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Representativeness of the European Social Partner Organisations: Textiles and Clothing Sector

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Representativeness of the European Social Partner Organisations: Textiles and Clothing Sector

Abstract

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

Keywords

Europe, social partners, textile and clothing sector

Comments

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This report is available in electronic format only.

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

Objectives of study

The aim of this representativeness study is to identify the relevant national and supranational social actors – that is, the trade unions and employer organisations – in the field of industrial relations in the textile and clothing sector, and to show how these actors relate to the sector's European interest associations of labour and business. The impetus for this study, and for similar studies in other sectors, arises from the European Commission's aim of identifying the representative social partner associations to be consulted under the provisions of the [Treaty on the Functioning of the European Union \(TFEU\) \(1.4 MB PDF\)](#). Hence, this study seeks to provide the basic information needed to set up sectoral social dialogue. The effectiveness of European social dialogue depends on whether its participants are sufficiently representative in terms of the sector's relevant national actors across the EU Member States. Only European associations that meet this precondition will be admitted to the European social dialogue.

To accomplish these aims, the study first identifies the relevant national social partner organisations in the textile and clothing sector, subsequently analysing the structure of the sector's relevant European organisations – in particular, their membership composition. This involves clarifying the unit of analysis at both the national and European level of interest representation. The study includes only organisations whose membership domain is 'sector-related' (Table 1).

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

Scope	Question in the standardised questionnaire to all correspondents	Possible answers	Notes and Explanations
Domain of the organisation within the sector	Does domain of union/employer organisation ...cover the whole textile and clothing sector in terms of economic activities, (that is, including all subactivities)?	Yes/No	This question refers to the economic subactivities of the NACE code chosen. Some organisations may limit their domain to some of the subactivities.
	... cover employees in all (legal) forms of enterprises (for instance, public ownership, private ownership, multinationals, domestic companies, and so on – of course, only insofar as they exist in the sector)?	Yes/No	Some organisations may limit, for instance, their domain to public sector companies/employees only.
	... cover employees in enterprises of all sizes in the	Yes/No	Some organisations (notably employer organisations) may

	textile and clothing sector?		limit their domain to enterprises by size class (such as small and medium-sized enterprises – SMEs – only).
	... cover the textile and clothing sector in all the regions?	Yes/No	This question refers to geographical coverage. Some organisations may not be national in scope and limit their domain to some of the regions.
	...cover all occupations in the textile and clothing sector?	Yes/No	Some organisations (notably trade unions) delimit their domain to certain occupations only.
	...cover blue-collar and white-collar employees in the textile and clothing sector?	Yes/No	Some organisations (notably trade unions) delimit their domain to either blue-collar or white-collar employees
	.. cover employees with non-standard employment contracts in the textile and clothing sector? (self-employed, temporary agency workers, fixed-term contracts...)?	Yes/No	Some organisations (notably trade unions) potentially cannot cover certain types of workers, such as self-employed, free-lancers, temporary agency workers.
Domain of the organisation outside the sector	...also cover employees or enterprises outside the textile and clothing sector?	Yes/No	Some organisations may enlarge their domain to other activities not included in the textile and clothing sector.

Source: Standardised Excel-based questionnaire sent to EIRO national correspondents

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

As regards the national-level associations, classification as a sector-related social partner organisation means that an association must fulfil one of the following three criteria:

- be a party to ‘sector-related’ collective bargaining;
- be a member of a ‘sector-related’ European association of business or labour that is on the Commission’s list of European social partner organisations consulted under Article 154 of the EU treaty;
- participate in the sector-related European social dialogue.

Taking affiliation to a European social partner organisation as a sufficient criterion for determining a national association as a social partner does not necessarily imply that the association is involved in industrial relations in its own country. Although this selection criterion may seem odd at first glance, a national association that is a member of a European social partner organisation will become involved in industrial relations matters through its membership of the European organisation.

Furthermore, it is important to assess whether the national affiliates to the European social partner organisations are engaged in industrial relations in their respective countries. Affiliation to a European social partner organisation and/or involvement in national collective bargaining

are of utmost importance to the European social dialogue, since they are the two constituent mechanisms that can systematically connect the national and European levels.

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

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

National associations are considered a relevant sector-related interest association if their domain relates to the sector, and they are:

- regularly involved in sector-related collective bargaining;
- affiliated to a ‘sector-related’ European association of business or labour on the Commission’s list of European social partner organisations consulted under Article 154 of the TFEU;
- participating in sector-related European social dialogue.

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

Definitions

For the purpose of this study, the textile and clothing sector is defined in terms of the Statistical Classification of Economic Activities in the European Community (NACE), to ensure the cross-national comparability of the findings. More specifically, the textile and clothing sector is defined as embracing NACE (Rev. 2) 13 and 14. This includes the following activities:

NACE Rev.2	
13	Manufacture of textile
14	Manufacture of wearing apparel

The domains of the trade unions and employer organisations and the scope of the relevant collective agreements are likely to vary from this precise NACE definition. The study therefore includes all trade unions, employer organisations and multiemployer collective agreements that are ‘sector-related’ in terms of any of the following four patterns:

- congruence: the domain/purview is identical to the NACE classification;
- sectionalism: the domain/purview only covers a certain part of the sector as demarcated by NACE classification, while no group outside the sector is covered;
- overlap: the domain/purview covers the entire sector plus (parts of) one or more other sectors;
- sectional overlap: the domain/purview covers part of the sector plus (parts of) one or more other sectors.

Organisations are considered ‘sector related’ if their membership domain relates to the sector in one of the ways displayed in Figure 1.

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

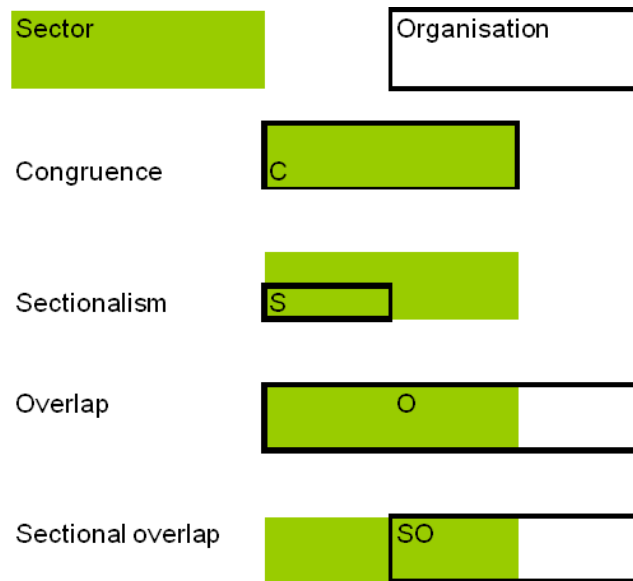


Figure 2: Sector-relatedness of social partner organisations: Domain patterns

According to this definition, the organisations listed by the European Commission as social partner organisations consulted under Article 154 of the TFEU are:

- (on the employees' side) IndustriAll;
- (on the employers' side) The European Apparel and Textile Confederation (EURATEX).

In addition, the study will consider any other sector-related European associations with sector-related national associations – as defined below – under its umbrella.

Collective bargaining

To delineate the bargaining system, two further indicators are used. The first refers to the relevance of multiemployer bargaining compared with single-employer bargaining. The second indicator considers whether statutory extension schemes have been applied to the sector. For reasons of brevity, this analysis is confined to extension schemes that widen the scope of a collective agreement to employers not affiliated to the signatory employer organisation. Extension regulations targeting the employees are therefore not included in the research. Regulations concerning the employees are not significant to this analysis for two reasons.

- Extending a collective agreement to employees who are not unionised in a company covered by the collective agreement is a standard rule of the International Labour Organization, aside from any national legislation.
- If employers did not extend a collective agreement concluded by them, even when not formally obliged to do so, they would set an incentive for their workforce to unionise.

Collection of data

The collection of quantitative data is essential for investigating the representativeness of the social partner organisations, and is done through a bottom-up approach (by correspondents of Eurofound's European Industrial Relations Observatory – EIRO) and also a top-down one (a list of members of European social partners at national level). Unless cited otherwise, this study draws on country studies provided by EIRO, which is a network of national industrial relations experts. They complete a standard questionnaire by contacting the sector-related social partner organisations in their countries. The contact is generally first made via telephone interviews, but can also be established via email. In the case of unavailability of any representative, the national correspondents are asked to fill out the relevant questionnaires based on secondary sources, such as information given on the social partner's website, or derived from previous research studies.

It is often difficult to find precise quantitative data. In such cases, the EIRO national centres are requested to provide rough estimates rather than leaving a question blank, given the practical

and political relevance of this study. However, if there is any doubt over the reliability of an estimate, this will be noted.

In principle, quantitative data may stem from three sources:

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

Quality control

In order to ensure the quality of the information gathered, several verification procedures and feedback loops have been used with the different parties involved (European- and national-level social partner organisations, the European Commission, Eurofound).

- First, the coordinators, in collaboration with Eurofound staff, check the consistency of the national contributions.
- Second, Eurofound sends the national contributions to the national members of its Governing Board, as well as to the European-level sector-related social partner organisations. The peak-level organisations then ask their affiliates to verify the information. Feedback received from the sector-related organisations is then taken into account, if it is in line with the methodology of the study.
- Third, the complete study is finally evaluated by the European-level sectoral social partners and Eurofound's Advisory Committee on Industrial Relations, which consists of representatives from both sides of industry, governments and the European Commission.

Employment and economic trends

The textile and clothing sector accounts for approximately 4.5% of EU manufacturing production and 7.5% of manufacturing employment. The vast majority of companies in the sector are micro companies, with more than 85% of them employing fewer than 10 people, and fewer than 5% employing more than 50.

The textile and clothing industry is one of the most globalised sectors, and the EU27 is the largest world market for textile and clothing products. According to the [EURATEX Annual Report 2010](#), the European industry is the world's second-largest exporter of textiles and third-largest of clothing.

According to [Eurostat's 2011 European Union Labour Force Survey \(LFS\) \(137 KB PDF\)](#) the sector employed more than 2,033,500 people in the EU27 in 2011. Manufacture of wearing and apparels is the most important activity in terms of employment, employing 1,302,700 workers and representing 64% of total employment in the sector).

Average employment losses in recent years came to about 120,000 posts per year (-5%). This accelerated in 2008 to -7%, and the trend has continued (European Commission, 2010). From 2008 to 2011, there was a loss of 602,000 jobs. However, the average employment loss has slowed in recent years, from -8% in 2010 to -2% in 2011 (LFS, data from 2010 and 2011).

Now, European industry is competitive in areas such as technical and industrial textiles, non-woven products and high-quality fashion, where demand is growing. The current economic crisis is having a greater impact on the textiles area than on the clothing sector, because clothing is oriented towards private consumption. Besides, in terms of production, textile and clothing are very different sectors. Thus, the textile sector requires major capital investment while clothing requires significant human resources. Recent developments suggest that the textile sector will continue to suffer more than the clothing sector in the near future (European Commission, 2010).

Employment characteristics

Women make up the majority of the workforce in the sector, representing 71% in both subsectors, according to LFS data for 2011. There are more men employed in the manufacture of textiles (48%) than in manufacture of wearing apparels (29%). Moreover, the composition of the workforce by age group is very similar in both activities. Most people in the workforce are aged 25 and 49 years (66% in the manufacture of textiles and 72.4% in the manufacture of clothing). Self-employment and other non-employee relationships (such as apprenticeships and freelancing) is not very common in the textile and clothing sector, with the exception of Germany (more than 30%), Greece (more than 30%) and Finland (more than 20%).

Long-term trends

The European textile and clothing industry was already undergoing restructuring well before the start of the economic crisis, due to the following factors:

- changing consumer demand;
- technological advances;
- changes in production costs;
- growth in retailers' purchasing power;
- environmental issues.

Moreover, as [a Eurofound report from 2008](#) points out, as a labour-intensive sector, with a lower added value per person employed than a number of other activities, it faces strong competition from low-cost economies and has been strongly affected by the liberalisation of international trade. In response, European industry has undertaken extensive sub-contracting, or relocation to low-cost countries; this has resulted in a diminishing skilled labour force and accelerating technological change.

Tables 2 and 3 give a general overview of the development of the sector from 2001 to 2011. They present figures on companies, employment and employees in the sector and in relation to the national economy.

The number of enterprises decreased in 16 out of the 21 countries where data were available for 2001 and 2011. In all cases with available data, the decrease in the number of enterprises is linked to a drop in employment (see, for example, Belgium, Denmark, Finland and Italy). Indeed, in every country the drop in the number of companies has meant a subsequent drop in employment.

However, in the Czech Republic, Latvia, Slovakia and Spain, employment fell even though the number of companies increased. Apparently, in these countries, the sector is fragmented into enterprises with fewer employees.

Table 2: Employment in the EU textile and clothing sector, 2001 and 2011

	Year	Number of companies	Total employment	Female employment	Male employment	Sectoral employment as % of total employment
AT	2001	n.a.	41,100	25,900	15,200	1.11
AT	2010	1,341	17,124	10,017	7,107	0.42
BE	2001	5,402	50,577	24,981	25,596	0.90
BE	2011	4,204	28,400	13,346	15,054	0.70

BG	2001	n.a.	n.a.	n.a.	n.a.	n.a.
BG	2011	4,893	n.a.	n.a.	n.a.	n.a.
CY	2001	819	3,985	n.a.	n.a.	1.30
CY	2011	343	1,252	860	392	0.30
CZ	2001	35,202	125,400	93,300	32,100	2.70
CZ	2011	36,327	56,500	42,600	13,900	1.20
DE	2001	n.a.	292,000	176,000	116,000	0.70
DE	2011	9,179 (2010)	175,000	106,000	69,000	0.40
DK	2001	1,023	13,297	7,425	5,872	0.50
DK	2011	730 (2010)	5,468	2,888	2,580	0.20
EE	2001	595 (2005)	26,400	n.a.	n.a.	4.50
EE	2011	546 (2010)	13,500	n.a.	n.a.	2.20
EL	2008	15,597	65,113	32,170	32,943	1.40
EL	2011	11,107	33,312	15,217	18,095	0.80
ES	2001	27,121	242,354	149,345	93,009	1.50
ES	2011	33,600	112,300	63,700	48,600	0.60
FI	2001	3,660	14,508	10,695	3,813	0.60
FI	2010	1,867	7,055	4,890	2,165	0.30
FR	2002	6,832	n.a.	n.a.	n.a.	n.a.
FR	2011	4,182	n.a.	n.a.	n.a.	n.a.
HU	2001	9,479	100,000	90,000	10,000	2.60
HU	2011	7,211	71,900	59,677	12,223	1.30
IE	2002	n.a.	13,100	n.a.	n.a.	0.70
IE	2012	n.a.	5,500	n.a.	n.a.	0.30
IT	2001	73,344	609,629	400,023	209,606	2.80
IT	2010	48,804	376,900	220,241	142,409	1.60
LT	2001	1,106 (2006)	41,900 (2008)	n.a.	n.a.	2.8 (2008)
LT	2011	805 (2012)	36,000	N.a.	n.a.	2.90
LU	2000	n.a.	800	n.a.	n.a.	0.30
LU	2011	n.a.	1,400	n.a.	n.a.	0.40
LV	2001	552	25,579	15,814	20,044	5.10
LV	2011	1,290	13,337	n.a.	n.a.	2.50
MT	2001	230 (2002)	3,603	2,464	1,014	2.50
MT	2011	205	736	346u*	390u*	0.40
NL	2001	2,940	n.a.	n.a.	n.a.	n.a.

