organisation's related services in a

situation where the respective collective agreement will bind them in any case (see Traxler, Blaschke and Kittel, 2001).

Table 5: System of sectoral collective bargaining (2004–2005)

System of sectoral collective bargaining

Country	Collective bargaining coverage (CBC)	Proportion of multi-employer bargaining (MEB) in total CBC (%)	Extension practices
AT	100%	50%	(2)
BE	100%	50%	2
BG	30.5%	0%	0
CY	n.a.	0%	0
CZ	n.a.	MEB prevailing	0
DE	n.a.	0%	0
DK	90%	MEB prevailing	0
EE	77%	0%	0
EL	n.a.	0%	0
ES	97%	0%	0
FI	~ 90%	100%	2
FR	100%	100%	2
HU	67.5%	0%	0
IE	n.a.	MEB prevailing	0
IT	100%	100%	(2)
LT	80%	0%	0
LU	<20% ^a	0%	0
LV	n.a.	0%	0
MT	~ 85%	0%	0
NL	n.a.	n.a.	0
PL	~ 50%	0%	0
PT	23%	0%	0
RO	100%	n.a.	2
SI	100%; <50% ^b	100%; 0% ^b	(2); 0 ^b
SK	~ 72%	~ 72%	1
UK	39%	0%	0

Notes: Collective bargaining coverage means employees covered as a percentage of the total number of employees in the sector. Multi-employer bargaining is noted

relative to single-employer bargaining. Extension practices, including functional equivalents to extension provisions, namely obligatory membership and labour court rulings: 0 = no practice, 1 = limited/exceptional, 2 = pervasive. Cases of functional equivalents appear in parentheses. ^a = referring to NACE 64, ^b = since June 2006.

Source: EIRO national centres, 2006

Collective bargaining coverage

In terms of the sector's collective bargaining coverage, around half of the 18 countries for which figures are available register a very high coverage rate of 80% or more. In five countries, namely Bulgaria, Luxembourg, Poland, Portugal and the UK, the coverage rate is around 50% or less. Depending on national circumstances, several factors – sometimes interacting with each other – account for the generally high coverage rates. Multi-employer bargaining coincides with a high density of both the trade unions and employer organisations in the case of Denmark. Multi-employer bargaining is backed by pervasive extension practices in Belgium, for instance. France and Finland are examples of high bargaining coverage supported by both high employer density and pervasive extension practices. In the case of Austria and Slovenia, obligatory membership of employer organisations works as a functional equivalent to pervasive extension. Finally, the high economic concentration of the sector in terms of employment may give rise to very high bargaining coverage even when only single-employer bargaining takes place, provided that the sector's key companies are covered. Lithuania and Malta exemplify this situation. However, less supportive conditions appear to reduce the collective bargaining coverage rate considerably. Typically, single-employer agreements exist in all the countries with a coverage rate of 50% or lower.

For most countries, at least a rough estimate can be made with regard to the relative importance of multi-employer bargaining, which prevails only in seven countries, if Slovenia is included (see below). In Finland, France and Italy, all of the employees covered come under the terms of multi-employer bargaining. This also applied in Slovenia up to June 2006, when the expiration of the general, central-level agreement left only one company under the terms of a collective agreement which covers almost 50% of the sector's employees.

It should be noted that multi-employer bargaining does not mean sector-level bargaining in all these cases. In Ireland, Romania and – until recently – Slovenia, the sector is covered by an all-encompassing central agreement. The Romanian agreement is complemented by single-employer bargaining that embraces around 63% of the sector's employees. In France, centralised bargaining covering the public sector as a whole includes the telecommunication sector's employees still employed under public law terms. Likewise, in Austria, the sector's public law employees are covered by centralised employment regulation of the state sector. However, only certain negotiations can be conducted for Austria's public sector, since it is excluded from the right to bargain collectively.

Multi-employer bargaining is completely absent in 14 countries, where only single-employer agreements are negotiated. This predominance of single-employer bargaining across Europe can be traced back to the particular nature of the sector, since single-employer bargaining prevails in a number of countries – such as Germany, Portugal and Spain – where multi-employer agreement is otherwise most common. Even in Austria and Belgium, where statutory regulations strongly support multi-employer bargaining, multi-employer agreements determine the employment terms of no more than half of the total number of employees covered by an agreement. The other half of such employees are employed by the former monopoly provider, for which a separate agreement is negotiated. Thus, the sector's high concentration, particularly along with the special status of the former monopoly provider with regard to employment relations, has paved the way for widespread practices of single-employer bargaining.

