

Industrial relations and social dialogue

Representativeness of the European social partner organisations: Audiovisual sector



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Country codes EU27 and the UK

AT	Austria	FI	Finland	NL	Netherlands
BE	Belgium	FR	France	PL	Poland
BG	Bulgaria	HR	Croatia	PT	Portugal
CY	Cyprus	HU	Hungary	RO	Romania
CZ	Czechia	IE	Ireland	SE	Sweden
DE	Germany	IT	Italy	SI	Slovenia
DK	Denmark	LT	Lithuania	SK	Slovakia
EE	Estonia	LU	Luxembourg		
EL	Greece	LV	Latvia		
ES	Spain	MT	Malta	UK	United Kingdom

Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners – that is, the trade unions and employer organisations – in the audiovisual sector and to show how they relate to the sector’s European-level organisations representing employees and employers. The report is divided into three parts: an overview of the economic specificities of and the employment trends in the audiovisual sector; an analysis of the social partner organisations in the 27 EU Member States and the United Kingdom (UK);¹ and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

This section presents the objectives of the study along with a brief introduction to the chosen methodology. The context of this study is the European sectoral social dialogue committee (ESSDC) for the audiovisual sector, which was established in its current form in 2014.

0.1. Objectives of the study

Representativeness studies are conducted for three reasons.

- The European Commission aims to confirm the representativeness of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU).
- Representativeness is one eligibility criterion for setting up or participating in an ESSDC.
- Representativeness means also having the capacity to negotiate agreements that can lead to an implementation by Council decision, as provided by Article 155 of the TFEU.

Representativeness is defined by the European Commission Decision on the establishment of sectoral dialogue committees promoting the dialogue between the social partners at European level (98/500/EC) (European Commission, 1998). For an organisation to be recognised as a representative EU social partner organisation, 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, that have the capacity to negotiate agreements and that are representative of several Member States
- have adequate structures to ensure its effective participation in the work of the ESSDCs

To accomplish its aims, this study first identifies the relevant national social partner organisations in the audiovisual sector before analysing the structure of the sector’s relevant European organisations, in particular their membership composition. This analysis involves clarifying the unit of analysis at both national and European levels. The study includes only those organisations whose membership domain is classed as ‘sector related’.

¹ This research was carried out prior to the UK’s withdrawal from the European Union on 31 January 2020 and includes data relating to the EU27 and the UK.

0.2. Historical background

There is a strong history of international industrial relations in the audiovisual sector, going back to the 1950s and 1960s, long before the establishment of the ESSDC in 2004.

The first example of multinational collective bargaining is an agreement signed on 11 March 1954 between the International Federation of Musicians (FIM) and the International Federation of the Phonographic Industry (IFPI). Based on this agreement, IFPI had to pay 25% of its broadcasting revenue to musicians, and 5% to the FIM secretariat (Miscimarra, 1981, p. 51). FIM, together with the International Federation of Actors (FIA), also negotiated agreements with the European Broadcasting Union (EBU), as early as 1967 and 1973. In 1969, there was also an agreement between FIM and FIA on the trade union side, and the International Radio and Television Organisation (OIRT) on the employers' side. Just like the agreements with the EBU, the agreement with the OIRT regulated the working conditions of freelance performers involved in international broadcasting relays. As Miscimarra (1981, p. 60) states, it is somewhat surprising that international collective bargaining emerged in the audiovisual sector, as it is marked by many different unions, a high degree of individual bargaining, and a predominance of freelance and short-term employment. Miscimarra (1981, p. 60) notes that 'European Community officials avidly promoted multinational industrial relations, viewing them as a proper culmination of European integration'.

Overarching the multitude of international organisations in the sector, there is also a long history of alliances between them. The cooperation between FIM and FIA in the abovementioned negotiations was done in an alliance called the International Federation of Performers (FFF; Miscimarra, 1981, pp. 49–50). Besides FIM and FIA on the trade union side, there were also the International Federation of Unions of Audiovisual Workers (FISTAV) and the International Secretariat of Entertainment Trade Unions (ISETU). ISETU joined FIET (now UNI), and later in 1991 they created the International Committee of Entertainment and Media Unions (ICEMU) together with FISTAV, FIM and FIA, again independent from FIET. In 1993, FISTAV and ISETU merged, and they changed their name in 1997 to Media and Entertainment International (MEI). In 2000, EURO-MEI became part of UNI Europa (Fattmann, 2002). Together with FIM and FIA, EURO-MEI created the European Arts and Entertainment Alliance (EAEA).

EURO-MEI and the EBU started talks to set up a European social dialogue for the audiovisual sector in 1998 (ETUI, 2010). The ESSDC for the audiovisual sector was created in 2004 with FIM, FIA, EURO-MEI and the European Federation of Journalists (EFJ) on the trade union side, and on the side of the employers the EBU, the European Coordination of Independent Producers (CEPI), the Association of Commercial Television in Europe (ACT), the Association of European Radios (AER) and the International Federation of Film Producers' Associations (FIAPF).

In 2006, during a conference in Warsaw, the audiovisual sector EU social partners issued a first joint declaration on the challenges in the sector due to digitalisation and new business models, and the importance of strengthening social dialogue in the newer Member States. Also included in the 2006 Warsaw declaration was the ambition to work towards a joint position in the European Commission consultation process on the Commission's green paper on the modernisation of labour law (European Commission, 2006). This joint position was the second joint agreed text of the audiovisual ESSDC. The matter of this second joint position is important for the sector, as it includes a wide range of contractual and working arrangements, on a full-time, part-time or casual basis. In 2009 a new sub-working group on training started its work on two test categories: journalists and technicians. Its objective was to identify the challenges and needs of media and entertainment workers in the sector and to develop joint activities (European Commission, 2010). Also in 2009, a joint opinion was issued on the opportunities of the internet for the sector, and the impact of unauthorised file sharing. With this third joint opinion from 2009, the audiovisual European sectoral social dialogue had reached cruising speed (ETUI, 2010). Between 2010 and 2020, nine joint opinions were agreed

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upon in the audiovisual ESSDC (Table 1). In their September 2012 joint opinion, the European social partners of the sector underlined the importance for them of labour market data, which allowed them to monitor developments in the sector. Resulting from a 2015 project financed by the Commission is an analysis by ICF Consulting Services of the sectoral labour market and changing forms of employment and work arrangements (Carta et al, 2016).

Table 1: Agreed texts in the ESSDC for the audiovisual sector

Date	Title
4 June 2020	Good practice handbook on gender equality and diversity in the audiovisual sector
13 December 2018	Joint statement on the potential impact of Brexit in the live performance and audiovisual sectors
23 February 2018	Joint opinion by the audiovisual ESSDC on the Creative Europe programme and the role of the European Audiovisual Observatory
30 September 2014	Joint contribution of the social partners of the audiovisual ESSDC to the public consultation on the revision of the EC impact assessment guidelines
17 June 2013	Joint opinion on the position of public service media in Greece
22 November 2012	Tallinn Declaration – Promoting social dialogue in the audiovisual industry
10 September 2012	Joint opinion on the matter of the European Audiovisual Observatory
27 October 2011	Framework of actions on gender equality
1 October 2010	Joint declaration on promoting social dialogue in the audiovisual industry
30 November 2009	Joint opinion on protecting creativity, innovation and jobs
16 April 2007	Joint position on green paper on labour law
7 May 2006	Social dialogue as a tool to tackle changing environments (Warsaw Declaration)

0.3. Definitions and methodology

The methodology applied is linked to the criteria identified in European Commission Decision 98/500/EC: sector-relatedness, membership and organisational capacity (European Commission, 1998). This section will define each of these criteria successively, starting with sector-relatedness – that is, the demarcation of the audiovisual sector in agreement with the social partners and the European Commission.

Sector-relatedness

This study describes the audiovisual sector as covering the following NACE² codes: 59.1, 59.2, 60.1 and 60.2 (Table 2).³

Table 2: Demarcation of the audiovisual sector based on NACE codes

NACE code	Corresponding economic activity
59.1	Motion picture, video and television programme activities
59.2	Sound recording and music publishing activities
60.1	Radio broadcasting
60.2	Television programming and broadcasting activities

Note: Regarding the definition of the scope of the sector, the FIAPF underlines that NACE code 59.2 covers activities that might not be fully within the scope of the audiovisual sector, in particular as regards music publishing activities.

Source: NACE (Rev. 2)

Table 3 shows the membership domain patterns that can exist. The membership domains of trade unions and employer organisations can be exactly in line with this demarcation of the sector (i.e. covering all activities in NACE codes 59.1, 59.2, 60.1 and 60.2); this type of sector-relatedness is called ‘congruence’. If the membership domain of an organisation goes beyond the audiovisual sector as described here, it is categorised as ‘overlapping’. ‘Sectionalism’ is a type of sector-relatedness whereby an organisation covers a part of the sector and nothing else, whereas organisations that fall into the category of ‘sectional overlap’ cover part of the sector but also have members in other sectors.

Table 3: Domain patterns of the members of an organisation

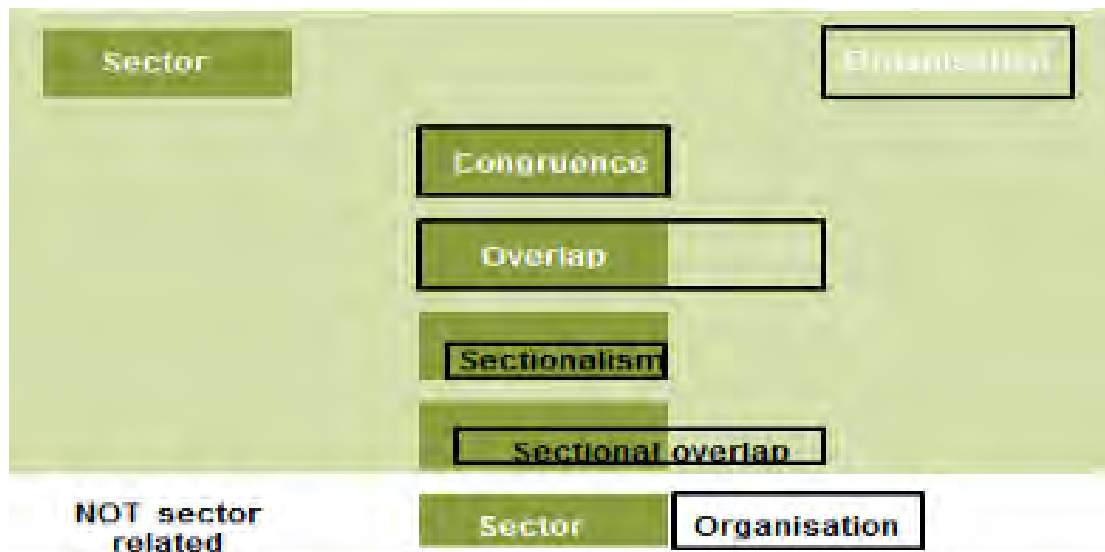
Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the domain of the trade union/employer organisation potentially cover all employees/companies in the sector?	Does the trade union/employer organisation also potentially represent employees/companies outside the sector?
Congruence	Yes	No
Overlap		Yes
Sectionalism	No	No
Sectional overlap		Yes

² NACE refers to the Statistical Classification of Economic Activities in the European Community – specifically, NACE Rev. 2. For the demarcation of a specific sector, reference is made to a number of NACE codes.

³ At European level, Eurostat defines the audiovisual sector in line with NACE codes 59.1, 59.2, 60.1 and 60.2. However, Carta et al (2016) describe this classification as not completely capturing the complexity of the activities in the audiovisual sector in national contexts. One reason, they write, resides in the fact that radio and audiovisual are organised differently, partly owing to the natures of the media. There are thus many coexisting definitions of the audiovisual sector at national level, since different national stakeholders and official bodies have defined the audiovisual sector in different ways linked to their own purposes and objectives. This is also influenced by different regulatory frameworks and methods of gathering statistics and data.

Figure 1 presents these four types of sector-relatedness graphically.

Figure 1: Four types of sector-relatedness



Membership

Membership constitutes another important aspect of representativeness. Two levels of membership are looked at here: first, the geographical coverage of the EU-level organisations (the Member States where the EU-level trade union/employer organisation has affiliates) and, second, the organisational density of the national affiliates. Important aspects to be assessed are whether the EU-level players organise most of the national-level players, or at least the most significant ones, in relation to their membership strength in the sector and their involvement in collective bargaining, and whether there are any major gaps in their membership domain.

Membership in a social partner organisation requires payment of membership fees. However, some organisations are reluctant to inform third parties about such payments. Taking into account limits of transparency, this study does not always distinguish between different membership statuses. Where possible, indirect membership (i.e. membership via another organisation to which the employer organisation or trade union is affiliated) is taken into account in this report.

Organisational capacity

The organisational capacity of the European social partners is analysed in terms of their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates. To assess their capacity to negotiate, the **bodies** and their objectives and decision-making structures provided in their statutes are considered as well as the **outcome** in terms of texts agreed. The **processes** through which the organisations obtained mandates, support and approval from their member organisations in the negotiation process are also considered.

The **involvement of social partners' members in national-level collective bargaining** is also important, as it shows that they are able to obtain a mandate to negotiate on behalf of their members (at least at national level, which could then also translate to a mandate to negotiate at EU level). Such a mandate, whether implicit or explicit, allows for negotiations to take place at European level, which could potentially result in binding agreements or the drafting of European autonomous agreements (requiring implementation by social partners at national level in line with their respective practices and traditions). The capacity to act autonomously in this way is an important contribution to the effectiveness of the ESSDC.

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The involvement of national sector-related trade unions and employer organisations in collective bargaining is also a factor that distinguishes them from professional associations and business associations, which only defend their members' interests through unilateral lobbying activities and do not involve themselves in negotiations on working conditions through collective or social dialogue. Trade unions and employer organisations that do engage in collective bargaining on behalf of their members have a proven capacity to obtain a mandate from their members to negotiate and to make compromises and agreements with organisations representing different interests. In its analysis, this report aims to distinguish between these different types of organisation.

Finally, representativeness also depends upon the organisations' structures and resources and their capacity to mobilise the active participation of their members and aggregate the different interests of member organisations, as well as their potential to act autonomously at European level. **Effective participation in the ESSDC meetings** is assessed in terms of presence at the meetings in the two years before the year of publication of this report.

0.4. Data collection and quality control measures

Representativeness studies combine top-down and bottom-up approaches. The top-down approach in the present study aimed to identify all sector-related affiliates of the European associations listed in Table 4. These are the European social partner organisations currently involved in the ESSDC for the audiovisual sector.

Table 4: Organisations represented in the audiovisual ESSDC

Representing workers	Representing employers
UNI Europa – Media, Entertainment & Arts (EURO-MEI) ⁴	Association of Commercial Television in Europe (ACT)
European Federation of Journalists (EFJ)	International Federation of Film Producers' Associations (FIAPF) ⁶
International Federation of Musicians (FIM)	Association of European Radios (AER)
International Federation of Actors (FIA) ⁵	European Audiovisual Production Association (CEPI) ⁷
	European Broadcasting Union (EBU)

The bottom-up approach targeted other organisations involved in collective bargaining related to the audiovisual sector and sought to identify their membership in other European-level organisations.

⁴ EURO-MEI is the European Region of the sectoral global trade union organisation: Media, Entertainment & Arts sector of UNI Global Union.

⁵ Both FIA and FIM are organisations with a wider global scope. Within FIA there is a European section called EuroFIA, and within FIM there is a 'European Group'. These European sections are not formal separate organisations; rather, they are like working groups within FIA and FIM (see section 3.9)

⁶ FIAPF is also a global organisation. For its involvement in the ESSDC, it has an ad hoc working group on EU affairs (see section 3.9)

⁷ CEPI was founded as the European Coordination of Independent Producers (Coordination Européenne des producteurs indépendants) in 1990 to organise and represent the interests of independent cinema and television producers in Europe. In 2018, CEPI relaunched itself as the European Audiovisual Production Association.

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Unless cited otherwise, this study draws on the country studies provided by the Network of Eurofound Correspondents. Where precise quantitative data could not be obtained, estimates are provided rather than leaving a question unanswered.

Thus, most quantitative data stem from three sources, namely:

- official statistics and representative surveys
- administrative data, such as membership figures provided by the organisations (e.g. to calculate the density rates)
- estimates, expert opinions and assessments made by the Network of Eurofound Correspondents or representatives of the organisations

Other sources include data and reports published by the European organisations listed above and their members, the social dialogue texts database, data from Eurostat (Structural Business Statistics and the EU Labour Force Survey) and data from the ICF sector study (Carta et al, 2016). A complete list of relevant publications can be found in the references section at the end of the report.

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of drawing up this study. A preparation meeting was held on 12 March 2019 with all EU social partner organisations from the audiovisual sector at the premises of the European Commission.

First, combining the top-down with the bottom-up approaches, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the national reports prepared by the Network of Eurofound Correspondents between September and December 2019. Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions and, if necessary, asked the national correspondents to revise these in March–April 2020.

Draft versions of the overview report were shared in November 2020 with the European trade union organisations EURO-MEI, the EFJ, FIA and FIM, the European employer organisations ACT, the AER, CEPI, the EBU and the FIAPF, and the European Commission. As different social partner organisations were able to view the information reported by other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information from other organisations representing a similar membership, this process involved an element of mutual verification and recognition.

The final report, taking into account all comments provided, was evaluated and approved in a written procedure of the Eurofound Advisory Committee on Industrial Relations – which consists of representatives of both sides of industry, governments and the European Commission – in consultation with the European-level sectoral social partners identified in the report. This written evaluation procedure ran from 16 April 2021 to 24 May 2021. To allow for a discussion between the social partners, an online discussion was organised during the written evaluation procedure, on 6 May 2021, to which delegates from the European social partner organisations from the sector and the members of the Eurofound Advisory Committee on Industrial Relations were invited.

After the formal evaluation, the report was edited and prepared for publication in the second half of 2021.

0.5. Structure of the report

The report consists of three main chapters, beginning with a brief summary of the economic background and employment specificities of the audiovisual sector. The report then analyses the relevant social partner organisations in the 27 EU Member States and the UK. The third part considers the representative associations at European level.

Finally, it is important to note the difference between the research and political aspects of this study. While providing data on the representativeness of the organisations under consideration, the report does not conclude whether the representativeness of the European social partner organisations and their national affiliates is sufficient for participation in the European social dialogue. The information and analyses provided in this report will provide the evidence base for further efforts and decisions by the social partners themselves and the European Commission.

1. Economic background and employment specificities of the sector

This chapter describes the economic background of the audiovisual sector in terms of employment and company structure. It aims to outline the scope of the workforce and the companies in the sector that are to be represented by the trade unions and employer organisations discussed in the following chapter.

1.1. Employment in the audiovisual sector

The audiovisual sector in the EU27 and the UK employs some 743,000 people, which is about 0.5% of the total EU27 and UK workforce. Table 5 shows the number of employees in the audiovisual sector per country as well as the percentage of sector employees as a share of all employees, and as a share of the EU sector workforce. In absolute numbers, the sector is largest in the UK (163,827 employees), Germany (123,519), France (122,963), Spain (63,122), Italy (42,251) and the Netherlands (33,352). Together, these countries have about 73.8% of the total EU27 and UK audiovisual workforce. As a share of total employment in each country, the audiovisual sector is largest in the UK, France and Denmark, where 0.8% of the national workforce is employed in the audiovisual sector. These percentages, and others above the EU27 + UK average, are marked green in Table 5.

Considering only the EU27, without the UK, the sector employs a total workforce of 580,000, of whom 22% are employed in Germany, 22% in France and 11% in Spain. More than half of the EU27 workforce is found in these three Member States.

Table 5: Employees in the audiovisual sector, 2017

Country	Employees in NACE 59	Employees in NACE 60	Employees in the audiovisual sector (NACE 59 and 60)	Share of total employment (%)	Share of the total EU27 sector workforce (%)
DE	80,190	43,329	123,519	0.4	21.5
FR	76,457	46,506	122,963	0.8	21.4
ES	34,887	28,235	63,122	0.5	11.0
IT	27,200	15,051	42,251	0.3	7.3
NL	25,820	7,532	33,352	0.6	5.8
PL	15,208	16,485	31,693	0.3	5.5
SE	15,246	7,605	22,851	0.7	4.0
EL	8,589	7,654	16,243	0.7	2.8
RO	5,965	9,543	15,508	0.4	2.7
DK	9,720	3,495	13,215	0.8	2.3
HU	8,828	3,343	12,171	0.4	2.1
BE	8,598	1,961	10,559	0.4	1.8
PT	6,386	3,687	10,073	0.3	1.8
AT	8,240	1,641	9,881	0.3	1.7
BG	4,461	3,013	7,474	0.4	1.3
HR	1,778	4,848	6,626	0.6	1.2
IE	6,559	n.d.	6,559	0.5	1.1
FI	5,165	840	6,005	0.4	1.0
CZ	4,241	1,308	5,549	0.1	1.0
SK	3,143	580	3,723	0.2	0.6
SI	1,870	713	2,583	0.4	0.4
LT	1,987	501	2,488	0.3	0.4

Representativeness of the European social partner organisations: Audiovisual sector

Country	Employees in NACE 59	Employees in NACE 60	Employees in the audiovisual sector (NACE 59 and 60)	Share of total employment (%)	Share of the total EU27 sector workforce (%)
LV	1,217	728	1,945	0.3	0.3
EE	1,466	296	1,762	0.4	0.3
CY	492	852	1,344	0.5	0.2
MT	728	363	1,091	0.7	0.2
LU	370	570	940	0.2	0.2
EU27	364,984	214,646	579,630		100
UK	117,752	46,075	163,827	0.8	22% of EU27 + UK
EU27 + UK	482,736	260,721	743,457	0.5	

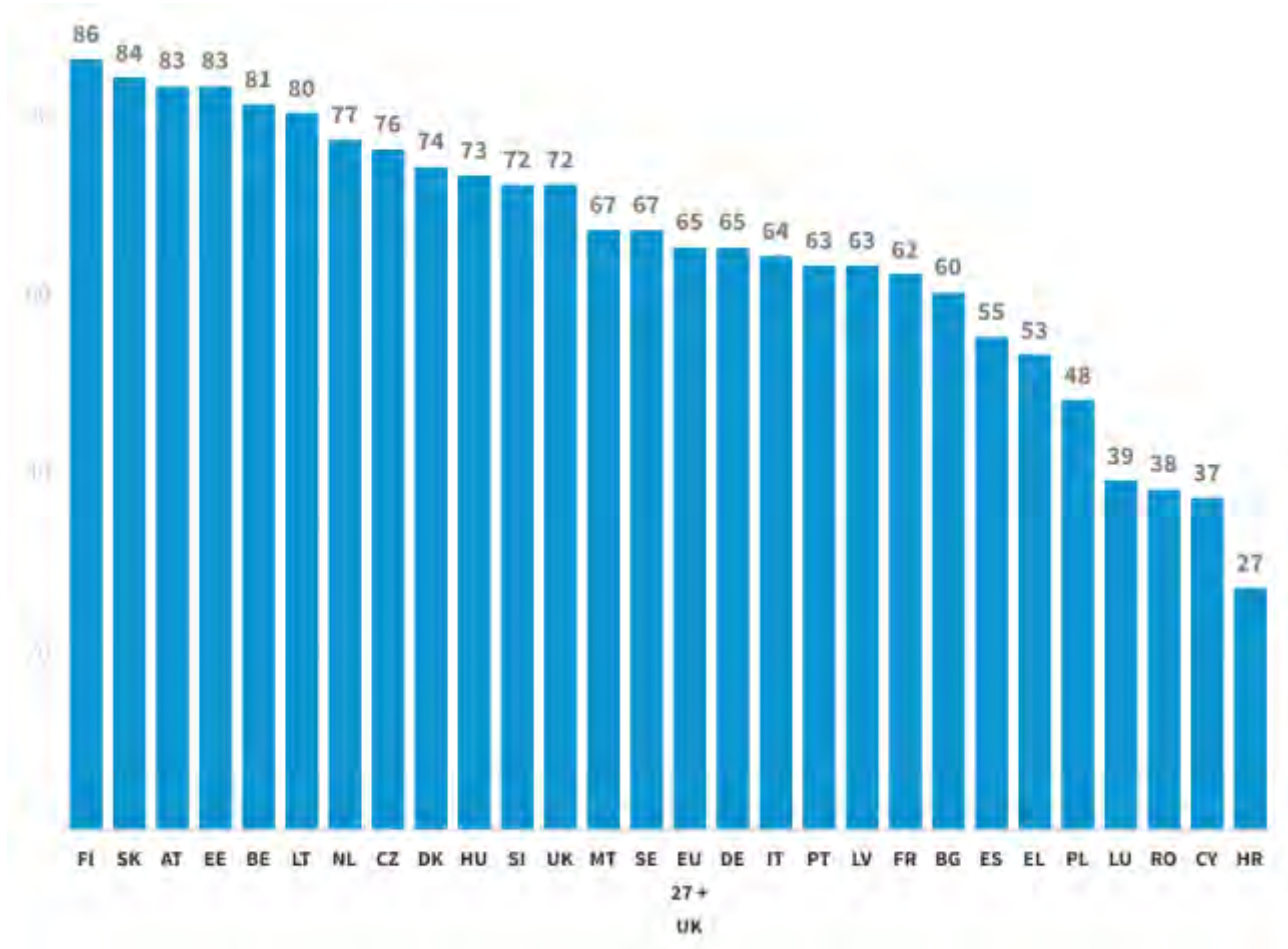
Notes: Ordered by highest number of persons employed in the audiovisual sector. Data for Estonia are from 2016. The percentages shaded in green are the countries for which the proportion of employment in the audiovisual sector is higher than the EU27 + UK average, 0.5% of the entire national workforce. These are the countries for which the audiovisual sector is most important in terms of employment in the country. n.d., no data.

Source: Eurostat, Structural Business Statistics, 2017

The two subsectors – ‘Audiovisual production’ (NACE 59) and ‘Programming and broadcasting activities’ (NACE 60) – differ somewhat in size, with production corresponding to 63% and broadcasting to 37% of the audiovisual sector workers in the EU27 (Figure 2). There are also variations at country level (see Table 5 and Figure 2 for the distribution of audiovisual sector employment between the two subsectors). For example, in Croatia, Cyprus, Luxembourg, Poland and Romania, programming and broadcasting activities are the more significant part of the sector in terms of employment. In those five countries less than 50% of the sectoral workforce is employed in the making of audiovisual productions (NACE 59).

Representativeness of the European social partner organisations: Audiovisual sector

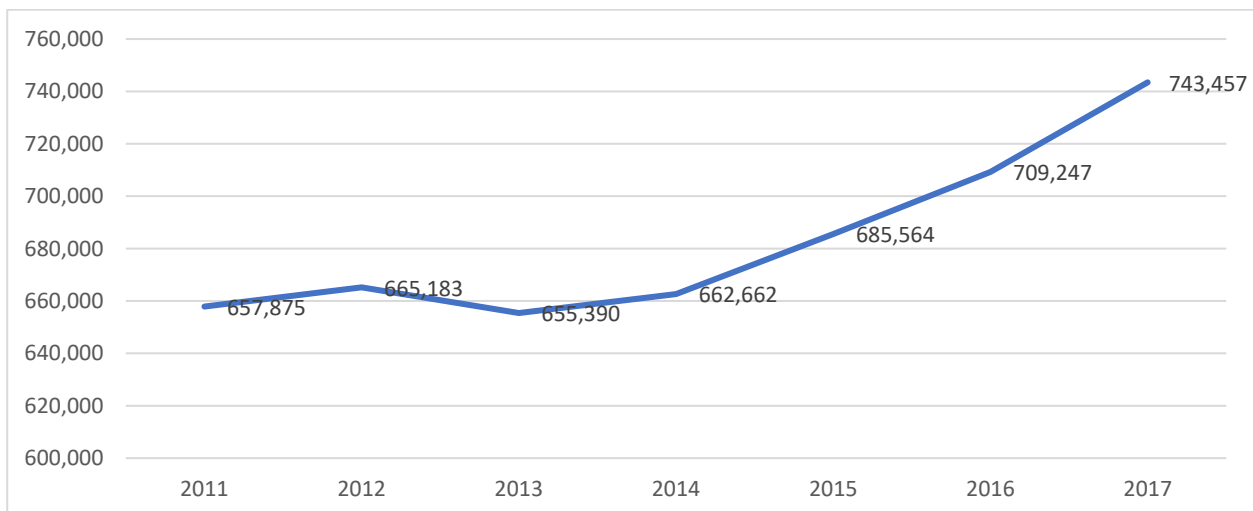
Figure 2: Percentages of the audiovisual workforce employed in audiovisual production in 2017



Source: Eurostat, Structural Business Statistics, 2017

Employment in the sector has increased steadily during the past few years. In total, as shown in Figure 3, the number of employees in the audiovisual sector in the EU increased by around 85,000 workers (13%) between 2011 and 2017.

Figure 3: Number of employees in the audiovisual sector in the EU27 and the UK, 2011–2017



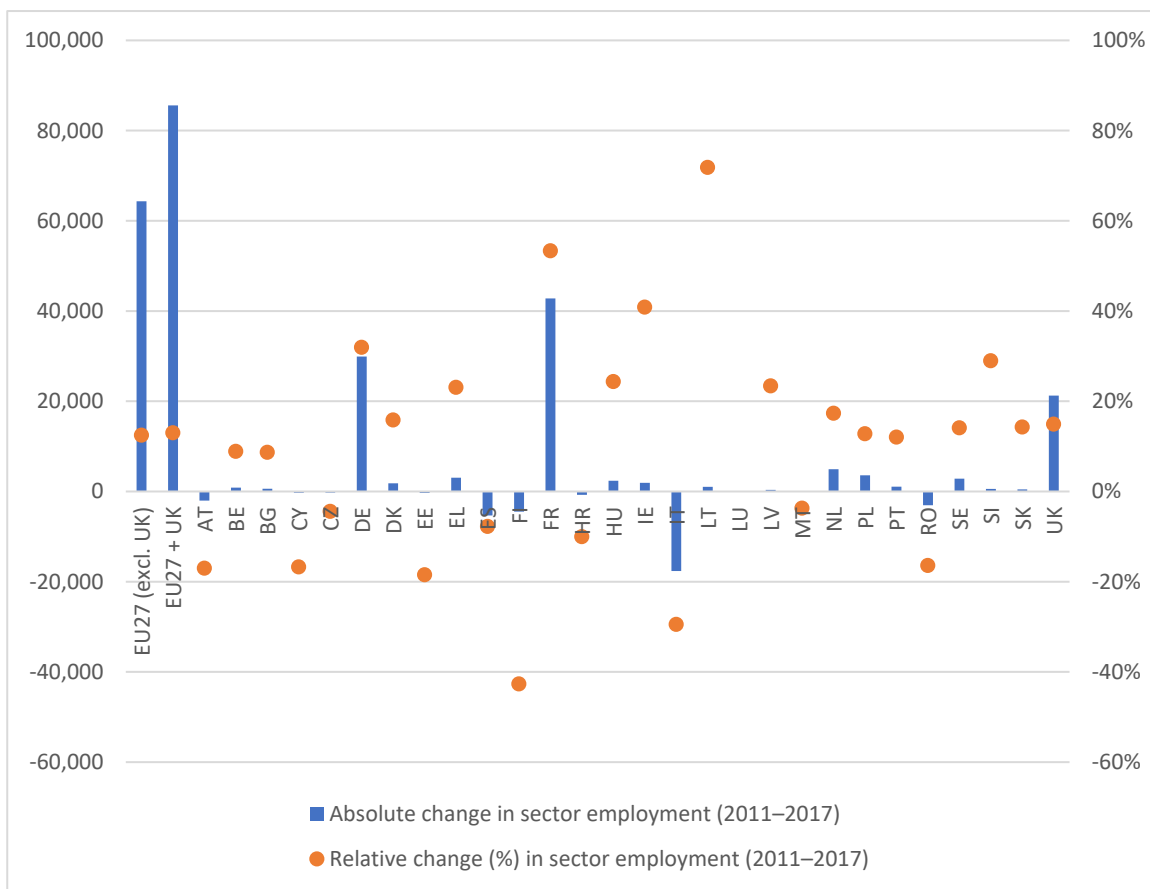
Source: Eurostat, Structural Business Statistics, 2017

Representativeness of the European social partner organisations: Audiovisual sector

Carta et al (2016) indicate that the main reason why employment has increased in recent years may be that the sector is characterised by higher levels of self-employment than average in the EU economy, driven by the increase in the production sector. The increase mainly appeared in France, Germany and the UK, while in Italy, Romania and Spain, among other countries, there was a decrease in employment in the sector between 2011 and 2017 (see Figure 4).

Figure 4 shows the changes in sector employment from 2011 to 2017, disaggregated by country. In relative terms, the increase was highest in Lithuania. As the sector is very small there, a small increase in absolute figures generates a very high relative change. France shows a vast increase, with over 40,000 more employees in 2017 than in 2011 – an increase of more than 50%. A large increase also occurred in Germany in the same period, in both absolute and relative terms.

Figure 4: Change in the number of employees in the audiovisual sector from 2011 to 2017



Note: For Estonia, data are from 2016 instead of 2017. For Finland, data are for 2010 instead of 2011. For Ireland and Malta, data cover only NACE code 59. There are no data for Luxembourg.

Source: Eurostat, Structural Business Statistics

The sector has a younger workforce than the European average. According to Carta et al (2016), 59% of the workers in the audiovisual sector were aged between 25 and 44, compared with 48% of workers in the whole economy. Furthermore, the sector is also characterised by a highly educated workforce and there is still a steady increase in the number of workers with a high-level qualification, while the number of less educated workers has decreased (Carta et al, 2016).

Data are scarce. However, based on qualitative assessments and interviews with sector stakeholders, the national correspondents, on whose input this report is based, report that certain specificities of the sector make it difficult for the trade unions to organise the sector workforce. One such factor is that the workforce works under 'atypical work arrangements', which include contracts under labour law, but also a wide range

of contracts that are under a mixture of labour and civil commercial law (project-based, freelance and zero-hour contracts). In some countries there were reported practices of work contracts for as short as 30 minutes (such practices are common for artists and musicians in some parts of the sector, while in film production this would be rather exceptional). Some of these atypical work arrangements are the consequence of the per-project work in the production part of the audiovisual sector, for example for the duration of the shooting of a film or a TV series.