NL	2011	3,305	n.a.	n.a.	n.a.	n.a.
PL	2001	n.a.	n.a.	n.a.	n.a.	n.a.
PL	2011	41,179	229,900	171,100	47,800	1.40
PT	2000	9,674	224,656	n.a.	n.a.	8.60
PT	2010	7,494	159,110	n.a.	n.a.	5.70
RO	2002	7,096	n.a.	n.a.	n.a.	n.a.
RO	2012	5,979	n.a.	n.a.	n.a.	n.a.
SE	2008	763	7,000	n.a.	n.a.	0.15
SE	2011	740	n.a.	n.a.	n.a.	n.a.
SI	2001	528	25,970	n.a.	n.a.	4.00
SI	2011	371	8,262	n.a.	n.a.	1.10
SK	2001	7,191	73,200	62,800	10,400	3.50
SK	2011	7,719	31,100	26,400	4,700	1.30
UK	2001	10,545	238,486	129,387	109,089	0.90
UK	2011	7,245	95,672	50,706	44,966	0.30

Note: *u = under-represented; as can be seen data for the two years 2001 and 2011 has not been provided for all countries – where it was not available, alternative years were chosen.

n.a. = not available or not applicable

Source: EIRO national contributions (2012), national statistics. For detailed description of sources please refer to the national reports.

Table 3: Employees in the textile and clothing sector, 2001 and 2011

	Year	Total Employees	Female Employees	Male Employees	Sectoral employees as a % of total employees
AT	2001	28,292	17,184	11,108	0.90
AT	2010	16,044	10,001	6,043	0.48
BE	2001	46,909	22,969	23,940	2.40
BE	2011	25,280	11,415	13,865	0.80
BG	2001	n.a.	n.a.	n.a.	n.a.
BG	2011	114,479	98,820	15,659	5.48
CY	2001	3,518	n.a.	n.a.	1.40
CY	2011	1,127	789	338	0.30
CZ	2001	113,200	83,400	29,800	2.80
CZ	2011	47,800	35,400	12,400	1.20

DE	2001	196,791	114,127	82,664	0.70
DE	2011	112,630	61,918	50,712	0.80
DK	2001	12,188	6,651	5,538	0.50
DK	2011	4,726	2,335	2,391	0.20
EE	2001	24,300	n.a.	n.a.	4.60
EE	2011	13,200	n.a.	n.a.	2.30
EL	2008	46,285	23,294	22,991	1.60
EL	2011	20,423	9,547	10,876	0.80
ES	2001	205,093	125,771	79,322	1.60
ES	2011	98,725	56,425	42,300	0.60
FI	2001	12,022	8,651	3,371	0.60
FI	2010	5,438	3,591	1,847	0.30
FR	2001	191,360	116,701	74,659	n.a.
FR	2011	67,574	65,984	45,178	n.a.
HU	2008	100,000	n.a.	n.a.	n.a.
HU	2011	71,900	n.a.	n.a.	0.30
IE	2001	n.a.	n.a.	n.a.	n.a.
IE	2011	n.a.	n.a.	n.a.	n.a.
IT	2001	502,453	345,505	156,948	3.20
IT	2010	313,173	194,843	118,330	1.80
LT	2006	55,800 (2006)	n.a.	n.a.	6.50
LT	2012	27,600	n.a.	n.a.	3.40
LU	2000	700	n.a.	n.a.	0.30
LU	2011	1,400	n.a.	n.a.	0.40
LV	2001	25,555	n.a.	n.a.	5.20
LV	2011	12,697	n.a.	n.a.	2.50
MT	2001	3,416	2,402	1,014	2.70
MT	2011	725	346u*	379u*	0.50
NL	2001	28,000	12,000	16,000	n.a.
NL	2011	16,000	6,000	10,000	n.a.
PL	2001	n.a.	n.a.	n.a.	n.a.
PL	2011	n.a.	n.a.	n.a.	n.a.
PT	2000	214,810	159,687	55,123	9.10
PT	2010	153,495	107,554	45,941	5.90
RO	2002	413,039	355,214	57,825	8.40
RO	2012	188,646	n.a.	n.a.	4.20

SE	2008	7,357	n.a.	n.a.	0.18
SE	2011	5,983	n.a.	n.a.	0.15
SI	2001	25,970	n.a.	n.a.	n.a.
SI	2011	8,262	n.a.	n.a.	n.a.
SK	2001	69,600	59,700	9,900	3.60
SK	2011	27,900	24,100	3,800	1.40
UK	2001	209,399	112,681	96,718	0.90
UK	2011	80,085	40,581	39,504	0.30

*Note: *u - under-represented; as can be seen data for the two years 2001 and 2011 has not been provided for all countries – where it was not available, alternative years were chosen.*

n.a.= not available or not applicable

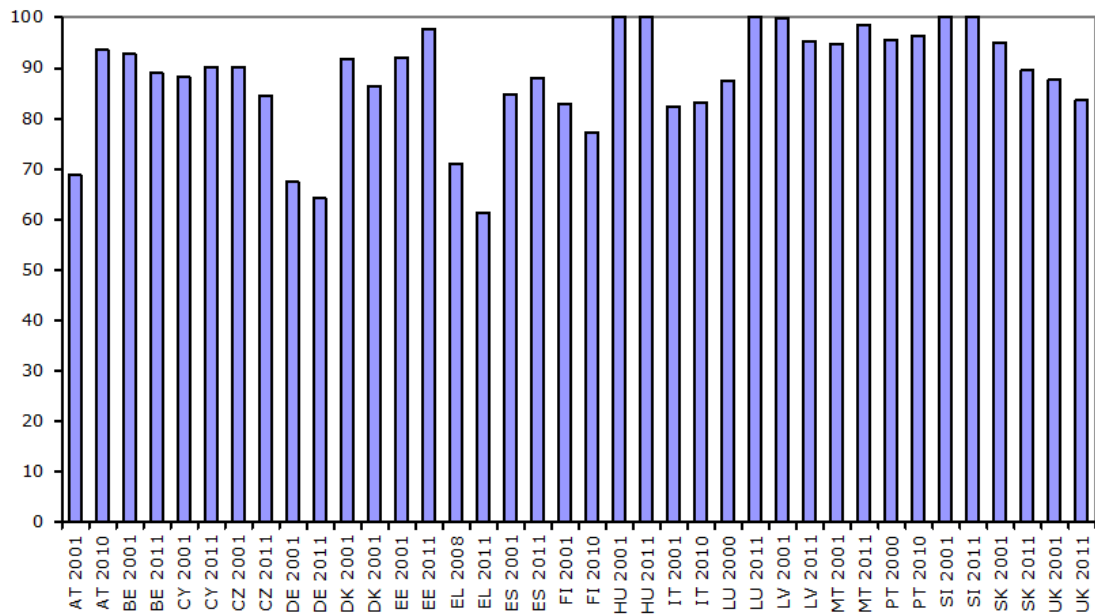
Source: EIRO national contributions (2012), national statistics. For detailed description of sources please refer to the national reports.

The data in Tables 2 and 3 also show that female employment is lower than the European sectoral average of 71% in Belgium (where it is 47%), Denmark (53%), Spain (56%), Greece (46%), Italy (58%) and the UK (52%). It is higher than the European sectoral average in three countries that have available data (Czech Republic, Hungary and Slovakia).

The tables also show that only one country (Luxembourg) out of the 22 countries with available information recorded an increase in overall employment from 2001 to 2011. Data on the development of employment from 2001 to 2011 show a similar trend. Thus, only one Luxembourg, out of 24 countries with available information, shows a rise in the number of employees in the sector (although the sector here is very small). Moreover, this country does not report sector-related social partners. None of the countries records an increase in employment and a decrease in employees.

Data provided by national centres in Figure 2 show the change in the number of employees working in the sector from 2001 to 2011. According to available data, the proportion of employees in the sector has remained very stable in the majority of countries. The exception to this is Austria, where the proportion of employees rose from 69% in 2001 to 94% in 2010. Eight out of 19 countries with available data have recorded an increase in employees; in nine countries, this has slightly decreased. In Sweden and Hungary the proportion of employees has remained stable at 100%.

Figure 2: Proportion of employees in textile and clothing sector 2001–2011



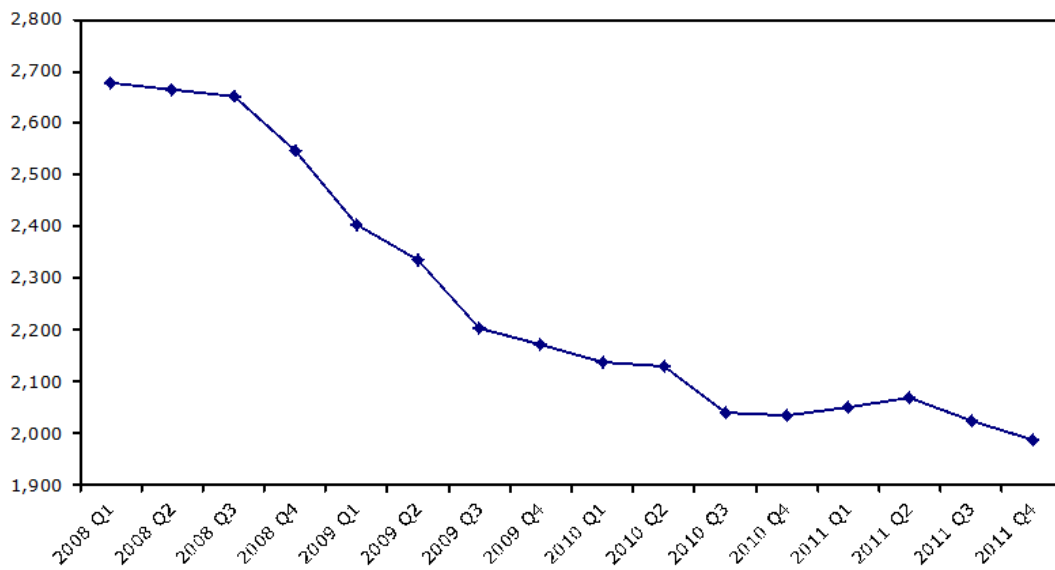
Source: Author's own interpretation of data from EIRO national contributions (2012). For a detailed description of sources please refer to national reports.

Figure 2: Proportion of employees in textile and clothing sector, 2001–2011

Recent developments

The financial crisis has had a considerable impact on the textile and clothing industry. As seen in Figure 3, employment began to decrease in the first quarter of 2008 and followed a negative trend until 2011. Since the third quarter of 2008 there has been a substantial loss of employment. Indeed, from 2008 to the last quarter of 2010 there was a loss of 644,500 jobs. In the last quarter of 2010, the fall in employment stopped, only to be followed by a new drop in the second quarter of 2011. These figures show that employment levels have not yet recovered.

Figure 3: Fall in employment, 2008–2011 (thousands)



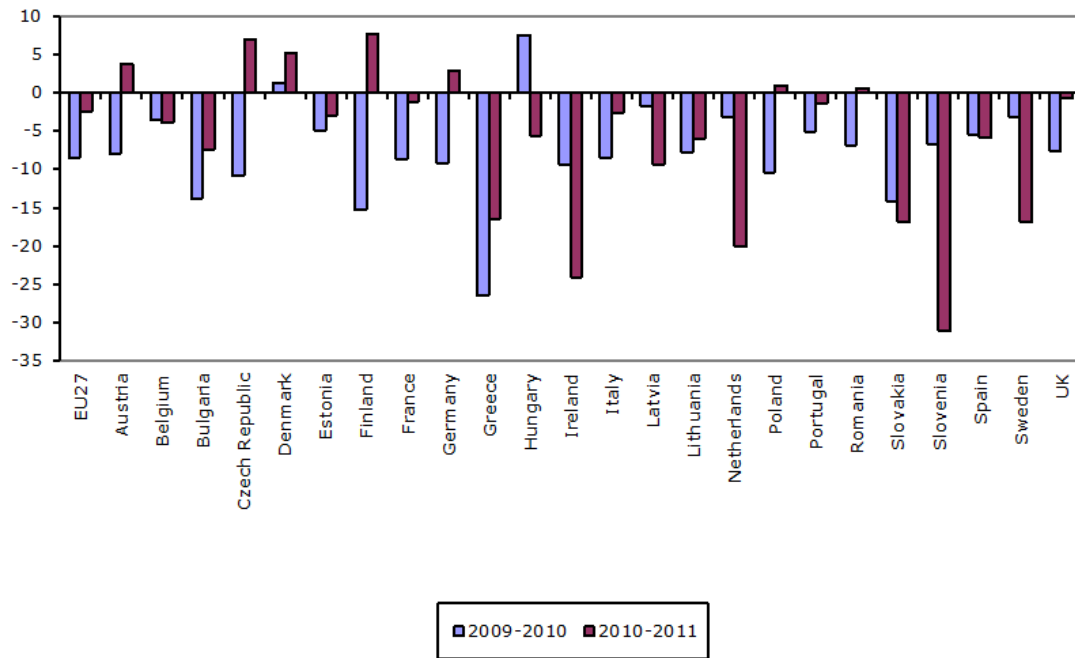
Source: Labour Force Survey (2012)

Figure 3: Fall in employment, 2008–2011 (thousands)

Generally, a negative employment trend caused by the financial crisis is observed in the countries with available data. As seen in Figure 4, most of the countries show a drop in employment from 2009 to 2010, notably Bulgaria, the Czech Republic, Finland, Greece, Poland and Slovakia, all with an employment loss of more than 10%. In this period only two countries (Denmark and Hungary) recorded an increase of employment in the sector, although, in the case of Denmark the increase is very small (1%).

From 2010 to 2011 the negative trend persists, although more countries (7 out of 24 with available data) show a trend towards employment recovery, especially the Czech Republic and Finland. It is worth noting that Denmark is the only country that records an increase in employment during both periods.

Figure 4: Differences in employment, 2009–2011 (%)

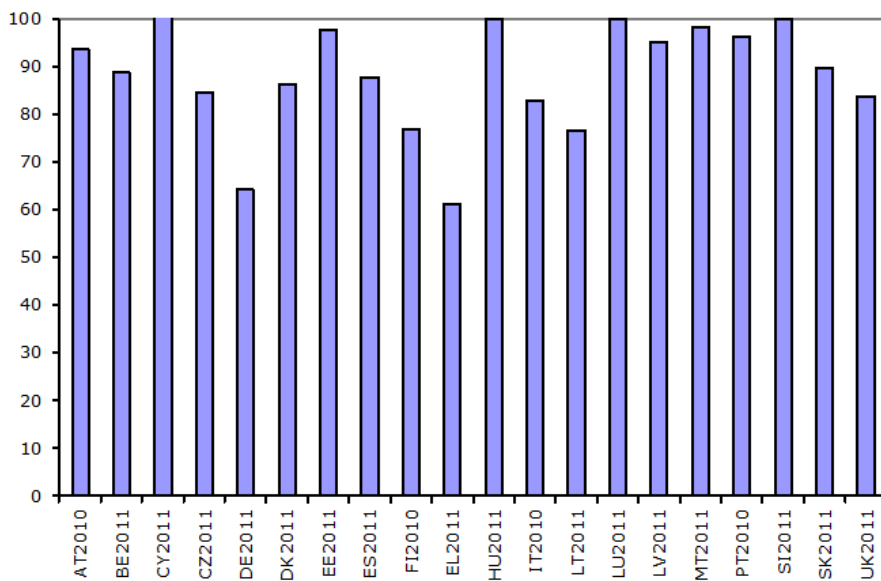


Source: Labour Force Survey (2012), annual differences 2009–2010, 2010–2011

Figure 4: Differences in employment, 2009–2011 (%)

Figure 5 illustrates the proportion of employees in the sector in the countries with available data for 2011. The figure shows that self-employment and other non-employee relationships (such as apprenticeships and freelancing) are rare in most countries except for Germany and Greece (both more than 30%) and Finland (more than 20%).