This situation sometimes contrasts with what the trade unions would prefer. In Latvia, they have called in vain for the existing sector-related business associations to take on the role of a bargaining party, and have asked for the government's support in this matter. In contrast to what may be expected, few agreements exist in countries where single-employer bargaining prevails. No more than one single company agreement, each concluded for the principal provider, is reported to exist in Bulgaria, Cyprus, Latvia, Lithuania, Luxembourg and Poland, while all the other companies of the sector are not covered by any agreement. Slovenia has joined this group since 2006 for the aforementioned reasons.

The high bargaining coverage rate in terms of employees thus conceals a very low coverage in terms of companies in several countries. In some countries, such as Bulgaria, the impact of the single collective agreement extends its formal scope, since the companies that are not covered by an agreement tend to base their employment terms on those of the principal provider. In other countries, the one collective agreement carries little weight even with regard to the company covered. For instance, the agreement for the blue-collar workers of [P&T Luxembourg](#) is merely an amendment of the collective agreement for the employees of the state sector. The agreement in [Telekomunikacja Polska S.A. \(TP\)](#), concluded in connection with ongoing privatisation, dates back to 1998; since that time, only some amendments have been made to the agreement.

Since extension schemes can be applied only to multi-employer agreements, the widespread practice of single-employer bargaining limits their use even in cases where labour law provides for such schemes. Extension practices are common in Belgium, Finland, France, Romania and Slovakia. As is generally typical of Belgium, Finland and France, these practices are prevalent there, while they are rather limited in the remaining two countries. Referring to the aim of extension provisions, that is, making multi-employer agreements generally binding, the provisions for obligatory membership in the WKÖ in Austria and the GZS in Slovenia should also be noted. They create an extension effect, since both of these organisations are parties to multi-employer bargaining. Another functional equivalent to statutory extension schemes can be found in Italy. According to the country's constitution, minimum conditions of employment must apply to all employees. The labour court rulings relate this principle to multi-employer agreements, to the extent that they are regarded as generally binding.

In all of these cases, the bargaining coverage rate is very high. Austria, Belgium, Finland, France, Italy, Romania and Slovenia all record a maximum of 100% coverage. At 72%, Slovakia marks the lower limit of coverage in this group of countries.

Participation in public policymaking

Interest associations may partake in public policy in two basic ways: they may be consulted by the authorities in matters affecting their members; and they may be represented on 'corporatist', in other words tripartite, committees and boards of policy concertation. This study considers only cases of consultation and corporatist participation that are suited to sector-specific matters. Consultation processes are not necessarily institutionalised, so that the organisations consulted by the authorities may vary according to the issues to be addressed and also over time, depending on changes in government. Moreover, the authorities may initiate a consultation process on an occasional rather than on a regular basis. Given this volatility, Tables 3 and 4 designate only those sector-related trade unions and employer organisations that are usually consulted.

Trade unions

The trade unions are consulted by the authorities in the majority of countries. Since a multi-union system is established in almost all countries, it is possible that the authorities may prefer to consult certain trade unions or that the unions rival for participation rights. However, in most

countries where a noticeable practice of consultation is found, any of the existing trade unions can take part in the consultation processes. Spain, Malta and Portugal are the exceptions to this rule. In the case of Spain and Portugal, access to sector-related consultation processes is bound to a trade union's affiliation to one of the major union confederations represented on the country's chief board of corporatist cross-sectoral policy concertation, the Economic and Social Council ([Consejo Económico y social, CES](#)). These major trade union confederations comprise CC.OO and UGT in Spain, and the General Confederation of Portuguese Workers ([Confederação Geral dos Trabalhadores Portugueses, CGTP](#)) and the General Workers Union ([União Geral de Trabalhadores, UGT](#)) in Portugal. Inter-union conflicts over participation in public policy are rare. Such rivalries are reported only for Hungary and for Portugal, involving SINTTAV, STPT and SINDELCO.

Employer organisations

Due to their monopoly-like position in most countries, any conflict over participation rights is absent in the case of the sector-related employer organisations. In the majority of the countries, where such organisations are found, they are usually consulted by the authorities on sector-related matters. Furthermore, if employer organisations exist, then their opportunity to participate in consultation processes does not differ from that of the trade unions. Generally, the two sides of industry are both consulted or not consulted at all. As noted above, employer organisations in the sense of the earlier definition of a social partner organisation are not established in 15 of the 26 countries, including Slovenia since 2006. This does not mean that business is excluded from consultation procedures in these countries. Under these circumstances, the numerous sectoral trade associations are usually consulted. In Hungary, the trade associations are the main partners of the authorities in matters of sector-related policies. In addition to these business associations, the large companies themselves may be involved directly in consultation procedures, in particular when policymaking follows the pattern of a 'company state' rather than that of an 'associative state' (see Grant, W., *Business and politics in Britain*, Macmillan, 1993).