The high share of self-employed people and small and medium-sized enterprises (SMEs) in the sector affects the organisation rates of social partners. Organising workers in SMEs is generally harder than in larger companies. In terms of companies, the share of SMEs in the sector is large (more than 96%), while, in terms of workforce, 28% of the sectoral workforce is employed in companies with fewer than 10 employees (see Figure 5). Thus, regular contact with union representatives is less common than when all company employees are gathered in only one or a few places.

However, in most countries the sector is characterised by the presence of a handful of very large public service media organisations. Thus, if a few large companies choose to sign collective bargaining agreements, the coverage rate may be quite significant even where the vast majority of SMEs choose not to do so. Figure 5 illustrates that only 0.07% of all audiovisual companies have more than 250 employees, while together they employ 36% of the sectoral workforce. Of all companies in the sector, 96% have fewer than 10 employees. Altogether these microfirms employ 28% of the employees in the sector.

Many who work in the sector are also active in other sectors. In particular, live performance, other subsectors of culture, press, publishing companies, education etc. are common sectors to be involved in as well as audiovisual activities. Multiple job (or assignment) holding is common, both for the same employer and for different employers simultaneously.

Posted workers, on the other hand, seem extremely scarce in the sector, and employment through temporary work agencies does not seem widespread either. This is the consequence of the per-project approach of the sector, in particular the production segment, and the fact that, for many functions, individuals are contracted for both their skills and the creative input they will inject into the project. Therefore, employers approach potential employees without going through temporary work agencies in many cases.

1.2. Companies in the audiovisual sector and economic development

Companies in the audiovisual sector offer services in the production of film, video and television programmes, the recording of sound and music and the publishing of films or programmes, and broadcasting activities. The sector is composed of a variety of functions (artistic, technical, administrative) and activities (creation, production, distribution, etc.) (Creative Skills Europe, 2016). Activities offered and the degree of specialisation naturally differ between companies, but the largest audiovisual companies (such as the public service companies and broadcasters) are involved in a vast array of activities including production, distribution (including films), promotion and electronic diffusion. The sector mainly consists of small companies (including self-employment or other forms of independent work depending on the national legal context). The average number of persons employed per company in the EU was 4.4 in 2017 (see Table 6). However, public broadcasting companies still have a predominant role in the sector, taking up 37% of the sector workforce, a significant proportion, while, over the EU27 + UK as a whole, 65% of the sectoral workforce works on audiovisual productions (NACE 59) (see Figure 2).

The audiovisual sector is currently undergoing a series of major changes, mainly due to the digital shift, other technological developments, changes in regulations and the emergence of new business models, all of which

Representativeness of the European social partner organisations: Audiovisual sector

present new opportunities and pose new challenges for the sector (Carta et al, 2016). Project-based work, intermittent employment and retraining needs have been features of the sector for decades. However, the digital shift has reinforced these employment features even more. According to Creative Skills Europe (2016), employment opportunities have become more precarious since the financial crisis of 2007–2008, which has pushed professionals to diversify their activities within the sector.

The new digital environment has also put pressure on the sector and subsectors to adapt more rapidly than others in terms of developing new skills, at times purely digital (the management of cybersecurity; mobile and cloud computing; big data and analytics; new applications of social media; etc.). Journalists, for instance, have had to adapt to new working methods both in the way information is collected (monitoring of the internet, fact-checking, crowdsourcing, etc.) and in the way that the communication channels operate to reach out to audiences (multimedia platforms, management of commentaries, infographics, etc.). In addition, public and private broadcasters have come under pressure to diversify their content production and content access, in part because of the increasing use of on-demand streaming services and other online platforms. This development has created a business opportunity for the rapidly growing SMEs, which continue to contribute significantly to job creation in the sector (Creative Skills Europe, 2016).

In 2017, a total of 167,331 companies were actively involved in the audiovisual sector in the EU. Most of these companies were located in the UK, France, the Netherlands, Sweden and Germany. Together, these five countries thus account for over half of all audiovisual companies in the EU (Table 6).

Table 6: Companies in the audiovisual sector by size, 2017

Country	Total number of companies	Company size (%)					Average number of persons employed per company
		0–9 persons employed	10–19 persons employed	20–49 persons employed	50–249 persons employed	250 or more persons employed	
EU27 + UK	167,331	96	2	1	n.d.	n.d.	4.4
AT	2,888	95	~3	~2	<1	<0.1	3.4
BE	4,118	n.d.	2	n.d.	n.d.	n.d.	2.6
BG	1,340	93	3	3	n.d.	n.d.	5.6
CY	177	84	12	n.d.	n.d.	0.1	7.6
CZ	3,985	99	~1	<0.1	<0.1	<0.1	1.4
DE	12,545	87	~6	~5	~2	<0.1	9.8
DK	3,031	95	~2	~2	~1	<0.1	4.4
EE	702	96	2	<2	<1	<0.1	2.5
EL	2,565	93	3	n.d.	n.d.	n.d.	6.3
ES	9,823	92	4	2	1	~0.1	6.4
FI	1,822	95	3	<1	<1	<0.1	3.3
FR	24,105	97	1	<1	<1	<0.1	5.1
HR	846	93	5	<2	<0.1	<0.1	7.8
HU	6,579	98	<1	<1	<0.1	<0.1	1.8
IE	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	2.4
IT	8,918	93	4	~2	<1	<0.1	4.7
LT	1,510	99	<1	<0.1	<0.1	<0.1	1.6
LU	197	90	5	~3	<2	<0.1	n.d.
LV	658	96	~3	<1	<0.1	<0.1	3.0
MT	278	n.d.	n.d.	n.d.	n.d.	0.1	3.9
NL	18,443	99	~0.1	~0.1	~0.1	~0.1	1.8
PL	8557	98	1	~0.1	~0.1	~0.1	3.7
PT	3295	97	1	<1	<1	~0.1	3.1

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Country	Total number of companies	Company size (%)					Average number of persons employed per company
		0–9 persons employed	10–19 persons employed	20–49 persons employed	50–249 persons employed	250 or more persons employed	
RO	2836	95	3	1	<1	<0.1	5.5
SE	12,973	99	<1	<0.1	<0.1	<0.1	1.8
SI	1,614	99	<1	<0.1	<0.1	<0.1	1.6
SK	2,302	n.d.	n.d.	n.d.	n.d.	n.d.	1.6
UK	28,289	95	~2	~1	~1	~1	5.8

Notes: Data for Ireland cover only NACE 59. In some size categories, the number of companies is closer to 0 than to 1, so that if consistent rounding of the percentages was applied, they would appear as 0%. As this could be misinterpreted to mean there are no companies in this size category in a country, a figure of 0.1% is given. <, less than; ~, approximately. n.d., no data.

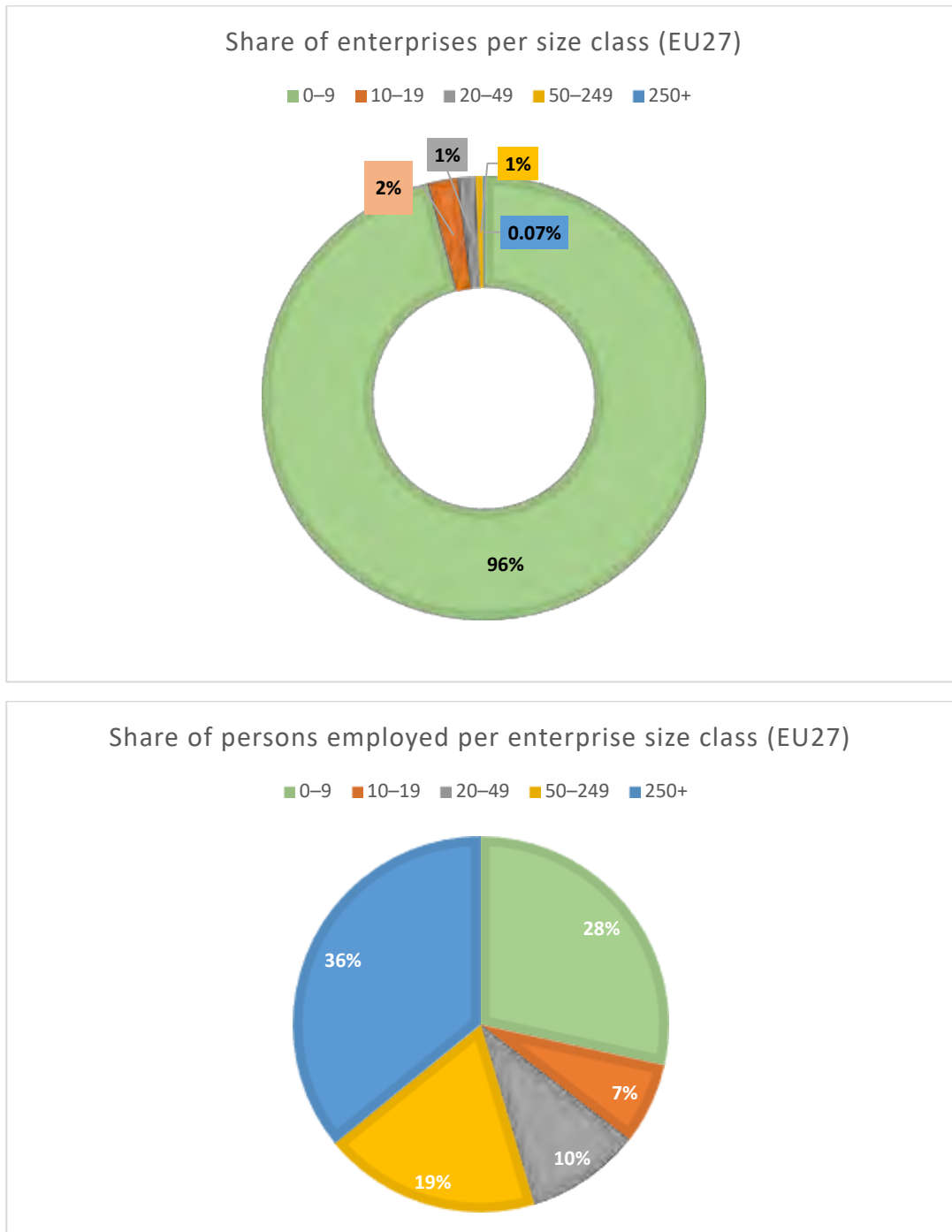
Source: Eurostat, *Structural Business Statistics, 2017*

Table 6 gives an overview of the number of enterprises in Member States and shows the distribution of companies in terms of size. Smaller companies are very common in the audiovisual sector. In the EU overall, an average of 96% of companies had only 0–9 employees in 2017. Table 6 shows that, in terms of the average number of persons employed per company, Germany had the largest number (with an average of 9.8 workers per company), followed by Croatia (7.8) and Cyprus (7.6). On the other hand, Czechia had the smallest number (1.4), in terms of average number of persons employed per company, followed by Lithuania, Slovakia and Slovenia (all with an average of 1.6). These averages do, however, combine the large proportion of companies with fewer than 10 employees and the small proportion of the much larger companies with more than 250 employees.

Across most of the countries, a large proportion of companies in the audiovisual sector are small and very small, with a significant share being single person owned companies. In terms of the legal form, private companies dominate the sector in terms of numbers. However, these companies usually employ a rather small proportion of the workforce. The companies with more than 250 employees correspond to 0.07% of all companies and they employ altogether 36% of the sectoral workforce (see Figure 5). Still, a significant share of the workforce is employed by the very few large companies and public service media organisations in the sector (in some countries, there is only one such large public service media organisation, as is the case in Cyprus and Hungary, among others). Generally, these are the public broadcasting companies, are the largest employers and are often publicly funded by a public broadcasting tax.

Owing to the high share of companies with a very small number of employees, it is relatively demanding and complicated for employer organisations to organise the sectors. The audiovisual sector is a very competitive market, at both national and international levels, with a few large companies. In some cases, these large companies do not necessarily need employer organisations to enter collective bargaining. There are six Member States where there are no employer organisations for the audiovisual sector (Cyprus, Hungary, Latvia, Lithuania, Poland and Romania). There are, however, producers' associations in a number of countries, listed in Table A5, including Hungary, Latvia, Lithuania and Poland. These are, however, associations that are not involved in collective bargaining, and therefore not considered employer organisations in this study. At subsector level, NACE 59 has a higher share of microfirms than NACE 60, which makes it more difficult to organise. France represents an exception, as the overrepresentation of very small companies seems not to be an obstacle to creating employer organisations, considering the high number of such organisations within the sector.

Figure 5: Proportion of persons employed in audiovisual companies of different sizes in the EU27, 2017



Note: Data are missing for several countries for the categories 50–249 and 250+. Estonia, Luxembourg and Slovakia only have data for the category 0–9.

Source: Eurostat, Structural Business Statistics, 2017

Reading Table 7 and Figure 5 together, we see that, while 96% of the European companies in the audiovisual sector have fewer than 10 employees, these employ 28% of the European sectoral workforce. For the 2% of companies that have between 10 and 19 employees, the share of the overall EU workforce is 7%. The 1.3% of companies with between 20 and 49 employees employ 10% of the European workforce. While small companies are thus the most significant in absolute numbers, large companies are very important for sector employment. This becomes evident when we consider that the 0.5% of companies with 50–249 employees cover 19% of the sectoral workforce and the 0.1% of all audiovisual companies that employ 250 or more

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persons cover 36% of the sectoral workforce. The companies with more than 50 employees correspond thus to 0.6% of the companies in the sector and they employ 55% of the sectoral workforce.

Table 7: Numbers of companies and workforce by company size in the EU27, 2017

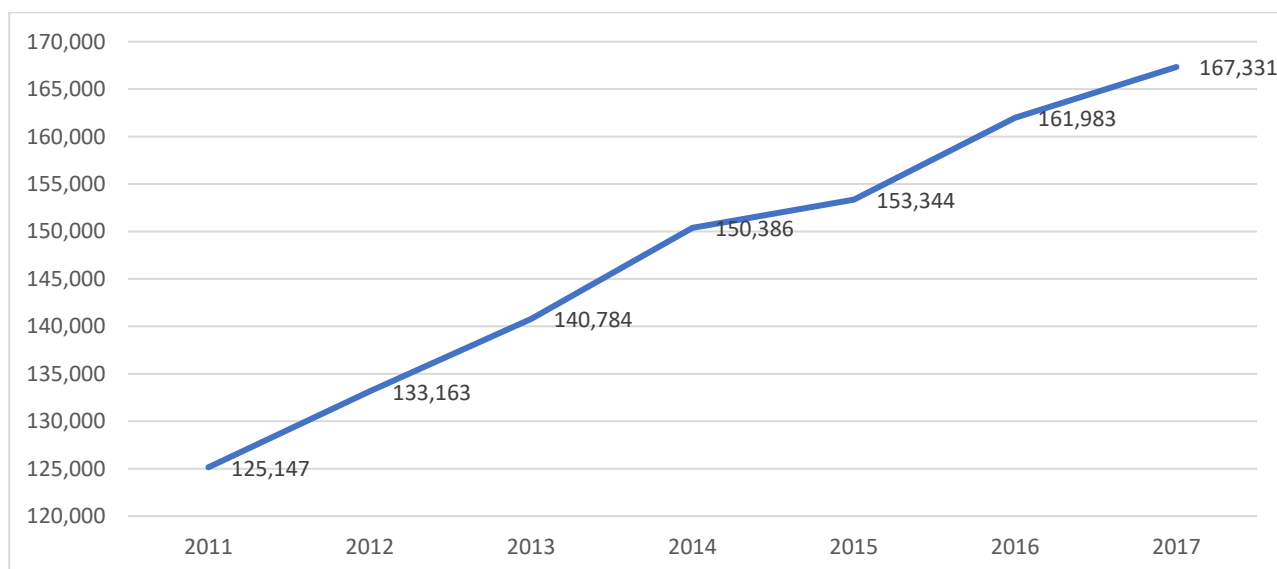
	Enterprise size class					
	Total	0–9	10–19	20–49	50–249	250+
Number of enterprises						
NACE 59	129,976	125,391	2,300	1,432	758	100
NACE 60	9,000	7,775	642	370	n.d.	n.d.
Total	138,976	133,166	2,942	1,802	758	100
%	100	95.8	2.1	1.3	0.5	0.1
Persons employed						
NACE 59	364,984	149,000	31,636	46,161	81,801	56,218
NACE 60	214,646	15,996	8,962	11,255	26,756	151,680
Total	579,630	164,996	40,598	57,416	108,557	207,898
%	100	28	7	10	19	36

Note: *n.d.*, no data.

Source: Eurostat, *Structural Business Statistics, 2017*

As well as from sector employment, the growth of the sector is also clear from the increase in the number of companies. Between 2011 and 2017 the number of active enterprises increased by 33.7%, reaching an all-time high of 167,331 companies in the EU in 2017, as shown in Figure 6. If we compare this with the 13% increase in the workforce over the same period of time (see Figure 4), this indicates that the growth in the sector is among the small enterprises and microfirms. Between 2011 and 2017, the number of companies employing 0–9 persons increased by 36%, companies in the 10–19 group increased by 6% and companies in the 20–49 group decreased by 3%.

Figure 6: Number of companies in the audiovisual sector in the EU27 and the UK, 2011–2017



Source: Eurostat, *Structural Business Statistics, 2017*

Turnover in the audiovisual sector rose steadily between 2011 and 2017 (22% across all Member States) and was estimated at about €161 billion in 2017. Lithuania (72%), the Netherlands (70%), the UK (63%), Latvia (50%) and Bulgaria (46%) were the countries with the highest percentage increases between 2011 and 2017, while the UK and France were the two countries with the highest increase in absolute numbers. Italy (-22%), Austria (-14%), Cyprus (-10%), Denmark (-5%) and Hungary (-1%) had negative development in turnover

between 2011 and 2017. The numbers also correspond to the downward trend in sector employment for Austria, Cyprus and Italy as shown in Figure 4.

The UK had by far the largest turnover and economic influence in the sector, about one-third (31%) of the turnover across all EU Member States (about €50 billion), followed by France (17%) and Germany (15%) (Eurostat, Structural Business Statistics, 2016⁸).

1.3. Specificities of the audiovisual sector

The changing environment of the audiovisual sector is shaped by a number of factors, including the European legal framework for the sector, digitalisation and financial challenges.

The EU policy framework for the audiovisual sector started with the Television without Frontiers Directive, adopted in 1989, which became the Audiovisual Media Services Directive in 2000. With its 2018 revision, this directive also included in its scope online services and platforms (Broughton Micova, 2020). Just like the ICT and telecommunication sector, the audiovisual sector is affected by the Digital Single Market strategy and the single market approach to spectrum policy, bringing together the frequencies for TV and radio broadcasting with those of online broadcasting.⁹ In 2016, there were initiatives to modernise EU copyright rules, and audiovisual sector stakeholders expressed major concerns about the legislative proposal on the grounds that it could potentially interfere with the economic and legal system for financing and distributing audiovisual works and content in Europe (Carta et al, 2016).

The progressive liberalisation in the sector has led to an increasing division of labour and a heterogeneous landscape of public and private sector, producers and broadcasters, TV and radio, and very small microfirms alongside public and private TV and radio producers and broadcasters with a very large workforce. There is increased outsourcing of production, separating further production from broadcasting, and there is an increase in European co-productions (Carta et al, 2016).

Digitalisation has accompanied this development. Both public and private broadcasters have come under growing pressure to diversify content production and content access due to the increasing use of on-demand streaming services and online platforms. This represents a business opportunity for rapidly growing SMEs in the sector, which continue to contribute to job creation in the sector (Carta et al, 2016). At the other extreme are about 160,000 employees in the EU27 and the UK in 2018 in public service media organisations (corresponding to 21% of the European sectoral workforce), where the EBU reported a slight decrease in employment.

A financial liability for the sector is linked to uncertainties around public services broadcasters' licence fees, and public funding being under threat, while advertising revenue is decreasing and the number of work commissions varies over time, leading to financial instability in the sector. This has an impact on the production segment as well as working conditions in the sector. In particular, many workers face irregular and unpredictable employment opportunities, atypical contractual relationships and lack of control over their working conditions (European Commission, 2010, p. 18). A European Commission communication from December 2020 has confirmed this (European Commission, 2020).

Traditionally there is a link between the audiovisual sector and the live performance sector. In terms of social partners, especially on the trade union side, this is also reflected in the EU industrial relations landscape of

⁸ Data are missing for Estonia, Ireland, Luxembourg and Malta.

⁹ See Directive (EU) 2019/789 of the European Parliament and of the Council of 17 April 2019 laying down rules on the exercise of copyright and related rights applicable to certain online transmissions of television and radio programmes, and amending Council Directive 93/83/EEC.

both sectors. EURO-MEI, FIM and FIA organise both sectors. Digitalisation is, however, bringing the audiovisual sector closer towards links with the ICT and telecommunication sector, while there are completely different industrial relations bodies.

The audiovisual sector is characterised by non-standard forms of employment in most Member States, with a high proportion of project-based work delivered by freelance and self-employed workers, often on a seasonal, sporadic basis. Greece stands out as an exception, where almost all (96.7%) of the persons employed in NACE 59 and 60 are full-time employees and 87.7% work under a permanent or open-ended contract. In most of the other countries, however, the proportion of atypical working arrangements is significantly higher than in other sectors.

It is important to mention the risk of bogus self-employment, in which, for fiscal reasons, employers often prefer to work on a business-to-business basis, rather than under an employment contract. For these reasons, the official data might provide a slightly distorted image in some cases (Ireland, the Netherlands and Romania, among others), as the official statistics in these countries count self-employed workers not as employees, but as enterprises. It is also worth mentioning that there are workers who hold multiple jobs, some of which are also in other sectors (such as live performance, other subsectors of culture, the press, publishing companies and education).

Flexible and atypical working arrangements, often described as 'gig contracts', seem to be increasing across all countries surveyed, driven by several factors, including technological developments and the increasing financial instability of the sector. The only exception in most countries is represented by the few big companies, mostly radio and television companies, which are more likely to use permanent contracts for at least some of the workers in this sector, considering that they are carrying out running programmes or several projects at the same time, while smaller companies operate project by project.

In terms of differences at subsector level, the largest share of self-employed people seems to be in film and motion picture, video and television programme production (NACE 59), while television presenters, journalists, and crew employed by the main television and radio broadcasters (NACE 60) are more likely to enjoy full-time and permanent contracts.

In a lot of countries, it is rather difficult for unions to organise workers, given the high prevalence of non-standard forms of employment and multiple job holding, as well as the size of the enterprises. As the sector is characterised by a lot of smaller companies (mostly in NACE 59), there are countries in which the size of the enterprise represents a barrier for trade union organisation (Belgium, Bulgaria and Romania, among others). Within the larger – and especially public broadcasting – companies, where the standard form of employment is more common, there is also a strong tradition of unionisation and collective bargaining. In Denmark, Germany and Sweden, the situation is different, as there is relatively strong union membership in the sector, including among self-employed people. The sector is very dynamic and fast-changing, and the recent technological developments (such as the explosion of podcast production) are proving to be demanding for trade unions organising these new parts of the sector.

2. National level of interest representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the audiovisual sector.

This study has identified 155 sector-related trade unions in the EU27 (160 including the UK), and 70 sector-related employer organisations in the EU27 (72 including the UK). All countries have at least one sector-related trade union, although the number of organisations varies from 2 to 12 (Table 8). Sector-related employer organisations exist in 20 Member States and in the UK. The number of organisations per country varies between 0 and 15.

Table 8: Number of trade unions/professional associations in the audiovisual sector

Number of trade unions/professional associations in the audiovisual sector in the country	Country	Number of employer organisations/business associations in the audiovisual sector in the country
2	AT	3
9	BE	6
6	BG	1
5	CY	0
3	CZ	2
5	DE	6
9	DK	2
3	EE	2
10	EL	2
4	ES	2
7	FI	4
12	FR	15
7	HR	3
5	HU	0
5	IE	3
7	IT	7
2	LT	0
3	LU	0
4	LV	1
2	MT	0
5	NL	4
9	PL	0
10	PT	3
2	RO	0
6	SE	2
9	SI	1
4	SK	1
155	EU27	70
5	UK	2

Sources: Tables 9 and 14 for trade unions and Tables 17 and 20 for employer organisations

The countries without a sectoral employer organisation included in this study are Cyprus, Hungary, Lithuania, Luxembourg, Malta, Poland and Romania. The specific industrial relations landscape in these countries deserves to be clarified. For Hungary there is Media Service Support and Asset Management (Médiaszolgáltatás-támogató és Vagyonkezelő, MTVA), which is a state-owned public media service organisation involved in single-employer collective bargaining. It is, however, a single employer (company),

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and cannot thus be considered an employer organisation (organising several sectoral employers) in this study. In Luxembourg, there is multi-employer collective bargaining for the employees of three companies – RTL, CLT-UFA and BCE – directly with the management of those companies, without any overarching sectoral employer organisation.

In Lithuania and Poland, there are business associations, which cannot be considered employer organisations. In Lithuania, there are a number of associations operating in the sector (Association of Lithuanian Radio and Television, Association of Regional Radio Stations, Independent Producers Association, Vilnius Film Cluster, Lithuanian Filmmakers Union); however, they do not view themselves as social partners (employer and/or employee organisations) and do not participate in collective bargaining. In Poland there are the following two organisations:

- Private Media Employer Organisation (Związek Pracodawców Prywatnych Mediów, ZPPM) – not involved in collective bargaining and not affiliated to any European-level federations/organisations
- Public Media Employer Organisation (Związek Pracodawców Mediów Publicznych, ZPMP) – not involved in collective bargaining and not affiliated to any European-level federations/organisations

Cyprus and Malta have a cross-industry employer organisation each, with some members from the audiovisual sector, although they cannot be considered sector-related organisations within the scope of this study, as they are not involved in sector-related collective bargaining. This concerns the MEA in Malta and the OEB in Cyprus.

2.1. Coverage, sector-relatedness and organisational density of trade unions in the sector

Of the 160 trade unions active in the sector, 62 (39%) organise workers in all four NACE codes encompassing the audiovisual sector. Even fewer, 31 (19%), organise workers in all four of the occupational categories. The most common scenario is to cover only one of the occupational categories. More detailed breakdowns of trade union representation in the audiovisual sector by NACE code and sectoral occupational categories are shown in Tables 9–11. The reason why attention is given here to the coverage of the different subsectors and occupational categories is that there are three European trade union organisations with specific membership domains. FIM is expected to organise the musicians in the sector, FIA the performers/actors, and EFJ the journalists (see Chapter 3). Table 9 shows how this corresponds with the (often larger) scopes of the membership domains of their affiliated trade unions.

Table 9: Trade unions by type of sector coverage

	NACE 59.1	NACE 59.2	NACE 60.1	NACE 60.2	Musicians	Performers	Journalists	Technicians etc.
Number (%) of trade unions with NACE code/occupational category coverage	125 (79)	76 (48)	122 (77)	121 (76)	54 (34)	60 (38)	85 (53)	103 (65)
Number of Member States with NACE code/occupational category coverage by at least one trade union	27 + UK	25 + UK	27 + UK	27 + UK	24 + UK	24 + UK	27 + UK	27 + UK

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 10: Width of trade union coverage

	0	1	2	3	4 (full)	n.d.
Number (%) of trade unions covering this number of NACE codes	0 (0)	25 (16%)	26 (16%)	41 (26%)	62 (39%)	6 (4%)
Number (%) of trade unions covering this number of occupational categories	8 (5)	69 (43)	35 (22)	13 (8)	31 (19)	4 (3)

Source: *Network of Eurofound Correspondents' national contributions to this study, 2019*

With only a few exceptions, all four occupational groups are covered by at least one trade union. For Cyprus, Estonia, Hungary and Lithuania, this study has not found trade unions covering musicians, and trade unions covering other performers are missing in Cyprus and Lithuania.

The same is true of the coverage of different economic activities: all NACE codes are covered by at least one organisation except in Estonia and Greece, where there are no trade unions covering NACE code 59.2 (sound recording and music publishing activities).

In addition to showing the sector coverage of each identified trade union, Table 11 also highlights which organisations view themselves as professional associations, rather than traditional trade unions. These are marked light blue and fall within the scope of this study primarily because of their affiliation to EURO-MEI/UNI Europa, FIM, FIA or the EFJ. Professional associations are generally not involved in collective bargaining and often organise self-employed people, freelancers or other workers working under atypical forms of employment. Thus, their activities are similar to those performed by a guild. Their overrepresentation in this sector is connected to characteristics of the employment landscape in the audiovisual sector described in Chapter 1.

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Table 11: Sector coverage of trade unions, 2019

Country	Trade union/professional association	Parts of the sector organised								EU affiliation				Involvement in CB
		Occupations covered				Membership domain covered				EURO-MEI	FIM	FIA	EFJ	
		Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2					
AT	Younion													
	GPA-djp													
BE	ACV Puls													
	ACV-Transcom													
	ACV-CNE													
	ACOD – CGSP													
	BBTK – SETCa													
	ACCG													
	ACLVB – CGSLB													
	AJP													
	VVJ													
BG	HPTC													
	FC-CL Podkrepa													
	UBJ													
	CAP													
	UBMD													
	TU Technique													
CY	SEK													
	SIDIKEK – PEO													
	OYIK – SEK													
	PASEY – PEO													
	Union of Cyprus Journalists													
CZ	OS Media													
	NOO ČT v Praze													
	SN ČR													
DE	ver.di													
	VRRF													
	DJV													
	BFFS													
	DOV													
DK	FAF													
	DJ													
	DMF													
	DAF													
	DSF													
	Metal													
	DM													
	DJØF													

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Country	Trade union/professional association	Parts of the sector organised							EU affiliation				Involvement in CB		
		Occupations covered				Membership domain covered				EURO-MEI	FIM	FIA		EFJ	
		Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2						
	MDR														
EE	ENL														
	EAL														
	TALO														
EL	POSPERT														
	SEI														
	PMS														
	ETITA														
	ETER														
	ESIEA														
	ESIAMTH														
	ESPIT														
	POESY														
	ETEKT OT														
ES ¹⁰	FSC-CCOO														
	FeSMC-UGT														
	CONARTE														
	FeSP														
FI	SJL														
	TEME														
	PAM														
	Finnish Actors Union														
	YTN														
	SML														
	Pro														
FR	FNSAC-CGT														
	SNTPCT														
	FASAP-FO														
	F3C-CFDT														
	Journalistes FO														
	CFDT Journalistes														
	SNJ														
	SNJ-CGT														
	Fedecom CFTC														
	CFE-CGC														

¹⁰ There are two Spanish trade unions that are affiliated to European social partner organisations, and as such represented on the ESSDC, although no information was provided regarding their sector-relatedness: SPME (FIM) and ELA (EFJ). This report cannot therefore confirm their relevance in the scope of this study.

Representativeness of the European social partner organisations: Audiovisual sector

Country	Trade union/professional association	Parts of the sector organised							EU affiliation				Involvement in CB		
		Occupations covered				Membership domain covered				EURO-MEI	FIM	FIA		EFJ	
		Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2						
	UNSA Spectacle et Communication														
	SUD														
HR	HSDK														
	SNH					n.d.	n.d.	n.d.	n.d.						
	SOMK														
	SGNDH					n.d.	n.d.	n.d.	n.d.						
	HDDU														
	HND														
	HGU														
HU	MMDSZ														
	FFSZ														
	HPU														
	SZÍDOSZ					Assumed	Assumed	Assumed	Assumed						
	EMSZ														
IE	SIPTU														
	Connect														
	Opatsi														
	BATU														
	NUJ														
IT	SLC-CGIL														
	Fistel-CISL														
	Uilcom-UIL														
	FNSI														
	Cisalcom														
	Snater TLC														
	Libersind Confsal														
LT	LRTDPS														
	LŽS														
LU	FLTL (OGB-L)														
	LCGB														
	ALJP														
LV	LKDAF														
	LSAB														
	LŽA														
	LŽS	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.			
MT	GWU														
	IGM														
NL	FNV Media & Cultuur														

Representativeness of the European social partner organisations: Audiovisual sector

Country	Trade union/professional association	Parts of the sector organised							EU affiliation				Involvement in CB	
		Occupations covered				Membership domain covered				EURO-MEI	FIM	FIA		EFJ
		Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2					
	Kunstenbond													
	NVJ													
	CNV Vakmensen													
	AVV													
PL	FZZPKiS													
	ZASP													
	ZZAP													
	KSKiSP NSZZ 'Solidarnosc'													
	MZZPRiTV													
	SDP													
	SDRP													
	TD													
	ZZ PAMO													
PT	Sinttav													
	Sitese													
	CENA-STE													
	SJ					n.d.	n.d.	n.d.	n.d.					
	STT													
	SMAV													
	Sindetelco													
	FE	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.					
	SPEue	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.					
Sicomp														
RO	USIS					n.d.	n.d.							
	FAIR-MediaSind													
SE	SJF													
	Unionen													
	Teaterförbundet													
	SYMF													
	Svenska musikerförbundet													
	DIK													
SI	GLOSA													
	SUKI-GLOSA													
	GLOSA-SKG													
	SKUU RTV Slovenije													
	SDRS													
	SNS													
	ZDUS													

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Country	Trade union/professional association	Parts of the sector organised							EU affiliation				Involvement in CB	
		Occupations covered				Membership domain covered				EURO-MEI	FIM	FIA		EFJ
		Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2					
	DNS													
	SVIZ													
SK	Sloves	n.d.	n.d.											
	SSN													
	OZ Masmédií	n.d.	n.d.	n.d.	n.d.									
	ÚNIA OZ PHS													
UK	BECTU													
	Equity													
	MU													
	NUJ													
	WGGB													

Notes: 'Assumed' indicates information that is probably correct, but could not be verified and confirmed as the given organisation did not provide this information. Green and orange shading denote a positive response. Light blue shading indicates an organisation identified as a professional association or guild rather than a trade union. Organisations with names in bold are affiliated to at least one of the European organisations EURO-MEI/UNI Europa, FIM, FIA and the EFJ. CB, collective bargaining; n.d., no data.