Figure 5: Proportion of employees in sector, 2011 (%)



Source: Author's interpretation of EIRO national contributions (2012). For a detailed description of sources please refer to national reports.

Figure 5: Proportion of employees in sector, 2011 (%)

National level of interest representation

The analysis of the national level of interest representation will focus on three key elements:

- membership domain and the strength of organisations;
- their role in collective bargaining;
- their role in public policy-making.

Membership domain and strength

This study will focus on the following quantitative data on membership and relative strength within the textile and clothing sector, which were collected through the EIRO network of correspondents.

Table 4: Definitions of membership

Type of organisation	Membership	Density
Trade union	Number of active members in employment Number of active members in employment in the textile and clothing sector	Sectoral density: number of active members in employment in the textile and clothing sector divided by the total textile and clothing sector.
Employer organisation	Number of member companies Number of employees working in member companies Number of member companies in the textile and clothing sector	Sectoral density (companies): number of member companies in textile and clothing sector divided by the total number of companies in the textile and clothing sector. Sectoral density (employees): number of employees working in member companies

	Number of employees working in member companies in the textile and clothing sector	in the textile and clothing sector divided by the total number of employees in the textile and clothing sector
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Trade unions and employee interest representations

Tables 5, 6 and 7 present the employee organisations' data on their domains and membership strength. The tables list all sector-related organisations that are either involved in collective bargaining and/or affiliated to one of the European-level organisations.

Table 5: Domain coverage and membership of employee organisations in the textile and clothing sector, 2012

	Trade union	Domain coverage	Type of membership	Active members, total	Active members in the sector
AT	PRO-GE	sectional overlap	voluntary	232,226	10,280
AT	GPA-djp	sectional overlap	voluntary	172,000	1,000
BE	ABVV-TKD FGTB-TVD*	sectional overlap	voluntary	14,500	14,000
BE	ABVV-BBTK/FGTB-SETCA*	sectional overlap	voluntary	n.a.	n.a.
BE	ACV-CSC METEA*	sectional overlap	voluntary	n.a.	18,000
BE	LBC-NVK*	sectional overlap	voluntary	n.a.	n.a.
BE	ACLVB/CGSLB*	overlap	voluntary	n.a.	n.a.
BE	CNE	n.a.	n.a.	n.a.	n.a.
BG	FLI*	overlap	voluntary	3,000	1,200
BG	FITULI*	overlap	voluntary	7,150	5,200
CY	OBIEK*	overlap	voluntary	9,156	475
CY	SEVETTYK*	overlap	voluntary	13,840	150
CZ	OS TOK	overlap	voluntary	4,728	4,268
DE	IG Metall	overlap	voluntary	2,245,760	n.a.
DK	CO-industri	overlap	voluntary	239,891	4,100
DK	3F	sectional overlap	voluntary	280,756	1,900
DK	HK/Privat	sectional overlap	voluntary	199,085	800
DK	TL	sectional overlap	voluntary	20,348	1,500
EE	ETTAF	overlap	voluntary	880	451

EL	OEKIDE	sectional overlap	voluntary	5,286	4,274
EL	PSPKM	sectional overlap	voluntary	150	70
ES	FITEQA-CCOO*	overlap	voluntary	n.a.	n.a.
ES	FITAG-UGT*	overlap	voluntary	130,000	5,500
ES	FGAMT-CIG*	sectional overlap	voluntary	n.a.	n.a.
FI	TEAM	sectional overlap	voluntary	34,000	3,500
FI	Ammattiliitto Pro, Pro	sectional overlap	voluntary	110,000	1,200
FI	Sähköalojen ammattiliitto	sectional overlap	voluntary	21,000	30
FR	THC-CGT*	overlap	voluntary	5,000	4,000
FR	CFDT Services*	overlap	voluntary	80,000	4,000
FR	Fédération CFTC CMTE *	overlap	voluntary	n.a.	500
FR	Fédéchimie CGT- FO*	sectional overlap	voluntary	n.a.	n.a.
FR	FO Pharma-Cuir- Habillement*	sectional overlap	voluntary	n.a.	n.a.
FR	CFE-CGC Chimie*	sectional overlap	voluntary	10,000	1,000
HU	BDSZ	overlap	voluntary	n.a.	n.a.
HU	HVDSZ 2000	overlap	voluntary	8,975	152
HU	MOSZTRA	congruence	voluntary	200	200
IE	SIPTU	n.a.	voluntary	199,881	n.a.
IT	FILCTEM*	overlap	voluntary	233,000	100,000
IT	FEMCA*	overlap	voluntary	140,000	65,000
IT	UILTA*	overlap	voluntary	41,638	31,835
IT	UGL CHIMICI SINDACATO TESSILI*	congruence	voluntary	n.a.	n.a.
IT	FESICA CONFSAL*	overlap	voluntary	n.a.	n.a.
LT	LPİPS ‘Solidarumas	overlap	voluntary	784	700
LU	No sector-related trade union recorded for Luxembourg.				
LV	LIA	overlap	voluntary	4,410	300
MT	GWU	overlap	voluntary	35,719	273
NL	FNV Bondgenoten*	overlap	voluntary	470,000	2,400
NL	CNV Vakmensen*	overlap	voluntary	135,000	1,200
NL	De Unie/MHP*	overlap	voluntary	62,000	300

PL	FNSZZPL*	overlap	voluntary	n.a.	n.a.
PL	MNSZZP z Siedzibą w FFiK 'Haft' S.A. w Kaliszu	congruence	voluntary	45	45
PL	Sekcja Krajowa Pracowników Przemysłu Lekkiego NSZZ 'Solidarność'*	overlap	voluntary	1,050	525
PT	Têxtil Minho / FESETE*	n.a.	voluntary	6,000	n.a.
PT	SINTEVECC / FESETE*	n.a.	voluntary	3,000	n.a.
PT	SINPICVAT*	n.a.	voluntary	1,750	n.a.
PT	Vestuário Norte / FESETE*	n.a.	voluntary	1,500	n.a.
PT	TÊXTIL Beira Baixa / FESETE*	n.a.	voluntary	1,500	n.a.
PT	TÊXTEIS Sul / FESETE*	n.a.	voluntary	1,500	n.a.
PT	TÊXTIL Aveiro / FESETE*	n.a.	voluntary	1,300	n.a.
PT	TÊXTIL Centro / FESETE*	n.a.	voluntary	1,000	n.a.
PT	TÊXTIL Beira Alta / FESETE*	n.a.	voluntary	1,000	n.a.
PT	Bordados Madeira / FESETE*	n.a.	voluntary	n.a.	n.a.
PT	SINDEQ*	overlap	voluntary	7,000	n.a.
RO	CONFTEX*	congruence	voluntary	5,000	5,000
RO	CRAIMODEX*	congruence	voluntary	3,600	3,600
RO	PELTRICONTEX - FRĂȚIA*	overlap	voluntary	3,000	2,000
RO	CONFPELTEX*	overlap	voluntary	4,500	3,500
RO	UNICONF*	congruence	voluntary	1,500	1,500
SE	Unionen*	sectional overlap	voluntary	520,000	620
SE	The Swedish Association of Graduate Engineers*	sectional overlap	voluntary	138,000	850
SE	Ledarna*	sectional overlap	voluntary	88,000	170
SE	IF Metall*	sectional overlap	voluntary	272,000	3,500
SI	STUPIS	overlap	voluntary	3,500	2,380

SK	IOZ	overlap	voluntary	1,995	1,486
UK	Community*	overlap	voluntary	22,340	1,310
UK	GMB*	overlap	voluntary	610,116	n.a.
UK	Unite the Union *	overlap	voluntary	1,510,026	n.a.

Note: * Domain overlap with other sector-related trade unions

n.a. = not available

Table 6: Density, collective bargaining, consultation and affiliations of employee organisations in the textile and clothing sector, 2012

	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
AT	PRO-GE	64.1	Yes, multiemployer bargaining only	Yes, both	On an ad hoc basis and on a regular basis	IndustriAll Global Union, ILO, ITUC-CSI-IGB, IUF – UITA – IUL, TUAC, IndustriAll European Trade Union, EFFAT, ETUC, ÖGB
AT	GPA-djp	6.2	Yes, multiemployer bargaining only	No		ITUC-CSI-IGB, UNI global union, WOW, ETUC, EPSU, EFFAT, EFJ, UNI Europa, ÖGB
BE	ABVV-TKD – FGTB-TVD	55.4	Yes, both single-employer and multiemployer bargaining	Yes	On an ad hoc basis	IndustriAll, IndustriAll Europe, ABVV/FGTB
BE	ABVV-BBTK/ FGTB-SETCA	n.a.	Yes, both	Yes	n.a.	ABVV/FGTB
BE	ACV-CSC METEA	71.2	Yes, both	Yes	On a regular basis	IndustriAll, IndustriAll Europe, ACV-CSC

BE	LBC-NVK	n.a.	Yes, both	Yes	n.a.	Eurocadres, ACV/CSC
BE	ACLVB/CGSL B	n.a.	Yes both	Yes	n.a.	ETUF: TCL, Eurocadres
BE	CNE	n.a.	n.a.	n.a.	n.a.	n.a.
BG	FLI	1	Yes, both	Yes	n.a.	IndustriAll European Trade Union
BG	FITULI/ FOSIL	4.5	Yes, both	Yes	n.a.	IndustriAll European Trade Union, CITUB
CY	OBIEK	42.1	Yes, multiemploy er bargaining	No		IMF, IUF, ITGLWF, IFG, ICEM, EMF, ECF, ETUF/TCL, IndustriAll EGF, EFFAT, SEK
CY	SEVETTYK	13.3	Yes, multiemploy er bargaining	No		PEO
CZ	OS TOK	8.9	Yes, both	No		IndustriAll European Trade Union –TFL, ČMKOS
DE	IG Metall	n.a.	Yes, both	n.a.		IndustriAll European Trade Union, DGB
DK	CO-industri	86.8	Yes, multiemploy er bargaining	Yes	On an ad hoc basis	IndustriAll Global, IUL, IndustriAll Europe, EFFAT, LO

DK	3F	40.2	Yes, both	Yes	On an ad hoc basis	IndustriAll Global union – indirectly, via CO-industri, BWI; UNI-Global. IndustriAll European union – indirectly, via the CO-industri, ETF; NTF; EFFAT; EPSU; EFBWW; UNI-Europa, LO
DK	HK/Privat	16.9	Yes, both	Yes	On an ad hoc basis	UNI-Global, IndustriAll Europe – indirectly, via CO-industri, UNI-Europa, LO
DK	TL	31.7	Yes, both	Yes	On an ad hoc basis	UNI Global, IndustriAll – indirectly, via CO-industri, UNI Europa, LO
EE	ETTAF	3.4	Yes, both	Yes, but not directly	On an ad hoc basis	IndustriAll Global Union, IndustriAll European Trade Union, Estonian Trade Union Confederation, Estonian Qualifications Authority
EL	OEKIDE	20.9	Yes, multiemployer bargaining	No		GSEE
EL	PSPKM	0.3	Yes, multiemployer bargaining	No		None
ES	FITEQA-CCOO	n.a.	Yes, both	Yes	On an ad hoc basis	Global Union, IndustriAll

ES	FITAG-UGT	5.6	Yes, both	Yes	On a regular basis (usually twice a year)	Global Union, UITA, IndustriAll, EFFAT, EPSU, AESCOOMED
ES	FGAMT-CIG	n.a.	n.a.	n.a.	n.a.	IndustriAll
FI	Industrial Union TEAM	64.4	Yes, multiemployer bargaining	Yes	On a regular basis	ICEM, IndustriAll –EX-ETUF :TCL, SAK
FI	Ammattiliitto Pro, Pro	22.1	Yes, multiemployer bargaining	Yes	On a regular basis	ICEM, IndustriAll –EX-ETUF :TCL, STTK
FI	Sähköalojen ammattiliitto	22.1	Yes, multiemployer bargaining	Yes	On an ad hoc basis (not too often)	BWI, IndustriAll Global Union, EFBWW, IndustriAll European Trade Union, SAK
FR	THC-CGT	5.9	Yes, both	Yes	On an ad hoc basis	IndustriAll Global Unions, IndustriAll European Trade Unions, CGT
FR	CFDT Services	5.9	Yes, both	Yes	On an ad hoc basis	IndustriAll Global Union, UNI Global Union, IUF, IndustriAll Europe Trade Union, EFFAT, UNI Europa, CFDT
FR	Fédération CFTC CMTE	0.7	Yes, both	n.a.	n.a.	CFTC
FR	Fédéchimie CGT-FO	n.a.	Yes, both	Yes	On an ad hoc basis	IndustriAll Global Union, IndustriAll Europe Trade Union, CGT-FO

FR	FO Pharma-Cuir-Habillement	n.a.	Yes, both	Yes	On an ad hoc basis	IndustriAll Global Union, IndustriAll Europe Trade Union, CGT-FO
FR	CFE-CGC Chimie	1.5	Yes, both	Yes	On an ad hoc basis	FICCIA, - IndustriAll FECCIA, – IndustriAll European Trade Union, CFE-CGC
HU	BDSZ	n.a.	Yes, single-employer bargaining	No		Global IndustriAll, IndustriAll, MSZOSZ
HU	HVDSZ2000	0.2	Yes, single-employer bargaining	No		PSI, EPSU
HU	MOSZTRA	0.3	No	No		IndustriAll, Workers Councils (Munkástanácsok)
IE	SIPTU	n.a.	n.a.	n.a.		UNI Global, ETUC, ICTU
IT	FILCTEM	31.9	Yes, both	Yes	On an ad hoc basis	IndustriAll Global Union, PSI, ITGLW, IndustriAll, EPSU, CGIL
IT	FEMCA	20.8	Yes, both	Yes	On an ad hoc basis and on a regular basis	IndustriAll Global Union, PSI, ITGLW, IndustriAll, EPSU, CGIL, IndustriAll, EPSU, CISL
IT	UILTA	10.2	Yes, both	Yes	On an ad hoc basis	IndustriAll Global Union, ITGLW, IndustriAll, UIL
IT	UGL CHIMICI SINDACATO TESSILI	n.a.	n.a.	n.a.	n.a.	UGL
IT	FESICA CONFESAL	n.a.	n.a.	n.a.	n.a.	CONFESAL

LT	LPIPS 'Solidarumas	0.2	Yes, single- employer bargaining	Yes	On an ad hoc basis	LPS 'Solidarumas'
LU	No sector-related trade union recorded for Luxembourg.					
LV	LIA	2.4	Yes, multiemploy er bargaining	Yes	On a regular basis	ICEM, ITGLWF, IUF, IndustriAll, EFFAT, LBAS
MT	GWU	37.7	Yes, single- employer bargaining	No		ITGLWF -, IndustriAll- European Trade Union
NL	FNV Bondgenoten	15	Yes, both	Yes	On an ad hoc basis	ILO; IndustriAll Global; ETUC; IndustriAll Europe; FNV
NL	CNV Vakmensen	7.5	Yes, both	Yes	On an ad hoc basis	ILO; IndustriAll - Global; ETUC, IndustriAll - Europe; CNV,
NL	De Unie/MHP	1.9	Yes both multiemploy er and single- employer bargaining	Yes	On an ad hoc basis	MHP
PL	FNSZZPL	n.a.	Yes, single- employer bargaining only	Yes	On an ad hoc basis, at least quarterly	IndustriAll – European Trade Union, OPZZ
PL	MNSZZP z Siedzibą w FFiK 'Haft' S.A. w Kaliszu	n.a.	Yes, single- employer bargaining only	No		FNSZZPL