Tripartite participation

Turning from consultation to tripartite participation, the research reveals that sector-specific tripartite bodies are established in only a few countries, namely Denmark, France, Slovakia and Spain. In Bulgaria, such a tripartite body was established until the privatisation of the principal provider in 2004. In Slovenia, a tripartite committee for postal services and telecommunications has been inactive since its formation. Table 6 summarises the main properties of the active tripartite boards of public policy. With the exception of the Slovakian board, which rests on a bipartite agreement of the social partners, they are all based on statute. Their tasks differ somewhat and most of them deal with matters other than industrial relations. As far as their composition is concerned, one interesting difference arises between the trade unions and business associations. In all cases except for Slovakia, the cross-sectoral trade union confederations are represented on the tripartite bodies either exclusively or together with their sector-related counterparts. On the business side, however, only sector-related associations participate. This suggests that, compared with their confederal cross-sectoral, top-level organisations, the sector-related business associations have a stronger role in sector-specific matters of public policy than is the case of their trade union counterparts.

Table 6: Tripartite sector-specific boards of public policy*Tripartite sector-specific boards of public policy*

Country	Name of body and scope of activity	Origin	Participants	
			Trade unions	Business associations
DK	EU Special Committee for IT and Telecommunications: EU policies targeting telecommunications	Statutory	LO, Dansk Metal, HK Privat	DI, DHS, HTS
ES	Quality Control Commission for telecommunication services: Quality control and audit in the sector	Statutory	CC.OO, UGT	ASTEL, ASIMILEC
FR	Joint bargaining commission: Collective bargaining	Statutory	CFDT, CFE-CGC, CFTC, CGT, CGT-FO	UNETEL-RST
SK	Body for postal services and telecommunications: Employment, wage and social policy, working conditions, changes in legislation	Agreement between the social partners	SOZ PT, SPOJE	Employer Association of Transport, Post and Telecommunications

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

Source: EIRO national centres, 2006

Several of the business associations which are represented on the tripartite boards were not listed earlier in Table 4, since they do not meet the criteria of a social partner organisation. This implies that they primarily perform the tasks of a trade association. In some countries, the profile of sector-specific corporatism reflects the predominant position of the former monopoly providers. In Belgium, a separate Joint Committee for [Belgacom](#) is in operation, while several specific boards exist for [France Telecom](#). All of these bodies have a statutory basis. In contrast to the boards listed in Table 6, they deal with industrial relations rather than public policy issues, and they are bipartite bodies, comprising representatives of company management and of those trade unions that are present in the company.

European level of interest representation

At European level, eligibility for consultation and participation in the social dialogue is linked to three criteria, as defined by the Commission. Accordingly, a social partner organisation must have the following attributes:

- be cross-industry, or relate to specific sectors or categories and be organised at European level;

- consist of organisations which are themselves an integral and recognised part of Member States' social partner structures and with capacity to negotiate agreements, and which are representative of all Member States, as far as possible;
- have adequate structures to ensure effective participation in the consultation process.

Regarding social dialogue, the constituent property of these structures is the ability of an organisation to negotiate on behalf of its members and to conclude binding agreements. Accordingly, this section on the European associations of the telecommunications sector will analyse their membership domain, the composition of their membership and their capacity to negotiate.

As will be outlined in greater detail below, two European associations in this area are significant in the telecommunications sector: UNI Europa as the representative of labour, and ETNO for business. Hence, the following analysis will concentrate on these two organisations, while providing supplementary information on others which are linked to the sector's national industrial relations actors.

Membership domain

In terms of membership domain, UNI Europa – which in turn is linked to [UNI Global](#) and the [European Trade Union Confederation \(ETUC\)](#) – is differentiated into 13 sectors which gather the corresponding national trade unions: commerce; electricity; financial services; gambling and betting; graphic design/printing; hairdressing and beauty; industry, business and information technology services (IBITS); media, entertainment and the arts; postal services; real estate; social insurance; tourism; and telecommunications. Thus, the membership domain of UNI Europa overlaps relative to the sector.

In contrast to other European associations of business, ETNO does not organise associations. Its unit of membership is the company itself. As ETNO argues, direct company membership is preferable, since national business associations do not exist in many EU Member States, or otherwise are exclusively dedicated to commercial, technical or market-related issues in respect of the national regulatory authorities. Full members of ETNO may be those undertakings established in Europe and providing therein electronic communications networks. Hence, ETNO's membership domain largely corresponds with the statistical demarcation of the sector.