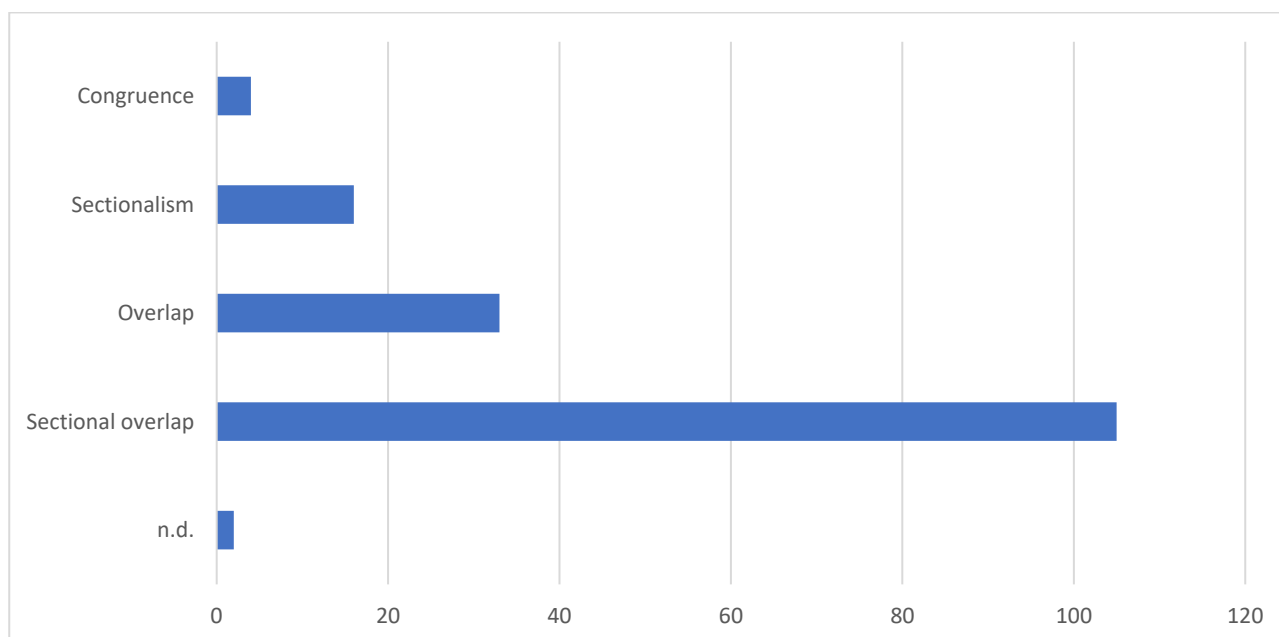
Source: Network of Eurofound Correspondents' national contributions to this study, 2019

The sector-relatedness of trade unions has been assessed above regarding whether their membership includes affiliates in the four main parts of the sector in terms of economic activities (i.e. covering NACE codes 59.1, 59.2, 60.1 and 60.2), as well as the four main occupational categories of the sector (musicians, performers, journalists and technicians). Additional factors regarding their sector-relatedness include whether all categories of employees (white- and blue-collar workers) are covered, whether employees in the larger and the smaller companies are covered, and whether employees in all parts of the country can be part of the trade union. On the basis of these factors, an organisation is categorised as being congruent with the sector or as having an overlapping, sectional or sectionally overlapping membership domain (Table 3 and Figure 1 presents these four types of sector-relatedness graphically).

Figure 1The overlapping domains indicate links with other sectors, while sectionalism might contribute to fragmentation (if different organisations cover different parts of the sector) or pluralism (if different organisations have similar membership). The numbers of trade unions in the audiovisual sector that fall into the four categories of sector-relatedness are presented in Figure 7 and Table 12.

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Figure 7: Membership domains of trade unions in the audiovisual sector (number), 2019



Note: n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 12: Membership domain of trade unions in the audiovisual sector, 2019

Country	Congruence	Sectionalism	Overlap	Sectional overlap
AT			Younion, GPA-djp	
BE			ACLVB – CGSLB	ACV Puls, ACV-Transcom, ACV-CNE, ACOD – CGSP, BBTK – SETCa, ACCG, AJP, VVJ
BG		HPTC, TU Technique		FC-CL Podkrepa, UBJ, CAP, UBMD
CY		Union of Cyprus Journalists	OYIK – SEK	SEK, SIDIKEK – PEO, PASEY – PEO
CZ			OS Media, SN ČR	NOO ČT v Praze
DE			ver.di	VRFF, DJV, BFFS, DOV
DK		FAF, MDR		DJ, DMF, DAF, DSF, Metal, DM, DJØF
EE				ENL, EAL, TALO
EL		ETITA, ETER, ETEKT OT		POSPERT, SEI, PMS, ESIEA, ESIEMTH, ESPIT, POESY
ES			FSC-CCOO, FeSMC-UGT	CONARTE, FeSP
FI			TEME	SJL, PAM, Finnish Actors Union, YTN, SML, Pro
FR	SNTPCT		FASAP-FO, F3C-CFDT, Fedecom CFTC, CFE-CGC, UNSA Spectacle et Communication, SUD	FNSAC-CGT, Journalistes FO, CFDT Journalistes, SNJ, SNJ-CGT
HR			HSDK, SOMK, SGNDH	SNH, HDDU, HND, HGU
HU		FFSZ, EMSZ	HPU	MMDSZ, SziDoSz

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Country	Congruence	Sectionalism	Overlap	Sectional overlap
IE				SIPTU , Connect, Opatsi, BATU, NUJ
IT			SLC-CGIL , Fistel-CISL , Uilcom-UIL , Libersind Confasal	FNSI , Ciscalcom, Snater TLC
LT	LRTDPS			LŽS
LU		ALJP	FLTL (OGB-L) , LCGB	
LV*			LSAB	LKDAF , LŽA
MT		IGM	GWU	
NL			FNV Media & Cultuur	Kunstenbond , NVJ, CNV Vakmensen, AVV
PL		MZZPRiTV		FZZPKiS , ZASP , ZZAP , KSKiSP NSZZ 'Solidarnosc', SDP , SDRP , TD , ZZ PAMO
PT	SMAV		STT	Sinttav , Siteese, CENA-STE , SJ , Sindelco , FE, SPEue, Sicomp
RO*			FAIR-MediaSind	
SE				SJF , Unionen , Teaterförbundet , SYMF , Svenska musikerförbundet , DIK
SI	SDRS		GLOSA-SKG , SKUU RTV Slovenije, SVIZ	GLOSA , SUKI-GLOSA , SNS , ZDUS , DNS
SK		OZ Masmédií	SSN	Sloves , ÚNIA OZ PHS
UK				BECTU , Equity , MU , NUJ , WGGB

Notes: Organisations with names in bold are affiliated to at least one of the European organisations EURO-MEI/UNI Europa, FIM, FIA and the EFJ. *No data available on the domain of LŽS (LT) or USIS (RO).

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Only four trade unions (3% of the total) have congruent membership domains. These are found in France, Lithuania, Portugal and Slovenia (see Table 12). The vast majority of trade unions cover other sectors in addition to the audiovisual sector. The most common type of domain is sectional overlap, meaning that a union covers only one or a few parts of the sector (as defined in this study) but also parts of other sectors. This is the case for 105 trade unions (66%). The second most common domain type that the trade unions fall into is overlapping. This means that they cover the whole audiovisual sector as well as other sectors (or part of them). This is the case for 35 trade unions (22%), many of these being of a general character, covering many types of workers in many different sectors. The most common sectors for overlapping trade unions to cover in addition to the audiovisual sector are live performance and print media. Some trade unions cover only a part of the audiovisual sector and have no members in any other sector. This type of membership domain is called sectionalism and is the case for 14 (9%) of the trade unions in the sector.

Combining the trade unions with congruent membership domains and those with overlapping domains gives the total number of trade unions that cover the entire audiovisual sector. This is the case for 39 trade unions out of the total 160 (24%).

Combining trade unions with overlapping membership domains and those with sectional overlap gives all the unions that have members in other sectors as well as the audiovisual sector. In total, 140 trade unions (87%)

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also have members in other sectors. Comparison with the proportion of trade unions that cover the audiovisual sector exclusively provides an indication of how closely the definition of the sector fits with the reality of trade unions' membership domains. Just 20 trade unions (13%) only have members in the audiovisual sector, so it is clear that the definition of the sector does not account for actual membership domains particularly well.

The following assesses the membership strength (organisational density) of trade unions in the audiovisual sector. Table 13 shows the organisational density of those trade unions for which data are available. Two main problems arise. First, several unions do not provide the information required to calculate density, suggesting that organisational density will be underestimated. The primary reason for this is that the trade unions find it very difficult to distinguish which members belong to different sectors. As Figure 7 shows, there is a significant degree of sectoral overlap. For instance, many of the trade unions organising journalists have members working in both the audiovisual sector and print media. And trade unions organising musicians and performers have members working in the audiovisual sector as well as in live performance. Therefore, many trade unions have declined to provide membership figures, deeming that there is too high a risk that they may be incorrect. On the other hand, those unions that have provided membership figures, as explained above, often do not operate according to the same sectoral definition as the ESSDC. Thus, this probably leads to overestimation of density for these particular unions.

The sizes of these two errors cannot be estimated. On the basis of the available data, around 155,000 trade union members can be counted.

Ranging from 5% in Belgium up to 167% in Croatia (although the latter obviously proves the abovementioned tendency to overestimate union density), organisational density rates vary greatly between countries.

Table 13: Organisational density of trade unions in the audiovisual sector

Country	Number of sector employees, 2017	Number (%) of unions covered by data	Number of trade union members in the sector	Density based on trade union data (%)
AT	9,881	1 out of 2 (50)	800	8
BE	10,559	1 out of 9 (11)	480	5
BG	7,474	5 out of 6 (83)	970	13
CY	1,344	All (100)	1,170	87
CZ	5,549	All (100)	3,890	70
DE	123,519	2 out of 5 (40)	34,500	28
DK	13,215	8 out of 9 (89)	9,320	70
EE	1,762	All (100)	800	45
EL	16,243	All (100)	14,320	88
ES	63,122	All (100)	10,430	17
FI	6,005	6 out of 7 (86)	5,080	85
FR	122,963	5 out of 12 (42)	8,500	7
HR*	6,626	All (100)	11,050	n.d.
HU	12,171	4 out of 5 (80)	3,090	25
IE	6,559	3 out of 5 (60)	2,900	44
IT	42,251	1 out of 7 (14)	5,000	12
LT	2,488	All (100)	1,200	48
LU	n.d.	All (100)	1,000	n.d.

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Country	Number of sector employees, 2017	Number (%) of unions covered by data	Number of trade union members in the sector	Density based on trade union data (%)
LV	1,945	3 out of 4 (75)	1,380	71
MT	1,091	All (100)	150	14
NL	33,352	1 out of 5 (20)	2,000	6
PL	31,693	6 out of 9 (67)	4,300	14
PT	10,073	All (100)	3,390	34
RO	15,508	1 out of 2 (50)	6,980	45
SE	22,851	5 out of 6 (83)	8,460	37
SI*	2,583	7 out of 9 (78)	2,590	n.d.
SK	3,723	All (100)	410	11
UK	163,827	3 out of 5 (60)	10,500	6

Notes: *Clear cases of overestimation of union density. The numbers of affiliated trade union members in Croatia and Slovenia are higher than the number of employees in the sector, which brought us to the conclusion that either the reported number of trade union members or the number of employees in the sector is not correct. Consequently, these two countries were marked with 'n.d.'. n.d., no data.

Sources: Eurostat, Structural Business Statistics, 2017; Network of Eurofound Correspondents' national contributions to this study, 2019

2.2. Involvement of trade unions in collective bargaining

The previous section considered the sector-relatedness and membership strength of trade unions. This section analyses their involvement in collective bargaining. Table 14 shows whether trade unions are involved in single- and/or multi-employer bargaining. Single-employer bargaining covers only the workers employed by a specific employer, while multi-employer bargaining covers all employees of the member companies of employer organisations covered by the agreement. Table 14 also includes the share of workers covered by such agreements.

In each of the EU Member States where there are sector-related trade unions, at least one trade union is involved in collective bargaining. Out of the 160 trade unions in the sector (including the UK), 131 are or have been involved in collective bargaining in some form – either multi-employer or single-employer.

Table 14: Involvement of trade unions in the audiovisual sector in collective bargaining, 2019

Country	Trade union /professional association	Collective bargaining			Collective bargaining coverage of occupational groups				Collective bargaining coverage of NACE codes				% of sector covered	
		MEB (historically)	MEB (currently)	SEB	Musicians	Performers	Journalists	Technicians	59.1	59.2	60.1	60.2	By MEB + SEB	By MEB only
AT	Younion												65	45
	GPA-djp													
BE	ACV Puls												100 (ext.)	100 (ext.)
	ACV-Transcom													
	ACV-CNE													
	ACOD – CGSP													

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Country	Trade union /professional association	Collective bargaining			Collective bargaining coverage of occupational groups				Collective bargaining coverage of NACE codes				% of sector covered	
		MEB (historically)	MEB (currently)	SEB	Musicians	Performers	Journalists	Technicians	59.1	59.2	60.1	60.2	By MEB + SEB	By MEB only
	BBTK – SETCa													
	ACCG													
	ACLVB – CGSLB													
	AJP													
	VVJ													
BG	HPTC												33	0
	FC-CL Podkrepa													
	UBJ													
	CAP													
	UBMD													
	TU Technique													
CY	SEK												27	0
	SIDIKEK – PEO													
	OYIK – SEK													
	PASEY – PEO													
	Union of Cyprus Journalists													
CZ	OS Media												≥30	0
	NOO ČT v Praze													
	SN ČR													
DE	ver.di												n.d.	n.d. but most who are covered by collective bargaining are covered by SEB
	VRFF													
	DJV													
	BFFS													
	DOV													
DK	FAF												80	n.d.
	DJ													
	DMF													
	DAF													
	DSF													
	Metal													
	DM													
	DJØF													
MDR														

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Country	Trade union /professional association	Collective bargaining			Collective bargaining coverage of occupational groups				Collective bargaining coverage of NACE codes				% of sector covered	
		MEB (historically)	MEB (currently)	SEB	Musicians	Performers	Journalists	Technicians	59.1	59.2	60.1	60.2	By MEB + SEB	By MEB only
EE	ENL ¹¹												n.d.	n.d.
	EAL													
	TALO													
EL	POSPERT													
	SEI													
	PMS													
	ETITA													
	ETER													
	ESIEA													
	ESIEMTH													
	ESPIT													
	POESY													
	ETEKT OT													
ES	FSC-CCOO													
	FeSMC-UGT													
	CONARTE													
	FeSP													
FI	SJL													
	TEME													
	PAM													
	Finnish Actors Union													
	YTN ¹²													
	SML													
	Pro													
FR	FNSAC-CGT													
	SNTPCT													
	FASAP-FO													
	F3C-CFDT													
	Journalistes FO													
	CFDT Journalistes													
	SNJ													

¹¹ While ENL is not strictly speaking involved in collective bargaining, the organisation does negotiate agreements with specific companies about repeat fees (the fees that companies must pay when shows in which the affiliated actors have performed are repeated on TV or radio).

¹² YTN is involved in collective bargaining in the sector through an affiliate (Yleisradion Päälliköt ja Ylemmät toimihenkilöt, YPY), which organises employees in managerial positions at the public service broadcasting company YLE.

Representativeness of the European social partner organisations: Audiovisual sector

Country	Trade union /professional association	Collective bargaining			Collective bargaining coverage of occupational groups				Collective bargaining coverage of NACE codes				% of sector covered	
		MEB (historically)	MEB (currently)	SEB	Musicians	Performers	Journalists	Technicians	59.1	59.2	60.1	60.2	By MEB + SEB	By MEB only
	SNJ-CGT													
	Fedecom CFTC													
	CFE-CGC													
	UNSA Spectacle et Communication													
	SUD													
HR	HSDK												35	20
	SNH													
	SOMK													
	SGNDH													
	HDDU													
	HND													
	HGU													
HU	MMDSZ												29	0
	FFSZ													
	HPU													
	SziDoSz ¹³													
	EMSZ													
IE	SIPTU												<30	<30
	Connect													
	Opatsi													
	BATU													
	NUJ													
IT	SLC-CGIL												75	n.d.
	Fistel-CISL													
	Uilcom-UIL													
	FNSI													
	Cisalcom													
	Snater TLC													
	Libersind Confasal													
LT	LRTDPS												43	0
	LŽS													
LU	FLTL (OGB-L)												90	90
	LCGB													

¹³ SziDoSz has made attempts to bargain, but is currently not a signatory party to any collective agreements.

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Country	Trade union /professional association	Collective bargaining			Collective bargaining coverage of occupational groups				Collective bargaining coverage of NACE codes				% of sector covered	
		MEB (historically)	MEB (currently)	SEB	Musicians	Performers	Journalists	Technicians	59.1	59.2	60.1	60.2	By MEB + SEB	By MEB only
	ALJP													
LV	LKDAF												n.d.	0
	LSAB													
	LŽA													
	LŽS	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.		
MT	GWU												20	0
	IGM													
NL	FNV Media & Cultuur												17	15
	Kunstenbond													
	NVJ													
	CNV Vakmensen													
	AVV													
PL	FZZPKiS												3	0
	ZASP													
	ZZAP													
	KSKiSP NSZZ 'Solidarnosc'													
	MZZPRiTV													
	SDP													
	SDRP													
	TD													
ZZ PAMO														
PT	Sinttav												37 (all persons employed), 46 (all employees)	22 (all persons employed), 27 (all employees)
	Sitese													
	CENA-STE													
	SJ													
	STT													
	SMAV													
	Sindelco													
	FE													
	SPEue													
Sicomp														
RO	USIS												n.d. but probably very low	0
	FAIR-MediaSind													
SE	SJF												80	75
	Unionen													

Representativeness of the European social partner organisations: Audiovisual sector

Country	Trade union /professional association	Collective bargaining			Collective bargaining coverage of occupational groups				Collective bargaining coverage of NACE codes				% of sector covered	
		MEB (historically)	MEB (currently)	SEB	Musicians	Performers	Journalists	Technicians	59.1	59.2	60.1	60.2	By MEB + SEB	By MEB only
	Teaterförbundet													
	SYMF													
	Svenska musikerförbundet													
	DIK													
SI	GLOSA												80 (ext.)	n.d.
	SUKI-GLOSA													
	GLOSA-SKG													
	SKUU RTV Slovenije													
	SDRS													
	SNS													
	ZDUS													
	DNS													
SK	SVIZ													
	Sloves												48	8
	SSN													
	OZ Masmédií	n.d.												
UK	ÚNIA OZ PHS													
	BECTU												n.d.	n.d.
	Equity													
	MU													
	NUJ		n.d.											
UK	WGGB													

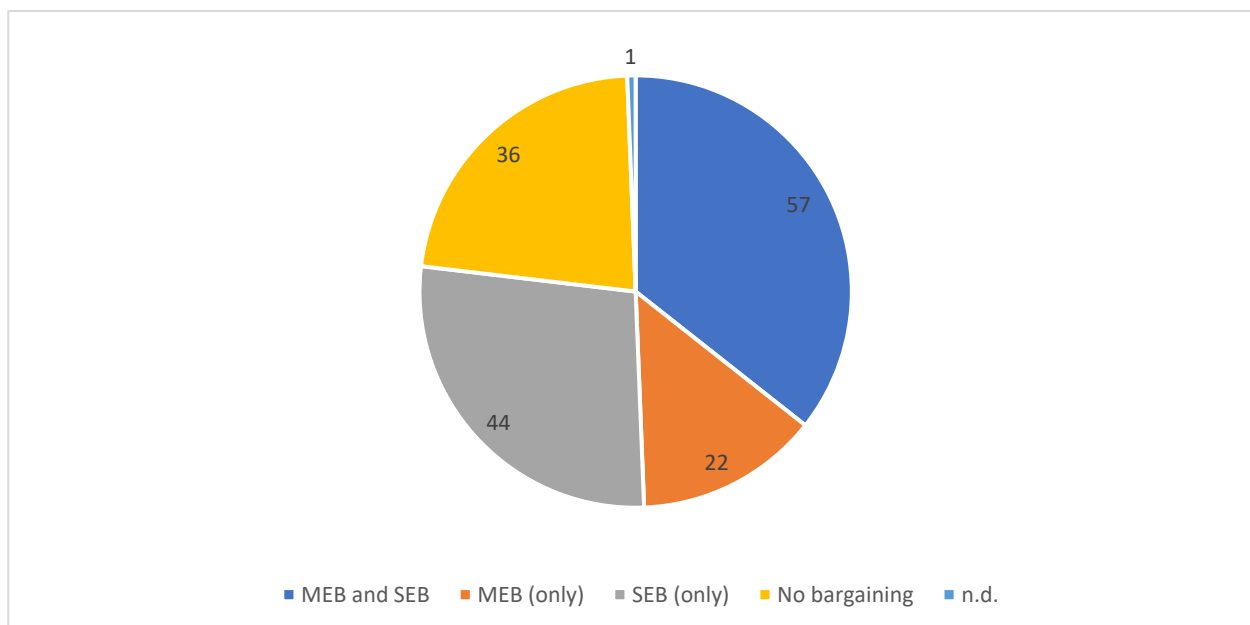
Notes: In the columns 'Collective bargaining', 'Collective bargaining coverage of occupational groups' and 'Collective bargaining coverage of NACE codes', coloured shading indicates a positive response. ext., extended agreement to make it generally binding on all workers in the sector (100%); MEB, multi-employer bargaining; n.d., no data; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 14 shows that 94 trade unions have at some point been involved in multi-employer bargaining in the audiovisual sector. Out of these, 79 still are. One hundred and one trade unions are involved in single-employment bargaining. Combining the two types of bargaining is also fairly common, as is evident from Figure 8, showing the sector trade unions' current involvement status. Out of the 160 trade unions in the sector, 56 (35%) are involved in both multi-employer and single-employer bargaining. Another 49 (31%) are only involved in single-employer bargaining, while 17 (11%) are exclusively involved in multi-employer bargaining.

A total of 37 organisations are not involved in bargaining at all. Out of these, 17 (in Belgium, Czechia, Croatia, Estonia, Latvia, Luxembourg, Malta, Poland and Slovenia) identify themselves as professional associations rather than trade unions (although they are classified as the latter for the purpose of this report).

Figure 8: Involvement of trade unions in different forms of collective bargaining (number), 2019



Note: MEB, multi-employer bargaining; n.d., no data; SEB, single-employer bargaining.

Source: Based on information from Network of Eurofound Correspondents' national contributions to this study, 2019

In 19 countries (Austria, Belgium, Croatia, Denmark, Estonia, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, the Netherlands, Portugal, Slovakia, Slovenia, Spain, Sweden and the UK), trade unions are involved in multi-employer bargaining. In 16 of these countries (all except Estonia, Greece and Luxembourg), trade unions combine single-employer and multi-employer bargaining. In the other nine countries (Bulgaria, Cyprus, Czechia, Hungary, Latvia, Lithuania, Malta, Poland and Romania), trade unions are involved in single-employer bargaining only.

The data regarding what proportion of the workforce is covered by collective bargaining are based on estimates that have been either provided by members of the Network of Eurofound Correspondents or inferred from general information about collective bargaining coverage (particularly where such coverage is near universal) and systems for the extension of collective agreements (see, for example, Eurofound, 2011 and 2015; Oesingmann, 2016). As the last two columns in Table 14 show, collective bargaining coverage varies considerably between Member States, from full coverage in countries with extension mechanisms (such as Belgium and Spain) to around 3% in Poland.

2.3. Coverage, sector-relatedness and organisational density of employer organisations in the sector

The search for employer organisations in the audiovisual sector identified a total of 72 organisations in 21 countries. Among the organisations identified, fragmentation is fairly high in some countries and lower in others. While the median number of employer organisations per country is only 2, France has as many as 15.

Of the 72 employer organisations active in the sector, only 9 (12%) organise companies in all four NACE codes encompassing the audiovisual sector. The most common scenario is to cover only one of the NACE codes. Thirteen organisations (18%) organise companies employing workers in all four of the occupational categories. More detailed breakdowns of the representation of employer organisations in the audiovisual sector by NACE code and sectoral occupational categories are shown in Tables 15–17.

Representativeness of the European social partner organisations: Audiovisual sector

Table 15: Employer organisations by type of sector coverage

	NACE 59.1	NACE 59.2	NACE 60.1	NACE 60.2	Companies employing musicians	Companies employing performers	Companies employing journalists	Companies employing technicians etc.
Number (%) of employer organisations with NACE code/occupational category coverage	49 (68)	24 (33)	27 (37)	28 (39)	26 (36)	29 (40)	26 (360)	49 (68)
Number of Member States with NACE code/occupational category coverage by at least one employer organisation	19 + UK	12 + UK	15 + UK	14 + UK	13 + UK	13 + UK	15	19 + UK

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 16: Width of employer organisation coverage

	0	1	2	3	4 (full)	n.d.
Number (%) of employer organisations covering this number of NACE codes	0 (0)	37 (51)	17 (23)	8 (11)	9 (12)	2 (3)
Number (%) of employer organisations covering this number of occupational categories	12 (16)	18 (25)	17 (23)	12 (16)	13 (18)	1 (1)

Note: n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

In contrast to the trade union landscape in the audiovisual sector (in Tables 9–11), there are several countries where NACE codes or occupational groups are not covered by any employer organisations (Tables 15–17). Companies employing musicians and performers lack representation in six countries (Belgium, Czechia, Denmark, Estonia, Portugal and Slovenia). Companies employing journalists lack representation in three countries (Slovakia, Slovenia and the UK). These companies may be represented by other organisations, but the latter do not meet the requirements to be included in this study. For instance, the organisation may not be affiliated to a European-level employer organisation or it may not be involved in collective bargaining. Or it may be that the companies are not organised at all in those countries.

The Czech Radio Company, Český rozhlas, is a public service media organisation (single employer) that is a direct member of the EBU and employs musicians. An employer organisation, organising the orchestras and theatres that employ musicians and actors/performers, does not exist in Czechia. In Belgium, Febelav has DGP Media and SBS as member companies that employ musicians, actors and journalists, albeit most of them probably as freelancers. VRT and RTBF are public service media organisations that are not affiliated to an employer organisation. The high number of freelance contracts among musicians, actors and journalists might explain why the member companies of some employer organisations in the sector do not consider them their employees; public service media organisations not being affiliated to employer organisations might be another explanation.

As for NACE codes, 59.1 is the only code for which at least one employer organisation has coverage in all countries (where there are employer organisations in the sector). NACE code 59.2 is not covered by any organisation in seven countries (Belgium, Denmark, Estonia, Greece, the Netherlands, Slovakia and Slovenia). NACE code 60.1 is not covered by any organisation in four countries (Bulgaria, Czechia, Slovakia and Slovenia).

Representativeness of the European social partner organisations: Audiovisual sector

NACE code 60.2 is not covered by any organisation in five countries (Bulgaria, Denmark, Portugal, Slovakia and Slovenia).

Table 17: Sector coverage of employer organisations/business associations, 2019

Country	Employer organisation	Parts of the sector organised								EU affiliation					Involvement in collective bargaining	
		Occupations covered				Membership domain covered										
		Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2	CEPI	EBU	FIAPF	ACT	AER		
AT	FAMA															
	FVKKV															
	VÖP ¹⁴															
BE	VOFTP															
	VOTF															
	Febelav															
	FEWEB ¹⁵ (no membership in audiovisual sector)					n.d.	n.d.	n.d.	n.d.							
	UPFF															
	FCB															
BG	Association of the film and TV producers															
	АБРО ¹⁶ (ABBRO)															
CY	No employer organisation in the sector															
CZ	APA															
	AKVT															
DE	TPR															
	HDF Kino															
	Produzentenallianz															
	VTFF															
	Vaunet															
DK	Producentforeningen															

¹⁴ VÖP is not entitled to conclude a collective agreement; this right lies with the Chamber of Commerce. VÖP is, however, involved in collective bargaining (as a partner of the Chamber of Commerce and the commercial broadcasters).

¹⁵ The Belgian organisation FEWEB seems not to be sector related, as it does not seem to have members in the sector. It is involved in sector-related collective bargaining, but only by being part of a joint committee that has a wider scope, its involvement in that collective bargaining committee is based on its membership outside the audiovisual sector.

¹⁶ In Bulgaria there is also the Association of Bulgarian Broadcasters (Асоциация на българските радио-телевизионни оператори, АБРО). It organises 48 companies in the sector, which together represent about 25% of the sectoral workforce. As it is not involved in collective bargaining or social dialogue at national level, not recognised as a sectoral employer organisation and not affiliated to a European social partner organisation, it was not included in this study, as it is merely a business association, which does not deal with working conditions. It is, however, a member of a national cross-industry employer organisation, the Confederation of Employers and Industrialists in Bulgaria (CEIBG).

Representativeness of the European social partner organisations: Audiovisual sector

Country	Employer organisation	Parts of the sector organised							EU affiliation					Involvement in collective bargaining	
		Occupations covered				Membership domain covered				CEPI	EBU	FIAPF	ACT		AER
		Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2						
	Danske Medier ¹⁷														
EE	ERFÜ										1				
	EFK ¹⁸														
	ERL ¹⁹														
	Estonian Ministry of Culture														
EL	EIIRA														
	EITISEE														
ES	AERC														
	AEC														
FI	PALTA														
	APFI														
	RadioMedia ry														
	Medialiitto ry														
FR	UPC														
	API														
	SPI														
	SPFA														
	SPECT														
	USPA														
	SNEP														
	FICAM														
	ACCeS														
	TLSP														
	CNRA														
	SIRTI														
	SNRL														
	SNRC														
SMSP															

¹⁷ Danske Medier's sister organisation Danske Medier Arbejdsgiver (DMA) is the organisation that has the authority to negotiate collective bargaining agreements. Danske Medier is a trade association/advocacy group, while DMA is an employer organisation.

¹⁸ In Estonia there is the Estonian Film Industry Cluster (Eesti Filmitööstuse Klaster, EFK), which represents 18 member companies with a collective workforce of about 100 employees in the sector. It is not involved in collective bargaining and not recognised as an employer organisation. However, it expressed interest in negotiating on working conditions in the sector, although in the absence of a trade union counterpart this is difficult. EFK has not been included in this study, because it is not a national social partner organisation and is not affiliated to a European social partner organisation. Since it has expressed its interest in becoming a member of the FIAPF in the future, it deserves to be mentioned here.

¹⁹ The Association of Estonian Broadcasters (Eesti Ringhäälingute Liit, ERL) organises 12 broadcasting companies with a collective workforce of about 600 employees. It is the largest business association in the sector. As it is a business organisation that is not involved in collective bargaining or social dialogue, not recognised as an employer organisation and not affiliated to a European social partner organisation, it was not included in this study.

Representativeness of the European social partner organisations: Audiovisual sector

Country	Employer organisation	Parts of the sector organised								EU affiliation					Involvement in collective bargaining
		Occupations covered				Membership domain covered									
		Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2	CEPI	EBU	FIAPF	ACT	AER	
HR ²⁰	MK														
	HRUP														
	HDNP														
HU	No employer organisation in the sector														
IE	SPI														
	Audiovisual Ireland/lbec														
	IBI														
IT	FIMI														
	Univideo														
	Aeranti-Corallo														
	APA														
	ANICA														
	ANEC														
	CRTV														
LT	No employer organisation in the sector														
LU	No employer organisation in the sector														
LV	Film Producers Association of Latvia	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.						

²⁰ In Croatia there are also five other organisations that are not involved in collective bargaining, not recognised as employer organisations and not affiliated to European social partner organisations, and therefore not included in this study. (1) The Croatian Employers' Association – Coordination of cultural and creative industry (Hrvatska udruga poslodavaca – Koordinacije kulturnih i kreativnih industrija, HUP KKKI) represents nine companies in the sector, which employ about 3% of the sectoral workforce. They are involved in cross-industry social dialogue via their membership in the cross-industry employer organisation, the Croatian Employers' Association. (2) The Croatian Audiovisual Centre (Hrvatski audiovizualni centar, HAVC) is the government-backed strategic agency for the audiovisual sector in Croatia. It has 12 employees but regularly collaborates with 130 production houses, which are mostly firms and arts organisations. As it is not an employer organisation, it was not included in the study. (3) The Croatian Film Workers' Association (Hrvatsko društvo filmskih djelatnika, HDFD) has more than 1,000 individual members in occupations related to film production, covering 14% of the sectoral workforce. As the oldest and the largest filmmakers' association in Croatia, the HDFD has been looking after the dignity and well-being of Croatian professional filmmakers for more than 68 years and has played a huge role in the evolution of the Croatian film industry. It is, however, not involved in collective bargaining or social dialogue, not recognised as a national employer organisation and not affiliated to a European social partner organisation, which is why it was not included in this study. (4) The Croatian Association of Radio Publishers (Hrvatska udruga radijskih naknadnika, HURIN) has 121 local, regional and national radio stations as members, covering about 6% of the sectoral workforce. HURIN is not involved in collective bargaining or social dialogue, not recognised as a national employer organisation and not affiliated to a European social partner organisation, which is why it was not included in this study. (5) The Federation of the Phonographic Industry Croatia (Hrvatska diskografska udruga, HDU) represents the business interests of 20 companies, of which 14 are regular members and 6 are associate members. It is not involved in collective bargaining or social dialogue, not recognised as a national employer organisation and not affiliated to a European social partner organisation, which is why it was not included in this study.

Representativeness of the European social partner organisations: Audiovisual sector

Country	Employer organisation	Parts of the sector organised				EU affiliation				Involvement in collective bargaining						
		Occupations covered				Membership domain covered										
		Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2		CEPI	EBU	FIAPF	ACT	AER	
MT	No employer organisation in the sector (MEA has one single audiovisual sector company affiliated ²¹)															
NL	NPO															
	FPN															
	NVBF															
	RPO															
PL	(KIPA) ²²															
PT	APIT															
	APR															
	APEC															
RO	No employer organisation in the sector															
SE	Medieföretagen															
	Film & TV-producenterna															
SI	DFPS															
SK	SAPA															
	ANP ²³															
UK	PACT															
	Radiocentre															

Note: Green and orange shading denote a positive response. Light blue shading indicates an organisation identified as a professional associations not engaged in collective bargaining or social dialogue. Organisations with names in bold are affiliated to at least one of the European organisations CEPI, the EBU, the FIAPF, ACT and AER. n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

²¹ In Malta the cross-industry employer organisation MEA is a member of SGI Europe (formerly CEEP, the European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest). MEA has one audiovisual sector company affiliated, PSB Ltd, with 103 employees in the sector, representing 8% of the sectoral workforce in Malta.