PL	Sekcja Krajowa Pracowników Przemysłu Lekkiego NSZZ 'Solidarność'	n.a.	Yes, single-employer bargaining	Yes	On an ad hoc basis, at least quarterly	NSZZ 'Solidarność'
PT	Têxtil Minho/ FESETE	n.a.	Yes, multiemployer bargaining	n.a.	n.a.	IndustriAll (via FESETE), FESETE and CGTP
PT	SINTEVECC/ FESETE	n.a.	Yes, multiemployer bargaining	n.a.	n.a.	IndustriAll (via FESETE), FESETE and CGTP
PT	SINPICVAT	n.a.	Yes, multiemployer bargaining	n.a.	n.a.	IndustriAll (via FESETE), FESETE and CGTP
PT	Vestuário Norte/FESETE	n.a.	Yes, multiemployer bargaining	n.a.	n.a.	IndustriAll (via FESETE), FESETE and CGTP
PT	TÊXTIL Beira Baixa/FESETE	n.a.	Yes, multiemployer bargaining	n.a.	n.a.	IndustriAll (via FESETE), FESETE and CGTP
PT	TÊXTEIS Sul/FESETE	n.a.	Yes, multiemployer bargaining	n.a.	n.a.	IndustriAll (via FESETE), FESETE and CGTP
PT	TÊXTIL Aveiro/FESETE	n.a.	Yes, multiemployer bargaining	n.a.	n.a.	IndustriAll (via FESETE), FESETE and CGTP
PT	TÊXTIL Centro/FESETE	n.a.	Yes, multiemployer bargaining	n.a.	n.a.	IndustryALL (via FESETE), FESETE and CGTP
PT	TÊXTIL Beira Alta/FESETE	n.a.	Yes, multiemployer bargaining	n.a.	n.a.	IndustriAll (via FESETE), FESETE and CGTP
PT	Bordados Madeira/FESETE	n.a.	Yes, multiemployer bargaining	n.a.	n.a.	IndustriAll (via FESETE), FESETE and

			bargaining			CGTP
PT	SINDEQ	n.a.	Yes, multiemployer bargaining	n.a.	n.a.	IndustriAll, UGT
RO	CONFTEX	2.7	Yes, both	Yes, as member of CSDR	On an ad hoc basis	IndustriAll – European Trade Union, CSDR
RO	CRAIMODEX	1.9	Yes, both	Yes. As member of BNS	On an ad hoc basis	IndustriAll – European Trade Union, BNS
RO	PELTRICONTEX -FRĂȚIA	1.1	Yes, both	Yes. As member of CNSLR Frăția	On an ad hoc basis	IndustriAll – European Trade Union, CNSLR Frăția
RO	CONFPELTEX	1.9	Yes, both	Yes. As member of CNS Cartel Alfa.	On an ad hoc basis	IndustriAll – European Trade Union, CNS Cartel Alfa
RO	UNICONF	0.8	Yes, both	Yes. As member of CNS Cartel Alfa	On an ad hoc basis	IndustriAll – European Trade Union, CNS Cartel Alfa
SE	Unionen	n.a.	Yes, both	Yes, but consultation mostly occurs via TCO	On an ad hoc basis	UNI Global Union (UNI), IndustriAll Global Union, TCO, PTK
SE	The Swedish Association of Graduate Engineers	n.a.	Yes, both	Yes	On a regular basis	IndustriAll Global Union, CEC, FEANI, ICEM, IMF. UNI Global Union, ANE, IN, TCO
SE	Ledarna	n.a.	Yes, multiemployer bargaining	No		CEC, EUROCADRES, PTK

SE	IF Metall	n.a.	Yes, multi-employer bargaining	Yes	On a regular basis	IndustriAll Global Union, LO
SI	STUPIS	28.8	Yes, both	Yes	On an ad hoc basis	IndustriAll, the Union of Free Trade Unions of Slovenia
SK	IOZ	5.3	Yes, single-employer bargaining	Yes	On a regular basis	ITGLWF, IndustriAll - European Trade Union, KOZ SR
UK	Community	1.6	Yes both	Yes	On a regular basis	IndustriAll Global Union, IndustriAll European Trade Union, TUC, GFTU
UK	GMB	n.a.	Yes both	n.a.	n.a.	IndustriAll Global Union, BWI, ITF, IUF, PSI, UNI Global Union, IndustriAll European Trade Union, EFBWW, EFFAT, EPSU, ETF, UNI Europa, TUC
UK	Unite the Union	n.a.	Yes both	n.a.	n.a.	IndustriAll Global Union, BWI, ITF, IUF, PSI, UNI Global Union, IndustriAll European Trade Union, EFBWW, EFFAT, EPSU, ETF, UNI Europa, TUC

Note: n.a. = not available

Table 7: Employee organisations, domain coverage and domain description in relation to the textile and clothing sector, 2012

	Employee organisation	Domain coverage	Domain description
AT	PRO-GE	sectional overlap	Blue-collar workers in the sector and in metalworking, mining, energy, electric power, agriculture, food-processing, tobacco, chemicals, glass production, paper, vulcanisation, mineral oil and gas, waste and temporary agency workers.

AT	GPA-djp	sectional overlap	White-collar employees in all private sectors
BE	ABVV-TKD – FGTV-TVD	sectional overlap	Blue-collar workers in the sector and in the diamond sector
BE	ABVV-BBTK/FGTB-SETCA	sectional overlap	White-collar employees across all sectors
BE	ACV-CSC METEA	sectional overlap	Blue-collar workers in the sector and in the metal sector
BE	LBC-NVK	sectional overlap	White-collar employees in the Dutch-speaking and bilingual region
BE	ACVLB/CGSLB	overlap	Workers across all sectors
BE	CNE	n.a.	
BG	FLI	overlap	All workers in textiles, clothing, leather, shoes, glass and porcelain/faience industries, paper and cellulose, woodworking
BG	FITULI	overlap	All workers in wool and silk textiles, cotton and linen/hemp textiles, knitwear, tailoring, leather and fur, shoe and haberdashery, glass and porcelain/faience industries, machine building, children's toys and custom goods
CY	OBIEK	overlap	Workers in all private and semi-public sectors.
CY	SEVETTYK	overlap	All workers in the textile and clothing sector, plus those in footwear, tanning and leather, paper, press and printing, chemical, tobacco, food and drink.
CZ	OS TOK	overlap	All workers in the textile and clothing sector. Plus one trade union in a municipal transport company, two company trade unions in two community centres and a few company trade unions in automotive textile companies
DE	IG Metall	overlap	Workers across all sectors
DK	CO-industri	overlap	Eight unions with members in all manufacturing industry sectors
DK	3F	sectional overlap	Blue-collar workers in different sectors including textile and clothing
DK	HK/Privat	sectional overlap	White-collar workers in most sectors
DK	TL	sectional overlap	Technicians in most sectors.
EE	ETTAF	overlap	All workers in the sector plus those in the chemistry, food, leather and footwear sectors

EL	OEKIDE	sectional overlap	Blue-collar workers, including those in the leather sector
EL	PSPKM	sectional overlap	Licensed engineers including those in the chemical industry (colour and dye manufacturing), as well as professionals in related training and public institutions
ES	FITEQA-CCOO	overlap	All workers in the sector plus those in the chemical sector
ES	FITAG-UGT	overlap	Industrial and farm workers
ES	FGAMT-CIG	sectional overlap	All workers in the sector plus those in the clothing, fisheries and the transport sectors in Galicia
FI	TEAM	sectional overlap	Blue-collar workers in 13 different industrial sectors.
FI	Ammattiliitto Pro, Pro	sectional overlap	White-collar workers in the sector plus those in technology industries
FI	Sähköalojen ammattiliitto	sectional overlap	Electrical workers
FR	THC-CGT	overlap	All workers in the sector, plus those in leather activities
FR	CFDT Servives	overlap	All workers in the sector plus textile retailers, laundries, leather goods, the shoe industry, tanneries and cobblers
FR	Fédération CFTC CMTE	overlap	All workers in the sector plus chemical industry, mining and energy industries
FR	Fédéchimie CGT-FO	sectional overlap	All the workers in textile, and leather production
FR	FO Pharma-Cuir-Habillement	sectional overlap	All workers in clothing, fashion design, leather goods (cobblers, shoe industry); pharmaceuticals (medical and biology laboratories)
FR	CFE-CGC Chimie	sectional overlap	Managers and technicians including those in chemical and pharmaceutical industries, plus laundry, rubber, glass, chemists, camping, plastics industry
HU	BDSZ	overlap	All workers, plus those in the mining sector
HU	HVDSZ2000	overlap	All workers plus municipal management, and employers of disabled workers
HU	MOSZTRA	congruence	All workers
IE	SIPTU	n.a.	
IT	FILCTEM	overlap	All workers plus those in chemical and energy sectors
IT	FEMCA	overlap	All workers plus those in chemicals, energy, textiles, clothing, footwear/tanning and leather,

			fashion
IT	UILTA	overlap	All workers plus those in footwear, leather, glasses, pens and pencils, brushes, toys, games, hobby and models, industrial laundry, headwear, umbrellas and handles for umbrellas, beach umbrellas, fishing nets
IT	UGL CHIMICI SINDACATO TESSILI	congruence	All workers in the sector
IT	FESICA CONFESAL	overlap	All workers in the sector and in other, non-specified sectors
LT	LPİPS ‘Solidarumas	overlap	All workers in the sector and in the footwear sector
LV	LIA	overlap	All workers in the sector and in other non-specified sectors
MT	GWU	overlap	Workers across all sectors
NL	FNV Bondgenoten	overlap	All workers in the sector and in other non-specified sectors
NL	CNV Vakmensen	overlap	All workers in the sector and in other non-specified sectors
NL	De Unie/MHP	overlap	All workers in the sector and in other non-specified sectors
PL	FNSZZPL	overlap	All workers in the sector and in leather industry
PL	MNSZZP z Siedzibą w FFiK ‘Haft’ S.A. w Kaliszu	congruence	Single-company trade union
PL	Sekcja Krajowa Pracowników Przemysłu Lekkiego NSZZ ‘Solidarność’	overlap	All workers in the sector and in leather industry
PT	Têxtil Minho/FESETE	n.a.	n.a.
PT	SINTEVECC/FESETE	n.a.	n.a.
PT	SINPICVAT	n.a.	n.a.
PT	Vestuário Norte/FESETE	n.a.	n.a.

PT	TÊXTIL Beira Baixa/FESETE	n.a.	n.a.
PT	TÊXTEIS Sul/FESETE	n.a.	n.a.
PT	TÊXTIL Aveiro/FESETE	n.a.	n.a.
PT	TÊXTIL Centro/FESETE	n.a.	n.a.
PT	TÊXTIL Beira Alta/FESETE	n.a.	n.a.
PT	Bordados Madeira/FESETE	n.a.	n.a.
PT	SINDEQ	overlap	All the workers in the sector and in chemical, pharmaceutical and other industries
RO	CONFTEX	congruence	All the workers in the sector
RO	CRAIMODEX	congruence	All the workers in the sector
RO	PELTRICONTEX - FRĂȚIA	overlap	Workers in the sector and in the leather and footwear sectors
RO	CONFPELTEX	overlap	Workers in the sector and in the leather and footwear sectors
RO	UNICONF	congruence	All the workers in the sector
SE	Unionen	sectional overlap	White-collar workers in all the sectors
SE	The Swedish Association of Graduate Engineers	sectional overlap	White-collar workers (graduate engineers) in all sectors
SE	Ledarna	sectional overlap	White-collar workers (managers) in all sectors
SE	IF Metall	sectional overlap	Blue-collar workers plus those in engineering and plastics, building components, mining, ironworks, automobile repair shops, and sectors dealing with working assessments for the disabled
SI	STUPIS	overlap	Workers in the sector and in the leather sector
SK	IOZ	overlap	Workers in the sector and in the leather sector

UK	Community	overlap	Workers in the sector and in the steel, wire and domestic appliance industry, betting shops, and social/voluntary/charity work
UK	GMB	overlap	Workers across all sectors
UK	Unite the Union	overlap	Workers across all sectors

Note: n.a. = not available

All 27 countries, except Luxembourg, record at least one sector-related trade union. In total, 76 sector-related trade unions were identified that fulfil the criteria for inclusion in the representativeness study. In 33% of the countries only one sector-related union is recorded; in 15% of the countries two sector-related unions are recorded; and in 22% of the countries, three sector-related unions. In 30% of the countries four or more sector-related unions are recorded, thus showing a fragmented landscape.

The undefined boundaries of the textile and clothing sector imply that only six unions (9% of all the unions) have demarcated their domain in a way that is congruent with the sector definition. This implies that statistical definitions of business activities of the sector differ from the lines along which employees identify their interests, mainly based on trades and occupational categories.

Domain demarcations resulting in overlap prevail in the textile and clothing sector (56% of the cases). Overlap, by and large, arises from two different modes of demarcation. The first one refers to general (for example, cross-sectoral) domains; these include ACLVB/CGSLB in Belgium, SIPTU in Ireland, GWU in Malta, FNV, CNV Vakmensen in the Netherlands, and GMB and UNITE in the UK. The second and more frequent mode in the sector relates to various forms of multi-sector domains; this covers the following types of sector:

- contiguous sectors such as leather or shoe manufacturing (THC-CGT, CFDT Services in France, UILTA in Italy, LPĪPS ‘Solidarumas in Lithuania, FNSZZPL in Poland, PELTRICONTEX–FRĂȚIA and CONFPELTEX in Romania, STUPIS in Slovenia);
- sectors included in light industry (FLI and FITULI in Bulgaria, ETAFF in Estonia);
- sectors that do not directly relate to the textile and clothing sector, such as municipal transport, metallurgy, general manufacturing industry, chemical and energy sectors, mining, municipal management and employers of disabled workers, commerce or social/voluntary/charity work (OS TOK in Czech Republic, IG Metall in Germany, CO-industri in Denmark, FITEQA-CCOO and FITAG-UGT in Spain, Fédération CFTC CMTE in France, BDSZ and HVDSZ2000 in Hungary, FILCTEM, FEMCA and FESICA CONFESAL in Italy, LIA in Latvia, SINDEQ in Portugal, Community in the UK, OVIEK and SEVETTYK in Cyprus).

It should be noted that, according to the Danish national report, CO-industri is not a union, but a negotiation cartel of unions in manufacturing industry, and also that these unions represent only workers in the private and the semi-public sectors. However, since there are no publicly owned enterprises in the textile and clothing sector, we have defined its domain demarcation as overlap.

Domain demarcations resulting in sectional overlap in relation to the sector occur in 34% of cases. This is usually because of domain demarcations focusing on certain categories of employees that are then organised across several or all sectors. Employee categories are specified by various parameters.

These parameters can be distinct occupations:

- technicians and designers (TL in Denmark);
- electrical workers (Sähköalojen ammattiliitto in Finland);
- managers and technicians (CFE-CGC Chimie in France);
- engineers (PSPKM in Greece, the Swedish Association of Graduate Engineers in Sweden)

- managers (Ledarna in Sweden).