Membership composition

In terms of membership composition, it should be noted that, in the case of both UNI Europa and ETNO, the countries covered extend beyond the 26 countries examined in this study. However, this report will consider only membership of these 26 countries. Furthermore, the study will be confined to the affiliates of UNI Europa's telecommunications section only. Table 7 outlines the list of members in UNI Telecom. Accordingly, no national affiliations exist in two cases, Hungary and Malta. Insofar as available data on membership of the national trade unions provide sufficient information on their relative strength (see Table 3), it may be concluded that UNI Telecom covers the sector's most important labour representatives in the remaining 24 countries. In three countries, namely Austria, Finland and the UK, UNI Europa's membership includes any of the existing sector-related national trade unions.

Table 7: Members of UNI Telecom, 2006*Members of UNI Telecom*

AT	GPA, GPF
BE	CGLSB/ALCVB, CGSP Telecom – Aviation, CNE-CSC, LBC-NVK, SETCa
BG	PTT-Podkrepa, TUFC
CY	EPOET
CZ	OS ZPTNS
DE	ver.di
DK	DEF, Dansk Metal, HK Privat
EE	ESTAL
EL	OME-OTE
ES	ELA-Zerbitzuak, FCT CC.OO, FTCM-UGT
FI	YT-IL, Metallityövääen Liitto, Sähköalojen ammattiliitto, YT-SEFE, YT-TEK, TU
FR	F3C-CFDT, CGT-PTT, CGT-FO-COM
HU	—
IE	CPSU, CWU, PSEU
IT	FISTEL-CISL, SLC-CGIL, UILCOM
LT	LRDPS
LU	Syndicat des P&T
LV	LSAB
MT	—
NL	AbvaKabo, De Unie
PL	SL NSZZ
PT	SERS, SINDETELCO, SINTTAV, SITESE, SNTCT, STPT
RO	RomTelecom, TUF, FTUT
SI	TS

SK	SPOJE
UK	Connect, CWU

Notes: List confined to the 26 countries under examination; sector-related associations. See Annex for list of abbreviations and full names of organisations.

Source: EIRO national centres, 2006

ETNO has direct company membership in 25 of the 26 countries under examination, with the exception of Lithuania (Table 8). ETNO gathers primarily the major telecommunications companies, many of which belong to the group of former monopoly providers. Figures for the 25 EU Member States, before Bulgaria and Romania acceded to the EU on 1 January 2007, reveal that ETNO's members employ around 1,022,000 employees in total. Some 14 of the largest 20 telecom companies in terms of revenues are affiliated to ETNO (see 'Facts and Figures', ETNO, undated).

With direct company membership, ETNO's structures are not tied to the national systems of business associations. This raises the question of how these structures relate to the above Commission criterion of representativeness, which requires European associations to represent organisations which are themselves an integral and recognised part of Member States' social partner structures and with capacity to negotiate agreements. As noted above, collective bargaining is conducted either mainly or exclusively at company level in most of the 26 countries (Table 5). In these circumstances, the companies themselves are the agents of business in industrial relations, while employer organisations are absent. More specifically, the very large companies, in particular the former monopoly providers, are the key actors and leaders of business in the sector's systems of single-employer bargaining; furthermore, they are usually affiliated to ETNO. In the case of the smaller number of countries where multi-employer bargaining is all-encompassing, ETNO can be linked indirectly to the national bargaining process in two possible ways. First, its member companies may conduct bargaining within its own realm, so that their agreements complement the sector-level agreements. Secondly, ETNO's members, when affiliated to the national employer organisations, can influence their goal formation and bargaining strategies.

Table 8: Members of ETNO, 2006

Members of ETNO

AT	Telekom Austria
BE	Belgacom
BG	BTC (Bulgarian Telecommunications Company)
CY	ATHK
CZ	Český Telecom
DE	Deutsche Telekom
DK	TDC

EE	Elion Enterprises Ltd
EL	OTE
ES	Ono, Telefónica
FI	Elisa Corporation, Finnet Group, TeliaSonera (Sweden/Finland)
FR	TDF, France Telecom
HU	Invitel, Magyar Telekom
IE	Eircom
IT	Telecom Italia
LT	—
LU	P&T Luxembourg
LV	Lattelekom
MT	Maltacom
NL	KPN
PL	Netia Holdings, Telekomunikacja Polska
PT	Portugal Telecom
RO	RomTelekom, Radiocom
SI	Telekom Slovenije
SK	Slovak Telekom
UK	BT (British Telecom)

Notes: List confined to the 26 countries under examination. See Annex for list of abbreviations and full names of organisations.