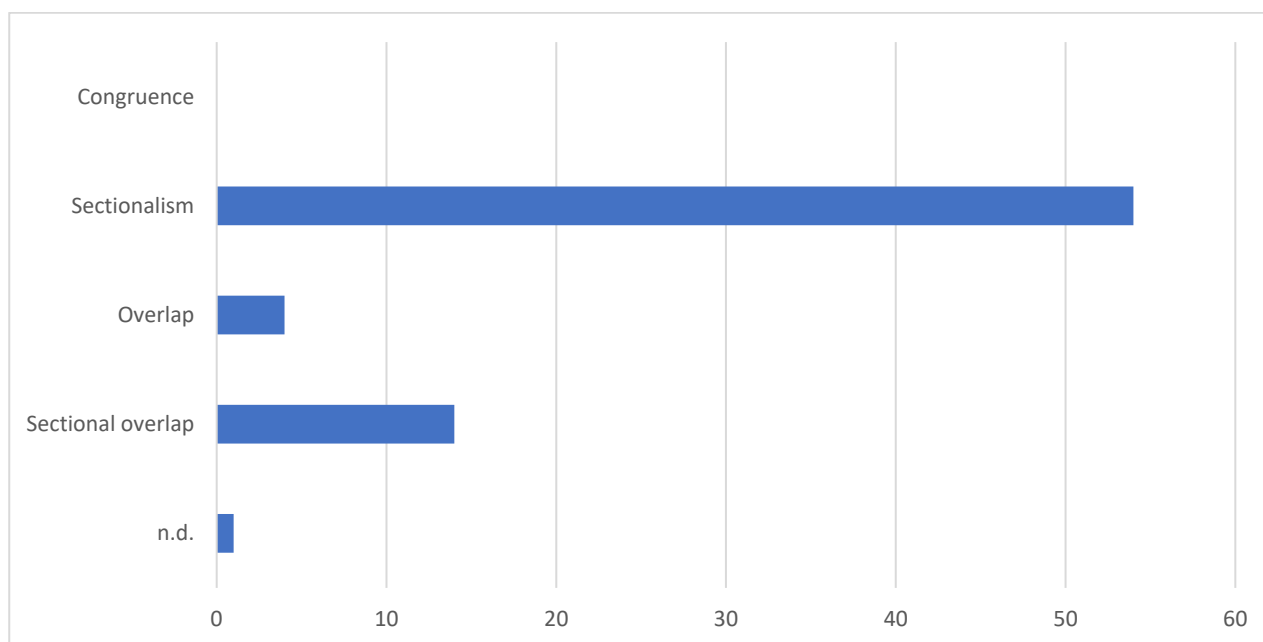
²² The Polish Producers Alliance (Aktualności – KIPA Krajowa Izba Producentów Audiowizualnych, KIPA) joined CEPI and the FIAPF in 2020. As the data collection for this study was conducted in 2019, no information on KIPA is included in this study. Therefore, no employer organisation from Poland was included.

²³ In Slovakia there is the Association of Independent Producers (Asociácia nezávislych producentov, ANP), which represents 21 companies that employ around 5% of the sectoral workforce. Many self-employed people work for its member companies occasionally, on temporary project-related contracts. The ANP is considered to be a business association, as it is not involved in collective bargaining or social dialogue and not affiliated to a European social partner organisation, so it was not included in this study.

Representativeness of the European social partner organisations: Audiovisual sector

Figure 9 and Table 18 show the domain coverage of the employer organisations in the sector. As we have seen from Tables 15–17, most of the organisations cover only part of the audiovisual sector. In fact, only four organisations (in Finland, Ireland, Italy and Sweden) can be considered to cover the whole sector. All four also cover parts of other sectors, giving them an overlapping domain type. No organisations identified in this report have a congruent domain. That is, none of them cover all parts of the audiovisual sector while not also covering parts of other sectors.

Figure 9: Membership domains of employer organisations/business associations in the audiovisual sector (number), 2019



Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 18: Membership domain of employer organisations/business associations, 2019

Country	Congruence	Sectionalism	Overlap	Sectional overlap
AT		VOP		FAMA, FVKKV
BE		VOFTP, VOTF, Febelav, FEWEB, UPFF, FCB		
BG				Association of the film and TV producers
CY	<i>No employer organisation in the sector</i>			
CZ		APA, AKVT		
DE		HDF Kino, Produzentenallianz, VTFF, Vaunet, ProduzentenVerband		TPR
DK		Producentforeningen		Danske Medier
EE		ERFÜ		Estonian Ministry of Culture
EL		EIIRA, EITISEE		
ES		AEC		AERC
FI		APFI, RadioMedia ry	PALTA	Medialiitto ry
FR		UPC, API, SPI, SPFA, SPECT, USPA, SNEP, FICAM, ACCeS, TLSP, CNRA, SIRTI, SNRC, SMSP		SNRL
HR		HRUP, HDNP		MK
HU	<i>No employer organisation in the sector</i>			
IE		IBI	SPI	Ibec/Audiovisual Ireland
IT		FIMI, Univideo, Aeranti-Corallo, ANEC, CRTV	APA	ANICA

Representativeness of the European social partner organisations: Audiovisual sector

Country	Congruence	Sectionalism	Overlap	Sectional overlap
LT	No employer organisation in the sector			
LU	No employer organisation in the sector			
LV*				
MT	No employer organisation in the sector			
NL		NPO, FPN , NVBF, RPO		
PL	No employer organisation in the sector			
PT		APIT , APR, APEC		
RO	No employer organisation in the sector			
SE		Film & TV-producenterna	Medieföretagen	
SI		DFPS		
SK		SAPA		
UK				PACT, Radiocentre

Notes: Employer organisations that are members of CEPI, EBU, FIAPF, ACT or AER are marked in bold. *No data available on Film Producers Association of Latvia.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

The vast majority of employer organisations in the sector cover only a section of the audiovisual sector, either exclusively or together with parts of other sectors. The former, sectionalism, applies to 53 (74%) of the organisations. The latter, sectional overlap, applies to 14 (19%) of them. Thus, those organisations that cover only one or a few parts of the sector make up 93% of all organisations in the sector.

Combining those employer organisations with overlapping and sectionally overlapping domains gives all those that have members that are also active in other sectors. This is the case for 18 organisations (25%).

The following assesses the membership strength (organisational density) of employer organisations in the audiovisual sector. Density can be assessed in two different ways: by looking at the share of employers in the audiovisual sector represented by different organisations; or by looking at the share of audiovisual sector employees working in companies organised by specific employer organisations.

As Table 19 shows, the available data indicate that in only four or five countries do the employer organisations cover 10% or more of the companies in the sector; this is certainly the case in Croatia, Ireland and Italy, and probably also in Germany, while for France it is probably slightly less than 10%. The density of the audiovisual sector employer organisations expressed in terms of the workforce of the organised companies is much higher, which indicates that mainly the larger companies are affiliated to employer organisations. For Austria this density rate is 100%, while for Germany 72% of the sectoral workforce are employed in the companies that are affiliated to the employer organisations included in this study.

Table 19: Organisational density of employer organisations in the audiovisual sector

Country	Number of companies in the sector, 2017	Employer organisations covered by data	Companies covered by employer organisations	% of companies covered by employer organisation	Workforce of organised companies	Density in terms of workforce of organised companies (%)
AT	2,888	3 out of 3	5,178	100	75,000	100
BE	4,118	5 out of 6	102	2	n.d.	n.d.
BG	1,340	1 out of 1	7 ²⁴	1	11,200	n.d.
CY	177					
CZ	3,985	4 out of 6	106	3	n.d.	n.d.
DE	12,545	4 out of 6	1,183	9	98,121	72
DK	3,031	2 out of 2	158	5	3,105	19
EE	702	2 out of 2	19	3	738	24

²⁴ In addition, the business organisation ABBRO, which has not been included in this report (because of its non-involvement in collective bargaining and lack of affiliation at EU level), has 48 member companies in the sector.

Representativeness of the European social partner organisations: Audiovisual sector

EL	2,565	2 out of 2	40	2	n.d.	n.d.
ES	9,823	2 out of 2	257	3	14,476	16
FI	1,822	4 out of 4	109	6	4,600	43
FR	24,105	13 out of 14	1,707	7	38,932	16
HR	846	2 out of 3	212	18	n.d.	25
HU	6,579					
IE	n.d.	1 out of 3	127	25	1,500	9
IT	8,918	7 out of 7	4,342	49	n.d.	n.d.
LT	1,510					
LU	197					
LV	658					
MT	278					
NL	18,443	4 out of 4	337	2	5,000 (in 2 out of 4 employer organisations)	15 (2 out of 4 employer organisations)
PL	8,557					
PT	3,295	1 out of 3	33	1	458	5
RO	2,836					
SE	12,973	0 out of 2	n.d.	n.d.	n.d.	n.d.
SI	1,614	1 out of 1	20	1	n.d.	n.d.
SK	2,302	1 out of 1	70	3	675	15
UK	28,289	2 out of 2	490	2	n.d.	n.d.

Notes: For Austria the reported density rate appeared to be above 100% when calculated. This is most likely explained by a large proportion of freelance workers and self-employed people (one-person enterprises), temporary agency workers and trainees, as well as fixed-term employment relationships, which might lead to multiple counting. In some countries, such as Croatia and Estonia, there are also business associations that were not included in this table, for the same reasons as they were not included in Table 17, because they are not involved in collective bargaining or social dialogue, and not affiliated to a European social partner organisation. n.d., no data.

Sources: Network of Eurofound Correspondents' national contributions to this study, 2019; Structural Business Statistics (for a number of enterprises and employees)

2.4. Involvement of employer organisations in collective bargaining

The previous section considered the sector-relatedness and membership strength of employer organisations. This section examines their involvement in collective bargaining and the number of employees covered by collective bargaining agreements signed by these organisations.

In 15 countries at least one employer organisation is involved in collective bargaining (Table 20). In four countries – Bulgaria, Czechia, Slovakia, and Slovenia – the employer organisations in the audiovisual sector are not involved in collective bargaining. Seven countries have no employer organisations in the sector.

Representativeness of the European social partner organisations: Audiovisual sector

Table 20: Involvement of employer organisations in the audiovisual sector in collective bargaining, 2019

Country	Employer organisation	Collective bargaining			Collective bargaining coverage of occupational groups				Collective bargaining coverage of NACE codes				% of sector covered	
		MEB (historically)	MEB (currently)	SEB	Musicians	Performers	Journalists	Technicians	59.1	59.2	60.1	60.2	By MEB + SEB	By MEB only
AT	FAMA												65	45
	FVKKV													
	VÖP		25											
BE	VOFTP												100 (ext.)	100 (ext.)
	VOTF													
	Febelav													
	FEWEB													
	UPFF													
	FCB													
BG	Association of the film and TV producers												33	0
CY	<i>No employer organisation in the sector</i>											27	0	
CZ	APA												≥30	0
	AKVT													
DE	TPR												n.d.	n.d. but most who are covered by collective bargaining are covered by SEB
	HDF Kino													
	Produzentenallianz							n.d.						
	VTFF							n.d.						
	Vaunet													
	ProduzentenVerband													
DK	Producentforeningen												80	n.d.
	Danske Medier							n.d.						
EE	ERFÜ												n.d.	n.d.
	Estonian Ministry of Culture													
EL	EIIRA												n.d. but only a small share of workers is covered	
	EITISEE													
ES	AERC												100 (ext.)	29
	AEC													
FI	PALTA			n.d.									75	n.d.
	APFI													
	RadioMedia ry													
	Medialiitto ry													
FR	UPC												95 (ext.)	80

²⁵ VÖP is not entitled to conclude a collective agreement; this right lies with the Chamber of Commerce. VÖP is, however, involved in collective bargaining (as a partner of the Chamber of Commerce and the commercial broadcasters).

Representativeness of the European social partner organisations: Audiovisual sector

Country	Employer organisation	Collective bargaining			Collective bargaining coverage of occupational groups				Collective bargaining coverage of NACE codes				% of sector covered	
		MEB (historically)	MEB (currently)	SEB	Musicians	Performers	Journalists	Technicians	59.1	59.2	60.1	60.2	By MEB + SEB	By MEB only
	API													
	SPI													
	SPFA													
	SPECT													
	USPA													
	SNEP													
	FICAM													
	ACCeS													
	TLSP													
	CNRA													
	SIRTI													
	SNRL													
	SNRC													
	SMSP													
HR	MK							n.d.					35	20
	HRUP													
	HDNP													
HU	No employer organisation in the sector											29%	0%	
IE	SPI												<30	<30
	Audiovisual Ireland/Ibec													
	IBI													
IT	FIMI												75	n.d.
	Univideo													
	Aeranti-Corrallo													
	APA													
	ANICA													
	ANEC													
CRTV														
LT	No employer organisation in the sector											43	0	
LU	No employer organisation in the sector											90	90	
LV	Film Producers Association of Latvia	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	0
MT	No employer organisation in the sector											20	0	
NL	NPO												17	15
	FPN													
	NVBF													
	RPO													
PL	No employer organisation in the sector											3	0	

Representativeness of the European social partner organisations: Audiovisual sector

Country	Employer organisation	Collective bargaining			Collective bargaining coverage of occupational groups				Collective bargaining coverage of NACE codes				% of sector covered	
		MEB (historically)	MEB (currently)	SEB	Musicians	Performers	Journalists	Technicians	59.1	59.2	60.1	60.2	By MEB + SEB	By MEB only
PT	APIT												37 (all persons employed), 46 (all employees)	22 (all persons employed), 27 (all employees)
	APR													
	APEC													
RO	No employer organisation in the sector											n.d. but probably very low	0	
SE	Medieföretagen												80	75
	Film & TV-producenterna													
SI	DFPS												80 (ext.)	n.d.
SK	SAPA												48	8
UK	PACT												n.d.	n.d.
	Radiocentre													

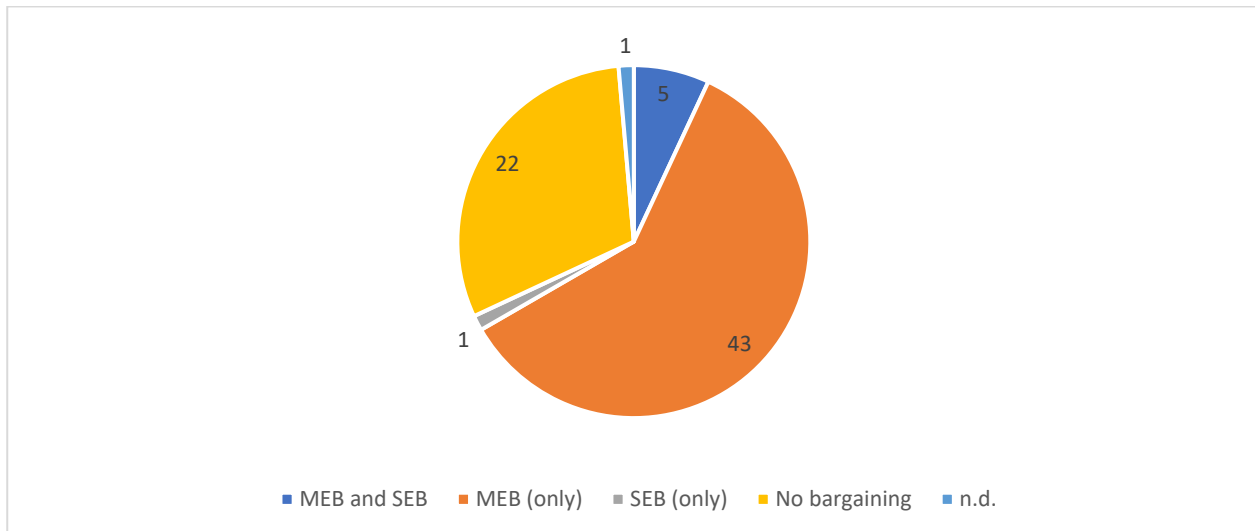
Notes: In the columns 'Collective bargaining', 'Collective bargaining coverage of occupational groups' and 'Collective bargaining coverage of NACE codes', coloured shading indicates a positive response. ext., extended agreement to make it generally binding on all workers in the sector (100%); MEB, multi-employer bargaining; n.d., no data; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

In total, 55 of the 72 employer organisations (76%) are, or have previously been, involved in collective bargaining. Figure 10 provides an overview of the share of single- and multi-employer bargaining in the sector. A total of 48 organisations (66%) are involved in multi-employer bargaining, either exclusively (43) or in combination with single-employer bargaining (5). This covers 14 countries (Austria, Belgium, Croatia, Denmark, Estonia, Finland, France, Germany, Italy, the Netherlands, Portugal, Spain, Sweden and the UK).

Only six (8%) organisations in six countries (Finland, France, Germany, Italy, Sweden and the UK) engage in single-employer bargaining, and in only one of those cases is it exclusively single-employer bargaining (Finland). This is not surprising, as single-employer bargaining generally takes place without the involvement of employer organisations. Twenty-two (30%) of the employer organisations are not involved in any form of collective bargaining. These are found in 13 countries (Bulgaria, Croatia, Czechia, Estonia, Finland, Germany, Ireland, the Netherlands, Portugal, Slovakia, Slovenia, Sweden and the UK).

Figure 10: Involvement of employer organisations in different forms of collective bargaining (number), 2019



Note: MEB, multi-employer bargaining; n.d., no data; SEB, single-employer bargaining.

Source: Based on information from Network of Eurofound Correspondents' national contributions to this study, 2019

2.5. Collective bargaining patterns and social dialogue practices

As outlined previously, the representativeness of the national social partner organisations is important for the implementation at national, regional and local levels of any agreements made by European-level organisations. The relevance of European sectoral social dialogue tends to increase along with the ability of national affiliates of the European organisations to regulate employment terms and influence national public policies affecting the sector (Perin and Léonard, 2011).

A cross-national comparative analysis shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy (Traxler, 2004). This correlation is also evident in the analysis of audiovisual sector organisations' involvement in bipartite and tripartite bodies, presented in this section. Multi-employer bargaining tends to have greater significance, primarily because of the macroeconomic impact of such agreements. An exception to this rule is the existence of single-employer agreements with very large employers, which serve as industry standards.

Table 21 summarises the coverage of different types of collective bargaining in terms of numbers of individual trade unions and employer organisations. Almost one in four (23%) of the trade unions in the audiovisual sector are not involved in collective bargaining (shown in orange in Table 17). Among the 160 trade unions, 73 (45%) are involved in multi-employer bargaining. Of those, 17 (11%) only participate in multi-employer bargaining, while 56 (35%) are involved in both multi-employer and single-employer bargaining. Excluding the one for which data are not available, the remaining 49 trade unions (31%) are only involved in single-employer bargaining.

Of the 72 employer organisations in the audiovisual sector, 50 (69%) are involved in collective bargaining. Most of them are involved in multi-employer bargaining: 44 (61%) take part in multi-employer bargaining only, and 5 also participate in single-employer bargaining. Only one organisation is involved in single-employer bargaining.

Representativeness of the European social partner organisations: Audiovisual sector

Table 21: Collective bargaining in the audiovisual sector (number and % of organisations), 2019

	Trade unions				Employer organisations					
No collective bargaining	37 (23%)				22 (30%)					
Multi-employer bargaining only	17 (11%)	73 (45%)	105 (66%)	118 (74%)	160 (100%)	44 (61%)	48 (66%)	6 (8%)	50 (69%)	72 (100%)
Both single- and multi-employer bargaining	56 (35%)					5 (7%)				
Single-employer bargaining only	49 (31%)	1 (1%)								
No data available	1 (1%)	1 (1%)								

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 22 presents collective bargaining information on a country-by-country basis, illustrating the different national collective bargaining patterns. Combining single-employer and multi-employer bargaining is the most common bargaining pattern, although not necessarily by one and the same organisation. Combination may occur from one national organisation exclusively engaging in single-employer bargaining and another in multi-employer bargaining. Some form of collective bargaining occurs in all Member States and in the UK.

Table 22: Type of collective bargaining, by country, 2019

Type of collective bargaining	Countries
Multi-employer bargaining	EL, LU
Single-employer bargaining and multi-employer bargaining	AT, BE, DE, DK, EE, ES, FI, FR, HR, IE, IT, NL, PT, SE, SI, SK, UK
Single-employer bargaining	BG, CY, CZ, HU, LT, LV, MT, PL, RO
No collective bargaining	

Note: In Luxembourg, multi-employer bargaining involves not an employer organisation, but three individual companies that together cover about 90% of the sector in Luxembourg: SA RTL Group, CLT-UFA and BCE.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 23 shows vertically the level of bargaining that takes place in different countries, and horizontally the proportion of the sectoral workforce covered by collective bargaining.

Table 23: Coverage of collective bargaining, 2019

Type of collective bargaining	Collective bargaining coverage						Information not available
	>94%	75–94%	50–74%	25–49%	1–24%	0%	
Multi-employer bargaining		LU			EL		
Single-employer bargaining and multi-employer bargaining	BE, ES, FR	DK, FI, IT, SE, SI	AT	HR, IE, PT, SK	NL		DE, EE, UK
Single-employer bargaining				BG, CY, CZ, HU, LT	MT, PL, RO		LV
No collective bargaining							

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

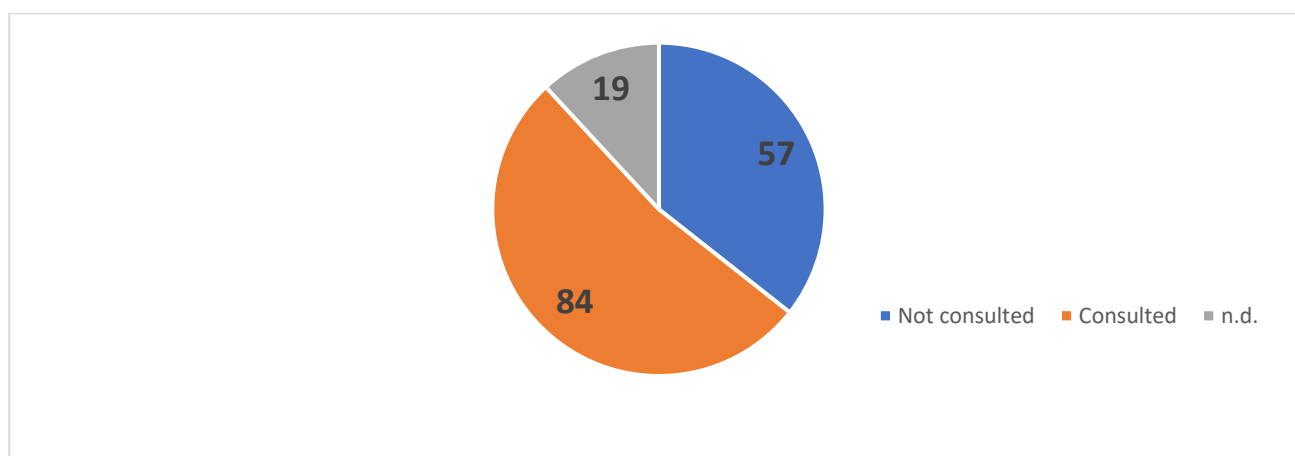
2.6. Participation in sectoral policies and national sectoral social dialogue

Involvement in policymaking is another indicator of the relevance of national social partner organisations in the sector. In a significant number of Member States (particularly in northern and western Europe), social partners' participation in the making of public policy is long established. In a number of other countries (particularly in central and eastern Europe), such involvement has emerged more recently, but in many of these countries it is already rather formalised, for instance in tripartite bodies at central level.

Participation in sectoral policies by trade unions and employer organisations

Figure 11 provides an overview of the involvement of trade unions in relevant policymaking at national level. This shows that 84 trade unions (53%) are consulted by the government on issues related to working conditions or employment and 57 (36%) are not. For 19 trade unions (12%), not enough information was available to assess whether or not they are consulted.

Figure 11: Trade union involvement in consultation (number), 2019



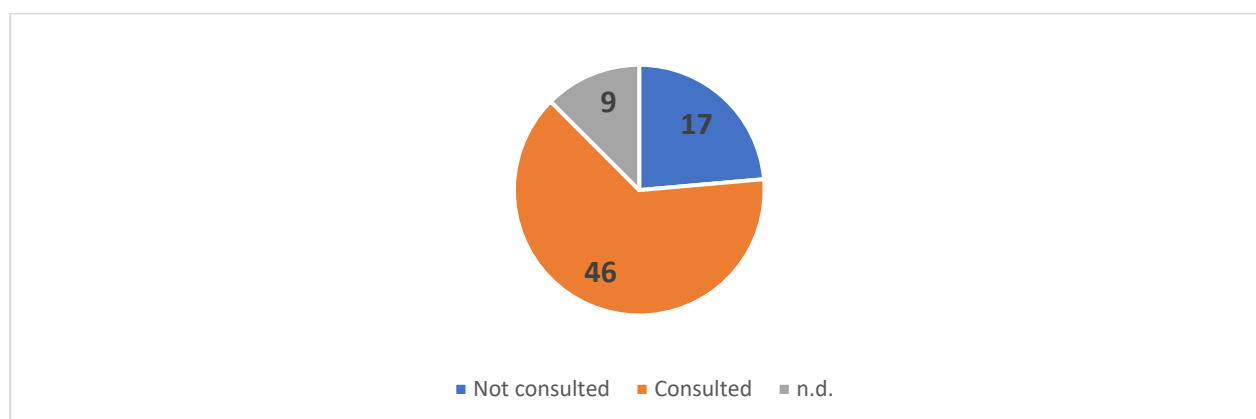
Note: n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Representativeness of the European social partner organisations: Audiovisual sector

Of the 72 employer organisations in the audiovisual sector, 46 (64%) are consulted by the government on issues related to working conditions or employment, while 17 (24%) are not (Figure 12). For nine organisations (13%), not enough information was available to assess whether or not they are consulted.

Figure 12: Employer organisation involvement in consultation (number), 2019



Note: *n.d.*, no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 24 shows that, in all countries except Bulgaria and Portugal, at least one trade union in the sector was consulted.

Table 24: Consultation of employers and trade unions, by country, 2019

	Trade unions consulted	No trade unions consulted
Employer organisations/business associations consulted	AT, BE, CZ, DE, DK, ES, FI, FR, HR, IE, IT, NL, SE, SK, UK FIAPF reported that its affiliated employer organisations in EE, LV and PL are consulted	
No employer organisations/business associations consulted	CY (no employer organisation), EL (no information on employer organisation consultation), HU (no employer organisation), LT (no employer organisation), LU (no employer organisation), MT (no employer organisation), RO (no employer organisation), SI	BG, PT

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Representativeness of the European social partner organisations: Audiovisual sector

On the employers' side, in four of the countries where there are employer organisations that could potentially be consulted (Estonia, Greece, Latvia and Slovenia), none of them reported being consulted by the government. FIAPF, however, indicated that its member organisations in Estonia and Latvia, and its new member organisation in Poland, are consulted. Consequently, only in Greece and Slovenia are there employer organisations that are not consulted. In an additional six countries, there are no employer organisations to consult (Cyprus, Hungary, Lithuania, Luxembourg, Malta and Romania). In 17 Member States and the UK, at least one employer organisation was consulted.

Bipartite and tripartite social dialogue structures for the audiovisual sector

The common involvement in tripartite and/or bipartite bodies, in which sector-related topics are dealt with or sector-related bodies are involved, implies some kind of mutual recognition. For EU Member States without established practices of multi-employer bargaining, this involvement can be a way to gain mutual recognition as representative counterparts. Table 25 indicates the trade unions and employer organisations that participate in these structures. In total, 15 countries have sector-related bipartite and/or tripartite bodies. In terms of sector-relatedness, it is not always completely clear whether these are strictly sector related or part of a wider setting.

Table 25: Tripartite and bipartite social dialogue bodies dealing with sector-related issues or involving sector-related social partners, 2019

Country	Social dialogue body	Bipartite/ tripartite	Scope/field of activity	Origin: agreement/ statutory	Trade unions participating	Employer organisations participating
AT						
BE	Sociaal Fonds voor de Audiovisuele Sector (JC227)	Bipartite	Social fund	Statutory	ACV-CSC, ACVLB-CGSLB, ABVV-FGTB	FEWEB, VOFTP, VOTF, Febelav
	Sociaal fonds voor de filmproductie (JC303.01)	Bipartite	Social fund	Statutory	ACV-CSC, ACVLB-CGSLB, ABVV-FGTB	UPFF, VOFTP
	Sociaal fonds voor de exploitatie van bioscoopzalen (JC303.03)	Bipartite	Social fund	Statutory	ACV-CSC, ACVLB-CGSLB, ABVV-FGTB	FCB
BG						
CY	Personnel Committee at Cyprus Broadcasting Corporation (CyBC)	Bipartite	Working conditions and terms of employment of CyBC's employees	Agreement	Trade Unions Federation in Semi-governmental Organisations (OHO – SEK), Cyprus Semi-government, Municipal and Local Authority Workers and Employees Trade Union (SIDIKEK – PEO)	CyBC
CZ						
DE	Pensionskasse Rundfunk; pension fund for self-employed people	Bipartite	Pension fund	Agreement	ver.di, DJV, BFFS	Public broadcasting companies
DK	Billedmediernes Faglige Udvalg (Vocational Committee of the image media)	Bipartite	Image media	Statutory	FAF, DJ, Metal	DI, ASAV
EE						

Representativeness of the European social partner organisations: Audiovisual sector

Country	Social dialogue body	Bipartite/ tripartite	Scope/field of activity	Origin: agreement/ statutory	Trade unions participating	Employer organisations participating
EL						
ES	AACCE (Academy of Motion Picture Arts and Sciences of Spain)	Bipartite	Motion picture professional issues	n.d.	CONARTE	No employer organisations but producers
	ICAA (Institute of Cinema and Audiovisual Arts) [body of the Ministry of Culture]	Tripartite	Register, support and regulation of cinema and TV show activities	n.d.	CONARTE (but ICAA consults regularly with trade unions such as CC.OO. and UGT, particularly with regard to the regulatory framework)	AEC (although AEC representative did not mention it)
	Academia TV (Academy of TV Sciences and Arts of Spain)	Bipartite	Promotion and defence of TV professional activity	n.d.	Main TV employers and more than 1,000 TV professionals within the institution (but neither trade union nor employer organisation)	
FI	Työturvallisuuskeskuksen työsuojeluhanke/työryhmä (Working group at the Centre for Occupational Safety)	Bipartite	Promotion of occupational safety within the sector and cooperation thereupon, and developing working life at workplaces	Agreement	TEME, SJL	APFI, Palta
FR	Commission Paritaire Nationale pour l'Emploi et la Formation de l'Audiovisuel (CPNEF Audiovisuel)	Bipartite	Employment, working conditions, collective bargaining	Agreement	CGT (FNSAC, SFA, SNTR, SNRT), CFDT, CFTC, FASAP-FO, CFE-CGC, SNTPT, SNJ, SNJ-CGT	ACCes, AFPF, API, CNRA, FICAM, SMSP, SyNTIP, SNRL, SPFA, SPI, SNRC, SRN, STP, UPC, USPA
	CPPNI	Bipartite	Collective bargaining	Agreement	CGT, F3C-CFDT, USNA-CFTC (affiliated to Fedecom), FORTAC-FO (affiliated to FASAP-FO)	SPECT, SPI, USPA SATEV
	Comité central d'hygiène, de sécurité et des conditions de travail de la production audiovisuelle	Bipartite	Health and safety issues	Agreement	F3C, CFTC, FASAP-FO, SNTPT, SPIAC-CGT	AFPf, SPECT, SPI, USPA
	Caisse des congés spectacle	Bipartite	Management of annual leave		CGT (FNSAC, SFA, SNTR, SNRT), CFDT, CFTC, FASAP-FO, CFE-CGC, SNTPT, SNJ, SNJ-CGT	ACCes, AFPF, API, CNRA, FICAM, SMSP, SyNTIP, SNRL, SPFA, SPI, SNRC, SRN, STP, UPC, USPA
	AFDAS	Bipartite	Vocational training	Agreement		ACCes, SNRL, SPI, USPA, UPC, FICAM, SIRT, SNEP
	AUDIENS	Bipartite	Social protection	Agreement		SPI, FICAM
	Commission paritaire de suivi d'application de l'accord chômage des intermittents (CPSA)	Bipartite	Unemployment scheme	Agreement		SPI

Representativeness of the European social partner organisations: Audiovisual sector

Country	Social dialogue body	Bipartite/ tripartite	Scope/field of activity	Origin: agreement/ statutory	Trade unions participating	Employer organisations participating
	Centre national du cinéma et de l'image animée (CNC)	Tripartite	Aid for the creation, production and distribution of films, including short films, and for exhibitions, technical industries, developing cinematography and export of French films	Statutory	F3C-CFDT, FASAP-FO, FNSAC-CGT, SFPA, SFA-CGT, SNRT-CGT, SNTPCT	ACCeS, AFPP, API, FICAM, SPI, USPA, UPC
	Comité central d'hygiène, de sécurité et des conditions de travail de la production cinématographique (CCHSCTPC)	Bipartite	Health and safety issues	Agreement	FNSAC-CGT, SNTPCT, F3C-CFDT	UPC, SPI, API
HR						
HU						
IE	Film Partnership Forum	Bipartite	Film and TV	Agreement	SIPTU	SPI
IT	Commission for fair pay in journalistic sector	Tripartite	Definition of pay levels	n.d.	FNSI	Aeranti-Corallo
	Bilateral fund for solidarity	Bipartite	Management of the solidarity fund	Agreement	SLC-CGIL, Fistel-CISL, Uilcom-UIL	CRTV, ANICA
	Bilateral body for professional training	Bipartite	Management of the body for professional training	Agreement	SLC-CGIL, Fistel-CISL, Uilcom-UIL	ANICA, APA
LT						
LU						
LV	National Tripartite Cooperation Council	Tripartite	General	Statutory	LKDAF and LSAB via Free Trade Union Confederation of Latvia	Latvian Employers' Confederation
MT	Malta Council for Economic Development (MCESD)	Mainly tripartite with exceptions	Forum for bipartite dialogue between employers and employees' representatives; and a supportive framework for social dialogue; also provides systematic monitoring and evaluation of bi-and tripartite social dialogue	Statutory	GWU is the only sector-related union that forms part of MCESD	MEA (not sector related)
NL	SER	Tripartite	National social and economic council, which facilitates discussions between government institutions, employers and workers, across sectors	n.d.	FNV, CNV, VCP	VNO-NCW, MKB Nederland
	Arbeidsmarkt Agenda Culturele en Creatieve sector	Tripartite	Improvement of working conditions in the cultural and creative sector; composed mainly of interest groups from the cultural and	n.d.	Kunstenbond	

Representativeness of the European social partner organisations: Audiovisual sector

Country	Social dialogue body	Bipartite/ tripartite	Scope/field of activity	Origin: agreement/ statutory	Trade unions participating	Employer organisations participating
			creative sector, as well as a few trade unions and a representative from the Ministry of Education and Culture and the SER			
	Film Fonds	Bipartite	Public fund that, as the main fund for Dutch film, also works to represent and lobby for the sector by bringing together employers and workers in the sector; however, apparently not a formal bipartite role but something the fund does by virtue of its expertise in the sector	Not applicable	Not applicable	Not applicable
PL						
PT						
RO						
SE	Kreativ sektor	Bipartite	Activities related to the creative sector	Agreement	Teaterförbundet	Film- och TV producenterna
SI						
SK	Economic and Social Council (HSR) – no sectoral body	Tripartite	All relevant economic, labour market and social policy issues, including those concerning the sector	Statutory	Sloves via its membership of the KOZ SR	Government bodies, including the Ministry of Culture
UK	ScreenSkills (sectoral skills and training council)	Tripartite	Skills/development of apprenticeship standards	Statutory	BECTU	n.d.
	UK Music	Bipartite	Industry-funded body, which represents the collective interests of the recorded, published and live arms of the British music industry	Agreement	Musicians' Union	n.d.
	British Copyright Council	Bipartite	Not-for-profit organisation that provides a forum for discussion of copyright law and related issues at UK, European and international levels; independent, with no government funding and the only organisation of its kind in the UK	Agreement	BECTU, WGGGB, Musicians' Union, NUJ	n.d.