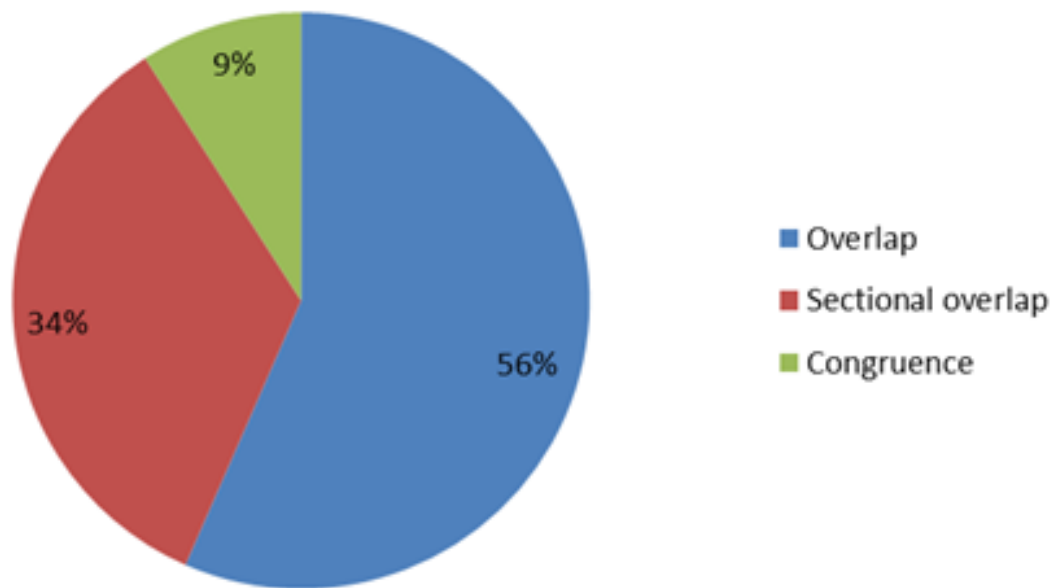
The parameters may also be employment status:

- white-collar workers (GPA-djp in Austria, ABVV-BBTK/FGTB-SETCA and LBC-NVK in Belgium, HK/Privat in Denmark, Ammattiliitto Pro, Pro in Finland, Unionen in Sweden);
- blue-collar workers (PRO-GE in Austria, ABVV-TKD – FGTB-TVD, ACV-CSC METEA in Belgium, 3F in Denmark, TEAM in Finland, OEKIDE in Greece, IF Metal in Sweden).

The parameters could also include geographical regions, such as FGAMT-CIG in Spain,

Finally, sectionalism was not found in any of the cases.

Figure 6: Sector-related trade unions and their domain patterns



Note: N = 64

Source: Author's own interpretation of EIRO national contributions (2012).

Figure 6: Textile sector-related trade unions and their domain patterns

In the textile and clothing sector, the union's domain refers to different occupations and employment statuses, and the presence of sector-specific trade unions is also relatively high. Table 5 shows the overlap of these inter-union domains. In 14 out of 18 countries that have more than one sector-related trade union, the domain of these unions overlaps with the domain of all or most of the others. (The Czech Republic, Estonia, Germany, Ireland, Latvia, Lithuania, Malta, Slovakia and Slovenia record only one sector-related trade union). However, in Austria, Denmark, Finland and Hungary none of the unions' domains overlaps with the domain of the others. According to the national report from Hungary, there might theoretically be an overlap between the three relevant unions but in fact this does not happen.

Noticeable inter-union competition is recorded only in France, Portugal and Sweden. In France, unions compete for members and their subsequent support in the workplace elections that determine which trade union has a seat on the works council. According to the French national correspondent, competition is expected to increase in 2013, when a new representativeness regulation based on the outcomes of workplace elections will come into force. In Portugal, the national report mentions that there is competition only between FESETE and SINDEQ. In Sweden, competition concerns members' recruitment.

Membership of the sector-related trade union is, in principle, voluntary in the 27 countries under consideration.

The numbers of active trade union members differ widely, ranging from more than 2.24 million (in the case of IG Metall in Germany) to only a few dozen (such as PSPKM in Greece). This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain, rather than the ability to recruit members. Therefore, density is the measure of membership strength, which is more appropriate to comparative analysis. In this context it should be noted that density figures in this section refer to net ratios, which means that they are calculated on the basis of active employees only, rather than taking all union members into account (both those who are in a job and those who are not). This is mainly because research usually considers net union densities as more informative than gross densities, since the former measure tends to reflect unionisation trends among the active workforce more quickly and accurately than the latter (only the active workforce is capable of taking industrial action). When looking at sector density (again referring only to active members), it is important to differentiate between the trade unions' sectoral density and their domain density. The domain or overall density must be higher than the sectoral density if a trade union organises only a particular part of the sector – that is, where the trade union's membership domain is sectionalist. It must be equal if a trade union organises the whole sector as it is defined in the study – that is, where the trade union's membership domain is congruent.

Sectoral density rates are available for more than half of the sector-related organisations covered (43 out of 76 cases). Statistics indicate the following:

- sectoral density exceeds 20% in 37% of the cases of the trade unions (16 in total) that document figures on density;
- three unions (7%) claim to gather between 10% and 20% of the sector's employees;
- eight unions (19%), for which data are available, claim to organise between 5% and 10% of the active employees of the sector;
- sixteen unions (37%) record a sector density rate of fewer than 5% of the employees in the sector.

These low sectoral densities prevail in the sector, with the exception of a couple of unions located in some 'old' Member States and Nordic countries, which record sectoral densities higher than 50% (such as PRO-GE in Austria, ABVV-TKD – FGTB-TVD and ACV-CSC METEA in Belgium, CO-industri in Denmark and Industrial Union TEAM in Finland). These low sector-density rates are caused by the fragmentation of the trade union domains shown above and the existence of several trade unions in the sector in many countries. In addition, it is noteworthy that data is not available in many cases.

Employer organisations

Tables 8 and 9 present membership data for the employers' organisations in the textile and clothing sector. In this case, employers' organisations are identified in 22 of the EU27 member States. In Cyprus, Ireland, Luxembourg, Malta and Slovakia, neither the top-down nor the bottom-up approach identified any relevant organisation.

Table 8: Domain coverage and membership of employer/business organisations in textile and clothing, 2012

	Employer organisation	Domain Coverage	Type of membership	Companies total	Companies in the sector	Employees total	Employees in the sector
AT	FVTBSL	overlap	compulsory	520	479	24,000	n.a.
AT	BIMBT	sectional overlap	compulsory	4,000	n.a.	9,000	7,000

BE	FEDUSTRIA	sectional overlap	voluntary	548	252	n.a.	22,154
BE	CREAMODA	sectionalism	voluntary	n.a.	n.a.	n.a.	1,000
BE	ABV	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
BG	BCGI*	congruence	voluntary	35	35	6,000	6,000
BG	BAATPE*	congruence	voluntary	140	140	30,000	30,000
CZ	ATOK	overlap	voluntary	43	42	12,000	11,712
DE	Confederation of the German Textile and Fashion Industry	congruence	voluntary	n.a.	n.a.	120,000	120,000
DK	DM&T	congruence	voluntary	320	320	n.a.	n.a.
DK	The Tailor's Guild	sectionalism	voluntary	35	35	n.a.	n.a.
EE	ERTL	congruence	voluntary	58	58	4,000	4,000
EL	SEPEE	congruence	voluntary	300	300	n.a.	n.a.
EL	HCIA	sectionalism	voluntary	180	180	n.a.	n.a.
EL	S.E.V.K.	sectionalism	voluntary	60	60	15,000	15,000
EL	GSEVEE	sectional overlap	voluntary	160,000	400	500,000	25,000
ES	CIE*	overlap	voluntary	2,480	2,480	47,380	47,980
ES	UNIFAM*	sectionalism	voluntary	30	30	400	400
ES	APOFYDE*	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
ES	ANEDA*	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
ES	ANCA*	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
ES	ADETEN*	sectionalism	voluntary	8	8	n.a.	n.a.
FI	FINATEX	congruence	voluntary	140	140	5,200	5,200
FR	UIT*	sectional overlap	voluntary	n.a.	n.a.	50,000	48,500
FR	UFIH*	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
HU	MKSZ*	overlap	voluntary	25	n.a.	n.a.	n.a.
HU	VOSZ - Textile*	overlap	voluntary	53,000	n.a.	1,500,000	n.a.
IT	SMI*	congruence	voluntary	1,100	1,100	60,000	60,000
IT	Federazione Italiana Industriali dei Tessili Vari e del Cappello*	sectionalism	voluntary	167	167	4,499	4,499
IT	Associazione Italiana della Filatura Serica*	sectionalism	voluntary	2	2	183	183

IT	Associazione Italiana dei Torcitori della Seta e dei Fili Artificiali e Sintetici*	sectionalism	voluntary	24	24	1,116	1,116
IT	Uniontessile*	overlap	voluntary	n.a.	n.a.	n.a.	n.a.
IT	Confartigianato Moda*	overlap	voluntary	700,000	n.a.	n.a.	n.a.
IT	CNA Federmoda*	overlap	voluntary	371,000	14,000	1,130,000	42,000
IT	Casartigiani*	overlap	voluntary	n.a.	n.a.	n.a.	n.a.
IT	CLAAI*	overlap	voluntary	n.a.	n.a.	n.a.	n.a.
IT	Confimpresa*	overlap	voluntary	30,250	900	100,000	4,000
IT	Federterziario*	overlap	voluntary	n.a.	n.a.	n.a.	n.a.
LT	LATIA	overlap	voluntary	130	10	13,000	10,000
LV	VRUA	overlap	voluntary	53	51	n.a.	n.a.
NL	Modint	congruence	voluntary	294	294	10,500	10,500
PL	PIOT	overlap	voluntary	60	53	10,000	9,500
PT	ATP*	congruence	voluntary	500	500	40,000	40,000
PT	APIV/ANIVEC*	sectional	voluntary	600	600	32,000	32,000
PT	ANIL*	sectional	voluntary	38	38	3,500	3,500
PT	AICR*	n.a.	voluntary	n.a.	n.a.	n.a.	n.a.
RO	FEPAIUS*	overlap	voluntary	300	300	n.a.	n.a.
RO	AMDR*	sectional	voluntary	n.a.	n.a.	n.a.	n.a.
SE	TEKO	overlap	voluntary	206	115	7,000	3,835
SI	ZTOUPI*	overlap	voluntary	n.a.	n.a.	n.a.	n.a.
SI	STU*	overlap	voluntary	n.a.	n.a.	n.a.	n.a.
UK	UKFT	overlap	voluntary	2,000	400	95,000	30,000

Note: * Domain overlap with other sector-related employer organisations

n.a. = not available

Table 9: Employer organisations, domain coverage and domain description in relation to the textile and clothing sector, 2012

	National association	Domain coverage	Domain description
AT	FVTBSL	overlap	All companies in the sector plus industrial laundry companies, dye works, dry cleaners and companies operating in the bed industry, button industry and zipper industry

AT	BIMBT	sectional overlap	Only small-scale trade enterprises in the textile and clothing sector, plus tanners and furriers, as well as textile cleaners and washers
BE	FEDUSTRIA	sectionalism overlap	Small and medium-sized companies in the textile sector and in the wood and furniture industries
BE	CREAMODA	sectionalism	All companies in the clothing sector
BE	ABV	n.a.	n.a.
BG	BCGI	congruence	All companies in the sector
BG	BAATPE	congruence	All companies in the sector
CZ	ATOK	overlap	All companies in the sector plus companies in the leather industry, schools, trading companies and suppliers of the textile industry.
DE	Confederation of the German Textile and Fashion Industry	congruence	All companies in the sector
DK	DM&T	congruence	All companies in the sector
DK	The Tailors' Guild	sectionalism	Tailors only
EE	ERTL (ECTA according EURATEX	congruence	All companies in the sector
EL	SEPEE	congruence	All companies in the sector
EL	HCIA	sectionalism	Companies in the clothing sector
EL	S.E.V.K.	sectionalism	Companies in the textile sector
EL	GSEVEE	sectional overlap	Small and medium-sized companies of the sector plus unspecified companies outside the sector

ES	CIE	overlap	All companies in the sector plus some companies specialised in providing services and chemical products. However, CIE points out that the number of companies they represent outside the textile and clothing sector is almost insignificant
ES	UNIFAM	sectionalism	All companies in carpet manufacture
ES	APOFYDE	sectionalism	Manufacturers of polyolefin textile and those in the hard fibres sector
ES	ANEDA	sectionalism	Cotton companies, mainly in Andalusia
ES	ANCA	sectionalism	Cooperatives in the cotton sector
ES	ADETEN	sectionalism	All companies in the sector in Navarra
FI	FINATEX	congruence	All companies in the sector
FR	UIT	sectional overlap	Companies in the clothing sector plus those in fibre activities within the chemical sector
FR	UFIH	sectionalism	Companies in the clothing sector
HU	MKSZ	overlap	All companies in the sector plus training companies, project management, retail and wholesale textile
HU	VOSZ - Textile	overlap	All companies in the sector plus unspecified companies outside the sector
IT	SMI	congruence	All companies in the sector
IT	Federazione Italiana Industriali dei Tessili Vari e del Cappello	sectionalism	Only enterprises that produce various textiles and headwear
IT	Associazione Italiana Della Filatura Serica	sectionalism	Only silk manufacturers
IT	Associazione Italiana dei Torcitori Della Seta e dei Fili Artificiali e Sintetici	sectionalism	Only silk spinners; artificial and synthetic fibre enterprises
IT	UNIONTESSILE	overlap	All companies in the sector plus footwear companies

IT	CONFARTIGIANATO MODA	overlap	All companies in the sector plus companies specialised in artisanal or craft tasks.
IT	CNA FEDERMODA	overlap	All companies in the sector plus companies specialised in artisanal or craft tasks.
IT	CASARTIGIANI	overlap	All companies in the sector plus companies specialised in artisanal or craft tasks.
IT	CLAAI	overlap	All companies in the sector plus companies specialised in artisanal or craft tasks.
IT	CONFIMPRESA	overlap	All companies in the sector plus unspecified companies outside the sector
IT	FEDERTERZIARIO	overlap	All companies in the sector plus unspecified companies outside the sector
LT	LATIA	overlap	All companies in the sector plus vocational training institutions, logistics companies, printing houses, tourism companies, banks
LV	VRUA	overlap	All companies in the sector plus unspecified companies outside the sector
NL	Modint	congruence	All companies in the sector
PL	PIOT	overlap	All companies in the sector plus companies producing protective clothing, companies organising fairs, R&D institutes and colleges
PT	ATP	congruence	All companies in the sector
PT	APIV/ANIVVEC	sectionalism	Companies in the clothing sector
PT	ANIL	sectionalism	Wool textile companies
PT	AICR	n.a.	n.a.
RO	FEPAIUS	overlap	All companies in the sector plus companies within the light industry sector such as manufacture of furniture
RO	AMDR	sectionalism	Fashion and design companies
SE	TEKO	overlap	All companies in the sector plus companies in the wholesale sector
SI	ZTOUPI	overlap	All companies in the sector plus companies in the leather sector

SI	STU	overlap	All companies in the sector plus companies in the leather sector
UK	UKFT	overlap	All companies in the sector plus companies trading in apparel, textiles and associated products, and related service providers such as laundries

In total, 52 sector-related employers' organisations are identified in 22 countries. Five countries (Cyprus, Ireland, Luxembourg, Malta and Slovakia) have no sectoral employer association. In three of the 22 countries with employer associations (Estonia, Latvia and Poland), their sectoral organisations are not party to collective bargaining (see Table 8). Of the 22 countries with sector employer associations, 19 have one or more organisations engaged in sector-related collective bargaining. Generally, business interest organisations may also deal with interests other than those related to industrial relations. Organisations specialised in matters other than industrial relations are commonly defined as 'trade associations' (see [TN0311101S](#)). Such sector-related trade associations also exist, in very small numbers, in the textile and clothing sector. In terms of their national scope of activities, not all the organisations are involved in collective bargaining. According to Table 9, ERTL in Estonia (or ECTA as it is referred to by EURATEX, the EU-level employer association), VRUA in Latvia and PIOT in Poland either primarily or exclusively act as trade organisations in their country. Moreover, all these organisations are members of EURATEX. It must be stressed that, according to the selection criteria described above, all national organisations affiliated to EURATEX are included in the study irrespective of whether or not they are involved in collective bargaining.