Source: EIRO national centres, 2006

Capacity to negotiate

The third criterion of representativeness at European level refers to the ability of organisations to negotiate on behalf of their own members. In the case of UNI Europa, the members of the social dialogue committee and the secretariat are empowered to sign agreements in the name of all affiliates by the regular, and statutory, steering group and committee meetings. ETNO has the capacity to negotiate and sign agreements on behalf of its members once it has received a mandate from its members to do so.

As a proof of the weight of UNI Europa and ETNO, it is useful to look for other European associations that may be important representatives of the sector. This can be done by reviewing the European associations to which the sector-related trade unions and employer organisations are affiliated.

Table 3 lists these affiliations for the trade unions. European organisations other than UNI Europa represent only a small number of sector-related unions and of countries. They include the [European Metalworkers' Federation \(EMF\)](#), with six affiliations covering five countries; the [European Federation of Public Service Unions \(EPSU\)](#), with six affiliations in four countries; the [European Federation of Public Service Employees \(EUROFEDOP\)](#) and the [European Transport Workers' Federation \(ETF\)](#), each with four affiliations and countries; the [European Mine, Chemical and Energy Workers' Federation \(EMCEF\)](#), with four affiliations in three countries; Eurocadres, the [European Trade Union Committee for Textiles, Clothing and Leather \(ETUF-TCL\)](#) and the [European Federation of Trade Unions in Food, Agriculture and Tourism \(EFFAT\)](#), each with two affiliations from two countries; the [European Federation of Building and Woodworkers \(EFBWW\)](#), with two affiliations in one country; and the [European Confederation of Executive and Managerial Staff \(CEC\)](#), with one affiliation.

Even though the list of affiliations in Table 3 may be incomplete, this review underlines the principal status of UNI Europa as a voice for telecom employees, all the more since many of the above affiliations to other European organisations reflect the overlapping domains of the affiliates rather than a real reference to telecommunications. Exceptions are those European organisations which organise public sector employees or certain professions or employee groups whose interests crosscut the confines of telecommunications.

Table 4 provides an analogous review of the memberships of the employer organisations. This shows that the sector-related employer organisations have few links with European federations. Only four federations record just one association from the sample: the [European Federation of Management Consultancies Associations \(FEACO\)](#), the [International Council of Management Consulting Institutes \(ICMCI\)](#), the [European Information and Communications Technology Industry Association \(EICTA\)](#), and the [European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest \(CEEP\)](#).

Commentary

In comparison with other sectors, telecommunications stands out as a relatively new sector, the origins of which are rooted in state monopoly. This evolution has led to high economic concentration in the core area of the sector, insofar as the former monopoly providers retain a predominant position in product markets and employment in the field of network operation in most of the European countries.

These economic properties have had an influence on the national industrial relations systems. In response to deregulation and liberalisation, new industrial relations structures have developed: new trade unions and new employer organisations were formed, organisations from other sectors expanded into the area of telecommunications, and new bargaining structures were set up which intersect with the remaining public sector style of industrial relations.

This development has given rise to highly polarised structures in several respects. New private law employment relations often coexist with the older public sector style, a feature which is echoed by parallel structures of interest representation and bargaining. Essentially, this has also led to a polarisation between the old and the new segment of the sector in terms of whether industrial relations are organised. Both the trade unions and employer organisations have encountered serious difficulties in organising the newly established companies. The strongholds

of the trade unions are still the former monopoly providers, while employer organisations have not been formed in the majority of countries. This has made single-employer bargaining more important in the sector than is generally the common pattern in many countries. At the same time, the former monopoly provider has often developed a key role in the sector's industrial relations system. In extreme cases, the sector concludes only one collective agreement, which is concluded for this provider.

Nevertheless, a comparison with recent figures on cross-sectoral collective bargaining coverage in the EU25 Member States before 1 January 2007 (see Marginson, P. and Traxler, F., 'After enlargement: Preconditions and prospects for bargaining coordination', *Transfer*, Vol. 11, 2005, pp. 423–438) indicates that the sector's bargaining coverage has increased in 13 of the 15 countries for which comparable data are available. This can be traced to the sector's specific market structures and industrial relations patterns: bargaining coverage is boosted by the fact that the former monopoly providers, which are generally covered, still represent the largest proportion of employment. However, collective bargaining as well as organised industrial relations may decline to the extent that this predominant employment position of the principal providers may come to an end.