Note: *n.d.*, no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

2.7. Fragmentation and pluralism in the audiovisual sector

This section provides an overview of the reasons for organisational fragmentation and pluralism in the sector. Fragmentation occurs when different organisations cover different segments of a sector. This makes those organisations complementary, as their membership domains are not overlapping. Pluralism, on the other hand, is when organisations coexist in the same domain (or very similar domains), representing the same types of employees.

In the audiovisual sector, there is an average of 5.7 trade unions per country. The reasons for fragmentation and pluralism of trade unions in the different countries are shown in Table 26. The most common reason for there being more than one trade union in the sector is that different trade unions have members in separate parts of the sector (e.g. one union for journalists and another for performers). This is the case in 20 countries. In 11 countries, fragmentation can be explained by trade unions organising different categories of workers (e.g. blue-collar and white-collar workers).

Less common reasons – in just one Member State each – are that different unions cover separate parts of the country or have members in different types of companies. Lastly, in nine Member States, there was more than one trade union in the sector because different unions represent different ideologies.

Table 26: Reasons for fragmentation and pluralism of trade unions in the audiovisual sector, 2019

Country	They organise different categories of workers	They have members in different parts of the country	They have members in different types of company (in terms of size or ownership)	They have members in different parts of the sector/types of activity	They have similar membership domains but differ in terms of ideology	Other reason
AT						
BE						
BG						26
CY						28
CZ						
DE						
DK						
EE						27
EL						
ES						
FI						
FR						28
HR						28
HU						
IE						28

²⁶ Other reasons for fragmentation among trade unions in Bulgaria include the fact that there are trade unions that are affiliated to the different national trade union confederations as well as several non-affiliated ones. In addition, some trade unions are company specific.

²⁷ Another reason for fragmentation among trade unions in Estonia is that TALO is a cross-sector umbrella trade union (having RTTTA and TLL as members).

²⁸ In some countries, such as Croatia and Malta, there are different professional associations in combination with the existing trade unions. In some other countries, such as Cyprus, France and Ireland, there are professional associations for actors that are affiliated to FIA, while these actors' associations are part of a recognised sectoral trade union, which is involved in collective bargaining on their behalf. In Cyprus, AUC is part of the trade union OYIK SEK; in France the actors' association SFA is part of the trade union FNSAC CGT; and in Ireland Irish Equity is part of the trade union SIPTU.

Representativeness of the European social partner organisations: Audiovisual sector

Country	They organise different categories of workers	They have members in different parts of the country	They have members in different types of company (in terms of size or ownership)	They have members in different parts of the sector/types of activity	They have similar membership domains but differ in terms of ideology	Other reason
IT						
LT						
LU						
LV						
MT						28
NL						
PL						
PT						
RO						29
SE						
SI						
SK						
UK						

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Fragmentation is less common among employer organisations in the sector. Currently, there is an average of 2.6 employer organisations per Member State in the sector, although, as seen above, the number of employer organisations varies a lot between countries, quite a few having no organisations and others having up to 15. Table 27 shows that the main reason for the fragmentation of interest representation on the employers' side is that the organisations have members in different parts of the sector or in different types of activity. This is the case in 15 Member States. Much less common is fragmentation due to regional coverage, differences in size and ownership of the member companies, or differences in ideology. Bulgaria, Latvia, Slovakia and Slovenia only have one employer organisation each for the whole of the audiovisual sector, and thus no fragmentation or pluralism.

Table 27: Reasons for fragmentation and pluralism of employer organisations in the audiovisual sector

Country	They have members in different parts of the country	They have members in different types of company (in terms of size or ownership)	They have members in different parts of the sector/types of activity	They have similar membership domains but differ in terms of ideology	Other reason
AT					
BE					
BG	<i>Only one employer organisation in the sector</i>				
CY	<i>No employer organisation in the sector</i>				
CZ					
DE					
DK					
EE					30
EL					
ES					

²⁹ Fragmentation among trade unions in Romania is mainly due to competition among leaders, different visions and different organisational cultures. According to the Romanian correspondent who contributed to this study, this is not a sector-specific trait.

Representativeness of the European social partner organisations: Audiovisual sector

Country	They have members in different parts of the country	They have members in different types of company (in terms of size or ownership)	They have members in different parts of the sector/types of activity	They have similar membership domains but differ in terms of ideology	Other reason
FI					
FR					
HR					30
HU	<i>No employer organisation in the sector</i>				
IE					
IT					
LT	<i>No employer organisation in the sector</i>				
LU	<i>No employer organisation in the sector</i>				
LV	<i>Only one employer organisation in the sector</i>				
MT	<i>No employer organisation in the sector</i>				
NL					
PL	<i>No employer organisation in the sector</i>				
PT					
RO	<i>No employer organisation in the sector</i>				
SE					30
SI	<i>Only one employer organisation in the sector</i>				
SK	<i>Only one employer organisation in the sector</i>				
UK					31

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

³⁰ In some countries, such as Croatia, Estonia and Sweden, there are coexisting employer organisations and business associations, sometimes with the same membership domains, sometimes only with partially overlapping domains.

³¹ A further reason for fragmentation among employer organisations in the UK is that there is a demarcation between the large national broadcasters (for example, the BBC and ITV) on the one hand and independent producers on the other, who can seek membership of PACT to represent their interests.

3. European level of interest representation

This chapter presents detailed data on the representativeness of the European-level social partners in the audiovisual sector. All are listed by the European Commission as social partner organisations to be consulted under Article 154 of the TFEU. The European organisations representing the trade unions, and thus the workers of the sector, are EURO-MEI, FIM, FIA and the EFJ. The employers of the sector are represented at European level by CEPI, the EBU, ACT, the AER and the FIAPF.

The representativeness of the social partners is assessed in three ways. First, the membership strength of the European-level social partner organisations on both sides is described, based on the membership domains covered by their national affiliates (in sections 3.1 and 3.4 for the trade unions and in sections 3.5 and 3.8 for the employers). Second, their capacity to negotiate is analysed (in section 3.9); this is their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide. This capacity to negotiate is affected by the involvement of their affiliates in collective bargaining at national level, which ensures not only that they can provide an effective mandate for discussion and negotiation at European level, but also that they are in a position to implement European-level agreements. Third, their effective participation in ESSDC meetings is assessed (in section 3.10).

Finally, the limits of the representativeness of social partners involved in the ESSDC for the audiovisual sector are assessed in two ways: first by looking at the national organisations not represented by the organisations involved in the ESSDC (in sections 3.2 and 3.6), and second by presenting the representativeness of any other European associations in the sector (in sections 3.3 and 3.7).

3.1. Membership domain of European-level trade union organisations

EURO-MEI, FIA and FIM have institutionalised their cooperation in the European Arts and Entertainment Alliance. Through the EAEA, they are involved in the ESSDCs for the audiovisual and live performance sectors. The representativeness of the EAEA is composed of the sum of the representativeness of the participating organisations, namely FIA, FIM and EURO-MEI. The EAEA has no staff, resources or representativeness independent from EURO-MEI, FIA and FIM. Therefore, the focus in this chapter will be on the assessment of each of the European organisations separately. These are EURO-MEI, FIA and FIM (forming the EAEA) and the EFJ. The EFJ is not part of the EAEA.

Membership domain of UNI Europa – Media, Entertainment & Arts

UNI Europa – Media, Entertainment & Arts (EURO-MEI) is the European Region of the Media, Entertainment & Arts sector of Union Global Union (UNI MEI). Since 2000 MEI has been part of UNI, at global level,³² while UNI MEI still has its own statutes. UNI Europa is the regional organisation of UNI Global. Article 4 of UNI Europa's statutes stipulates that the membership of UNI Europa comprises those organisations in the region that are affiliated to UNI at global level (UNI Europa, 2011). In other words, EURO-MEI with its affiliates in the EU27 is part of UNI Europa.

EURO-MEI is active in issues pertaining to several aspects of the sector, including developments in ownership structure, trade policy, technological change, copyright and neighbouring rights, piracy and censorship. It acts to exchange information about collective agreements, legal standards and practices in the categories it represents at European level.³³

EURO-MEI has a wide sectoral membership domain covering both unions and guilds, in both the audiovisual and live performance sectors in Europe. It represents multiple crafts in artistic, technical and administrative professions, but also screenwriters, film directors and other workers in broadcasting, cinema, theatre and visual arts.³⁴ Its wide sectoral membership domain covers, among others, sound designers, editors, set, lighting and sound designers, directors of photography, art directors and visual effects artists, but also those working in production teams and in distribution, who mostly occupy administrative and/or managerial professions. Looking at the membership domain of the EURO-MEI-affiliated trade unions in Table 28, we see generally a wide coverage of the different activities in terms of NACE codes covered. EURO-MEI has in absolute numbers most member trade unions (38 in the EU27) covering the occupational group of technicians, while as a proportion it is also relatively strong among the trade unions organising musicians (46%) and performers (43%).

An overview of the membership of EURO-MEI is presented in Table 28. The organisation has a total of 42 members in 23 Member States (and an additional 2 in the UK), almost all of which are involved in collective bargaining. The four EU Member States where EURO-MEI does not have a sectoral trade union affiliated are Croatia, Cyprus, Estonia and Slovakia. In Greece and Hungary, there are trade unions affiliated that are not involved in collective bargaining. EURO-MEI has affiliated trade unions in 21 Member States and in the UK that are involved in collective bargaining (marked in purple on the right in Table 28).

Of EURO-MEI's 42 member organisations, 14 are also members of other European-level associations, while 28 trade unions in 17 Member States plus 2 in the UK are represented on the ESSDC by EURO-MEI only (and thus by UNI Europa). The countries where the latter is the case are Belgium, Bulgaria, Czechia, Denmark, Finland, France, Greece, Hungary, Italy, Lithuania, Luxembourg, Malta, Poland, Portugal, Slovenia, Spain, Sweden and the UK.

³² UNI was the result of the merger of four organisations: the International Federation of Commercial, Clerical, Professional and Technical Employees (FIET), Media and Entertainment International (MEI), the International Graphical Federation (IGF) and Communications International (CI). They merged on 1 January 2000, to form Union Network International. On 2 March 2009, the federation changed its name to UNI Global Union.

³³ IAEA (undated); the International Arts and Entertainment Alliance [represents audiovisual and live performance sector trade unions worldwide, as an alliance of UNI-MEI, FIA and FIM.](#)

³⁴ <https://www.uni-europa.org/category/sectors-and-groups/media/>

Representativeness of the European social partner organisations: Audiovisual sector

Table 28: Membership domain of EURO-MEI

Country	Trade union/professional association	EU affiliation				Parts of the sector organised								Involved in collective bargaining	
		EURO-MEI	FIM	FIA	EFJ	Occupations covered				Membership domain covered					
						Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2		
AT	Younion														
BE	ACV Puls														
	ACV-Transcom														
	ACV-CNE														
	ACOD – CGSP														
	BBTK – SETCa														
	ACCG														
	ACLVB – CGSLB														
BG	HPTC														
CZ	OS Media														
	NOO ČT v Praze														
DE	ver.di														
DK	Metal														
	DM														
EL	POSPERT														
ES	FSC-CCOO														
	FeSMC-UGT														
FI	TEME														
	Pro														
FR	FNSAC-CGT														
	SNTPCT														
	FASAP-FO														
	F3C-CFDT														
HU	FFSZ														
IE	SIPTU														
IT	SLC-CGIL														
	Fistel-CISL														
LT	LRTDPS														
LU	FLTL (OGB-L)														
	LCGB														
LV	LKDAF														
MT	GWU														
NL	FNV Media & Cultuur														
PL	FZZPKiS														
PT	Sinttav														
	Sitese														
	STT														
RO	FAIR-MediaSind														
SE	Unionen														
	Teaterförbundet														
SI	GLOSA														
	SUKI-GLOSA														

Representativeness of the European social partner organisations: Audiovisual sector

Country	Trade union/professional association	EU affiliation				Parts of the sector organised								Involved in collective bargaining
						Occupations covered				Membership domain covered				
		EURO-MEI	FIM	FIA	EFJ	Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2	
EU27	42 sectoral trade unions in 23 Member States and 2 in the UK form the membership domain of EURO-MEI					25	26	24	38	39	33	35	37	39
						54	60	85	103	125	76	122	121	122
						46%	43%	29%	37%	31%	45%	30%	32%	34%
UK	BECTU													
	WGGB													

Notes: The numbers in green below in the table for the EU27 correspond to the numbers of trade unions organising the different professional groups, or parts of the sector, that are affiliated to EURO-MEI. The numbers in black below are the total numbers of national trade unions, obtained from Table 9. The percentages are the proportions of all trade unions organising the different professional groups, or parts of the sector, that are affiliated to EURO-MEI.

Seven other trade unions reported being affiliated to UNI Europa for their members in other sectors, but not for their members in the audiovisual sector, so they are not involved in EURO-MEI. These seven trade unions are GPA-djp (Austria), OYIK – SEK (Cyprus), PAM (Finland), Uilcom UIL (Italy), LSAB (Latvia), Syndetelco (Portugal) and Sloves (Slovenia). Of these seven there are two, Uilcom UIL (Italy) and LSAB (Latvia), that have members in the live performance sector, who may ultimately or occasionally also work in the audiovisual sector, but those two trade unions did not confirm this, and therefore they were not included in Table 28.

Membership domain of the International Federation of Musicians

FIM was founded in 1948 and is the international organisation for musicians' unions and equivalent representative organisations. It currently has around 70 members in 60 countries around the world.

FIM is engaged in a variety of activities to advocate for the interest of its members, such as furthering the organisation of musicians, strengthening international collaboration, promoting national and international protective legislative (or other) initiatives in the interests of musicians, compiling statistical and other information referring to the music profession, and providing such information to member unions.

An overview of the membership of FIM is presented in Table 29. The organisation has a total of 24 members in 19 Member States (and an additional 1 in the UK). With only a few exceptions, FIM's members are involved in collective bargaining. The eight EU Member States where FIM does not have a member organisation are Cyprus, Czechia, Estonia, Hungary, Lithuania, Luxembourg, Malta and Romania. In Croatia, Greece and Poland, FIM has affiliated trade unions that are not involved in collective bargaining. FIM thus has trade unions affiliated that are involved in collective bargaining in 16 EU Member States and in the UK.

The sectoral and occupational coverage of FIM's members is wide but is most dense in the coverage of musicians. Around half of FIM's members are also members of other European-level associations. There are 12 trade unions in 10 Member states that are only affiliated to FIM, and 1 in the UK. The countries where FIM has member organisations that are not affiliated to any other European trade union organisation are Bulgaria, Croatia, Denmark, Finland, Germany, Greece, Poland, Slovakia, Slovenia, Sweden and the UK.

The membership domain of FIM is clearly strongest among the trade unions organising musicians, of which 41% are affiliated. There are two trade unions affiliated to FIM that do not organise musicians: ACV-Transcom in Belgium and FNV Media & Cultuur in the Netherlands. Except these two, all FIM affiliates organise musicians. Six of the 24 FIM member unions organise only musicians, while the remaining 16 member unions organise musicians, but also other employees in the audiovisual sector.

Representativeness of the European social partner organisations: Audiovisual sector

Table 29: Membership domain of FIM

Country	Trade union/professional association	EU affiliation				Parts of the sector organised								Involved in collective bargaining	
						Occupations covered				Membership domain covered					
		EURO-MEI	FIM	FIA	EFJ	Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2		
AT	Younion														
BE	ACV-Transcom														
	ACOD – CGSP														
BG	UBMD														
DE	ver.di														
	DOV														
DK	DMF														
EL	PMS														
ES	FSC-CCOO														
FI	SML														
FR	FNSAC-CGT														
HR	HGU														
IE	SIPTU														
IT	SLC-CGIL														
LV	LKDAF														
NL	FNV Media & Cultuur														
PL	ZZ PAMO														
PT	FAIR-MediaSind														
SE	SYMF														
	Svenska musikerförbundet														
SI	GLOSA														
	GLOSA-SKG														
	SVIZ														
SK	ÚNIA OZ PHS														
EU 27	24 trade unions in 19 Member States and 1 in the UK form the membership domain of FIM					22	15	10	14	18	20	19	15	20	
						54	60	85	103	125	76	122	121	122	
						41%	25%	12%	14%	14%	26%	16%	12%	16%	
UK	MU														

Note: The organisation marked in blue is considered a professional association, rather than a trade union.

FIM has four affiliated trade unions or associations with members in the live performance sector that were reported to have no members in the audiovisual sector. These four are PASEY – PEO (Cyprus), Somesok (Cyprus), SPME (Spain) and MZTSZ (Hungary). Somesok, for example, is not a trade union but a guild, having only members in the Cyprus Symphony Orchestra, which is only related to the live performance sector, not to the audiovisual sector. Pasynek is an association of freelance musicians working in bars, hotels and restaurants, which is also part of the live performance sector, not audiovisual sector.

Membership domain of the International Federation of Actors

FIA is a global federation of performers' trade unions, guilds and professional associations. The organisation was founded in 1952 and currently has around 90 member organisations globally. FIA's activities include developing and promoting the organisation of performers and working with member unions to meet the challenges related to organising performers, and carrying out advocacy work at international level in different thematic areas such as social security, taxation, and health and safety.

An overview of the membership of FIA is presented in Table 30. The organisation has a total of 29 members in 22 Member States (and an additional 1 in the UK). Eighteen of FIA's members in the Member States are involved in collective bargaining. The sectoral and occupational coverage of FIA's members is fairly wide but differs between members and is most dense in the coverage of performers and in the subsector motion picture, video and television programme activities. Twelve of FIA's members are also members of other European-level associations. So there are 17 trade unions in 15 Member States and 1 in the UK that are only affiliated to FIA. The countries for which this is the case are Bulgaria, Croatia, Cyprus, Denmark, Estonia, Finland, Germany, Greece, Hungary, Netherlands, Poland, Portugal, Romania, Slovenia, Spain and the UK.

FIA is organising 43% of the trade unions organising actors and performers. There are three trade unions affiliated to FIA that do not organise actors: ACV-Transcom in Belgium, TEME in Finland and ZDUS in Slovenia. Except these three, all FIA member unions organise actors or performers. There are 9 affiliated trade unions that only organise actors and performers, while 17 others also organise other professional groups in the audiovisual sector.

Table 30: Membership domain of FIA

Country	Trade union/professional association	EU affiliation				Parts of the sector organised								Involved in collective bargaining	
		EURO-MEI	FIM	FIA	EFJ	Occupations covered				Membership domain covered					
						Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2		
AT	Younion														
BE	ACV-Transcom														
	ACOD – CGSP														
BG	CAP														
CY	OYIK – SEK ³⁵ (AUC)														
DE	ver.di														
	BFFS														
DK	DAF														
	DSF														
EE	ENL – Association of Professional Actors														
EL	SEI – Hellenic Actors Union														
ES	FSC-CCOO														
	CONARTE														

³⁵ The direct member of FIA is the organisation the Actors Union of Cyprus, which is a part of OYIK-SEK.

Membership domain of the European Federation of Journalists

The EFJ was created in 1994 within the framework of the EFJ Constitution to represent the interests of journalists' unions and associations and their journalists. Today, it is the largest organisation of journalists in Europe, representing over 320,000 journalists in 72 journalists' organisations across 45 countries, including all the 27 EU Member States and the UK. The EFJ's main objective is to advocate for the social and professional rights of journalists working in all sectors of the media across Europe through strong trade unions and associations. The EFJ supports its affiliates to foster trade union development and to recruit new members.

Table 31 presents an overview of the membership of the EFJ. The organisation has at least one member in each of the 27 Member States – 43 in total (and an additional 1 in the UK). Of the EFJ's members, 28 in 19 Member States are involved in collective bargaining (and an additional 1 in the UK). In the countries where this is not the case it is because several EFJ member organisations have the status of professional associations, and not of a trade union that is entitled to engage in collective bargaining.

The sectoral and occupational coverage of the EFJ is slightly more occupation-focused than the other European-level organisations, naturally with a concentration on journalists. The coverage is also most dense in NACE code 60, broadcasting activities. The affiliation of most of the EFJ's members is exclusive, meaning they are generally not members of other European-level organisations than the EFJ.

Among the trade unions organising journalists, 49% are affiliated to the EFJ. Except for the LŽS in Latvia, all trade unions affiliated to the EFJ organise journalists, which is clearly the focus of its membership domain.

Table 31: Membership domain of the EFJ

Country	Trade union/professional association	EU affiliation				Parts of the sector organised								Involved in collective	
		EURO-MEI	FIM	FIA	EFJ	Occupations covered				Membership domain covered					
						Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2		
AT	Younion														
	GPA-djp														
BE	AJP														
	VVJ														
BG	UBJ														
CY	Union of Cyprus Journalists														
CZ	SN ČR														
DE	ver.di														
	DJV														
DK	DJ														
EE	EAL														
EL ⁴¹	ESIEA														
	ESIEMTH														
	ESPIT														
	POESY														
ES	FSC-CCOO														

⁴¹ The Greek journalists' trade unions have been involved in collective bargaining in the past. It is noted that in 2019 a specific ministerial decision (No. 1447/25-4-2019) was issued as regards the wages of the journalists employed in the public media under a private law employment contract. Because of this, they were no longer involved in collective bargaining in 2019 or 2020.

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	FeSP													
FI	SJL													
FR	FNSAC-CGT													
	F3C-CFDT													
	CFDT Journalistes													
	SNJ													
	SNJ-CGT													
HR	SNH													
	HND													
HU	HPU													
IE	NUJ													
IT	FNSI													
LT	LŽS													
LU	ALJP													
LV	LŽA													
	LŽS	n.d.	n.d.	n.d.		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	
MT	IGM													
NL	NVJ													
PL	SDP													
	SDRP													
	TD													
PT	SJ									n.d.	n.d.	n.d.	n.d.	
RO	FAIR-MediaSind													
SE	SJF													
SI	SNS													
	DNS													
SK	SSN													
EU27	43 trade unions and professional associations in 27 Member States and 1 in the UK form the membership domain of the EFJ					6	7	42	19	32	11	40	39	28
						54	60	85	103	125	76	122	121	122
						11%	12%	49%	18%	26%	14%	33%	32%	23%
UK	NUJ													

Note: The organisations marked in blue are considered professional associations, rather than trade unions. n.d., no data.

Most of the EFJ member organisations are represented on the ESSDC only via the EFJ. Only six of its member organisations are also affiliated to other European trade union organisations.

3.2. National trade unions not represented on the ESSDC

In 18 Member States, there are trade unions that are not affiliated to EURO-MEI, FIM, FIA or the EFJ and thus not represented on the ESSDC. Table 32 gives an overview of these organisations. The 43 unrepresented trade unions either are currently involved in collective bargaining or have been until recently. The trade unions are fairly widespread in terms of sectoral coverage but primarily cover technicians and other workers (e.g. administrators) in the sector.

Table 32: Characteristics of audiovisual sector trade unions not represented on the ESSDC

Country	Trade union	No. of members in the sector	Parts of the sector organised							Involved in collective bargaining	
			Occupations covered				Membership domain covered				
			Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1		60.2
BG	FC-CL Podkrepa	250									
	TU Technique	200									
CY	SEK	350									
	SIDIKEK – PEO	90									
	PASEY – PEO	60									
DE	VRFF	2,500									
DK	FAF	1,200									
	DJØF	100									
	MDR	200									
EE	TALO	160									
EL	ETITA	1,090									
	ETER	180									
	ETEKT OT	250									
FI	YTN	270									
FR	Journalistes FO	n.d.									
	Fedecom CFTC	n.d.									
	CFE-CGC	n.d.									
	UNSA Spectacle et Communication	3,000									
	SUD	n.d.									
HR	HSDK	2,000									
	SNH	400					n.d.	n.d.	n.d.	n.d.	
	SOMK	100									
	SGNDH	50					n.d.	n.d.	n.d.	n.d.	
HU	MMDSZ	190									
	EMSZ	1,200									
IE	Connect	n.d.									
	Opatsi	n.d.									
	BATU	90									
IT	Cisalcom	n.d.									
	Snater TLC	n.d.									
	Libersind Confsal	n.d.									
NL	CNV Vakmensen	n.d.									
	AVV	n.d.									
PL	KSKiSP NSZZ 'Solidarnosc'	1,000									
	MZZPRiTV	n.d.									
PT	SMAV	750									
	FE	40	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	
	SPEue	20	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	
	Sicomp	20									
SE	DIK	n.d.									
SI	SKUU RTV Slovenije	n.d.									

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	SDRS	1,000									
SK	OZ Masmédií	80	n.d.	n.d.	n.d.	n.d.					
	43 sector-related trade union with capacity to negotiate collective bargaining agreements in 18 Member States		11	11	17	35	33	16	28	30	41
			54	60	85	103	125	76	122	121	122
			20%	18%	20%	34%	26%	21%	23%	25%	34%

Note: *n.d., no data.*

About a quarter of all sectoral trade unions are not affiliated to any of the European trade union organisations included in the ESSDC for the audiovisual sector. Considering that they include 41 of the 122 trade unions involved in sector-related collective bargaining, this means a third of them are not represented on the ESSDC.

For two EU Member States, the largest audiovisual sector trade union is not represented on the ESSDC. These two are HSDK (Croatia) and SDRS (Slovenia). The second largest trade unions in Bulgaria, Cyprus and Poland are also listed in Table 32. These are FC-CL Podkrepa (Bulgaria), SEK (Cyprus) and KSKiSP NSZZ 'Solidarnosc' (Poland).

The far-right column in Table 35 assesses whether all trade unions on the ESSDC through their membership domains represent the entire audiovisual sector in all Member States. This is indeed the case for 20 of the 27 Member States. The seven exceptions are Bulgaria, Cyprus, Czechia, Estonia, Germany, Greece and Lithuania. In Czechia the actors and performers are not represented, in Greece the musicians are not represented, and in Lithuania the musicians, actors and performers are not represented. In Cyprus and Estonia, it is only the actors and journalists that are represented, not any other employees of the sector. In Bulgaria only the employees of the broadcasting companies are represented, not those working in audiovisual production companies that are independent from the public service media organisations.

There are also a few organisations that were not included in this study (see Table A5), mainly for two different reasons. A first reason is that the organisations are not involved in collective bargaining or social dialogue, and not affiliated to any European sector social partner organisation. This is mainly the case for trade unions that only organise employees in one single company. Examples are the CyBC trade union from Cyprus, and the TLL and RTTTA trade unions in the Estonian public service media organisation ERR. Second, there are trade unions that do not have members in the audiovisual sector, but have them in other sectors. Examples here are the VdO and GDBA in Germany and IDA in Denmark.

3.3. Other European trade union associations

Table 33 provides an overview of the membership of national trade unions. As the table shows, most Member States have no, or relatively few, affiliations to European associations other than EURO-MEI, FIM, FIA and the EFJ. In fact, three organisations listed below were only mentioned by one or two single national audiovisual sector trade unions that are involved in sector-related collective bargaining and not yet represented on the ESSDC. First there is EPSU, to which the audiovisual sector trade union Trade Unions Federation in Semi-governmental Organisations – SEK (OHO-ΣEK) is affiliated. The latter has 353 members in the sector in Cyprus. Also related to multisectoralism in the public sector is CESI, which has two sectoral trade unions affiliated. These are CNV Vakmensen in the Netherlands and the Association of Radio, Movie and TV Employees – the Media Trade Union (VRFF) in Germany. The VRFF is a member of the Civil Servants Trade Union dbb. The VRFF is a small trade union in the sector but of relevance to public service media organisations in the broadcasting part of the sector. The VRFF has cooperation agreements with the occupational associations of, for example, actors and cinematographers to represent them in collective bargaining. The VRFF is involved in collective bargaining working groups with single employers alongside ver.di and other trade unions.

Representativeness of the European social partner organisations: Audiovisual sector

The European Federation for Managers in Technologies of Information and Communication (eTIC-CEC) has only one member: the Federation of Culture, Communication and Entertainment CFE-CGC (FCCS CFE-CGC) in France. From this, it can be concluded that there are no other European trade union associations with representativeness in the sector (in more than one or two Member States) comparable to that of EURO-MEI, FIM, FIA or the EFJ.

Table 33: Other EU associations with audiovisual sector national trade unions as members, 2019

Other EU trade union organisations			Member States with an affiliate according to organisation websites	Member States with an audiovisual sector affiliate
Abbreviation	Full name	Assessment of sector-relatedness		
EPSU	European Public Service Union	EPSU organises public service workers in all different public sectors.	27 + UK	1 (CY), which is not affiliated to any of the ESSDC organisations
CESI	European Confederation of Independent Trade Unions	CESI also organises trade unions in some public sector occupations, such as government administration at central, regional and local levels, human health and social services.	15 (BE, DE, ES, FI, FR, HR, HU, IT, LT, LU, LV, NL, PL, PT, RO)	1 (DE) and 1 (NL), neither affiliated to any of the ESSDC organisations
eTIC-CEC	European Federation for Managers in Technologies of Information and Communication	A non-governmental organisation based in France, it is registered as a lobby organisation ⁴² with member organisations CFE-CGC (FR), die Führungskräfte (DE) and Federmanager (IT).	3 (DE, FR, IT)	1 (FR), which is not affiliated to any of the ESSDC organisations
EWC	European Writers' Council	The federation of 46 national organisations of professional writers and translators in 22 Member States and the UK, it also has an associate member organisation for Portugal. The EWC's member associations represent 160,000 individual authors in the book and text sector in all genres.	22 (AT, BE, BG, CY, CZ, DE, DK, EE, EL, ES, FI, FR, HR, HU, IE, LT, LV, NL, RO, SE, SI + associate member in PT) + UK	1 (UK), which is also affiliated to EURO-MEI, namely the Writers' Guild of Great Britain, which is already represented on the ESSDC via EURO-MEI

⁴² <https://ec.europa.eu/transparencyregister/public/consultation/displaylobbyist.do?id=551868910766-44>

3.4. Collective representativeness of EURO-MEI, FIM, FIA (together EAEA) and the EFJ and comparative analyses between them

Table 34 includes all the sector-related trade unions identified in Chapter 2 in the first white row, at the top. The other white rows in Table 34, at the bottom, present the collective representativeness of the European trade union organisations on the ESSDC. All the national trade unions represented by EURO-MEI, FIA, FIM and the EFJ together form the collective representation on the ESSDC. These include 117 of all 160 sectoral trade unions (73%). The coloured rows in between indicate the contribution of each of the individual European trade union organisations to this collective representativeness on the ESSDC. At the left of the table, the situation is given for the entire audiovisual sector, while the columns on the right give a breakdown for the different professional groups and the different types of activities in the sector. The far-right column indicates that, of the 122 sectoral trade unions involved in collective bargaining, 81 (66%) are represented on the ESSDC.

Looking at the number of trade unions affiliated, EURO-MEI and the EFJ have 42 and 43 member organisations respectively, and FIM and FIA have 25 and 29 respectively (see the left column in Table 34). Considering only the number of trade unions involved in collective bargaining (in the far-right column in Table 34), however, shows that EURO-MEI has the strongest representativeness, with 41 unions in 20 Member States (marked in purple). The EFJ has among its members 25 trade unions involved in collective bargaining in 17 Member States, FIM has 21 trade unions in 16 Member States, and FIA has 18 trade unions in 15 Member States.

The middle part of Table 34 shows the professional groups and activities in the sector in which each European trade union organisation is the strongest and on which it mainly focuses (marked in blue). Obviously, for FIM these are the musicians (mainly in sound production (NACE 59.2) and radio broadcasting (NACE 60.1)), for FIA the actors (mainly in TV, video and film productions (NACE 59.1)) and for the EFJ the journalists (mainly in radio broadcasting (NACE 60.1) and TV broadcasting (NACE 60.2)). Whereas FIM, FIA and the EFJ have specific, more focused membership domains, EURO-MEI has a wider membership strength, fairly balanced all over the entire audiovisual sector. It is strongest, however, among the technical professions in the sector. The vast multitude of professions represented by EURO-MEI member unions can be visualised by imagining the credits shown at the end of a major fiction film produced for television or cinema. In such a list of credits one would first see the actors (represented by FIA), then the composers and musicians (represented by FIM) and then a very long list of crew members as well as managerial and producer team staff who are organised and represented by affiliates. Together with the journalists represented by the EFJ, all types of professional groups in all types of audiovisual sector activities are well represented on the ESSDC.

Other European organisations have some minor representativeness in the sector for a few occupations (see section 3.3): the employees in the public sector part of the audiovisual sector, in which EPSU and CESI appear to have some minor representativeness; management, which for example eTIC-CEC represents in France; and finally the scenario writers and creators, who in some countries, such as the UK, have a union that is affiliated to the European Writers' Council.

In Table 34, all trade unions are considered equal, while in Table 35 the focus is on the European affiliations of the largest and second largest audiovisual sector trade unions. In 17 Member States and in the UK, the largest audiovisual sector trade union is affiliated to EURO-MEI. The trade union with most members among the occupational group of musicians is affiliated to FIM in 17 Member States and in the UK. In 19 Member states and in the UK, the trade union organising most of the actors and performers is affiliated to FIA. The trade union with most members among journalists in each Member State and in the UK is affiliated to the EFJ.