In 10 of the 22 countries (or 45%) that have sectoral employer organisations, only one organisation was established. Two employer organisations were noted in seven countries (32%), three in one country (5%) and four in four countries (18%). Pluralist associational systems thus prevail in half of the countries. In the trade unions, a pluralist associational system prevails to a greater extent as 67% of the countries record more than one organisation.

Moreover, the employer organisations' domain tends to be narrower than those of the trade unions. Of all of the organisations for which related information is available, 40% have overlapping domains and 8% have sectionally overlapping domains compared with 56% and 34%, respectively, in the case of the unions. Few of these organisations have a cross-sectoral domain. Indeed, of all the employer organisations with available data, LATIA in Lithuania is the one that could be defined as cross-sectoral, according to the information provided.

Cases of domain overlap arise from the coverage of different sectors, such as the following:

- the leather sector (ATOK in Czech Republic, ZTOUPI and STU in Slovenia);
- the chemical sector (CIE in Spain);
- the retail and wholesale sector (MKSZ in Hungary, TEKÖ in Sweden);
- the footwear sector (UNIONTESSILE in Italy);
- artisanal activities (CONFARTIGIANATO MODA, CNA FEDERMODA, CASARTIGIANI, CLAAI in Italy);
- R&D institutes and colleges (PIOT in Poland);
- light industry (FEPAIUS in Romania);
- laundry activities (UKFT in the UK).

Sectionalist overlap is observed only in four organisations (BIMBT in Austria, UIT in France, FEDUSTRIA in Belgium and GSEVEE in Greece). In the case of BIMBT in Austria, it stems from the organisation's covering only small and medium-sized enterprises (SMEs) in the sector, specialist SMEs (such as tanners and furriers) and textile cleaners and washers. In regard to UIT in France, sectionalist overlap derives from domain demarcations, which focus on the clothing sector plus the chemical sector (more specifically, chemical fibres activities). In regard to FEDUSTRIA in Belgium, sectional overlap stems from its covering SMEs in the clothing sector

as well as SMEs in the wood and furniture sector. As for GSEVEE in Greece, sectional overlap comes from its having a general domain (the national report does not specify what those sectors are) but it covers SMEs only.

Sectionalism is mainly caused by domain demarcations; these focus on the following:

- one subsector, whether manufacture textile or clothing;
- more specific subsectors such as tailors, manufacturers of carpets, polyolefin textiles and hard fibres, cotton headgear, silk, wool, or design companies (CREAMODA in Belgium, The Tailor's Guild in Denmark, UNIFAM, APOFYDE and ANEDA in Spain, UFIH in France, HCIA, S.E.V.K. in Greece, Federazione Italiana Industriali dei Tessili Vari e del Cappello in Italy, APIV/ANIVEC, ANIL in Portugal, AMDR in Romania);
- a specific region (ADETEN in Spain);
- one subsector and a specific kind of company, such as cooperatives (ANCA in Spain).

Notably, countries where sectionalist domains prevail, such as Spain or Italy, are characterised by a pronounced fragmentation of the associational 'landscape' on the employers' side, with associations specialising in narrowly defined activities, such as the manufacture of carpets, polyolefin textiles and hard fibers, cotton, headgear or silk.

In line with this fragmentation, 34% of all the organisations have a membership domain that is sectionalist with regard to the sector.

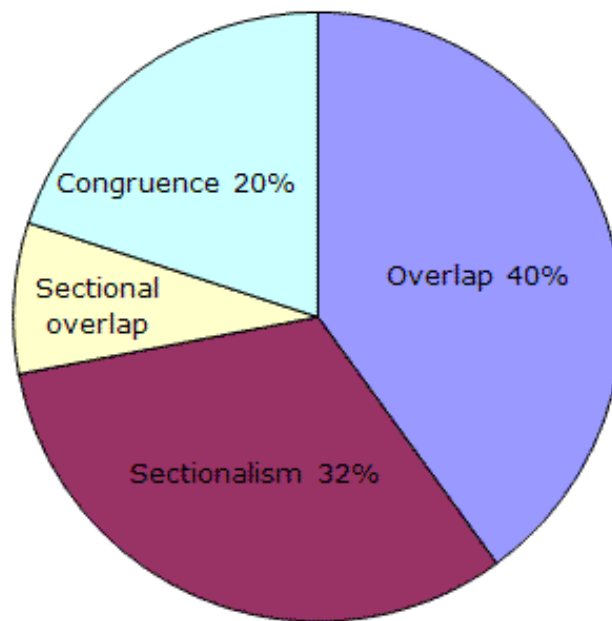
On the other hand, 10 organisations (20%) of all those with available information, show a domain that is more or less congruent with the sector definition. These are:

- BCGI, BAATPE in Belgium;
- Confederation of the German Textile and Fashion Industry in Germany;
- DM&T in Denmark;
- ERTL (or ECTA according to EURATEX) in Estonia;
- FINATEX in Finland;
- SEPEE in Greece;
- SMI in Italy;
- Modint in the Netherlands;
- ATP in Portugal.

This means that the domain of these organisations largely focuses on the textile and clothing sector as defined above. However, it cannot be ruled out that these organisations may also organise companies of a contiguous sector, or do not really organise the entire sector. The clear predominance of membership domains that overlap or are sectionalist with regard to the sector indicates that the technocratic definition of the sector is broader or narrower than the lines along which most sector-related employers identify common interests and band together in associations.

The two existing sector-related employer organisations in Austria can rely on obligatory membership. This is due to their status in law as chamber units.

Figure 7: Domain patterns of sector-related organisations/business associations



Source: Author's interpretation of EIRO national contributions (2012).

Figure 7: Domain patterns of sector-related organisations/business associations

In countries with a pluralist structure in relation to employer organisations, these organisations have usually managed to arrive at non-competing relationships with each other (as seen in the cases of Bulgaria, Hungary, Italy, Portugal, Romania, Slovenia and Spain). France is an exception; here, problems between the two employer organisations occurred in 2012 when UIT refused to agree to the collective wage agreement concluded by UFIH. However, since then, both organisations have decided to reinforce their cooperation and to meet before they start to negotiate wages.

In many countries, the activities of employer organisations are complementary as a result of interassociational differentiation by their membership demarcation (as is the case of Austria, Belgium, Denmark and Greece).

As the figures on density show, membership strength in terms of companies widely varies with regard to sector-related densities (Table 8). The same holds true of the densities in terms of employees. When information is available, the sectoral domain densities of companies tend to be lower than the density of employees, except in some cases in Italy (CNA FEDERMODA and CONFIMPRESA). This indicates that larger companies have a slightly higher propensity to associate than their smaller counterparts. In general, the densities of the employer/business organisations in the sector tend to be higher than those of trade unions, especially with regard to the density of employees. Accordingly, 59% (or 17 out of 29) of the organisations with available data show a sectoral domain density exceeding 20% in terms of employees. However, in terms of companies, only 12% (or 4 out of 32) show a sectoral domain density exceeding 10%. However, it should be noted that density data are available for only a minority of the employer/business associations. Therefore, the data should again be treated cautiously.

Collective bargaining and its actors

Table 6 and Table 10 list all social partners engaged in sector-related collective bargaining. With regard to the unions, 99% of sector-related unions for which there is available information record participation in collective bargaining (in only five unions is information unavailable). Some 11% record participation in single-employer bargaining, 34% show participation in

multiemployer bargaining, and 54% show participation both in single-employer and multiemployer bargaining.

Table 10: Density, collective bargaining, consultation and affiliations of employer/business organisations in textile and clothing, 2012

	Employer organisation	Sectoral density for companies (%)	Sectoral density for employees (%)	Collective bargaining	Consultation		National, European and international affiliations
AT	FVTBSL	35.7	n.a.	Yes, multiemployer	Yes	On an ad hoc basis	EURATEX, CELC, WKO
AT	BIMBT	n.a.	43.6	Yes, multiemployer	Yes	On an ad hoc basis	World Federation of Master Tailors, WKO
BE	FEDUSTRIA	6	87.6	Yes, both	Yes	On a regular basis	ITMF, EURATEX, CEI, EFIC, FEB
BE	CREAMODA	n.a.	4	Yes, multiemployer	Yes	On a regular basis	IAF, EURATEX, FEB Unizo
BE	ABV	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
BG	BCGI	0.7	5.2	Yes, both	Yes	n.a.	BIA
BG	BAATPE	2.9	26.2	Yes, both	Yes	n.a.	EURATEX, Bulgarian Chamber of Commerce
CZ	ATOK	0.1	24.5	Yes, multiemployer	Yes	On an ad hoc basis and on a regular basis	EURATEX, KZPS
DE	Confederation of the German Textile and Fashion Industry	n.a.	100	Yes, multiemployer	Yes	On an ad hoc basis and on a regular basis	EURATEX, BDA, BDI
DK	DM&T	43.8	n.a.	Yes, multiemployer	Yes	On an ad hoc basis	EURATEX, DA
DK	The Tailor's Guild	4.8	n.a.	Yes, multiemployer	Yes	On a regular basis	HVR
EE	ERTL	10.6	30.3	No	Yes, through ETTK		EURATEX, ETTK, ICC Estonia, Estonian Qualifications Authority

EL	SEPEE	2.7	n.a.	Yes, multiemployer	No		IAF, EURATEX
EL	HCIA	1.6	n.a.	Yes, multiemployer	No		IAF, EURATEX
EL	S.E.V.K.	0.5	73.4	Yes, multiemployer	No		EUROCOTON, S.E.V.
EL	GSEVEE	3.6	n.a.	Yes, multiemployer	No		
ES	CIE	7.4	48.6	Yes, multiemployer	Yes	On an ad hoc basis	EURATEX
ES	UNIFAM	0.1	0.4	Yes, multiemployer	Yes	On a regular basis	ATEVAL, CEOE
ES	APOFYDE	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	n.a.
ES	ANEDA	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	n.a.
ES	ANCA	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	n.a.
ES	ADETEN	0.02	n.a.	Yes, multiemployer	n.a.	n.a.	Employers' Confederation of Navarre
FI	FINATEX	7.5	95.6	Yes, multiemployer	Yes	On a regular basis	EURATEX, EK
FR	UIT	n.a.	71.7	Yes, multiemployer	Yes	On an ad hoc basis	EURATEX, MEDEF
FR	UFIH	n.a.	n.a.	Yes, multiemployer	Yes	On an ad hoc basis	EURATEX, MEDEF, CLIMO
HU	AHLI (or MKSZ, the Hungarian abbreviation)	n.a.	n.a.	Yes, both	Yes	On a regular basis	EURATEX, MGYOSZ

HU	VOSZ - Textile	n.a.	n.a.	Yes, both	n.a.	n.a.	UNICE, CEHIC
IT	SMI	2.2	19.2	Yes both	Yes	On an ad hoc basis	IWTO, GINETEX, EURATEX, CONFINDUSTRIA
IT	Federazione Italiana Industriali dei Tessili Vari e del Cappello	0.3	1.4	Yes, multiemployer	n.a.	n.a.	AIUFFASS, AERTEL, CELIBRIDE, CONFINDUSTRIA
IT	Associazione Italiana della Filatura Serica	0.004	0.3	Yes, multiemployer	n.a.	n.a.	Italian Industrial Federation of Various Textiles and Headwear (Federazione Italiana Industriali dei Tessili Vari e del Cappello)
IT	Associazione Italiana dei Torcitori della Seta e dei Fili Artificiali e Sintetici	0.05	0.4	Yes, multiemployer	n.a.	n.a.	Italian Industrial Federation of Various Textiles and Headwear (Federazione Italiana Industriali dei Tessili Vari e del Cappello)
IT	UNIONTESSILE	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	CONFAPI
IT	CONFARTIGIANATO MODA	n.a.	n.a.	Yes, both	Yes	On an ad hoc basis and on a regular basis	UEAPME
IT	Cna Federmoda	28.7	13.4	Yes, both	Yes	On an ad hoc basis and on a regular basis	
IT	Casartigiani	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	none
IT	Claai	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	none
IT	Confimpresa	1.8	1.2	Yes, both	Yes	n.a.	none
IT	Federterziario	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	none
LT	Latia	1.2	36.2	Yes, single-employer	Yes	On an ad hoc basis	LPK, EURATEX

LV	VRUA	4	n.a.	No	Yes	On a regular basis.	EURATEX, EIHA
MT	No employer organisations						
NL	Modint	8.9	65.6	Yes, multiemployer	Yes	On an ad hoc basis	ILO; IAF; VNO-NCW
PL	PIOT	0.1	n.a.	No	Yes	On an ad hoc basis, at least quarterly	EURATEX, KIG
PT	ATP	6.7	26	Yes, multiemployer	Yes	On a regular basis (at least once a year)	IAF, ITMF, EURATEX, CIP
PT	APIV/ANIVEC	8	20.8	Yes both	Yes	On a regular basis (at least once a year)	IWTO EURATEX, FITVEP
PT	ANIL	0.5	2.3	Yes, multiemployer	Yes	On an ad hoc basis	IWTO EURATEX, FITVEP
PT	AICR	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	n.a.
RO	FEPAIUS	5		Yes, single-employer	Yes	On an ad hoc basis	EURATEX
RO	AMDR	n.a.	n.a.	Yes, single-employer bargaining only	n.a.	n.a.	EURATEX
SE	TEKO	15.5	64	Yes, both	Yes	On a regular basis	EURATEX, Svenskt Näringsliv
SI	ZTOUPI	n.a.	n.a.	Yes, multiemployer	Yes	On an ad hoc basis	EURATEX, GZS
SI	STU	n.a.	n.a.	Yes, multiemployer	Yes	On an ad hoc basis	ZDS
UK	UKFT	5.5	37.5	Yes, multiemployer	Yes	On a regular basis	EURATEX

Note: n.a. = not available

From the employers' side, 94% of all the organisations for which information is available record participation in collective bargaining (there is only one organisation for which information is

not available). Some 6% participate in single-employer bargaining, 67% in multiemployer bargaining and 22% record participation both in single and multiemployer bargaining.

Figure 8: Involvement of employer organisations and trade unions in forms of collective bargaining (%)



Source: Author's interpretation of EIRO national contributions (2012).

Figure 8: Involvement of employer organisations and trade unions in forms of collective bargaining (%)

The data presented in Table 11 provide an overview of the system of sector-related collective bargaining in the 27 countries. The importance of collective bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (Traxler et al., 2001). Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

Table 11: System of sectoral collective bargaining, 2011

	CBC (estimates, %)	Share of MEB (estimates, %)	Extension practices ^a
AT	100	MEB prevailing	n.a.
BE	100	MEB prevailing	2
BG	n.a.	n.a.	n.a.
CY	n.a.	SEB prevailing	0
CZ	60	n.a.	1
DE	90	MEB prevailing	0
DK	65–70	MEB prevailing	0
EE	n.a.	0	0

EL	n.a.	n.a.	0 ^d
ES	3	2	2
FI	85	100	2
FR	100	MEB prevailing	2
HU	17	SEB prevailing	n.a.
IE	0	n.a.	0
IT	100	MEB prevailing	2 ^c
LT	10	0	0
LU	0	n/a	0
LV	n.a.	0	n.a.
MT	51	0	n.a.
NL	100	100	2
PL	0.1	0	n.a.
PT	33	MEB prevailing	0 ^d
RO	90	0	0 ^d
SE	80	95	1
SI	100	MEB prevailing	1 (becoming more pervasive)
SK	14	0	0
UK	13	MEB prevailing	0

Source: Author's interpretation of EIRO national contributions (2012).