Overall, the polarising properties of the sector affect business from organising together more than is the case for labour. While the sector's employers have refrained from forming a social partner organisation in the majority of countries, national business associations, where they are acting as social partner organisations, have not set up a sector-related European employer confederation. Reflecting the predominance of the sector's companies over business associations in most of the national industrial relations systems, ETNO, the sector-related representative organisation of employers at European level, admits only companies as members. Hence, employer organisations are excluded from membership even though they remain the key industrial relations actors of business in a number of countries, and may gain importance as relevant actors in some of the new Member States that joined the EU in May 2004. Regardless of this, ETNO and its labour counterpart, UNI Europa, are unmatched as the European speakers for employers and employees, particularly since no other European organisation can compare with them in terms of organising relevant sector-related industrial relations actors across the European Member States.

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Annex: List of abbreviations

Country	Abbreviation	Full Name
AT	FTR	Federal Organisation of Telecommunications and Broadcasting Companies
	GPA	Union of Salaried Private Sector Employees
	GPF	Post and telecommunications workers' union
	ÖGB	Austrian Federation of Trade Unions
	WKÖ	Austrian Federal Economic Chamber

Country	Abbreviation	Full Name
BE	CGSLB/ACLVB	Federation of Liberal Trade Unions of Belgium
	CGSP Telecom-Aviation	General Confederation of Public Services Telecom-Aviation
	CNE-CSC	National Federation of White-Collar Workers
	CSC Transcom Telecoms	Confederation of Christian Trade Unions
	CSC-ACV	Confederation of Christian Trade Unions
	FEB-VBO	Federation of Belgian Companies
	FGTB	Belgian General Confederation of Labour
	LBC-NVK	National Federation of White-Collar Workers
	SETCa	Belgian Union of White-Collar Staff, Technicians and Managers
	SLFP-Groupe Belgacom	Free Trade Union of Civil Servants
BG	ADTU	Association of Democratic Trade Unions
	BTC	Bulgarian Telecommunication Company
	CITUB	Confederation of Independent Trade Unions in Bulgaria
	CL 'Podkrepa'	Confederation of Labour 'Podkrepa'
	DTUC	Democratic Trade Union of Communications
	FC 'Podkrepa'	Federation of Communications 'Podkrepa'
	ITD	Independent Trade Union
	NTUAC 'Promania'	National Trade Union Association of Communications 'Promania'
	PTT-Podkrepa	Fédération des PTT 'Podkrepa'
	TUC	Trade Union of Communications
	TUFC	Trade Union Federation of Communications
CY	EPOET	Free Pancyprian Organisation of Telecommunications

Country	Abbreviation	Full Name
		Employees
	PEO	Pancyprian Federation of Labour
	PIEU	Pancyprian Independent Employees' Union
	SEK	Cyprus Workers' Confederation
	SIDIKEK	Local Authority Workers' and Employees' Trade Union
CZ	CUPTP	Czech Union of Postal, Telecommunications and Press Distribution Employees
	OOPR	Radiocommunication Workers' Trade Union Organisation
	OS ZPTNS	Trade Union of Employees in Postal, Telecommunications and Newspaper Services of the Czech Republic
DE	CGB	Christian Federation of Trade Unions
	CGPT	Christian post and telecoms workers' union
	DGB	German Confederation of Trade Unions
	IG BCE	Mining, Chemicals and Energy Workers' Union
	IG Metall	Metalworkers' Union
	Transnet	Rail Workers' Union
	ver.di	Unified Service Sector Union
DK	AC	Danish Confederation of Professional Associations
	AC-gruppen i TDC	Group of Professionals in TDC
	CO-industri	Central Organisation of Industrial Employees
	DA	Confederation of Danish Employers
	Dansk Metal	National Union of Metalworkers
	DEF	Danish Electricians' Union

Country	Abbreviation	Full Name
	DI	Confederation of Danish Industries
	FTF	Salaried Employees' and Civil Servants' Confederation
	HK Privat	Union of Commercial and Clerical Employees in Denmark/Private
	Lederne i TDC	Managers in TDC
	LO	Danish Confederation of Trade Unions
EE	EAKL	Confederation of Estonian Trade Unions
	Elion trade union	Elion trade union
	Eltel trade union	Eltel trade union
	ESTAL	Estonian Communication Workers' Trade Union
EL	OME-OTE	Greek Telecom Employees' Federation
ES	APLI	Asociación Profesional Libre e Independiente
	AST	Alternativa Sindical de Trabajadores
	CC.OO	Confederación Sindical de Comisiones Obreras
	CGT	General Confederation of Labour
	COBAS	Comisiones de Base
	ELA	Basque Workers' Solidarity (ELA-STV)
	FCT CC.OO	Federación de Comunicación y Transporte de CC.OO
	FTCM-UGT	Federación de Transportes, Comunicaciones y Mar
	STC	Sindicato de Trabajadores de Comunicaciones
	UGT	General Union of Workers
	UTS	Unión Telefónica Sindical
FI	AKAVA	Central Union of Special Branches
	EK	Confederation of Finnish Industries