Representativeness of the European social partner organisations: Audiovisual sector

Table 34: Comparative analyses of the representativeness of the European trade union organisations with members in the audiovisual sector

	TUs in total	Type of affiliation/coverage	Occupational categories				Membership domain covered				TU involvement in CB
			Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2	
All TUs	160 (5 of which are in the UK)	Number of TUs covering this part of the audiovisual sector	54	60	85	103	125	76	122	121	123
EURO-MEI	42 (+ 2 in the UK)	Number of TUs affiliated to EURO-MEI	25	26	24	38	39	33	35	37	39
	% of 44	% of EURO-MEI TUs with coverage	57%	59%	57%	90%	92%	78%	88%	88%	92%
	28% of all TUs in the sector	% of TUs with coverage that are affiliated to EURO-MEI	46%	43%	28%	37%	31%	43%	29%	27%	32%
	22 Member States + UK	Number of Member States	14	14 + UK	15 + UK	21 + UK	22 + UK	18 + UK	19 + UK	19 + UK	20 + UK
FIM	24 (+ 1 in UK)	Number of TUs affiliated to FIM	22	15	10	14	18	20	19	15	20
	% of 25	% of FIM TUs with coverage	92%	60%	42%	58%	72%	83%	79%	62%	83%
	16% of all TUs in the sector	% of TUs with coverage that are affiliated to FIM	43%	25%	12%	14%	15%	26%	15%	12%	16%
	19 Member States + UK	Number of Member States	18 + UK	14	10 + UK	13 + UK	14 + UK	17 + UK	17 + UK	12 + UK	16 + UK
FIA	29 (+1 in UK)	Number of TUs affiliated to FIA	12	26	10	19	27	20	21	19	18
	% of 29	% of FIA TUs with coverage	41%	90%	34%	66%	93%	68%	72%	66%	62%
	18% of all TUs in the sector	% of TUs with coverage that are affiliated to FIA	22%	43%	12%	18%	22%	26%	17%	17%	15%
	22 Member States + UK	Number of Member States	12 + UK	21 + UK	10	17	21 + UK	17 + UK	18 + UK	16 + UK	13 + UK
EFJ	43 (+1 in UK)	Number of TUs affiliated to EFJ	6	7	42	19	32	11	40	39	28
	% of 43	% of EFJ TUs with coverage	14%	16%	98%	44%	74%	26%	93%	91%	65%
	27% of all TUs in the sector	% of TUs with coverage that are affiliated to EFJ	11%	12%	49%	18%	26%	14%	33%	32%	23%
	27 Member States + UK	Number of Member States	5	6	27 + UK	14 + UK	23 + UK	18 + UK	26 + UK	25 + UK	19 + UK
EAEA and EFJ	117 in all 27 Member States	Number of TUs represented on ESSDC	43	49	68	68	92	48	94	90	81
	73% of 160	% of EAEA/EFJ TUs with coverage	80%	82%	80%	66%	74%	63%	77%	74%	66%
	43 trade unions in 18 Member States	Not represented on the ESSDC (see Tables 32 and 58)	11	11	17	35	33	16	28	30	41
		% of unrepresented TUs covered	20%	18%	20%	34%	27%	21%	23%	25%	34%

Notes: The blue marked parts are the professional groups and activities in the sector on which each organisation is focused, or the most strongly represented. The organisation that has most affiliated trade unions that are involved in collective bargaining is marked in purple; this is EURO-MEI. CB, collective bargaining; TU, trade union.

Source: Network of Eurofound Correspondents 2019

Representativeness of the European social partner organisations: Audiovisual sector

Table 35: European affiliation of the largest and second largest audiovisual trade unions

	Are the most important trade unions in the AUDIOVISUAL sector affiliated to EURO-MEI?		Are the most important trade unions organising MUSICIANS affiliated to FIM?		Are the most important trade unions organising PERFORMERS affiliated to FIA?		Are the most important trade unions organising JOURNALISTS affiliated to the EFJ?		Do the unions affiliated to EURO-MEI, FIM, FIA and the EFJ cover the entire audiovisual sector?
	Largest trade union	Second largest trade union	Largest trade union	Second largest trade union	Largest trade union	Second largest trade union	Largest trade union	Second largest trade union	
AT	Younion		Younion		Younion		GPA-djp		YES
BE	ACV-CSC	ABVV-FGTB	ACV-CSC	ABVV-FGTB	ACV-CSC	ABVV-FGTB	AJP or VVJ ⁴³	AJP or VVJ ⁴³	YES
BG				UBMD			UBJ		NO
CY						OYIK – SEK (not clear which size order)	Union of Cyprus Journalists		NO
CZ	OS Media						SN ČR and OS Media		NO
DE	ver.di		DOV		BFFS		ver.di		NO
DK			DMF		DSF		DJ		YES
EE					ENL		EAL		NO
EL	PROSPERT		PMS		HAU		POESY		NO
ES	FSC-CCOO		FSC-CCOO		CONARTE		FSC-CCOO		YES
FI		TEME	SML		Finnish Actors Union		SJL		YES
FR	F3C-CFDT		FNSAC-CGT		FNSAC-CGT		SNJ		YES
HR			HGU		HDDU		SNH	HND	YES
HU			MZTSZ		SZÍDOSZ		HPU		YES
IE	SIPTU		SIPTU		SIPTU		NUJ		YES
IT	SLC-CGIL		SLC-CGIL		SLC-CGIL		FNSI		YES
LT	LRTDPS						LŽS		NO
LU	FLTL (OGB-L)						ALJP		YES
LV	LKDAF		LKDAF		LKDAF		LŽA and LŽS ⁴⁴		YES
MT	GWU						IGM		YES
NL	FNV Media & Cultuur			FNV Media & Cultuur	Kunstenbond		NVJ		YES
PL					ZASP		SDP, SDRP and TD ⁴⁴		YES
PT	Sinttav				CENA-STE		SJ		YES

⁴³ View themselves as professional associations rather than trade unions.

⁴⁴ Not possible to say which is larger.

Representativeness of the European social partner organisations: Audiovisual sector

	Are the most important trade unions in the AUDIOVISUAL sector affiliated to EURO-MEI?		Are the most important trade unions organising MUSICIANS affiliated to FIM?		Are the most important trade unions organising PERFORMERS affiliated to FIA?		Are the most important trade unions organising JOURNALISTS affiliated to the EFJ?		Do the unions affiliated to EURO-MEI, FIM, FIA and the EFJ cover the entire audiovisual sector?
	Largest trade union	Second largest trade union	Largest trade union	Second largest trade union	Largest trade union	Second largest trade union	Largest trade union	Second largest trade union	
RO	FAIR-MediaSind		FAIR-MediaSind		FAIR-MediaSind		FAIR-MediaSind		YES
SE	Unionen		Musikerförbundet		Teaterförbundet		SJF		YES
SI			GLOSA-SKG			ZDUS	SNS		YES
SK			ÚNIA OZ PHS				SSN		YES
Total	17 Member States + UK	2 Member States	17 Member States + UK	3 Member States	19 Member States + UK	3 Member States	27 Member States + UK	2 Member States	20 Member States + UK
UK	BECTU		MU		Equity		NUJ		YES

3.5. Membership domains of European-level employer organisations

The employers for the producers of audiovisual productions (NACE 59) are represented by CEPI and the FIAPF on the ESSDC. CEPI organises the employers of the producers of TV and video productions, while the FIAPF organises the employers of film producers. The representatives of the employers of the broadcasting activities on the ESSDC are the EBU, ACT and AER. The membership domain of each of these organisations is presented separately.

Membership domain of European Audiovisual Production

CEPI was founded in 1990 (then named the European Coordination of Independent Producers) to organise and represent the interests of independent cinema and television producers in Europe. Today it represents approximately 8,000 independent production companies in Europe. The organisation's objectives include representing audiovisual production at European level, protecting its interests and supporting its development; promoting the development of production through information sharing and regular dialogue; developing common policies in the context of the EU legal framework; formulating the concerns of European audiovisual production, especially when dealing with the European Commission; jointly examining and contributing to all issues related to the European Commission when the interests of the European audiovisual production profession are affected; and sharing information in order to face national challenges when the interests of the European audiovisual production profession are affected.

Table 36 presents an overview of the membership of CEPI. The organisation has 15 members in 13 Member States, 9 of which are involved in collective bargaining. In recent years a number of changes have happened in the landscape of organisations affiliated to CEPI. The Bulgarian Association of Film and TV Producers (AFTP – АФТП) and the Estonian National Producers Union (ERFÜ) were members of CEPI, but since 2017 they are no longer affiliated to CEPI. In the UK, PACT stopped its membership of CEPI in 2020. In Poland, a new member organisation joined CEPI in 2020, the Polish Producers Alliance (KIPA). This brings the number of affiliated organisations to 16 in 14 Member States. CEPI also has a European association affiliated to it called Animation in Europe, which organises associations of animation producers from 13 Member States (Belgium,

Representativeness of the European social partner organisations: Audiovisual sector

Czechia, Denmark, Finland, France, Germany, Ireland, Italy, Lithuania, the Netherlands, Poland, Portugal, Spain). Animation in Europe, however, has no activities related to working conditions of employees in the sector. For example, the SPFA (France), listed in Table 36, is not a direct member of CEPI, but an indirect member via Animation in Europe. The SPFA is included here separately because it is an employer organisation involved in sector-related collective bargaining in France. The other member organisations of Animation in Europe are also indirectly affiliated to CEPI, although they are not involved in sector-related collective bargaining at national level.

The sectoral and occupational coverage of CEPI is broad but clearly densest in the production part of the audiovisual sector (NACE 59). The companies affiliated to its member organisations are mainly active in producing motion pictures, videos and television programmes. Six of its members are also members of the FIAPF. There are eight sectoral employer organisations in seven Member States that are represented on the ESSDC only by CEPI.

Both CEPI and the FIAPF are associations representing producers' associations (and also companies, for CEPI) covering NACE 59.1. The data collection for this study made no distinction within NACE 59.1 between audiovisual productions for television and for film. However, CEPI reported that it is traditionally seen as representing television and audiovisual producers.

The extent to which the members of CEPI also cover self-employed people in the sector is indicated in the footnotes below Table 36.

Table 36: Membership domain of CEPI⁴⁵

Country	Employer organisation	European affiliation					No. of member companies	% of sector workforce	Parts of the sector organised								Involved in collective bargaining		
		CEPI	EBU	FIAPF	ACT	AER			Occupations covered				Membership domain covered						
									Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2			
AT	FAMA						>5,000	40											
BE	VOFTP						33	n.d.											
BG	АФТП (АФТР) ⁴⁶						7	45											
CZ	APA						103	n.d. ⁴⁷											
DK	Producentforeningen						108	17											
EE	ERFü	ERFü has been reported to be a member of CEPI, although this was not confirmed in the scope of this study																	
ES	AEC						147	14 ⁴⁸											
FR	UPC						181	2											
	SPFA (via Animation in Europe)						58	1											
	USPA						128	3											
HR	HDNP						n.a. ⁴⁹	n.a.											

⁴⁵ Since the data collection was conducted, CEPI has gained two new members: the Polish Producers Alliance (KIPA) and the Association of Film Professionals of the Republic of Macedonia (MFPA).

⁴⁶ The Bulgarian Association of Film and TV Producers (АФТР – АФТП) used to be a member of CEPI until 2016. Since 2017, it is no longer affiliated to CEPI.

⁴⁷ The production companies affiliated to APA have no employees. APA members generally conclude contracts with self-employed persons, performers etc.

⁴⁸ Includes both permanent and temporary workers. Permanent workers amount to 2.5%.

⁴⁹ Its members are independent producers, not companies.

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IE	SPI ⁵⁰					100	n.d.												
IT	APA ⁵¹					53	n.d.												
PL	KIPA	Since the end of 2020, KIPA has been reported to be a member of CEPI, although this was not confirmed in the scope of this study, as it was based on data collected in 2019																	
PT	APIT					33	5												
SE	Film & TV-producenterna					115	n.d.												
SI	DFPS					20	n.d.												
SK	SAPA					49	10 ⁵²												
EU27	15 employer organisations from 13 Member States form the membership domain of CEPI							7	8	3	12	15	5	2	3	9			
								26	26	29	59	51	24	27	29	50			
								27	31	10	20%	29%	21	7%	10	18%			
UK	PACT ⁵³					450	n.d.												

Notes: The orange cells indicate European affiliation, the yellow cell indicates indirect affiliation, the green cells indicate the membership domain of the organisations and the parts of the sector that they cover, and the purple cells indicate the organisations that are involved in collective bargaining. The grey shaded cells indicate CEPI member organisations who, according to the EBU, performed these activities, but those organisations themselves reported to us that they do not have employees in those activities. The numbers in green below in the table for the EU27 correspond to the numbers of employer organisations organising the different professional groups, or parts of the sector, that are affiliated to CEPI. The numbers in black below are the total numbers of national employer organisations, obtained from Table 15. The percentages are the proportions of all employer organisations organising the different professional groups, or parts of the sector, that are affiliated to CEPI. n.a., not applicable; n.d., no data.

In addition to its employer organisation members, CEPI also has one affiliated company, presented in Table 37.

Table 37: Domain of CEPI company affiliate

Member State	Company	European affiliation					Affiliation to national employer organisation	% of sector workforce	Parts of the sector organised							Involved in collective bargaining				
		CEPI	EBU	FIAPF	ACT	AER			Occupations covered				Membership domain covered							
									Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1		60.2			
ES	Mediapro						No	9												
1 CEPI member company in 1 Member State									1	1	1	1	1	1	0	1	1			

Membership domain of the International Federation of Film Producers' Associations

The FIAPF is a global organisation of film and television producers. It currently represents 36 producer organisations in 29 countries around the world. The FIAPF's mandate is to represent the economic, legal and regulatory interests of film and TV production industries in five continents. Key areas for the FIAPF's activities include copyright and related intellectual property rights legislation; enforcement of intellectual property rights legislation and anti-piracy action; deployment of digital technologies and their impact on the audiovisual value chain; technology standardisation processes; media regulation; private and public sector

⁵⁰ The Irish organisation SPI mainly covers performers and technicians who are active in the production of film and television programmes. The SPI's engagement with musicians would be either through the Screen Composers Guild or with a musician who is performing as part of a film or TV production. The SPI does not engage with journalists, except in the context of an independently produced current affairs programme.

⁵¹ L'Associazione Produttori Audiovisivi (APA) was called Associazione Produttori Televisivi (ATP) until 2018.

⁵² Not including self-employed people.

⁵³ Since 2020, PACT is no longer a member.

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film financing mechanisms; and trade-related issues. The FIAPF acts as regulator of international film festivals.

Table 38 presents an overview of the FIAPF's membership in the EU27 and the UK, based on the findings collected in the scope of this study. The FIAPF has exclusively employer organisations as members in the audiovisual sector – in 2019 a total of 13 members in 12 Member States (and an additional 1 in the UK). Since the end of 2020, KIPA from Poland is reported to be a new member organisation of the FIAPF. This brings the number of affiliated organisations to 14 in 13 Member States.

Five of its members engage in collective bargaining. In terms of sectoral coverage, the FIAPF's members are relatively concentrated in NACE code 59.1 – motion picture, video and television programme activities. Half of its members are also members of CEPI.

The FIAPF and CEPI are associations representing producers' associations (and also companies, for CEPI) covering NACE 59.1. The data collection for this study made no distinction within NACE 59.1 between audiovisual productions for television and for film, despite the differences between the two associations – the FIAPF is traditionally seen as representing film producers while CEPI is seen as representing television and audiovisual producers.

Table 38: Membership domain of FIAPF⁵⁴

Country	Employer organisation	European affiliation					No. of member companies	% of sector workforce	Parts of the sector organised								Involved in collective bargaining		
		CEPI	EBU	FIAPF	ACT	AER			Occupations covered				Membership domain covered						
									Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2			
AT	FAMA						>5,000	40											
BE	VOFTP						33	n.d.											
CZ	APA						103	n.d.											
DE	Produzentenallianz						>270	52											
	Produzenten-Verband (VDFP)						110	n.d.											
DK	Producentforeninger						108	17											
EE	ERFÜ						18	n.a.											
FI	APFI						81	15											
HR	HRUP						62	0											
LV	Film Producers Association of Latvia						n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
NL	NAPA (FPN ⁵⁵)						36	n.d.											
PL	KIPA ⁵⁶	Since the end of 2020, KIPA has been reported to be a member of the FIAPF, although this was not confirmed in the scope of this study, as it was based on data collected in 2019.																	
SE	Film & TV-producenterna						115	n.d.											

⁵⁴ Since the data collection for this study was finalised, the FIAPF has gained a new member: the Polish Producers Alliance (KIPA).

⁵⁵ Since the data collection for this report was finalised, the FPN has merged activities with the organisation NAPA, which is now the direct member of the FIAPF.

⁵⁶ KIPA became a member of the FIAPF at the end of 2020. As this study is based on data collected in 2019, no information on KIPA is included.

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SK	SAPA					49	10									
EU 27	13 employer organisations from 12 Member States form the membership domain of the FIAPF							7	7	0	7	12	2	0	3	4
								26	26	29	59	51	24	27	29	50
								27%	27%	0%	12%	24%	8%	0%	10%	8%
UK	PACT					450	n.d.									

Note: n.a., not available; n.d., no data.

Membership domain of the European Broadcasting Union

The European Broadcasting Union currently represents 115 member organisations globally. Its objectives include striving to secure a sustainable future for public service media, to provide its members with high-quality content through the Eurovision and Euroradio brands, and to create a centre for learning and sharing. The EBU is an alliance of public service media organisations. The EBU has only one employer organisation (covering more than one employer in the sector) as a member: the Dutch NPO. All other EBU members are single-employer, public service media organisations. They are different from companies that pursue commercial purposes, as public service media organisations fulfil a public service remit.

Table 39 and 40 present an overview of the EBU's membership. With only a few exceptions, the EBU's members are involved in collective bargaining. In terms of sectoral coverage, most of its members cover large parts of the sector, but all cover public service media organisations employing journalists and technicians. Almost all EBU members are exclusively members of the EBU and no other European-level associations.

Table 39: Membership domain of the EBU

Member State	Employer organisation	European affiliation					No. of member companies	% of sector workforce	Parts of the sector organised								Involved in collective bargaining		
		CEPI	EBU	FIAPF	ACT	AER			Occupations covered				Membership domain covered						
									Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2			
NL	NPO						11	12											
1 EBU member employer organisation in 1 Member State									0	0	1	1	1	0	1	1	1		
Out of the total 72 employer organisations (Table 17)									26	26	29	59	51	24	27	29	50		
As a share of total number of employer organisations in the sector (1%)									0%	0%	3%	2%	2%	0%	4%	3%	2%		

Table 40: Domain of EBU company affiliates

Country	PSMOs	European affiliation					Affiliation to national employer organisation	% of sector workforce	Parts of the sector organised								Involved in collective bargaining		
		CEPI	EBU	FIAPF	ACT	AER			Occupations covered				Membership domain covered						
									Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2			
AT	ORF						No	30											
BE	VRT						No	20											
	RTBF						No	n.d. ⁵⁷											
BG	BNR						n.d.	12											
	BNT						No	18											
CY	PIK – CyBC						No	n.d.											

⁵⁷ No data available but estimated to cover a significant part of the sector.

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CZ	ČT				No	20											
	ČRo				No	10											
DE	WDR				No	3											
	ZDF				No	3											
	SWR				No	3											
	NDR				No	3											
	RBB				No	2											
	RB				No	0 ⁵⁸											
	HR				No	1											
	SR				No	0 ⁵⁹											
	BR				No	3											
	Deutschland radio				No	1											
	MDR				No	2											
	DW				No	1											
DK	DR				No	40						EBU	EBU				
	TV2				No	11						EBU	EBU				
EE	ERR				No	20							EBU				
EL	ERT SA				No	14							EBU				
ES	RTVE				No	7							EBU				
	SER (since June 2020 no longer member of the EBU)				No	1		X	X	X	X	X	X	X			X
FI	Yle				Yes, Palta	30											
FR	FMM				Yes, SMSP	1						EBU					
	Radio France				Yes, SMSP	2											
	Europe 1				n.d.	0											n.d.
	France télévisions				Yes, SMSP	4											
HU	Duna & MTVA	According to the EBU's official list of members, the EBU has a member organisation in Hungary. This was, however, not confirmed in the scope of this study by Eurofound's national correspondents															
HR	HRT				No	40											
IE	RTE				No	>10											
	TG4																
IT	RAI				No	n.d.											
LT	LRT				No	43											
LU	CLT-UFA			n.d.	No	71 ⁶⁰	n.d.	n.d.	n.d.			n.d.	n.d.				
	ERSL				No	4	n.d.	n.d.				n.d.	n.d.				
LV	LR				No	9											
	LTV				No	0											
MT	PBS Ltd				No	9											
NL	NOS				Yes, NPO	2											
	AVROTROS				Yes, NPO	1	n.d.	n.d.									

⁵⁸ Estimated 0.2%.

⁵⁹ Estimated 0.4%.

⁶⁰ Together with RTL Group.

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	BNNVARA				Yes, NPO	1													
	KRO-NCRV				Yes, NPO	1	n.d.	n.d.				n.d.							
	NTR				Yes, NPO	1													
	Omroep MAX				Yes, NPO	0													
	EO				Yes, NPO	1													
	VPRO				Yes, NPO	1													
PL	TVP SA				No	7													
	PR SA				No	3													
PT	RTP				No	16													
RO	SRR				No	13													
	SRTV				No	15													
SE	SVT				Yes, Medief öretagen	10													
	SR				Yes, Medief öretagen	7													
	UR				Yes, Medief öretagen	1													
SI	RTV Slovenija				No	60													
SK	RTVS				No	40													
EU27	Based on the findings collected in the scope of this study, the EBU represents 57 PSMOs in 26 Member States (or, as the EBU indicates, 58 PMSO in 27 Member States)						30	29	56	57	43	36	48	47	53				
							46	47	83	84	66	52	59	74	68				
							65 %	62%	67 %	68%	65 %	69 %	81 %	64%	78%				
UK	BBC				No	17													
	ITV				Yes, PACT	3													
	ITV Network Centre				No	n.d.													
	S4C				No	0													

Notes: The EBU reported these activities are covered by the respective organisations, while those organisations themselves reported to us that they do not have employees in those activities. The green 'X's in the table indicate cells that were green before but, since this organisation is no longer affiliated to the EBU, the cells are no longer green to denote members of this organisation. n.d., no data; PSMO, public service media organisation.

Membership domain of the Association of Commercial Television in Europe

ACT represents the interests of commercial broadcasters in Europe. ACT's activities include monitoring policy developments at EU level and providing members with regulatory expertise; engaging in dialogue with EU decision-makers while providing them with sector-specific expertise; and providing a platform for members to network and exchange ideas about policy developments and best practice.

Error! Reference source not found. presents an overview of ACT's membership. Like the EBU, ACT mostly has companies as members in the audiovisual sector. In 2019, when the data were collected for this study, ACT had 16 member companies in 8 Member States (and an additional 6 in the UK). At the beginning of 2021,

Representativeness of the European social partner organisations: Audiovisual sector

ACT had 21 affiliated companies in 12 Member States. Detailed information could not be gathered on all the recently affiliated companies in the scope of this study. Companies that were reported by ACT as its member organisations, and that are listed on the ACT website as member companies, but about which no information was provided, are Discovery Networks (Netherlands and the UK), United Media (Croatia and Slovenia), Gulli (France), ProSiebenSat (Germany), Nordic Entertainment Group (Denmark, Finland and Sweden) and Disney Europe (former FOX Networks Group) (Belgium and the UK).⁶¹

Based on the information provided, 11 of the ACT member companies are involved in company-level collective bargaining in seven Member States. In terms of sectoral coverage, ACT's members are quite concentrated in NACE code 60.2 – television programming and broadcasting activities. With only one exception, its members are exclusively affiliated to ACT and no other European-level association.

Some of the member companies of ACT are multinational companies providing TV broadcasting in several Member States, while other ACT member companies, such as A3M in Spain and LNK in Lithuania, are only active in a single Member State. The Spanish company AMC Networks International, for example, has broadcasting activities in all 27 Member States. The Czech company Central European Media Enterprises (ICME) provides broadcasting in five Member States: Bulgaria, Czechia, Romania, Slovakia and Slovenia. The Belgian-based SKY also does TV broadcasting in five Member States: Austria, Germany, Ireland, Italy and Portugal. Another example is RTL Group, which does TV broadcasting in Belgium, Croatia, France, Germany, Hungary, Luxembourg and the Netherlands. The countries in which these companies provide TV broadcasting activities appear to change over the years. This is because the landscape of commercial TV broadcasting companies is in a phase of transformation, involving mergers, take-overs and several changes in the names of the companies in recent years.

Table 41: Domain of ACT company affiliates

Country	Company	European affiliation					Affiliation to national employer organisation	% of sector workforce	Parts of the sector organised							Involved in collective bargaining		
		CEPI	EBU	FIAPF	ACT	AER			Occupations covered				Membership domain covered					
									Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1		60.2	
BE	DPG Media						n.d.	n.d.										
	SBS						n.d.	n.d.										
	SKY						EGTA, ECTA, MVNOe, Digital Europe, FSA, EIF	n.d.										
	FOX Networks Group						n.d.	n.d.										
CZ	CME							7										
EL	Antenna Group						EITHSEE, EIIRA	20										
ES	AMC							1										
	Mediaset						UTECA	2										
	A3M						UTECA	3										
FI	Sanoma Media Finland						n.d.	n.d.	n.d.	n.d.								

⁶¹ At the time of writing, the acquisition of Fox by Disney Europe, Middle East and Africa was ongoing, and it is likely that by the time the report is published the acquisition will be finalised.

Representativeness of the European social partner organisations: Audiovisual sector

FR	BelIn Sports France					n.d.	0										n.d.
	Canal+ Groupe					No	3										
	TF1					No	1										
	Gulli (formerly Lagardère Active – Jeunesse TV)					n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
IE	Virgin Media Ireland (formerly TV3)					No	1										
IT	Mediaset					n.d.	n.d.										
LT	LNK					EGTA, ENEX	10										
LU	RTL					EGTA, EBU											
PT	TVI					n.d.	10										
SE	Bonniers Broadcasting AB (in 2021 called TV4Media)					Medieföre- tagen	5										
	Nordic Entertainment Group					n.d.	0										
EU 27	21 companies from 12 Member States confirmed their membership of ACT in the scope of this study							8	8	17	19	16	8	8	20	11	
								46	47	83	84	66	52	59	74	68	
								17%	17%	20%	23%	24%	15%	14%	27%	16%	
UK	Viacom					No	0										
	A+E Networks UK					No	0										
	Discovery Networks					No	1										
	ITV Network Centre					No	n.d.										
	NBC Universal International					No	1										

Note: *n.d.*, no data.

Membership domain of the Association of European Radios

AER is a Europe-wide trade body representing the interests of over 5,000 private/commercial radio stations across the EU and in the UK and Switzerland. AER is composed of commercial radio national associations and commercial radio broadcasting companies, whose aim is to promote commercial and private radio broadcasters' interests in Europe and to offer technical assistance to its members. AER's main objective is to develop the most suitable framework for private commercial radio activity.

Tables 42 and 43 present an overview of AER's membership. AER has two company affiliates (in Latvia) but primarily represents employer organisations and business associations – currently nine organisations in nine Member States (and an additional one in the UK). Six of its members are involved in collective bargaining. In terms of sectoral coverage, AER's members are quite concentrated in NACE code 60.1 – radio broadcasting. In terms of occupational coverage, most of its members cover companies that employ technicians. All of its members are exclusively affiliated to AER and no other European-level association. At the request of AER, the information regarding the workforces of the affiliated companies is not disclosed. The collective workforce of the AER member companies varies between 1% and 10% of the sectoral workforce in the respective countries.

Representativeness of the European social partner organisations: Audiovisual sector

Table 42: Membership domain of AER

Country	Employer organisation	European affiliation					No. of member companies	Parts of the sector organised								Involved in collective bargaining		
		CEPI	EBU	FIAPF	ACT	AER		Occupations covered				Membership domain covered						
								Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2			
AT	VÖP						37											62
DE	Vaunet						150											
DK	Danske Medier						264											63
EL	EIIRA						29											
ES	AERC						110											
FI	RadioMedia ry						34											
FR	SIRTI						157											
HR	Croatian Radio Forum Association																	
IE	IBI						27											
IT	CRTV						97											
	9 employer organisations from 9 Member States form the membership domain of AER together with 2 companies from LV								2	4	7	8	2	3	9	4	6	
									26	26	29	59	51	24	27	29	50	
									8%	15%	24%	14%	4%	13%	33%	14%	12%	
UK	Radiocentre						50 ⁶⁴											

Note: AER reported that the Croatian Radio Forum Association is also affiliated to it. However, because no information was provided on this organisation in the scope of this study, this cannot be confirmed.

Table 43: Domain of AER company affiliates

Member State	Company	European affiliation					Affiliation to national employer organisation	% of sector workforce	Parts of the sector organised								Involved in collective bargaining	
		CEPI	EBU	FIAPF	ACT	AER			Occupations covered				Membership domain covered					
									Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2		
LV	EHR						No	0										
	LTV						Yes	16										
2 AER member companies in 1 Member State									0	0	2	2	1	0	1	1	1	
									46	47	83	84	66	52	59	74	68	
As a share of total number of companies with European-level affiliation in the sector (2%)									0%	0%	2%	2%	2%	0%	2%	1%	1%	

Note: AER reported that, since 2021, BAUER Media Sweden is also an affiliated company with radio broadcasting activities in several EU Member States, whereas before it was affiliated to AER for only its operations in Sweden. Because no information was provided on this company in the scope of this study, this cannot be confirmed. An up-to-date list of the member companies and member organisations of AER can be found at <https://www.aereurope.org/aer-members-eu/>

⁶² VÖP is not entitled to conclude a collective agreement; this right lies with the Chamber of Commerce. VÖP is, however, involved in collective bargaining (as a partner of the Chamber of Commerce and the commercial broadcasters).

⁶³ Danske Medier's sister organisation DMA is the organisation that has the authority to negotiate the collective bargaining agreements. Danske Medier is a trade association/advocacy group, while DMA is an employer association.

⁶⁴ Radiocentre represents 50 companies operating more than 300 licensed radio stations.

3.6. National employer organisations not represented on the ESSDC

In 13 Member States, there are employer organisations that are not affiliated to CEPI, the EBU, the FIAPF, ACT or AER, and thus not represented on the ESSDC. Table 44 gives an overview of these organisations. The 36 unrepresented employer organisations either are currently involved in collective bargaining or have been until recently. As with the trade unions, their sectoral coverage is quite broad but with a concentration on companies employing technicians and other workers (e.g. administrators) in the sector.

Table 44: Characteristics of employer organisations not represented on the ESSDC

Member State	Employer organisation	No. of member companies in the sector	% of sector workforce	Parts of the sector organised								Involved in collective bargaining	
				Occupations covered				Membership domain covered					
				Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2		
AT	FVKKV	142	13										
BE	VOTF	n.d.	n.d.										
	Febelav	10	13										
	FEWEB	n.d.	n.d.					n.d.	n.d.	n.d.	n.d.		
	UPFF	40	n.d.										
	FCB	19	n.d.										
DE	TPR	7	0										
	HDF Kino	602	15										
	VTFE	30	2										
EE	Estonian Ministry of Culture	1	25										
EL	EITISEE	5	n.d.										
FI	PALTA	28	33										
	Medialiitto ry	n.d.	n.d.										
FR	API	15	n.d.										
	SPI	294	n.d.										
	SPECT	49	n.d.										
	SNEP	16	n.d.										
	FICAM	130	n.d.										
	ACCeS	36	n.d.										
	TLSP	26	n.d.										
	CNRA	260	n.d.										
	SNRL	273	n.d.										
	SNRC	250	n.d.										
SMSP	6	n.d.											
HR	MK	150	25										
IE	Audiovisual Ireland/Ibec	n.d.	n.d.										
IT	FIMI	15	n.d.										
	Univideo	30	n.d.										
	Aeranti-Corallo	659	n.d.										
	ANICA	800	n.d.										
	ANEC	2,606	n.d.										
NL	NVBF	277	n.d.										
	RPO	13	4										
PT	APR	n.d.	n.d.										
	APEC	n.d.	3										
SE	Medieföretagen	n.d.	n.d.										
36 employer organisations in 13 Member States are not represented on the ESSDC				10	9	16	31	23	12	12	16	33	

Representativeness of the European social partner organisations: Audiovisual sector

Member State	Employer organisation	No. of member companies in the sector	% of sector workforce	Parts of the sector organised						Involved in collective bargaining		
				Occupations covered				Membership domain covered				
				Musicians	Performers	Journalists	Technicians etc.	59.1	59.2		60.1	60.2
Out of the total 72 employer organisations (Table 17)				26	26	29	59	51	24	27	29	50
Share of total number of employer organisations in the sector (49%)				38%	35%	55%	53%	45%	50%	44%	55%	66%

Note: *n.d., no data.*

The organisations listed in Table 44 are all employer organisations involved in collective bargaining. There are another 34 organisations from 12 Member States (Bulgaria, Croatia, Czechia, Estonia, France, Greece, Hungary, Lithuania, Luxembourg, Malta, Poland, Spain), which are not involved in collective bargaining; nevertheless, they do have some representativeness as business associations or professional associations. These organisations are listed in Table A7 in the annex.

The difference between the organisations included in Table 44 and in Table A7 is that the organisations in Table 44 are all employer organisations that are involved in collective bargaining, or at least have the status of an employer organisation, with authority to negotiate on working conditions of employees in the sector. It may be that at a given moment no new agreement could be reached, but nevertheless the power to negotiate remains. In contrast, there was no indication that the organisations in Table A7 are involved in activities related to the working conditions of the employees in the sector. The information available in the scope of this study indicates that those organisations in Table A7 represent only the business interests of the companies affiliated to them.

3.7. Other European-level organisations with sectoral employer organisations affiliated

Table 45 provides a review of the membership of the national employer organisations/business associations. Like trade unions, most have few or no affiliations to European associations other than CEPI, the EBU, the FIAPF, ACT and AER. Only in two cases – Commercial Film Producers of Europe and the International Union of Cinemas – do the listed organisations have an audiovisual member organisation in more than one Member State. And even then, the representativeness of these organisations is a lot lower than that of CEPI, the EBU, the FIAPF, ACT and AER.