CBC = collective bargaining coverage: employees covered as a percentage of the total number of employees in the sector

MEB = multiemployer bargaining relative to single-employer bargaining

SEB = single-employer bargaining

^a 0 = no practice, 1 = limited/exceptional, 2= pervasive. Cases of functional equivalence are put in parenthesis.

^b = 2007

^c = informal extension practices regarding wage agreements

^d = extension practices abolished or limited in 2011 or 2012

n.a. = not available or applicable

Collective bargaining coverage

In terms of the sector's collective bargaining coverage, 10 of the 21 countries with available data record collective bargaining coverage of more than 80%. These countries are Austria, Belgium, Germany, Finland, France, Italy, the Netherlands, Romania, Sweden and Slovenia. Denmark records a coverage rate of around 70%.

Conversely, there are eight countries where the rate of collective bargaining coverage is 20% at most. These countries are Hungary, Ireland, Lithuania, Luxembourg, Poland, Slovakia, Spain and the UK. In the case of Ireland and Luxembourg, no agreement is recorded. This is explained by the insignificance of the textile and clothing sector in the economy. In Ireland, the decline of employment has had a negative effect on the level of trade union and employer association representativeness and on collective bargaining. On the other hand, it is worth noting the case of

Spain, which records a very low coverage rate due to the non-renewal of the national multiemployer sectoral agreement in 2011. In Portugal, the coverage rate of collective bargaining dropped by 10% in 2011. This is due to the reform on the collective bargaining regulation enacted under the regime of the Memorandum of Understanding between the Troika and the Portuguese government. According to the new regulation, collective agreements only cover the companies that are affiliated to the employer organisations that sign the collective agreements. Prior to this regulation, collective agreement could be extended to all the companies regardless of whether they were affiliated to the employer organisations that concluded the collective agreement. This demonstrates a polarised collective bargaining coverage system in European countries. The exceptions to this polarised landscape are Malta and the Czech Republic: both countries record a coverage rate of collective bargaining of approximately 50%.

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

- the predominance of multiemployer bargaining (see Table 11);
- relatively higher density rates of the trade unions and/or employer organisations (Austria, Belgium, Denmark and Finland);
- the existence of pervasive extension practices, such as in Belgium, Finland, France, Italy, the Netherlands.

While coverage in countries with prevalent multiemployer bargaining is generally high, single-employer bargaining arrangements in the sector are the only existing type of bargaining in Estonia, Lithuania, Latvia, Malta, Poland, Romania and Slovakia. Moreover, single-employer bargaining prevails in Hungary and Cyprus. In these countries, collective bargaining coverage tends to be rather low. The exception to this is Romania, with a coverage rate of 90%.

Due to the relative prevalence of multiemployer settlements in the sector, the use of extension practices is significant. Extension practices in the textile and clothing sector are reported for several countries (see Table 11). But in the case of Greece ([GR1203019I](#)) and Portugal (see above), legislation in 2011 eliminated extension practices.

Participation in public policy

Interest associations may influence public policy in two ways:

- they may be consulted by the authorities on matters affecting their members;
- they may be represented on ‘corporatist’, in other words tripartite, committees and policy consultation boards.

This study considers only cases of consultation and corporatist participation that explicitly relate to sector-specific matters. Consultation processes can be wide-ranging and therefore the organisations consulted by the authorities may vary according to issues and also depend on changes in government. Moreover, consultation may be occasional rather than regular.

Trade unions or interest representations

Some 44 of the 56 sector-related unions with available data (or 79%) have been consulted. Authorities consult unions in 18 of the 26 countries where sector-related trade unions are recorded as being present. However, unions are regularly consulted only in Austria, Belgium, Spain, Finland, Italy, Latvia, Sweden, Slovakia and the UK.

Since a multi-union system has been established in 17 of the 26 countries with sector-related trade unions, it cannot be ruled out that the authorities favour certain trade unions over others, or that the unions compete for participation rights. In most countries with a multi-union system where a noticeable practice of consultation is observed, any existing trade unions may take part in the consultation process. By contrast, in Austria, Poland and Sweden only some of the sector-related trade unions are consulted.

Employer organisations or business associations

Authorities consult 33 of the 37 employer organisations (or 89%) for which related data are available. Employer organisations are consulted in all the countries with sector-related organisations except Greece (21 of 22 countries). However, organisations are not regularly consulted in Austria, Bulgaria, Estonia, France, Lithuania, the Netherlands, Poland, Romania and Slovenia. In all countries with a multi-organisation system where a practice of consultation is recorded, any existing employer organisation may take part in the consultation process. However, these data must be interpreted with caution since countries such as Belgium, Hungary, Italy, Portugal, Romania and Spain do not provide information on this for all the organisations.

Tripartite participation

The findings reveal that genuine sector-specific bodies have been established in 16 of the 27 countries under consideration (Table 12). Tripartite bodies have been established in Belgium, Bulgaria, the Czech Republic, Germany, Denmark, Estonia, Spain, Finland, France, Hungary, Italy, Poland, Portugal, Romania, Slovakia and the UK. The scope of activity of the tripartite bodies is focused on the following topics:

- training, qualifications or education (Belgium, Estonia, Finland, France, Italy and the UK); social liability and energy issues (Germany);
- commercial strategies, research and innovation strategies and environmental strategies (Hungary);
- pensions (Italy);
- health and safety (the UK).

Table 12: Tripartite and bipartite sector-specific boards of public policy (2011)

	Name of the body and scope of activity	Bipartite/ Tripartite	Origin	Trade unions participating	Employer organisations participating
BE	Joint Committee 109; Joint Committee 120; Joint Committee 214; Joint Committee 215; Central Economic Council – special advisory committee sector Textile and Clothing; SERV (sector committee textile and confection); COBOT/Cefret (Sectoral Training Centre-Joint Committee 120), COBOT/Cefret white collar workers (Sectoral Training Centre-Joint Committee 214)	All bipartite	Statutory	ACV-CSC Metea, ABVV- FGTB, ACLVB/CG SLB Textile, LBC-NVK, BBTK- SETCA	Fedustria, Creamoda
BG	National Council for Tripartite Cooperation	Tripartite	Agreement	FITULI at CITUB and FLI Podkrepa	BAPIOT and BCGI
CZ	Bipartite dialogue – textiles and apparel	Bipartite	Agreement	OS TOK	ATOK
DE	Employers' social liability	Tripartite	Statutory	IG Metall	Gesamtverband

	association (Berufsgenossenschaft Energie Textil Elektro Medienerzeugnisse) energy, textile/clothing electrics media products			(for the workers in manufacture of textile/clothing). Textile services are represented by chemical workers' unions and service workers' union.	textil mode
DK	The vocational committee in textile and clothing; Working environment committee in textiles	Bipartite	Statutory	3F	Dansk Mode og Textil, Dansk Industri, DI
EE	Estonian Qualifications Authority (Kutsekoda)	Tripartite	Statutory	ETTAF	ERTL
ES	Industrial Observatory of the textile and clothing sector	Tripartite	Agreement.	FITEQA- CCOO, FITAG-UGT	CIE, FEDIT (represents centres involved in Research and Development)
FI	Working group of educational policy	Tripartite	Agreement	TEAM and PRO	FINATEX
FR	OPCALIA	Bipartite	Agreement	CGT, CFDT, FO, CFE- CGC, CFDT	Medef, FNADE/SNADE, USP, FEDENE, FIJP, FNAM, FP2E
HU	Light industrial Sectoral Social Dialogue Committee: – Research and innovation strategies – Environmental strategies	Bipartite	Statutory	BDSZ HVDSZ2000	MKSZ, and invited member VOSZ
IT	National Bilateral Body for Textile Clothing and Fashion OBN TAM. For vocational training: Osservatorio Nazionale Tessile, Abbigliamento, Moda. Analysis of sectoral trends, and political concertation; PREVIMODA. Pension Fund; Comitato di Certificazione Unionfiliera. Improvements in 'Made in Italy' production chains	Bipartite	All agreement	Femcam, Filctem, Uilta	SMI, Confartigianato – can

PL	Tripartite Commission for Social and Economic Affairs – Sectoral Body of Light Industry: public procurement law	Tripartite	Statutory	FNSZZPL, Sekcja Krajowa Pracowników w Przemysłu Lekkiego NSZZ ‘Solidarność’	PIOT
PT	Sectoral consultative commission (Comissão Consultiva Sectorial)	No information obtained	No information	No information	ANIL
RO	Commission at MECMA level	Tripartite	Statutory	All the national representative trade union confederations	All the national representative employer associations
SK	Economic and Social Council (HSR)	Tripartite	statutory	IOZ representing the KOZ SR	RÚZ SR and AZZZ SR but none from the sector
UK	Textile Industry Advisory Committee (TEXIAC) on health and safety, Creative Skillset (skills and training)	Both are tripartite	Agreement and statutory	Community, GMB, Unite	UKFT

Source: Author’s interpretation according to EIRO national contributions (2012).

Analysis of the European level of interest representation

At European level, eligibility for consultation and participation in social dialogue is linked to three criteria defined by the [European Commission communication on adapting and promoting social dialogue at Community level \(2.8 MB PDF\)](#). Accordingly, a social partner organisation must have the following attributes. It must:

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

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

As outlined in greater detail below, one sector-related European association on the employee side (IndustriAll) and one on the employer side (EURATEX) are particularly significant in the textile and clothing sector: they are listed by the European Commission as social partner organisations consulted under Article 154 of the TFEU. Hence, the following analysis will concentrate on these organisations while providing supplementary information on others that are linked to the sector’s national industrial relations actors.

Membership domain

The European Trade Union IndustriAll is affiliated to the European Trade Union Confederation (ETUC) and organises workers from the manufacture, mining and energy sectors. It represents 194 national organisations and 7,314,027 workers from 39 European countries.

EURATEX belongs to the Alliance for a Competitive European Industry, formed in 2004 by 11 major European industry sector associations and by BUSINESSSEUROPE. It organises companies from the textile and clothing sector. Its organisations or federations at Member State level represent more than 180,000 companies and over 1.8 million jobs.

Membership composition

Table 13 documents a list of membership-related trade unions for IndustriAll drawn from the country reports. This membership list is confined to the sector-related associations of the countries under consideration; hence, it does not include members of the European-level organisations that do not have any members in the textile and clothing sector. The membership of employee organisations is obtained through the membership list provided by the organisations and a further check of the membership lists published on the organisations' webpages.

Table 13: Textile and clothing trade unions affiliated to IndustriAll (2012)

	Trade union	Collective bargaining	Geographical coverage
AT	PRO-GE	Yes, multiemployer	The whole country
BE	ABVV-TKD – FGTB-TVD	Yes, both	The whole country
BE	ACV-CSC METEA	Yes, both	The whole country
BE	ACLVB/CGSLB	Yes, both	The whole country
BE	LBC-NVK	Yes, both	Dutch-speaking and bilingual region
BG	FLI Podkrepa	Yes, both	The whole country
BG	FITULI/FOSIL	Yes, both	The whole country
CY	OVIEK-SEC	Yes, multiemployer	The whole country
CZ	OS TOK	Yes, both	
DE	IG Metall	Yes, both	The whole country
DK	CO-industri	Yes, multiemployer	The whole country
EE	ETTAF	Yes, both	
ES	FITEQA-CCOO	Yes, both	The whole country
ES	FITAG-UGT	Yes, both	The whole country
ES	FGAMT-CIG	n.a.	The Autonomous Community of Galicia
FI	Industrial Union TEAM	Yes, multiemployer	The whole country
FI	Ammattiliitto Pro, Pro	Yes, multiemployer	The whole country

FR	CFE-CGC Chimie	Yes, both	The whole country
FR	CFDT Servives	Yes, both	The whole country
FR	THC-CGT	Yes, both	The whole country
FR	CGT-FO	Yes, both	The whole country
HU	BDSZ	Yes, single employer	Yes potentially, but they are not present in all regions
HU	MOSZTRA	No	The whole country
IT	FILCTEM	Yes, both	The whole country
IT	FEMCA	Yes, both	The whole country
IT	UILTA	Yes, both	The whole country
LT	LPİPS ‘Solidarumas	Yes, single employer	The whole country
LV	LIA	Yes, multiemployer	The whole country
MT	GWU	Yes, single employer	The whole country
NL	FNV Bondgenoten	Yes, both	The whole country
NL	CNV Vakmensen	Yes, both	The whole country
PL	FNSZZPL	Yes, single employer	The whole country
PT	FESETE	Yes, multiemployer	The whole country by means of different territorial federations (TÊXTIL Centro/FESETE, Bordados Madeira/FESETE and so on)
PT	SINDEQ	Yes, multiemployer	The whole country
RO	CONFTEX	Yes, both	The whole country
RO	CRAIMODEX	Yes, both	The whole country
RO	PELTRICONTEX - FRĂȚIA	Yes, both	The whole country
RO	CONFPELTEX	Yes, both	The whole country
RO	UNICONF	Yes, both	The whole country
SE	IF Metall	Yes, multiemployer	The whole country
SE	Uniones	Yes, both	The whole country
SE	The Swedish Association of Graduate Engineers	Yes, both	The whole country
SI	STUPIS	Yes, both	The whole country
SK	IOZ	Yes, single employer	The whole country
UK	Community	Yes, both	The whole country
UK	GMB	Yes, both	The whole country
UK	Unite the Union	Yes, both	The whole country

In all countries, except Greece and Ireland, at least one affiliation to IndustriAll is found. IndustriAll has 47 direct affiliations from the countries under consideration, and 45 of them participate in sectoral collective bargaining. Moreover, all the unions affiliated to IndustriAll cover the sector in all the regions of their countries except in the case of LBC-NVK (Belgium), FGAMT-CIG (Spain) and BDSZ (Hungary). In the case of the Hungarian union, it potentially covers the whole country but according to the national report it is not present in all regions. Therefore, 62% of the unions listed in Tables 5 and 6 are directly affiliated to IndustriAll. From the available data on sectoral membership of the trade unions, one can conclude that IndustriAll covers the sector's most important labour representativeness organisations. Cases of major trade unions not covered can be found only in Greece and Ireland, where no union is affiliated.

According to the information provided by the national correspondents, there are only two members of IndustriAll that are not related to the textile and clothing sector and as such do not have members in the sector (Table 14). For this reason, they are not included in the scope of the study.

Table 14: IndustriAll affiliates without members in the textile and clothing sector (2012)

Country	Trade union
BE	La Centrale Générale
DE	IGBCE

Table 15 lists the members of EURATEX. Again, this membership list is confined to the sector-related associations of the countries under consideration; hence, it does not include employer organisations affiliated to those European-level organisations that do not have any members in the textile and clothing sector. Of the 22 countries under consideration that report any employer organisation, one country (Romania) does not report sectoral organisations affiliated to EURATEX. It reports one member of EURATEX that is not related to the textile and clothing sector, and as such does not have members in the sector. For this reason, it is not included in the scope of the study. In total, EURATEX has 25 direct affiliations, 23 of which participate in sectoral collective bargaining. Accordingly, 48% of the employer organisations listed in Tables 7 and 9 are directly affiliated to EURATEX. Thus, EURATEX covers the sector's most important sectoral employer organisations.