Country	Abbreviation	Full Name
	ERTO	Federation of Special Service and Clerical Employees
	IL	Insinööriliitto (Union of Professional Engineers)
	Metallityöväen Liitto	Metalworkers' Union
	Sähköalan ammattiliitto	Electrical Workers' Union
	SAK	Central Organisation of Finnish Trade Unions
	SEFE	Suomen Ekonomiliitto (Finnish Association of Graduates in Economics and Business Administration)
	STTK	Finnish Confederation of Salaried Employees
	TEK	Tekniikan Akateemisten Liitto (Finnish Association of Graduate Engineers)
	TIKLI	Employers' Association
	TU	Union of Salaried Employees
	YTN	Federation of Professional and Managerial Staff
FR	CFDT	French Democratic Confederation of Labour
	CFE-CGC	French Confederation of Managerial Employees – General Confederation of Professional and Managerial Staff
	CFTC	French Christian Workers' Confederation
	CFTC-PTT	Post and Telecommunications Workers Federation
	CGC	General Confederation of Commerce
	CGT	General Confederation of Labour
	CGT-FO	General Confederation of Labour – Force Ouvrière
	CGT-FO-COM	CGT-FO Communication Workers Federation
	CGT-PTT	CGT Post and Telecommunications Workers Federation
	F3C-CFDT	CFDT Communications, Consulting and Cultural

Country	Abbreviation	Full Name
		Workers Federation
	FO-COM	Force Ouvrière Communication
	SNT-CFE-CGC	CFE-CGC National Telecommunications Union
	SUD-PTT	SUD ('Solidaire, Unitaire, Démocratique') Post and Telecommunications Workers Federation
	UNETEL-RST	Telecommunication Employer Association
	UNSA	National Federation of Independent Unions
	UNSA-Télécoms	UNSA Telecommunications Workers Federation
HU	MSZOSZ	National Confederation of Hungarian Trade Unions
	PHDSZSZ	Trade Union Federation of Post and Communications Employees
	SZEF	Forum for the Cooperation of Trade Unions
	TÁVSZAK	Telecommunication Trade Union
IE	ATGWU	Amalgamated Transport and General Workers' Union
	CPSU	Civil, Public and Services Union
	CWU	Communication Workers' Union of Ireland
	IBEC	Irish Business and Employers Confederation
	IBEC-TIF	Telecommunications and Internet Federation of IBEC
	ICTU	Irish Congress of Trade Unions
	IMPACT	Public Sector Trade Union
	PSEU	Public Service Executive Union
IT	ASSTEL	Association of Telecommunications Service Companies
	CGIL	General Confederation of Italian Workers
	CISL	Italian Confederation of Workers' Unions
	CONFINDUSTRIA	Confederation of Italian Industry

Country	Abbreviation	Full Name
	FEDERCOMIN	Federation of Information and Communication Technology Sector
	FISTEL-CISL	Federation of Entertainment, Information and Telecommunications – Italian Confederation of Workers’ Unions
	SLC-CGIL	Communication Workers’ Union – General Confederation of Italian Workers
	UGL	General Labour Union
	UGL-COM	General Communication Workers’ Union
	UIL	Union of Italian Workers
	UILCOM	Union of Italian Communication Workers
	UILCOM-UIL	Union of Italian Communication Workers – Union of Italian Workers
LT	LPSK	Lithuanian Trade Union Confederation
	LRDPS	Lithuanian Communication Workers Trade Union
LU	CGFP	Confédération générale de la fonction publique
	FLTL	Syndicat imprimerie, médias et culture – trade union responsible for the telecommunications sector within the OGB-L
	LCGB	Luxembourg Christian Trade Union Confederation
	OGB-L	Luxembourg Confederation of Independent Trade Unions
	Syndicat des P&T	Syndicat des Postes et Télécommunications du Grand-Duché de Luxembourg
LV	LBAS	Free Trade Union Federation of Latvia (En)
	LSAB	Communication Workers Trade Union
MT	GWU	General Workers’ Union