Representativeness of the European social partner organisations: Audiovisual sector

Table 45: Other EU associations with audiovisual sector national employer organisations/business associations as members, 2019

Other EU employer organisations/business associations			Member States with an affiliate according to organisation websites	Member States with an audiovisual affiliate
Abbreviation	Full name	Assessment of sector-relatedness		
FIAD	International Federation of Film Distributors' Associations	FIAD's membership is made up of 14 national associations, each representing film distribution companies. In the 14 countries where the organisation has affiliates, FIAD claims that its members cover 90–100% of the theatrical market.	10 (AT, BE, DE, DK, ES, FI, FR, MT, NL, SE) + UK	1 (AT), which is also affiliated to CEPI and the FIAPF
UNIC	International Union of Cinemas	UNIC is an international trade organisation representing cinema operators and their national associations. UNIC currently has members in 38 European territories.	11 (AT, BE, DE, DK, ES, FI, FR, IT, NL, PL, SE) + UK	4 (BE, DE, IT, NL), all of which are unaffiliated to the ESSDC organisations
CFP-E	Commercial Film Producers of Europe	The CFP-E is an organisation representing advertising production associations. It currently has members in 21 countries, which together cover around 900 production companies.	18 (AT, BE, CY, CZ, DE, DK, EL, ES, FR, HU, IE, IT, LT, PL, PT, RO, SE, SI) + UK	3 (CZ, DE, SE), all of which are affiliated to CEPI, the FIAPF or both
EPC	European Producers Club	The EPC is an association of individual film and TV drama producers. It currently has around 130 members across Europe. The EPC also coordinates an alliance of national producer associations across Europe through the EPAA (European Producer Associations Alliance).	18 (BE, BG, DE, DK, EL, ES, FI, FR, IE, IT, LT, LU, LV, NL, PL, PT, SI, SK) + UK	1 (DE), which is also affiliated to the FIAPF
FEITIS	European Federation of Sound and Image Technical Industries	n.d.	n.d.	1 (DE), which is unaffiliated to the ESSDC organisations
WAN-IFRA	World Association of News Publishers	WAN-IFRA is an association organising publishing companies and technology entrepreneurs. It currently has 60 publisher associations as members, representing 18,000 publications in 120 countries.	25 (AT, BE, BG, CY, CZ, DE, DK, EE, EL, ES, FI, FR, HR, HU, IE, IT, LU, LV, NL, PL, PT, RO, SE, SI, SK) + UK	1 (FI), which is unaffiliated to the ESSDC organisations
EUROCINEMA	EUROCINEMA on-demand channel	EUROCINEMA represents the interests of audiovisual and cinematographic producers at European and international levels concerning issues directly or indirectly affecting film and audiovisual production (including intellectual property rights, copyright protection and enforcement, audiovisual regulation, online distribution of audiovisual content, international trade agreements, MEDIA programme).	FR	2 (FR), both unaffiliated to the ESSDC organisations
AMARC Europe	Association of Community Radio Broadcasters	AMARC Europe represents the interests of European community radio stations.	16 (AT, BE, CZ, DE, DK, EL, ES, FI, FR, HU, IE, IT, NL, RO, SE, SI) + UK	1 (FR), which is unaffiliated to the ESSDC organisations

Representativeness of the European social partner organisations: Audiovisual sector

IFACCA	International Federation of Arts Councils and Culture Agencies	IFACCA is a global network of arts councils and ministries of culture. It currently has member institutions in over 70 countries. In general, each country has one national member – usually a ministry of culture or an arts council whose primary role is to support the arts and culture through investment, promotion and policy. Countries may also have affiliate members – these are organisations engaged in public support for the arts, including international, national or subnational support or service agencies.	15 (BG, CY, DK, EE, ES, FI, HR, IE, LT, LU, MT, NL, SE, SI, SK) + UK have national members 10 (CZ, DE, DK, EL, ES, HR, IE, NL, RO, SE) + UK have affiliate members	1 (HR), which is unaffiliated to the ESSDC organisations
IVF	International Video Federation	IVF represents associations in the video publishing industry on physical carriers and online. The organisation currently has eight members.	6 (BE, DE, DK, FR, IT, NL) + UK	1 (IT), which is unaffiliated to the ESSDC organisations
egta	Association of Television and Radio Sales Houses	egta is a European trade association for marketers of advertising solutions, representing the interests of television and radio sales houses. It currently has 94 television advertising sales houses and 47 radio advertising sales houses as members in Europe.	24 (AT, BE, BG, CZ, DE, DK, EE, ES, FI, FR, HR, HU, IE, IT, LT, LV, LU, NL, PL, PT, RO, SE, SI, SK) + UK	1 (CZ), which is also affiliated to ACT
IFPI	International Federation of the Phonographic Industry	IFPI is an international organisation with a national group network. Together, they represent around 8,000 members in the recording industry (primarily record labels) globally.	20 (AT, BE, BG, CZ, DE, DK, EE, EL, ES, FI, FR, HR, HU, IE, IT, NL, PL, PT, RO, SE) + UK	1 (IT), which is unaffiliated to the ESSDC organisations

Note: *n.d., no data.*

Source: *Authors' own compilation based on the Network of Eurofound Correspondents' national contributions to this study, 2019*

Over the years there have been several European consultations in the audiovisual sector: in 2013 on a green paper, in 2015 on the Audiovisual Media Services Directive, in 2019 on the exercise of rights of performers and producers, and in 2020 on the application of recital 5 of Directive 2018/180 regarding video sharing platform services. Looking at the European associations that have submitted replies in these consultation processes reveals only business associations, which do not deal with issues related to working conditions. The European Telecommunications Network Operators' Association (ETNO) is the only exception, as ETNO is a European social partner organisation, not in the audiovisual sector, but in the telecom ESSDC. The ICT telecom and audiovisual sectors are clearly separated sectors, both with their own specificities and business activities, even if some overlap with, for example, online broadcasting activities appears.

None of the other European organisations listed below has the ambition to become a European social partner organisation:

- European Association of Advertising Agencies (EAAA, also called European Association of Communication Agencies, EACA)
- European Advertising Tripartite (EAT)
- World Federation of Advertisers (WFA)
- European Publishers Council (EPC)
- Federation of Free Radios (Fédération des Radios Libres, FERL)
- Association of Community Radio Broadcasters (AMARC Europe)

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- European Newspaper Publishers' Association (ENPA)
- News Media Europe (NME)
- Association of Television and Radio Sales Houses (egta)

3.8. Collective representativeness of ACT, AER, CEPI, the EBU and the FIAPF on the ESSDC and comparative analysis between them

Table 46 presents the collective representativeness of the European employer organisations on the audiovisual ESSDC, in a similar way to how this was done for the trade unions in Table 34 (section 3.4.). As the landscape on the employers' side combines represented national employer organisations with individual companies, this does not allow a clear comparison in terms of membership strength. It does, however, make it possible to see the parts of the sector in which each organisation has the strongest membership base, which is marked in blue in Table 46.

Table 46: Comparative analyses of the representativeness of the European employer organisations with members in the audiovisual sector

	EOs in total	Type of affiliation/coverage	Occupational categories				Membership domain covered				EO involvement in CB
			Musicians	Performers	Journalists	Technicians etc.	59.1	59.2	60.1	60.2	
ALL EOs	72 (2 of which are in the UK)	Number of EOs covering this part of the audiovisual sector	26	29	25	49	49	24	27	28	50
CEPI	15 (+ 1 in UK)	Number of EOs affiliated to CEPI	7	8	3	12	15	5	2	3	9
	% of 15	% of CEPI EOs with coverage	46%	53%	20%	80%	100%	33%	13%	20%	60%
	20% of all 72 EOs in the sector	% of EOs with coverage that are affiliated to CEPI	27%	11%	4%	16%	20%	7%	3%	4%	12%
	13 Member States + UK	Number of Member States	7 + UK	8 + UK	3	11 + UK	13 + UK	5 + UK	2 + UK	3 + UK	7 + UK
	1	Company members	1	1	0	1	1	1	1	1	1
13 Member States + UK	Number of Member States with EO or company members	7 + UK	8 + UK	3	11 + UK	13 + UK	5 + UK	2 + UK	3 + UK	7 + UK	
FIAPF	14⁶⁵ (+ 1 in UK)	Number of EOs affiliated to FIAPF	8	8	0	8	13	3	1	4	5
	% of 14	% of FIAPF EOs with coverage	57%	657 %	0%	57%	92%	21%	7%	29%	43%
	21% of all EOs in the sector	% of EOs with coverage that are affiliated to FIAPF	35%	35%	0%	15%	27%	13%	4%	14%	12%
	13 Member States + UK	Number of Member States	8 + UK	8 + UK	0	8 + UK	13 + UK	2 + UK	No Member States, UK only	3 + UK	5 + UK

⁶⁵ The total number of employer organisations affiliated to the FIAPF is 14. However, in the comparative analysis illustrated in this table, only 13 members of the FIAPF have been included since no data on sectoral coverage or involvement in collective bargaining were collected for KIPA from Poland, as explained in Table 38.

Representativeness of the European social partner organisations: Audiovisual sector

	0	Company members									
	13 Member States + UK	Number of Member States with EO or company members	8 + UK	8 + UK	0	8 + UK	13 + UK	2 + UK	No Member States, UK only	3 + UK	5 + UK
EBU	1	Number of EOs affiliated to EBU	0	0	1	1	1	0	1	1	1
	% of 1	% of EBU EOs with coverage	0%	0%	100%	100%	100%	0%	100%	100%	100%
	1% of all EOs in the sector	% of EOs with coverage that are affiliated to EBU	0%	0%	3%	2%	2%	0%	4%	3%	2%
	1 Member State	Number of Member States	0	0	1	1	1	0	1	1	1
	58 ⁶⁶ (+ 4 in UK)	Company members	34	33	60	61	47	49	49	51	57
	26 Member States + UK	Number of Member States with EO or company members	19 + UK	18 + UK	26 + UK	26 + UK	24 + UK	20 + UK	26 + UK	26 + UK	25 + UK
ACT	0	Number of EOs affiliated to ACT	0	0	0	0	0	0	0	0	0
	%	% of ACT EOs with coverage	0%	0%	0%	0%	0%	0%	0%	0%	0%
	0% of all EOs in the sector	% of EOs with coverage that are affiliated to ACT	0%	0%	0%	0%	0%	0%	0%	0%	0%
	1 Member State	Number of Member States	0	0	1	1	1	1	0	1	0
	21 (+ 6 in UK)	Company members	12	13	22	24	21	12	8	25	12
	12 Member States + UK	Number of Member States with EO or company members	6 + UK	6 + UK	11 + UK	10 + UK	9 + UK	9 + UK	7	12 + UK	7 + UK
AER	9 (+ 1 in UK)	Number of EOs affiliated to AER	2	5	8	9	2	4	10	4	6
	% of 10	% of AER EOs with coverage	20%	50%	80%	90%	20%	40%	100%	40%	60%
	14% of all EOs in the sector	% of EOs with coverage that are affiliated to AER	7%	17%	30%	18%	%	16%	37%	14%	12%
	9 Member States + UK	Number of Member States	2	4 + UK	7 + UK	8 + UK	2	3 + UK	9 + UK	4	6
	2	Company members	0	0	2	2	1	0	1	1	1
	10 Member States + UK	Number of Member States with EO or company members	3	3	7	8 + UK	3	3 + UK	10 + UK	5	6

Notes: The blue marked parts are the professional groups and activities in the sector on which each trade union is focused, or the most strongly represented. CB, collective bargaining; EO, employer organisation.

For CEPI and the FIAPF, the focus of their membership strength lies clearly among the employers working on TV, video and film productions (NACE 59.1), while ACT is focused on TV broadcasting (NACE 60.2) and AER on radio broadcasting (NACE 60.1). The EBU has the widest membership domain, covering the entire audiovisual sector in a balanced way. The EBU has also member organisations involved in collective bargaining in (almost) all EU Member States.

⁶⁶ The total number of EBU affiliates, according to the organisation, is 58. However data in the comparative analysis illustrated in this table were collected for only 57, as explained in Table 40.

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The limits of the collective representativeness have been explored in section 3.6, which lists the sectoral employer organisations involved in collective bargaining that are not represented on the ESSDC, and in section 3.7, which lists other European associations with affiliated national employer organisations.

Table 47 and Figure 13 provide a comparison of the representativeness of the European employer organisations for the audiovisual sector, in terms of the number of Member States with affiliated organisations. Table 51 also visualises this.

Looking at employer organisation affiliation, CEPI has the strongest representativeness with 19 affiliated audiovisual employer organisations. Its affiliates are spread across 16 Member States and the UK. In seven of those countries (plus the UK), CEPI has audiovisual employer organisations involved in collective bargaining.

However, looking at the total number of affiliates, that is, also including company affiliates, the EBU is the most representative association, with a total of 63 affiliates (62 companies and 1 employer organisation). Its members are spread across 27 Member States (plus the UK), and with only one exception it has at least one affiliate in all of those countries that is involved in collective bargaining.

Table 47: Comparative analyses of the representativeness of the European employer organisations

Employer organisations	Numbers of employer organisations and companies	Number of countries with an employer organisation	Number of employer organisations involved in collective bargaining	Number of countries with an employer organisation involved in collective bargaining
All sector-related employer organisations	70 employer organisations + 2 in UK	20 Member States + UK No employer organisation in CY, HU, LT, LU, MT, PL, RO	49 employer organisations + 1 in UK (+ 5 historically)	15 Member States + UK No collective bargaining in BG, CZ, LV, SI, SK
Affiliates of CEPI	18 employer organisations + 1 in UK 26% out of the 70 employer organisations	16 Member States + UK No affiliates in CY, DE, EL, FI, HU, LT, LU, LV, MT, NL, RO	9 employer organisations + 1 in UK 13% out of the 70 employer organisations	7 Member States (AT, BE, DK, ES, FR, IE, IT) + UK
	1 company	1 Member State (ES)	1 company	1 Member State (ES)
EBU (mainly corporate members)	1 employer organisation 58 companies + 4 in UK	1 Member State (NL) 27 Member States + UK	1 employer organisation 53 companies + 4 in UK	1 Member State (NL) No collective bargaining in EL, no data for HU
FIAPF	13 employer organisations + 1 in UK 19% out of the 70 employer organisations	13 Member States + UK No employer organisation in BG, CY, EL, ES, HU, FR, IE, IT, LT, LU, MT, PT, RO, SI	4 employer organisations + 1 in UK 6% out of the 70 employer organisations	4 Member States (AT, BE, DE, DK) + UK
ACT (mainly corporate members)	0 employer organisations 21 companies + 5 in UK		0 11 companies + 1 in UK	0 7 Member States + UK
AER	9 employer organisations 13% out of the 70 employer organisations 2 companies	9 Member States 1 Member State (LV)	5 employer organisations 7% out of the 70 employer organisations 1 company	5 Member States (AT, EL, ES, FR, IT) 1 Member State (LV)

Representativeness of the European social partner organisations: Audiovisual sector

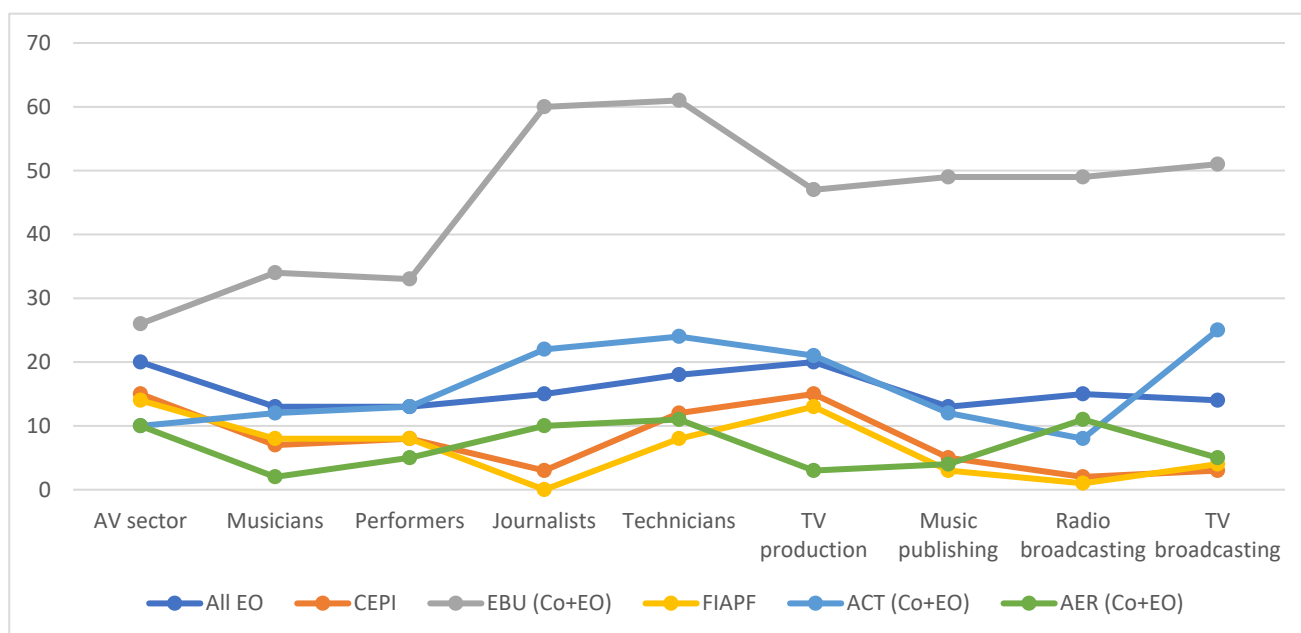
All employer organisations represented on ESSDC via CEPI, EBU, FIAPF, ACT and AER	34 employer organisations + 2 in UK 50%	20 Member States + UK No employer organisation in CY, HU, LT, LU, MT, PL, RO Since 2020, PL has been represented	20 employer organisations + 2 in UK 30%	10 Member States (AT, BE, DE, DK, EL, ES, FR, IE, IT, NL) + UK
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Notes: The countries in red are those for which there is no organisation or no member organisation. Numbers of companies are in green, and the countries in green are those for which there is a corporate member, but no employer organisation. The blue cells are all the sector-related employer organisations represented on the ESSDC via CEPI, the EBU, the FIAPF, ACT or AER.

Figure 13 indicates the number of Member States in which each European employer organisation has affiliated employer organisations or companies that organise that specific professional group or part of the sector. Only the 27 Member States are presented here, not the UK. The dark blue line represents all audiovisual sector-related employer organisations. There are employer organisations in 20 Member States.

The grey line represents the number of Member States in which the EBU has a company member or employer organisation covering that part of the sector. As the EBU has mainly corporate members, it has affiliates in more Member States than the number of Member States where there is an employer organisation (the dark blue line). ACT (light blue line) also has mainly corporate members. The green line shows the number of Member States where AER has an affiliated employer organisation (or company). The orange line represents CEPI and the yellow line represents the FIAPF.

Figure 13: Number of Member States covered by European employer organisations



Note: AV, audiovisual; Co, company; EO, employer organisation.

Source: Table A7

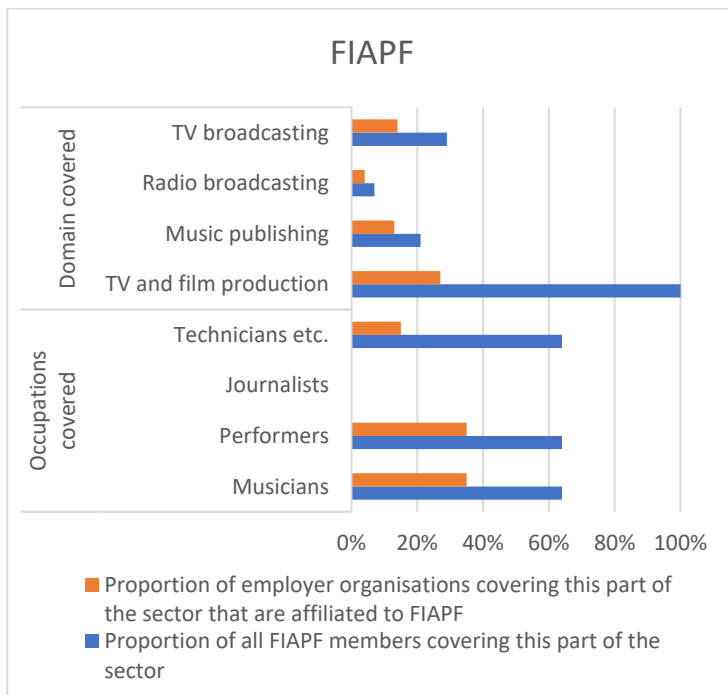
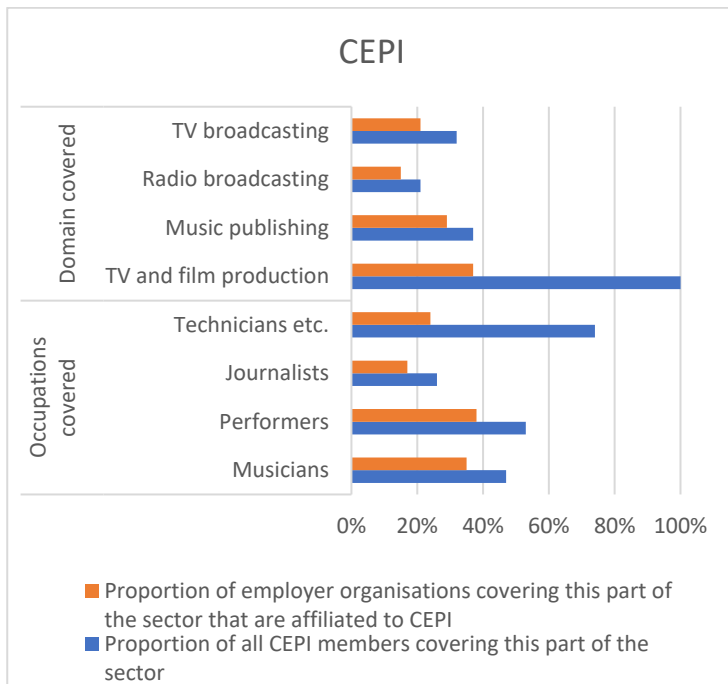
Figure 14 draws a detailed profile of the membership strength of each of the five European employer organisations in the audiovisual sector.

The first four items in each graph are the four main parts of the sector: TV broadcasting (NACE 60.2), radio broadcasting (NACE 60.1), music publishing (NACE 59.2) and film and TV production (NACE 59.1). They are followed by the four professional groups: technicians, journalists, actors/performers and musicians.

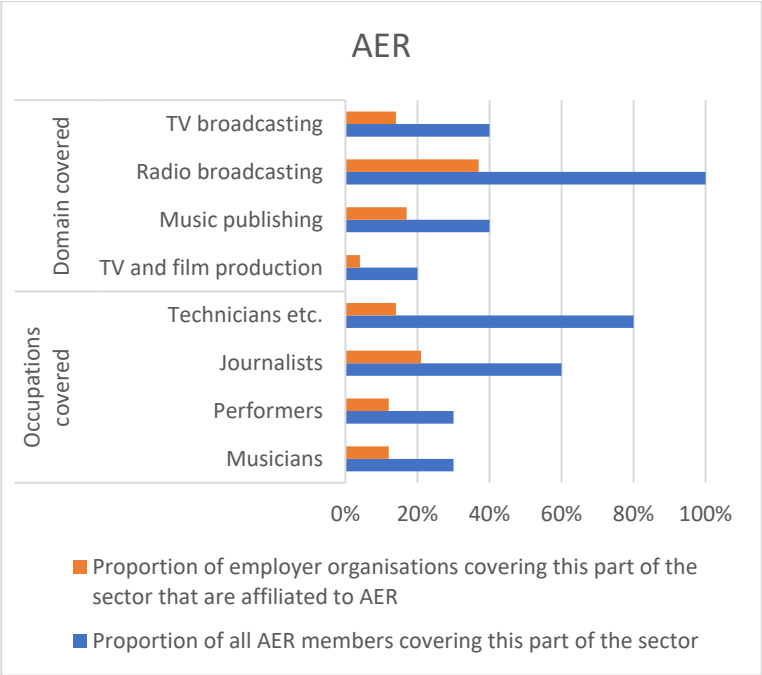
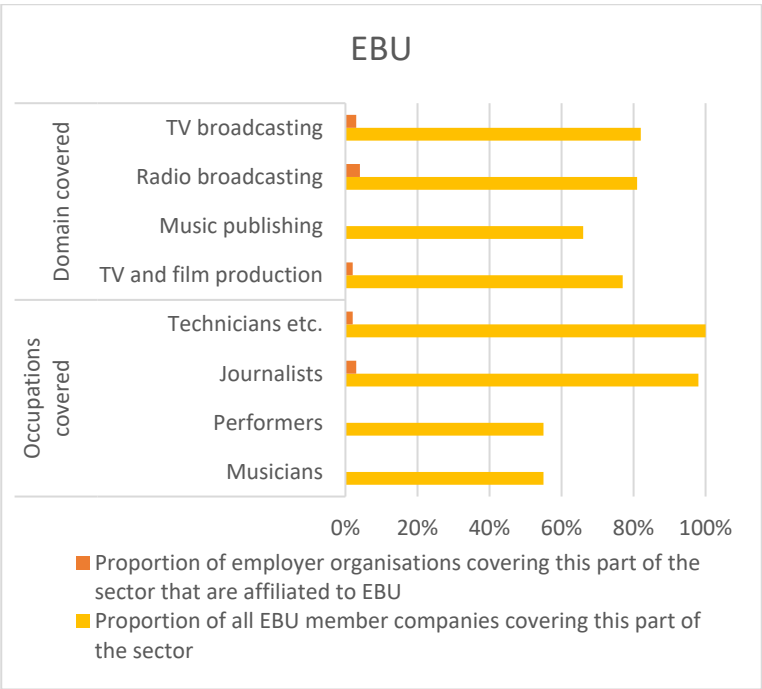
Representativeness of the European social partner organisations: Audiovisual sector

The orange bar represents the proportion of all the employer organisations covering that part of the sector that are affiliated, reflecting the relative membership strength. The blue bar gives the proportion of all the affiliated employer organisations of the organisation that cover that specific part of the sector; this visualises which part of the sector the organisation mainly focuses on. The yellow bar does the same for the organisations that have mainly corporate members, indicating the proportion of the affiliates representing the specific parts of the sector and the employers of the different professional groups.

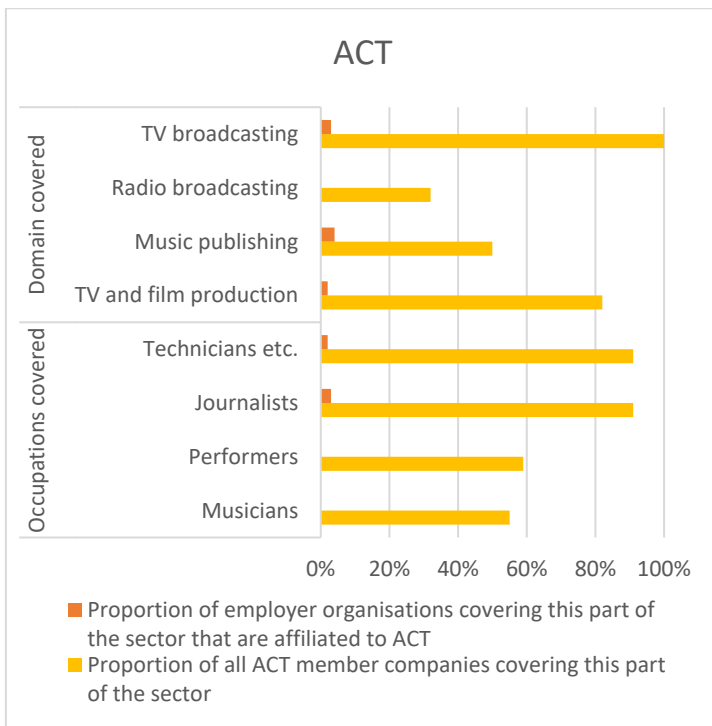
Figure 14: Profiles of the membership in different parts of the audiovisual sector (European employer organisations)



Representativeness of the European social partner organisations: Audiovisual sector



Representativeness of the European social partner organisations: Audiovisual sector



Source: Table A7

3.9. Capacity of European social partner organisations to negotiate

This section analyses the internal decision-making structures and how organisations obtain a mandate to negotiate and sign agreed texts on behalf of all the member organisations they are entitled to represent. This assessment of organisations' capacity to negotiate aims to clarify how far the representatives of European associations are enabled to commit their organisations, including all the affiliates of their member organisations. EURO-MEI has clearly defined procedures for mandating, with a capacity to negotiate based on provisions in its statutes, while the capacity of FIM and FIA to negotiate is less formalised in procedure, leaving room for interpretation on when and how to obtain support from the member organisations, although there are well-established mechanisms to keep all the members informed, and allow the European organisations to ensure support from all their members. For the EFJ, no information was provided regarding its capacity to negotiate on behalf of its member organisations.

EURO-MEI is a part of UNI Europa, and UNI MEI (at global level) is part of UNI Global. The EURO-MEI president and three representatives appointed by the EURO-MEI executive committee represent the sector in the UNI Europa executive committee to participate in decision-making processes on cross-sector policies. EURO-MEI is thus the structure within UNI Europa covering the audiovisual and live performance sectors.

The secretariat informs and consults with the president and the members of the management and executive committees on new policy proposals, to obtain a mandate. Affiliates may also originate an idea and then the secretariat organises the consultation with all members to facilitate a consensus. Once the secretariat has obtained the mandate, it acts on behalf of its affiliates within the framework of the mandate and reports back on progress and if further consultations are needed. The president and members of the executive may take part in exercising the mandate, for example when taking part in a working group with employers' representatives. Based on EURO-MEI and UNI Europa statutes, the secretariat acts on behalf of the executive and management committees and consults with the president and members. Sector policy is decided at sector level, i.e. at the level of EURO-MEI.

Representativeness of the European social partner organisations: Audiovisual sector

There is a hierarchy in the mandate. The General Assembly meets every four years, decides on a broad policy, and elects the president, executive committee and management committee. The executive committee meets once a year to adopt an action plan that the secretariat implements on behalf of the executive committee. The management committee oversees the implementation in between the meetings of the executive committee and has a mandate to make decisions. In practice, the secretariat consults on a regular basis with the president and the members of the management and executive committees on all documents drafted jointly with employers within the framework of the social dialogue. This is facilitated by the fact that members of the management committee are active in the ESSDC. Following the EURO-MEI and Uni Europa statutes, both the president and representatives of the secretariat have the authority to sign such texts. In terms of dissemination, the agreed text is subsequently distributed to all affiliates through email, social platforms and EURO-MEI's web page. It is also highlighted in the organisation's newsletter

FIA is a global organisation. Within FIA there is a European group (EuroFIA), which meets twice a year. EuroFIA does not have its own legal personality separate from FIA, although it does have its own logo. It operates according to the agreed standing orders and the EuroFIA coordinator's two-year rolling mandate. The EuroFIA group reports to the FIA executive's annual meeting on its activities, especially on its project work. All aspects of EuroFIA's work are included in the annual activity reports. The procedure to obtain a mandate, supported by the FIA members, varies depending on the status of the document in question. Internal consultations are only necessary if the document is in some way politically sensitive. This is not the case if the draft joint statement relies on established and commonly upheld principles, for instance the recognition of basic social rights, the need for stronger social dialogue or the need for more public support for the industry. If a matter is both urgent and politically sensitive, FIA organises a written consultation of its governing bodies (the FIA executive committee and presidium). It is the FIA general secretary who is entitled to legally represent FIA and as such can sign agreements. It is, however, common practice for the EAEA (European Arts and Entertainment Alliance), which has a rolling presidency, to sign on behalf of its members: EURO-MEI, FIM and FIA. On ongoing activities, there is a report twice a year on the social dialogue activities at the EuroFIA group meetings, which is an opportunity to inform the members that do not directly participate in ESSDC meetings. An extensive report is included in the annual report, covering project activities and ESSDC meetings.

Just like UNI MEI and FIA, **FIM** is a global organisation, within which there is a European group that meets once a year. This group, which includes EU and non-EU members (the latter from Iceland, Norway, Serbia, Switzerland and the UK), has no statutory recognition. It does not operate under formal rules. However, those members that are part of the FIM executive committee (at global level) may rely on discussions taking part at regional level to submit policy proposals to the FIM executive committee.

FIM does not need a separate negotiation mandate for all matters; it depends on the question raised. Mostly, there is no need to consult member organisations, because the proposed positions reflect positions already expressed by FIM governing bodies (congress, executive committee, presidium). In any case, information about proposed ESSDC initiatives is reported to the FIM governing bodies and the European group. If the matter is complex or delicate or cannot be addressed under the current mandate received from the FIM governing bodies, the secretariat may decide to organise consultations and specific internal meetings on that matter. For example, in 2011, when social partners agreed upon a European Framework of Action on Gender Equality in the Audiovisual Sector, internal consultations on the draft joint statement took place, as this was politically sensitive. If a matter is urgent and politically sensitive, the FIM secretariat organises a written consultation of its executive committee or presidium. If this is not the case, and the draft text relies on consensual principles, such as the recognition of basic social rights, the need for stronger social dialogue or the need for more public support to the industry, no specific further consultations are needed. Just like the question of necessity, there is no clear procedure on the timing of the potential consultation. This can be

done at an early stage, or when the draft text is ready for signing. In principle it is the FIM general secretary who assesses the political sensitiveness and urgency. For the joint opinion on Brexit, for example, a green light was requested from the FIM members in the EU and the UK. Had there been any reservation or opposition from members, the FIM secretariat would have submitted the matter to the FIM executive committee. It is the FIM general secretary who also signs off on agreed texts on behalf of FIM. In terms of dissemination, FIM distributes results from the ESSDC via its website and its newsletter.

Among the **European employers' associations**, CEPI appears to have the most strongly formalised and clearest capacity to negotiate on behalf of its member organisations, immediately followed by the FIAPF, which also has a well-defined capacity to negotiate. ACT, AER and the EBU operate with ad hoc internal consultation mechanisms, which may provide some kind of capacity to negotiate. See below for ACT and AER; the EBU did not disclose more detailed information.