Table 15: EURATEX sector related membership (2012)

	Employer organisation	Collective bargaining	Geographical coverage
AT	FVTBSL	Yes, multiemployer	The whole country
BE	FEDUSTRIA	Yes, both	The whole country
BE	CREAMODA	Yes, multiemployer	The whole country
BG	BAATPE	Yes, both	The whole country
CZ	ATOK	Yes, multiemployer	The whole country
DE	Confederation of the German Textile and Fashion Industry	Yes, multiemployer	The whole country
DK	DM&T	Yes, multiemployer	The whole country
EE	ERTL (ECTA according EURATEX)	ERTL participates in consultations in sector-	The whole country

		related matters through ETTK	
EL	SEPEE	Yes, multiemployer	The whole country
EL	HCIA	Yes, multiemployer	The whole country
ES	CIE	Yes, multiemployer	The whole country
FI	FINATEX	Yes, multiemployer	The whole country
FR	UIT	Yes, multiemployer	The whole country
FR	UFIH	Yes, multiemployer	The whole country
HU	AHLI (or MKSZ, the Hungarian abbreviation)	Yes, both	The whole country
IT	SMI	Yes, both	The whole country
LT	LATIA	Yes, single-employer only	The whole country
LV	VRUA	No	The whole country
NL	Modint	Yes, multiemployer	The whole country
PL	PIOT	No	The whole country
PT	ATP	Yes, multiemployer	The whole country
PT	APIV/ANIVÉC	Yes both	The whole country
SE	TEKO	Yes, both	The whole country
SI	ZTOUPI	Yes, multiemployer	The whole country
UK	UKFT	Yes, multiemployer	The whole country

Note: According to the national correspondent of Slovenia, ZTOUPI is a member of EURATEX. However, in the list of members of EURATEX, the organisation member from Slovenia that appears is the Chamber of Commerce and Industry of Slovenia, Textile, Clothing and Leather Processing Association.

Capacity to negotiate

The third criterion of representativeness at European level refers to the organisations' capacity to negotiate on behalf of their members. They have been asked whether they have this capacity. IndustriAll has not been given a permanent mandate to negotiate. Thus, if during a European Sectoral Social Dialogue they agree with EURATEX to make a joint declaration, they have to consult their members first. In the case of EURATEX, they also lack a permanent mandate to negotiate on behalf of their members.

As final proof of the weight of IndustriAll and EURATEX, it is useful to look at the other European organisations to which the sector-related trade unions and employer organisations are affiliated.

The affiliations of the trade unions are listed in Table 6. European organisations other than IndustriAll represent a relatively low proportion of both sector-related trade unions and countries. There are only three European organisations mentioned here that cover at least three countries: Uni-Europa, EFFAT and EPSU. The presence of these organisations responds to the overlapping domains of many trade unions because these organisations do not claim to attract unions from the textile and clothing sector. This overview underlines the principal status of IndustriAll as the sector's labour representative.

A similar review of the membership of the national employer/business associations can be derived from Table 6. Some have other European associations than EURATEX. However, there is no European association that covers at least three countries. In conclusion, EURATEX is by far the most important sector-related European organisation since it covers 20 countries.

Conclusions

Pluralist associational systems prevail on the employee side of the textile and clothing sector. Accordingly, 67% of the countries record more than one sector-related union. Moreover, 30% of the countries record four or more sector-related unions, thus showing a fragmented landscape. On the employer side, a pluralist associational system is present in only half the countries. Differences between unions and employer associations also appear with regard to their domain demarcation. In the case of the unions, overlap and sectional overlap prevail over sectionalism, while in the case of the employer associations, domain tends to be narrower. Thus, 56% of the unions have an overlapping domain and 34% have a sectional overlapping domain; this compares with 40% and 8% respectively in the case of the employer associations. On the other hand, densities of trade unions tend to be lower than densities of employer organisations, especially with regard to the density of employees. Accordingly, 59% of the employer organisations with available data show a sectoral domain density in terms of employees exceeding 20% compared with 37% of the trade unions.

Collective bargaining coverage is highly polarised. While 10 of the 21 countries with available data record high rates of collective bargaining coverage, exceeding 80%, there are eight countries where the rate of collective bargaining coverage is 20% at most.

According to the [European Commission Communication on adapting and promoting the social dialogue at Community level \(2.8 MB PDF\)](#) organisations that are eligible to be consulted shall fulfil the following criteria. They shall:

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

In the light of the present study both European social partners under consideration, IndustriAll and EURATEX, fulfil the above criteria.

As seen from the bottom-up mapping of individual organisations, IndustriAll has 44 direct affiliations (57% of the unions identified in the study), 42 of which participate in sectoral collective bargaining, and it covers 24 out of 26 countries that report any sector-related trade union. EURATEX has 24 direct affiliations (46% of the employer organisations identified in the study), 22 of which participate in sectoral collective bargaining, and it covers 20 out of 22 countries that report any sector-related employer organisation. Moreover, it is worth noting that no other European-level actors with comparable coverage could be found on either side of the industry.

Top-down and bottom-up analyses of the textile and clothing sector in the EU27 show that IndustriAll (on the employees' side) and EURATEX (on the employers' side) ought to be regarded as the most important EU-wide representatives of the employers and employees within the sector.

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Annex: Organisation names and abbreviations

Table 16: Employee organisation names and abbreviations

	Abbreviation	Full association name
AT	PRO-GE	Manufacturing Union
AT	GPA-djp	Union of Salaried Employees, Graphical Workers and Journalists
BE	ABVV-TKD – FGTB-TVD	ABVV/FGTB-Textile, Clothing and Diamond Workers' Union
BE	ABVV-BBTK/FGTB-SETCA	Union for employees, technicians and staff members
BE	ACV-CSC METEA	General Christian Trade Union METEA
BE	LBC-NVK	National confederation for employees
BE	ACLVB/CGSLB	Liberal Trade Union
BE	CNE	Centre nationale des employés
BG	FLI	Federation Light Industry
BG	FITULI	Federation of the Independent Trade Unions in the Light Industry
CY	OBIEK	Federation of Industrial Workers
CY	SEVETTYK	Cyprus Union of Workers Industry, Trade, Press and Printing and General Services
CZ	OS TOK	Trade Union of Workers in Textile, Clothing and Leather Industry of Bohemia and Moravia
DE	IG Metall	Metalworkers' Union
DK	CO-industri	CO-industri
DK	3F	United Federation of Danish Workers
DK	HK/Privat	The Union of Commercial and Clerical Employees in Denmark
DK	TL	Danish Association of Professional Technicians
EE	ETTAF	The Association of Estonian Light Industry Workers Trade Union
EL	OEKIDE	Greek Textile Clothing Leather Workers Federation
EL	PSPKM	Association of Greek Licensed Textile Engineers

ES	FITEQA-CCOO	Federation of Textile-leather, Chemical and Sector Related Industries of the Trade Union Confederation of Workers' Commissions
ES	FITAG-UGT	Federation of Industry and Farmer Workers of the General Workers' Unions of the General Workers' Unions
ES	FGAMT-CIG	Galician Federation of Food, Sea and Transport of the Inter-union Galician Confederation
FI	TEAM	Industrial Union TEAM
FI	Ammattiliitto Pro, Pro	Trade Union Pro
FI	Sähköalojen ammattiliitto	The Finnish Electrical Workers' Union
FR	THC-CGT	Textile-Clothing-Leather Federation – General Confederation of Labour
FR	CFDT Servives	Federation of services CFDT
FR	Fédération CFTC CMTE	Federation Chemicals, Mining, Textile, Energy CFTC
FR	Fédéchimie CGT-FO	National Federation of Workers of the nuclear industry, rubber, chemicals, leathers, oil, plastics, textiles and glass CGT FO
FR	FO Pharma-Cuir-Habillement	Federation of Pharmacy trades and Laboratories of Analysis and Medical Biology, Leather and Clothing CGT FO
FR	CFE-CGC Chimie	National Federation of Trade Unions of Professional and Managerial Staff of Chemical and Related industries
HU	BDSZ	Mining, Energy and Industry Workers' Trade Union
HU	HVDSZ2000	Trade Union of Local Industrial and Municipal Workers 2000
HU	MOSZTRA	National Federation of Workers' Councils' Textile and Clothing Workers Section
IE	SIPTU	Services, Industrial, Professional and Technical Union, SIPTU
IT	FILCTEM	The Italian Federation of the Chemical, Textiles, Energy and Manufacture Workers
IT	FEMCA	The Federation of Energy, Fashion, Chemical and Related Sector Workers

IT	UILTA	The Italian Union of Clothing and Textiles Workers
IT	UGL CHIMICI SINDACATO TESSILI	The General Union of Work – Chemical Sector – Textiles Trade Union
IT	FESICA CONFESAL	Trade-union Federation for Industry, Commerce and Artisan sectors
LT	LPİPS ‘Solidarumas	Lithuanian TU ‘Solidarumas’ of Industry Enterprises
LV	LIA	Latvian Industrial Workers Trade Union
MT	GWU	General Workers Union
NL	FNV Bondgenoten	FNV Allies
NL	CNV Vakmensen	National Federation of Christian Trade Unions – Professionals
NL	De Unie/MHP	The Union for Middle and Higher Personnel
PL	FNSZZPL	Federation of Independent Self-governing Trade Unions of Light Industry
PL	MNSZZP z Siedzibą w FFiK ‘Haft’ S.A. w Kaliszu	Intercompany Independent Self-governing Trade Union of Workers based in Net Curtains and Lace Factory ‘Haft’ Co. in Kalisz
PL	Sekcja Krajowa Pracowników Przemysłu Lekkiego NSZZ ‘Solidarność’	Domestic Section of Light Industry Employees of Independent Self-governing Trade Union ‘Solidarity’
PT	Têxtil Minho / FESETE	Textiles Union of the Minho and Trás-os-Montes
PT	SINTEVECC / FESETE	Sindicato dos Trabalhadores dos Sectores Têxteis, Vestuário, Calçado e Curtumes do Distrito do Porto
PT	SINPICVAT	National Union of Professionals in Manufacturing and Commerce of Apparel and Textile Articles
PT	Vestuário Norte / FESETE	Union of Workers in Clothing Industry and Textile of the North
PT	TÊXTIL Beira Baixa / FESETE	Union of the Workers of the Textile Sector in the Beira Baixa
PT	TÊXTEIS Sul / FESETE	TÊXTEIS Sul / FESETE
PT	TÊXTIL Aveiro / FESETE	Union of Workers in the Textile Sector of Aveiro

PT	TÊXTIL Centro / FESETE	Union of Textile, Wool and Clothing Workers of the Centre
PT	TÊXTIL Beira Alta / FESETE	Union of Workers in the Textile Sector of the Beira Alta
PT	Bordados Madeira / FESETE	Free Union of Workers in the Embroidery, Carpet, Textiles and Handicraft Industry of the Autonomous Region of Madeira
PT	SINDEQ	Democratic Union of Energy, Chemical, Textile and Other Industries
RO	CONFTEX	Textile and Clothing Trade Unions Federation – CONFTEX
RO	CRAIMODEX	CRAIMODEX Federation
RO	PELTRICONTEX -FRĂȚIA	PELTRICONTEX –FRĂȚIA Federation
RO	CONFPELTEX	Light Industry Workers Federation - CONFPELTEX
RO	UNICONF	Clothing and Knitwear Trade Unions Federation – UNICONF
SE	Unionen	Unionen
SE	The Swedish Association of Graduate Engineers	The Swedish Association of Graduate Engineers
SE	Ledarna	Organisation for executive and managing staff
SE	IF Metall	IF Metall
SI	STUPIS	Trade Union of the Slovenian Textile and Leather-Processing Industry
SK	IOZ	Integrated Trade Union Association
UK	Community	Community
UK	GMB	GMB
UK	Unite the Union	Unite the Union

Table 17: Employer organisation names and their abbreviations

	Abbreviation	Full association name
AT	FVTBSL	Federal Association of the Textile, Clothing, Shoe and Leather Industry
AT	BIMBT	Federal Association of Fashion and Clothing Engineering
BE	FEDUSTRIA	FEDUSTRIA, Belgian federation of the textile, wood and furniture industries
BE	CREAMODA	CREAMODA, Federation of Belgian clothing and confection manufacturers
BE	ABV	Algemeen Belgisch Vlasverbond

BG	BCGI	Branch Chamber of Garment Industry
BG	BAATPE	Bulgarian Association Of Apparel And Textile Producers And Exporters
CZ	ATOK	Association of Textile-Clothing-Leather Industry
DE	Confederation of the German Textile and Fashion Industry	Confederation of the German Textile and Fashion Industry
DK	DM&T	Danish Fashion and Textile
DK	The Tailor's Guild	The Tailor's Guild
EE	ERTL (ECTA according EURATEX)	Estonian Clothing and Textile Association
EL	SEPEE	Hellenic Fashion Industry Association
EL	HCIA	Hellenic Clothing Industry Association
EL	S.E.V.K.	Federation of Greek Textile Industrialists
EL	GSEVEE	Hellenic Confederation of Professionals, Craftsmen and Merchants
ES	CIE	Intertextil Spanish Council
ES	UNIFAM	National Union of Carpet Manufactures
ES	APOFYDE	National Employer Association of Polyolefin Textiles and Hard Fibres Manufacturers
ES	ANEDA	National Employer Association of Cotton Ginners
ES	ANCA	National Association of Cotton Cooperatives
ES	ADETEN	Textile Employer Association of Navarra
FI	FINATEX	The Federation of Finnish Textiles and Clothing Industries
FR	UIT	Union of textile industries
FR	UFIH	French Union of the Clothing Industry
HU	MKSZ	Association of Hungarian Light Industry
HU	VOSZ - Textile	Textile Section of the National Association of Entrepreneurs and Employers
IT	SMI	Italian Fashion System – Textiles and Fashion Federation
IT	Federazione Italiana Industriali dei Tessili Vari e del Cappello	Italian Industrial Federation of Various Textiles and Headwear

IT	Associazione Italiana della Filatura Serica	Italian Association of Silk Manufacturers
IT	Associazione Italiana dei Torcitori della Seta e dei Fili Artificiali e Sintetici	Italian Association of Silk Spinners and Artificial and Synthetic Fibres
IT	UNIONTESSILE	The National Union of Small and Medium Enterprises in the Textiles and Clothing Industry
IT	CONFARTIGIANATO MODA	National Federation of Artisans in the Fashion Sector
IT	CNA FEDERMODA	The National Confederation of Artisans and of Small and Medium-Size Enterprises – Fashion Federation
IT	CASARTIGIANI	The Autonomous Confederation of Artisan Unions
IT	CLAAI	The Confederation of Free Italian Artisan Associations
IT	CONFIMPRESA	Italian Confederation of Small and Medium Size Enterprises and of Artisans
IT	FEDERTERZIARIO	Italian Confederation of Tertiary, Services, Autonomous Work, Small Industrial, Commercial and Artisan Enterprises
LT	LATIA	Lithuanian Apparel and Textile Industry Association
LV	VRUA	Association of Textiles and Clothing
NL	Modint	Fashion International
PL	PIOT	Federation of Apparel & Textiles Industry Employers
PT	ATP	Textiles and Clothing Association of Portugal
PT	APIV/ANIVÉC	National Association of Clothing Manufacturers
PT	ANIL	Portuguese Wool Textile Association
PT	AICR	Association of Rope and Net Industries
RO	FEPAIUS	Light Industry Employer Federation – FEPAIUS
RO	AMDR	Association of Fashion and Design from Romania
SE	TEKO	Swedish Textile and Clothing Industries Association
SI	ZTOUPI	Association for Textile, Clothing and Leather Processing Industry
SI	STU	Section for textile and leather

UK	UKFT	UK Fashion and Textile Association
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