Country	Abbreviation	Full Name
	UHM	Union of United Workers
NL	AbvaKabo	AbvaKabo FNV
	AWVN	General Industrial Employers' Association
	CMP/VPP	Union for middle and higher staff
	CNV	National Federation of Christian Trade Unions
	De Unie	DE UNIE, union for industry and services
	FNV	Dutch Trade Union Federation
	ICT-Office	branch association of IT, telecom, office and internet companies in the Netherlands
	VNO-NCW	Confederation of Netherlands Industry and Employers
PL	FZZ	Forum of Trade Unions
	FZZPT	Federation of Telecommunications Employee Trade Unions in the Republic of Poland
	KZZPT	Confederation of the Telecommunications Employee Trade Unions
	NSZZ Solidarność	NSZZ Solidarity
	OPZZ	All-Poland Alliance of Trade Unions
	SKPT NSZZ Solidarność	National Section of Telecommunications Employees of NSZZ Solidarity
	SL NSZZ	Sekretariat Łączności NSZZ Solidarność
	WZZ Sierpień 80	August '80 Free Trade Union
	ZZ Kontra	National Board of the Kontra Trade Union
	ZzliT	Trade Union of Engineers and Technicians
PT	CGTP	General Confederation of Portuguese Workers
	CPQTC	Portuguese Confederation of Technical and Scientific

Country	Abbreviation	Full Name
		Staff
	FENSIQ	National Confederation of Unions for Technical Staff
	FENTCOP	National Union of Transports, Communication and Public Works
	SERS	Union of Engineers in Southern Portugal
	SETN	Portuguese Union of Engineers Graduated in the EU
	SICOMP	Communications Union of Portugal
	SINDETELCO	Democratic Union of Communication and Media Workers
	SINTTAV	National Union of Telecommunication and Audiovisual Workers
	SITese	Union of Administrative, Commerce, Hotel and Service Workers
	SNAQ	National Union of Technical Staff
	SNE	National Union of Engineers
	SNTCT	National Union of Post and Telecommunication Workers
	STPT	Union of the Workers of the Portugal Telecom Group
	STT	National Union of Telecommunication and Audiovisual Communication Workers
	TENSIQ	National Union of Technical Staff in Telecommunications
	UGT	General Workers' Confederation
	USI	Union of Independent Trade Unions
RO	Cartel ALFA	National Trade Union Confederation
	CNPR	National Confederation of Romanian Employers
	CNSLR Frăția	National Confederation of Free Trade Unions of

Country	Abbreviation	Full Name
		Romania Brotherhood
	FTURC	Federation of Trade Unions in Radio Communications
	FTUT	Federation of Trade Unions in Telecommunications
	RomTelekom	RomTelecom Trade Unions Federation
	TUF	Trade Union Federation
	UFS Atlas	Federative Trade Unions Union
SI	GZS	Chamber of Commerce and Industry of Slovenia
	SDPZ	Trade Union of Workers in Transport and Communications
	SELEKS	Trade Union of Electronic Communications of Slovenia
	TS	Telekom Slovenije (Trade Union of Electronic Communications of Slovenia – SELEKS)
	ZDS	Association of Employers of Slovenia
	ZSSS	Association of Free Trade Unions of Slovenia
SK	KOZ SR	Confederation of Trade Unions of the Slovak Republic
	RUZ SR	National Union of Employers
	SOZ PT	Slovak Trade Union of Post and Telecommunications
	SPOJE	Communications Trade Union Association
UK	CONNECT	Union for Professionals in Communications
	CWU	Communication Workers Union
	TUC	Trades Union Congress

Europe	CEC	European Confederation of Executive and Managerial Staff
	CEEP	European Centre of Enterprises with Public Participation and of Enterprises of General Economic

		Interest
	EFBWW	European Federation of Building and Woodworkers
	EFFAT	European Federation of Trade Unions in Food, Agriculture and Tourism
	EICTA	European Information and Communications and Technology Industry Association
	EMCEF	European Mine, Chemical and Energy Workers' Federation
	EMF	European Metalworker's Federation
	EPSU	European Federation of Public Service Unions
	ETF	European Transport Workers' Federation
	ETUC	European Trade Union Confederation
	ETUF-TCL	European Trade Union Federation for Textiles, Clothing, Leather
	Eurocadres	ETUC Council of European Professional and Managerial Staff
	EUROFEDOP	European Federation of Public Service Employees
	FEACO	European Federation of Management Consultancies Associations
	ICMCI	International Council of Management Consulting Institutes
	UNI	Union Network International Europe Telecom