Most of the **CEPI** member organisations do have specific senior officers specialised in social dialogue at national level supporting the secretariat. This has resulted in CEPI activities on topics related to health and safety, gender equality, skills and social partner capacity building. If there is an ESSDC initiative, CEPI informs its board as laid down in Article 13.1 of its statutes. Following a first discussion, which the CEPI secretariat organises between the board and the specific delegates from the associations that attend ESSDC meetings, their feedback and recommendations are cascaded to all CEPI member organisations, to gather a final overview on the specific issue from all. This may also be reviewed during general assembly meetings, if a joint opinion is under discussion at that specific time. The general assembly (two per year) is given a progress report that includes activities of the ESSDC, while also in the more frequent (four to six per year) board meetings the members are kept informed of the ESSDC's activities. Once a draft text is ready for signing, the CEPI board gives the final green light, allowing the general secretary or the president of CEPI to sign off on the text. There is no specific rule on who is to sign on behalf of CEPI; this can be either the general secretary or the president. CEPI disseminates ESSDC products through its weekly updates, the CEPI newsletter, board meetings, the general assembly, its website and social media such as Twitter.

The **FIAPF's** presence in the audiovisual ESSDC goes through its Belgium-based entity, FIAPF Headquarters asbl. The FIAPF is a global organisation. Its European members have a fixed representation on the FIAPF executive committee. The FIAPF's Ad Hoc Working Group on EU Affairs is the dedicated channel of communication for the FIAPF's European members for any matters of EU relevance. If any kind of consultation is needed to take place, this also is done within the working group. Regarding mandates for and support of draft joint opinions, initiatives will be discussed by the European members of the FIAPF and its executive committee. Draft texts need to be within the scope of the FIAPF mandate agreed by its general assembly and are subject to review by and advice from the internal and external council, for example to ensure competition law compliance. If a mandate is approved, the European members who provided this mandate are regularly updated on the progress of eventual negotiations and are invited to comment on draft versions of the text, and to endorse it in the final instance. It is the FIAPF president or its managing director who signs ESSDC texts on behalf of the FIAPF. It is the FIAPF managing director who validly represents the organisation but acts by delegation.

ACT has two task forces and a board, and issues regarding the ESSDC can be discussed there. This is generally by written procedure or through task force calls or board calls. Member companies are informed on a weekly basis of ACT activities, and when there is an ESSDC activity on the agenda this features in this weekly brief. ACT has a mandate to represent its members regarding positions that affect the industry. The details of this mandate are refined during calls with the task forces and board, depending on the question being considered. At the beginning of each year, ACT sets out its annual priorities, and this affects the positions of ACT on the ESSDC. In the last five years no ESSDC joint opinion or agreement has been made that required an ACT

internal consultation procedure. If this were necessary, it would take place in the board or task force, not in the ACT general assembly, as this is usually focused on accepting accounts and new members.

AER has working groups established to deal with specific issues, and to support cooperation among commercial radio stations. The secretariat keeps all AER member organisations informed of the activities of the ESSDC, through the working groups and the AER executive committee. Agreed texts from the ESSDC are signed on behalf of AER by the general secretary or by two members of the executive committee, in accordance with the instructions of the executive committee.

3.10. Effective participation in the audiovisual sector ESSDC

In 2018 and 2019 six audiovisual ESSDC meetings were held (in February, October and December 2018, and in March, June and October 2019). At the 2018 meetings there were respectively 26, 24 and 33 trade union delegates. In 2019 the numbers of trade union delegates were 25, 16 and 27. The employers' delegates at the ESSDC meetings numbered 15, 10 and 16 in 2018 and 8, 13 and 14 in 2019. This gives an average of 25 trade union delegates and 13 employer delegates for the ESSDC meetings of 2018 and 2019.

Looking at countries from which there was effective participation in the ESSDC for the audiovisual sector in 2018 and 2019 (Table 48), the trade union side had participants from 19 Member States and the UK, and the employer delegation had participants from 12 Member States and the UK.

Table 48: Effective participation in the ESSDC for the audiovisual sector, 2018–2019

19 Member States (+ UK) with trade union participation in the ESSDC for the audiovisual sector	AT, BE, CZ, DE, DK, EL, ES, FI, FR, IE, IT, LT, LV, NL, PL, PT, RO, SE, SI, UK
12 Member States (+ UK) with employer organisation participation in the ESSDC for the audiovisual sector	AT, BE, DE, ES, FI, FR, HR, HU, IE, IT, PT, RO, UK

Sources: Eurofound and European Commission

EURO-MEI reported participation in ESSDC meetings over the last five years from the following 14 EU Member States and the UK; Austria (1 trade union), Belgium (2), Czechia (1), Finland (1), France (3), Germany (1), Latvia (1), Lithuania (1), Portugal (1), the Netherlands (1), Romania (1), Slovenia (2), Spain (2), Sweden (2) and the UK (1). FIM indicated having member organisations from seven EU Member states that are regularly involved in the ESSDC activities. FIA draws from a pool of 12 trade unions from 11 Member States to put together its delegation for the ESSDC. The FIA delegation on the ESSDC is normally limited to five places for working group meetings and nine places for plenary meetings.

EURO-MEI has member organisations in 22 EU Member States and in the UK. The five countries where EURO-MEI does not have a member are Croatia, Cyprus, Estonia, Romania and Slovakia. FIA also has member organisations in 22 EU Member States and in the UK. The five not covered by FIA are Czechia, Lithuania, Luxembourg, Malta and Slovakia. FIM has member organisations in 19 EU Member States and in the UK. The eight countries not covered by FIM are Cyprus, Czechia, Estonia, Hungary, Lithuania, Luxembourg, Malta and Romania. The European Arts and Entertainment Alliance (EURO-MEI, FIA and FIM together) cover all 27 EU Member States and the UK. The EFJ also has member organisations in all 27 EU Member States and in the UK.

Comparing the membership in all the 27 EU Member States and the UK with the effective participation at the ESSDC meetings in 2018 and 2019, there are eight EU Member States for which EAEA and the EFJ have member organisations but had no active participant in any of the ESSDC meetings in 2018 and 2019. These eight countries are Bulgaria, Croatia, Cyprus, Estonia, Hungary, Luxembourg, Malta and Slovakia.

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On the side of the employers, only CEPI indicated that the delegates from its board and four national associations (FAMA from Austria, USPA from France, SPI from Ireland and APA from Italy) participate very proactively in ESSDC activities and meetings. For the other EU organisations it is mainly only the secretariat that participates actively in ESSDC meetings.

Looking at the membership domain of the European employer associations, this study can confirm that the EBU covers 26 EU Member States and the UK, while, based on the effective participation indicated in Table 48, there is participation from the Hungarian employers' delegate. This supports the finding that the EBU has affiliated public service media organisations in all 27 Member States. CEPI has member organisations in 16 Member States, the FIAPF in 13 Member States, ACT in 12 Member States and AER in 9 Member States. There are 15 EU Member States for which the EU employer organisations have members but had no participant in the ESSDC meetings in 2018 or 2019. These are Bulgaria, Cyprus, Czechia, Denmark, Estonia, Greece, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Slovakia, Slovenia and Sweden.

3.11. Summary on the Member States with the largest sectoral workforces and assessment of the representation of microfirms and self-employed people

This section looks first at the membership structures in the seven EU Member States with the largest audiovisual sector workforces in absolute numbers. Subsequently, it examines the membership of the ESSDC organisations in EU Member States where the proportion of the audiovisual workforce corresponds to at least 0.6% of total employees in the country.

Member States with the largest sectoral workforces

Tables 49 and 50 demonstrate that, in the countries with the highest numbers employed in the audiovisual sector, organisations are represented on the ESSDC by at least one trade union organisation and at least one employer organisation. All of them also have at least one organisation on the trade union side and one on the employer side represented on the ESSDC and involved in collective bargaining.

Table 49: Affiliations in the countries with sectoral employment in excess of 20,000

Country	Total number employed (2017)	At least one national trade union represented on the ESSDC	At least one national trade union represented on the ESSDC involved in collective bargaining	At least one national employer organisation represented on the ESSDC	At least one national employer organisation represented on the ESSDC involved in collective bargaining
DE	123,519				
FR	122,963				
ES	63,122				
IT	42,251				
NL	33,352				
PL	31,693			(Since 2021)	
SE	22,851				
UK	117,752				

Notes: Countries are ordered according to the total number employed, with the exception of the UK, which is included on account of its size. Green shading indicates a positive response, while orange shading indicates a negative response. There are, however, companies affiliated to the European employer organisations from Poland and Sweden that are

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involved in single-employer bargaining. Since 2021, CEPI and the FIAPF each have a member organisation in Poland, although this was not confirmed by the data collection for this study, which was done in 2019.

Sources: Structural Business Statistics for data; Network of Eurofound Correspondents' national contributions to this study, 2019, for information on affiliations

Looking at the seven countries (eight including the UK) with the highest proportions of the national workforce in the audiovisual sector, all have at least one trade union affiliated to one of the organisations on the ESSDC. The same is true on the employers' side, with the exception of Malta, where there are no employer organisations in the sector.

Table 50: Affiliations in the countries where the audiovisual sector is largest as a share of total employment

Country	Share of total employment (2017) (%)	At least one national trade union represented on the ESSDC	At least one national trade union represented on the ESSDC involved in collective bargaining	At least one national employer organisation represented on the ESSDC	At least one national employer organisation represented on the ESSDC involved in collective bargaining
FR	0.8				
DK	0.8				
SE	0.7				
EL	0.7				
MT	0.7				
NL	0.6				
HR	0.6				
UK	0.8				

Notes: Countries are ordered according to share of total employment, with the exception of the UK, which is included on account of its size. Green shading indicates a positive response, while orange shading indicates a negative response.

Sources: Structural Business Statistics for data; Network of Eurofound Correspondents' national contributions to this study, 2019, for information on affiliations

In Croatia and Greece, the trade unions represented on the ESSDC are not involved in collective bargaining. This is also the case for Croatia and Sweden on the employers' side. The reason for this is that the affiliated parties in these cases are viewed as professional/business associations rather than trade unions/employer organisations (which also exist in these countries and *are* involved in collective bargaining).

Assessment of the representation of microfirms and self-employed people

The first chapter (section 1.2) indicated that 96% of all audiovisual sector companies have fewer than 10 employees, and altogether they employ 28% of the European sectoral workforce (in green in Figure 5). Therefore, besides assessing whether the largest countries and the largest sectoral companies are represented on the ESSDC, it is important to assess whether microfirms and self-employed people are also represented.

EURO-MEI has trade unions affiliated that mainly or only focus on employees in microfirms and relatively small companies. These are trade unions that mainly organise freelance workers in the film and TV production sector, for example the Swedish trade union TF. Some other member unions of EURO-MEI represent employees both in microfirms as well as in larger companies in the sector. These trade unions have members in all segments and activities of the audiovisual sector. The French trade union F3C-CFdT is an example of such a trade union affiliated to EURO-MEI that represents employees in both smaller companies and the larger ones. Finally, there are trade unions affiliated to EURO-MEI that also represent self-employed

people in the sector. The representation of the self-employed is an important reality especially among the creative professions. Despite the barriers imposed by national competition authorities, the number of EURO-MEI member unions that also organise self-employed workers is increasing. An example of them is the German trade union ver.di.

Some trade unions represented in the statutory structures of EURO-MEI mainly have members in microfirms, while some others represent some employees in microfirms although most of their members come from larger firms.

Among the EURO-MEI activities that target specifically the film and TV production sector and freelance workers in microfirms, an initiative is reported that aims to bring member unions together, exchange information, define common priorities and then work towards a campaign that combats the long working hours culture in film and TV production that is predominant in SMEs and microfirms. Most microfirms operate in the independent film and TV production sector (also in exhibitions, but with less volume). According to EURO-MEI, this part of the sector is volatile, with a high percentage of temporary employment, low pay, bad working conditions and long working hours. Those microfirms do not respect provisions in collective bargaining agreements, because of high fragmentation and a freelance labour market. Therefore, higher job security and pay, better quality of working conditions and more work–life balance are the key issues among the many concerns of employees of microfirms.

EURO-MEI reports that its member unions defend the rights, conditions, remuneration and dignity of all workers in the media, entertainment and arts, whatever their employment status is, and in all types of companies, including microfirms. At national level, member unions will provide specific services that cater to the specific needs of self-employed workers (for example, contract and tax advice), set up specific units (for example, ver.di's Referat Selbstständige), represent their interests to improve social protection (for example, the German Künstlersozialkasse), remuneration (for example, Reform zur Urheberrechtsvergütung) etc., and bargain with and for them (for example, Vereinbarungen zu Mindesthonoraren). During the COVID-19 crisis, which has hit the self-employed workers in the audiovisual sector the hardest, ver.di has multiplied initiatives (and continues to do so) and is campaigning for the inclusion of these workers in relief and recovery programmes. The union has also established practical support measures in response to COVID-19 for self-employed workers.

However, some trade unions that have reported representing employees from microfirms and self-employed people are not represented on the ESSDC. In Cyprus, the Trade Union of Self-Employed, Fixed-Term and Indefinite-Term Employees and Contract Employees Ισοτητα (Isotita, equality) organises workers in the Cyprus Broadcasting Corporation (CyBC). In Greece, there is just one trade union (PMS) that covers self-employed musicians, along with musicians with indefinite or fixed-term employment in the private sector. In the Netherlands, self-employed workers do not always recognise the benefits of a union and are therefore less willing to become union members; however, two trade unions in the sector cover self-employed workers. In Poland, trade union representatives reported that the share of self-employed/B2B workers is significantly higher than in the Polish economy as a whole. In Slovenia, following a court decision in 2015, the public institute RTV Slovenia, where the majority of the audiovisual workforce works, had to employ almost 600 people who were previously in non-standard forms of employment (self-employed, but working as employees on short-term contracts). Also in Slovenia, the self-employed are underrepresented, as they are usually not trade union members and are therefore not covered by collective agreements. One of the trade unions from Slovenia (SUKI GLOSA) is a member of a working group for social dialogue for self-employed people, constituted at the Ministry of Culture. SUKI GLOSA is a member of EURO-MEI and FIM, and as such is represented on the ESSDC. In Germany, about a third of the workforce in production activities in the audiovisual sector (NACE 59) are self-employed. In autumn 2019, VRFF (which is a member of CESI, and not

Representativeness of the European social partner organisations: Audiovisual sector

represented on the ESSDC) set up a new collective bargaining commission for self-employed workers in the film and TV industry – Freie Produktionswirtschaft. There is also a bipartite pension fund for self-employed people in Germany – Pensionskasse Rundfunk – with ver.di, DJV and BFFS having representatives on the trade union side, and the public broadcasting companies on the employers' side. In Italy, the sector is dominated by single person-owned companies, which represent more than one-third of the total active enterprises in the sector (3,612 out of 9,083). That makes it difficult for the employer organisations to organise the sector.

At European level, EURO-MEI has focused on facilitating cooperation among member unions to raise their capacity to organise, represent and bargain for atypical and self-employed workers. EURO-MEI has carried out two projects. One was in cooperation with FIA, FIM and the EFJ (2018–2020) and will be followed up with a new project in 2021. Another project targeted federations of film directors and screenwriters (2018–2020) and is also being followed up by a new project, starting in March 2020. Simultaneously, the trade unions represented on the ESSDC have worked very closely together over the past 10 years to engage the EU institutions in a dialogue to address the imbalance of rights between EU competition law and the fundamental rights of freedom of association and collective bargaining. The latest activity took place in autumn 2020, when they jointly organised a webinar for affiliates of FIA, FIM, the EFJ and UNI MEI with representatives of the Directorate-General for Competition and ETUC to discuss the prospects of an initiative of the European Commission on EU competition law and collective bargaining. CEPI on the employers' side also mentioned this as an issue for the representation of self-employed people.

Based on a small-scale survey conducted among 10 of the CEPI-affiliated organisations, CEPI reports the following interests and issues relevant to microfirms of the sector: competition with larger production companies, securing European funding, international scaling, demands of in-house production/relationships with broadcasters, terms of trade with broadcasters and cross-border service providers, adaptation to digitalisation and new formats, promotion and audience development, increase in co-production, securing continuous income and securing professional expertise

CEPI has some affiliated employer organisations mainly or only representing microfirms and smaller companies, for example FPS (Slovenia) and HDNP (Croatia). Some of the CEPI members also represent both the microfirms and the larger companies in the sector. Examples are APA (Czechia), APA (Italy), APIT (Portugal), PROA (Spain), SPI (Ireland), VIRKE (Norway), F&MA (Austria), Finnanimation (Finland) and Proanimats (Spain). And finally there are CEPI member organisations that also represent the self-employed from an employers' perspective, for example F&MA (Austria), VIRKE (Norway) and FPS (Slovenia). The statutory structures of CEPI involve some member organisations that mainly organise larger firms, although they also represent some microfirms. Some of those members (such as PROA (Spain), Finnanimation (Finland), Proanimats (Spain)) are indirectly members of CEPI, as it also represents Animation in Europe.

4. Conclusions

In 2017 there were 743,000 employees in the audiovisual sector in the EU27 and the UK. This includes 580,000 in the EU27 and 163,000 in the UK. On average, 63% of sectoral employment is in audiovisual production and 37% in broadcasting activities. Exceptionally, there are five EU Member States where more than half of the employment in the sector is in broadcasting: Croatia, Cyprus, Luxembourg, Poland and Romania. The sector combines large companies with a large workforce together with a high number of microfirms. The 0.07% of the companies with more than 250 employees employ altogether 36% of the sectoral workforce, while 96% of the companies have fewer than 10 employees and employ altogether 28% of the sectoral workforce.

Digitalisation and internationalisation have a huge impact on audiovisual production as well as on online distribution opportunities. Reduced income from advertising and from public fees for the broadcasting segment of the sector presents further challenges to the sector. Employment in the sector grew between 2013 and 2017, while the number of companies grew much more. This indicates that additional employment in the sector was created especially in microfirms.

This study has identified 155 trade unions and 70 employer organisations in the audiovisual sector in the EU27. This corresponds to an average of six trade unions per Member State and three employer organisations per Member State. In the UK it found five trade unions and two employer organisations (see Table 8). In all EU Member States there are sector-related trade unions, while audiovisual sector employer organisations were found in 20 EU Member States. The six EU Member States where there are no audiovisual sector employer organisations in this study are Cyprus, Hungary, Lithuania, Luxembourg, Malta and Romania. In Poland there is an organisation that since the end of 2020 has been affiliated to CEPI and the FIAPF, although this is an association and is not involved in sector-related collective bargaining.

In general, the trade unions have a wider membership domain, which is illustrated by the 39% of the sectoral trade unions covering all NACE subheadings (59.1, 59.2, 60.1 and 60.2), while only 12% of the sectoral employer organisations cover all of them (see Tables 10 and 16). Of all sector-related trade unions, 74% are involved in collective bargaining, with a predominance of single-employer bargaining (Table 21). This is explained by the fact that in nine EU Member States only single-employer bargaining (at company level) occurs in the audiovisual sector, in which trade unions are involved but employer organisations not (Table 22). Among the employer organisations, 68% are involved in collective bargaining, predominantly multi-employer bargaining. In 14 EU Member States and in the UK, there are audiovisual social dialogue structures. This is the case for Belgium, Cyprus, Denmark, Finland, France, Germany, Ireland, Italy, Latvia, Malta, the Netherlands, Slovakia, Spain, Sweden and the UK (see Table 25).

At European level there are four European trade union organisations: EURO-MEI, FIA, FIM and the EFJ. EURO-MEI has the widest membership domain, covering employees in all occupations and in all types of audiovisual production and broadcasting. FIA represents the actors and performers, and FIM the musicians, while some of their member organisations do have a wider membership domain covering other occupations too. The EFJ specifically organises the journalists (see Table 34).

EURO-MEI has affiliated trade unions in 23 EU Member States (and the UK). The four Member States in which EURO-MEI does not have a sectoral trade union affiliated are Croatia, Cyprus, Estonia and Slovakia. In 21 Member States (and the UK), EURO-MEI has trade unions involved in collective bargaining. In Hungary and Greece, EURO-MEI has affiliated trade unions that are not involved in collective bargaining. The membership domain of EURO-MEI covers all professional groups in all activities of the entire audiovisual sector.

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FIA has affiliated trade unions in 22 EU Member States (and the UK), and trade unions involved in collective bargaining in 13 EU Member States and the UK. The five Member States in which FIA has no member organisation are Czechia, Lithuania, Luxembourg, Malta and Slovakia. FIM has member organisation in 19 Member States (and the UK), and affiliated trade unions involved in collective bargaining in 16 Member States and the UK. The eight Member States in which FIM has no member organisation are Cyprus, Czechia, Estonia, Hungary, Lithuania, Luxembourg, Malta and Romania. The EFJ has affiliated trade unions in all 27 Member states. In 19 Member States, the EFJ has affiliated organisations involved in collective bargaining (see Tables 34 and 51).

Looking at the trade unions with most members in the audiovisual sector in each country, these largest trade unions in most of the countries are represented on the ESSDC. EURO-MEI has affiliated the largest audiovisual sector trade union in 17 Member States and in the UK, and in two Member States also the second largest sectoral trade union. FIA organises the trade union with most members among the actors and performers in 19 Member States and in the UK, and the second largest in three Member States. FIM organises the trade union with most members among the musicians in 17 Member States and in the UK, and the second largest in three Member States. In all 27 Member states and in the UK, the largest trade union organising journalists is affiliated to the EFJ (Table 35).

The four Member States with the largest sectoral workforces (Table 49) are all represented in all the four European trade union organisations. Among the seven Member States for which the audiovisual sector workforce as a proportion of the total national workforce is the largest (Table 50), it is to be noted that EURO-MEI has no affiliate in Croatia and FIA and FIM have no affiliate in Malta.

An assessment has also been made about the representativeness of the national sectoral trade unions not affiliated to any of the four European trade union organisations involved in the ESSDC. These are 43 audiovisual sector trade unions from the following 18 Member States: Bulgaria, Croatia, Cyprus, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, the Netherlands, Poland, Portugal, Slovakia, Slovenia and Sweden (Table 32).

Of only the trade unions organising audiovisual sector activities in the public sector, in one or two Member States some were affiliated to EPSU and CESI, for the management employees there was one organisation affiliated to eTIC-CEC, and for the scenario writers one from the UK that was affiliated to the European Writers' Council (see Table 33). As none of these other European associations has affiliated trade unions in more than one or two countries involved in sector-level collective bargaining that are not represented by other European associations on the ESSDC, the following conclusion is justified.

No other European trade union organisation was found that had any significant representativeness in the audiovisual sector, allowing the conclusion that **EURO-MEI, FIA, FIM and the EFJ are the only European trade union organisations in the audiovisual sector, and that together they are fully representative of all employees in all occupations and all activities in the sector.** EURO-MEI, FIA and FIM have proven their capacity to negotiate and are able to make commitments on behalf of all the member organisations they represent. For the EFJ, no information has been provided regarding its capacity to negotiate.

On the employers' side, there are five European employer organisations involved in the audiovisual ESSDC: CEPI, the EBU, ACT, AER and the FIAPF. CEPI and the FIAPF mainly organise employer organisations in audiovisual production (NACE 59), and the EBU, ACT and AER mainly in broadcasting (NACE 60).

Both CEPI and the FIAPF are associations representing producers' associations (and also companies for CEPI) covering NACE 59.1. In the data collection for this study, there was no distinction made within NACE 59.1 between audiovisual productions for television or film. Despite the differences between the two associations – the FIAPF is traditionally seen as representing film producers while CEPI is seen as representing television

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and audiovisual producers – both associations are representative of film, television and audiovisual producers in their role as employers of professionals and talents working in the creation process of content. This includes, according to CEPI and the FIAPF, audio and video technicians, actors, costume and make up talents and additional professionals working within the creative industry.

The EBU mainly organises the public service media organisations, which are active in audiovisual production as well as broadcasting. ACT organises commercial TV companies and AER the employers at radio stations.

CEPI has affiliated employer organisations in 13 Member States and the UK, and in 9 Member States and the UK there is an affiliated employer organisation that is involved in collective bargaining (Tables 36 and 37). CEPI has an affiliated company only in Spain. Taking the employer organisations and companies together, CEPI has affiliates in 13 Member States (Table 46). The Member States in which CEPI has no affiliates are Cyprus, Finland, Germany, Greece, Hungary, Latvia, Lithuania, Luxembourg, the Netherlands and Romania. With effect from 2021, CEPI has a member organisation in Poland, although this was not confirmed in the scope of this study. In 11 Member States (and the UK), the largest audiovisual sector employer organisation is affiliated to CEPI. This is the case for Austria, Belgium, Czechia, Denmark, Estonia, Ireland, Italy, Portugal, Slovakia, Slovenia, Spain and the UK (Tables 36 and 37).

The FIAPF organises employer organisations covering film production in 13 Member States and in the UK. The FIAPF has no affiliated companies. In four Member States it has an affiliated employer organisation that is involved in collective bargaining (Table 38). This is the case for Austria, Belgium, Denmark and Germany. In seven Member States (and the UK) the largest audiovisual employer organisation is affiliated to the FIAPF: in Austria, Belgium, Czechia, Denmark, Estonia, Germany, Slovakia and the UK. In six of these countries this affiliate is also a member of CEPI, but in Germany it is only a member of the FIAPF. The 14 Member States in which the FIAPF has no member organisation are Bulgaria, Cyprus, France, Greece, Hungary, Ireland, Italy, Lithuania, Luxembourg, Malta, Portugal, Romania, Slovenia and Spain. With effect from 2021, the FIAPF also has a member organisation in Poland, although this was not confirmed in the scope of this study, as it was based on data collected in 2019–2020.

The EBU represents 57 public service media organisations in 26 Member States and 4 in the UK. According to the EBU's official list of members, the EBU has also a member organisation in Hungary; however, this is not confirmed in this study (by the Eurofound national correspondents). This would bring the number of Member States where the EBU has an affiliate to 27. The EBU has only one affiliated employer organisation, which is involved in both single-employer bargaining at company level and multi-employer bargaining at sector level in the Netherlands. In 26 EU Member States, the EBU has affiliates involved in collective bargaining; as these are public service media organisations, they engage in single-employer bargaining (Tables 39 and 40). The largest public service media organisations in audiovisual broadcasting activities are affiliated to the EBU in 23 Member States and the UK for radio broadcasting (NACE 60.1) and in 20 Member States and the UK for TV broadcasting (NACE 60.2) (Table 46).

ACT organises 21 companies active mainly in commercial TV broadcasting (NACE 60.2), but also in audiovisual production (NACE 59). In Czechia a business association is affiliated that is not involved in collective bargaining. Altogether, ACT has affiliates in 12 Member States and the UK. ACT has affiliated companies that are involved in collective bargaining in seven Member States – Belgium, Czechia, Finland, France, Italy, Luxembourg and Spain – and the UK (Table 41).

AER organises 10 employer organisations mainly covering radio broadcasting in nine Member States and the UK, plus 2 company members in Latvia, of which one is involved in collective bargaining. Of the affiliated employer organisations, those in Austria, Denmark, France, Greece, Italy and Spain are involved in collective bargaining (Tables 42 and 43).

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An analysis of the national employer organisations that are not affiliated to any of the five European employer organisations on the ESSDC listed 36 employer organisations from 13 Member States. All of them are involved in collective bargaining or have been until recently, because associations that are not involved in collective bargaining and not affiliated to any European social partner organisation are not included in this study. The 13 Member States for which national employer organisations involved in collective bargaining were identified that are not represented on the ESSDC are Austria, Belgium, Croatia, Estonia, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Portugal and Sweden (Table 44).

Some other European associations were identified, although most of them only organise national business associations. Only in two cases – Commercial Film Producers of Europe and the International Union of Cinemas – do the listed organisations have sectoral employer organisations affiliated in more than one Member State (Table 45).

CEPI and the FIAPF have a proven capacity to negotiate, to obtain a mandate and to commit the organisation on behalf of all its member organisations. ACT and AER have both illustrated how they are able to represent all their members on the ESSDC. The EBU operates with ad hoc internal consultation mechanisms that may provide some kind of capacity to negotiate, but no details were disclosed.

Altogether CEPI, the EBU, the FIAPF, ACT and AER are the most representative European employer organisations in the audiovisual sector. Together they cover all 27 Member States and the UK. Half of the employer organisations and the largest public service media organisations from the sector are represented by them. The Member States with the largest workforces are also represented, with effect from 2021. From the analyses in section 3.11, it can be concluded that the employees and employers of microfirms and the self-employed are also represented on the ESSDC.

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Table 51: Membership landscape of European social partner organisations in the audiovisual sector

	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	UK	
EURO-MEI (TUs)	Purple	Purple	Purple		Purple	Purple	Purple		Blue	Purple	Purple	Purple		Blue	Purple	Purple		Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Purple
FIA (TUs)	Purple	Purple	Blue	Purple		Purple	Purple	Blue	Blue	Purple	Purple	Purple	Blue	Blue	Purple	Purple			Purple		Blue	Blue	Blue	Purple	Purple	Blue			Purple
FIM (TUs)	Purple	Purple	Purple			Purple	Purple		Blue	Purple	Purple	Purple	Blue		Purple	Purple			Purple		Blue	Purple			Purple	Purple	Purple	Purple	Purple
EFJ (TUs)	Purple	Blue	Purple	Blue	Blue	Purple	Purple	Purple	Purple	Purple	Purple	Purple	Blue	Purple	Purple	Purple	Purple		Blue	Blue	Blue	Purple	Blue	Purple	Purple	Purple	Purple	Blue	Purple
CEPI (EOs)	Purple	Purple			Blue		Purple	Blue		Purple		Purple	Blue		Purple	Purple						Grey	Blue		Blue	Blue	Blue	Purple	
CEPI (companies)										Orange																			
FIAPF (EOs)	Purple	Purple			Blue	Purple	Purple	Blue			Blue		Blue						Blue		Blue	Grey			Blue		Blue	Purple	
FIAPF (companies)																													
EBU (EOs)																					Purple								
EBU (companies)	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Yellow	Orange	Orange	Orange	Orange	Grey	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange
ACT (EOs)																													
ACT (companies)		Orange			Orange	Grey			Yellow	Orange	Orange	Orange			Yellow	Orange	Yellow	Orange				Grey		Yellow		Yellow		Orange	
AER (EOs)	Blue					Blue	Purple		Purple	Purple	Blue	Purple	Grey		Blue	Purple												Blue	
AER (companies)																			Orange							Grey			

Notes: The purple cells correspond to member organisations (trade unions or employer organisations) involved in collective bargaining. The blue cells represent member organisations not involved in collective bargaining. The white cells are those countries for which the organisations do not have an affiliated member organisation. The yellow cells indicate the countries in which there is an affiliated company that is not involved in collective bargaining. The orange cells are the countries for which there is an affiliated company that is involved in collective bargaining. The grey cells indicate cases in which the European organisations' official lists include members in these countries, but during the research for the scope of this study this was not confirmed, as no information was provided, or new member organisations have joined after the data were collected in 2019. This is case in DE, HR, HU, NL, PL and SE. EO, employer organisation; TU, trade union.

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All published representativeness studies can be found on the Eurofound website:

<https://www.eurofound.europa.eu/observatories/eurwork/representativeness-studies>

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Annex 1: Supplementary information

Table A1: Abbreviations and names of trade unions in the audiovisual sector, 2019

Country	Abbreviation	Full name in original language	Full name in English
AT	Younion	Die Daseinsgewerkschaft	Younion – The Existence Union
	GPA-djp	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier	Union of Salaried Private Sector Employees, Graphical Workers and Journalists
BE	ACV Puls (formerly LBC-NVK) (part of ACV-CSC)	Algemeen Christelijk Vakverbond Puls	ACV Puls
	ACV-Transcom (part of ACV-CSC)	Algemeen Christelijk Vakverbond - Transcom	ACV-Transcom
	ACV-CNE (part of ACV-CSC)	Centrale nationale des Employés	National White-Collar Federation
	ACOD – CGSP	Algemene Centrale der Openbare Diensten – Centrale Générale des Services Publics	General Federal of Public Services
	AC – CG	Algemene Centrale – Centrale Générale	General Federation
	BBTK – SETCa	Bond van Bedienden, Technici en Kaderleden – Syndicat des Employés, Techniciens et Cadres	Union of Employees, Technicians and Managers
	ACLVB – CGSLB	Algemene Centrale der Liberale Vakbonden van België– Centre générale des syndicats libéraux de Belgique	General Confederation of Liberal Trade Unions in Belgium
	AJP	Association des journalistes professionnels	Professional Federation of Journalists
	VVJ	Vlaamse Vereniging van Journalisten	Flemish Federation of Journalists
BG	HPTC	Национален радио-телевизионен синдикат	National Radio and Television Trade Union-CITUB
	FC-CL Podkrepa (ФК-КТ Подкрепа)	Федерация Култура-КТ Подкрепа	Federation Culture-CL Podkrepa
	UBJ (СБЖ)	Съюз на българските журналисти	Union of Bulgarian Journalists (UBJ)
	САР	Съюз на артистите в България	Union of Bulgaria Actors (UBA)
	UBMD (СБМТД)	Съюз на българските музикални и танцови дейци	Union of Bulgarian Musicians and Dancers (UBMD)-CITUB
	TU Technique (С Техника)	Синдикат Техника	Trade Union Technique
CY	ΟΗΟ-ΣΕΚ	Ομοσπονδία Σωματείων Ημικρατικών Οργανισμών	Trade Unions Federation in Semi-governmental Organisations – SEK
	SIDIKEK – ΠΕΟ (ΣΗΔΗΚΕΚ – ΠΕΟ)	Συντεχνία Ημικρατικών, Δημοτικών και Κοινοτικών Εργατοϋπαλλήλων Κύπρου	Cyprus Semi-government, Municipal and Local Authority Workers and Employees Trade Union – ΠΕΟ
	ΟΥΙΚ – ΣΕΚ (ΟΥΙΚ – ΣΕΚ)	Ομοσπονδία Ιδιωτικών Υπαλλήλων Κυπρου	Cyprus Federation of Private Employees
	ΡΑΣΕΥ – ΠΕΟ (ΠΑΣΕΥ - ΠΕΟ)	Παγκύπρια Συντεχνία Εργαζομένων στις Υπηρεσίες	Cyprus Trade Union of Employees in Services
	ΕΣΚ	Ένωση Συντακτών Κύπρου	Union of Cyprus Journalists
CZ	OS Media	Odborový svaz pracovníků hromadných sdělovacích prostředků České republiky	Trade Union of Mass Media Workers of the Czech Republic
	NOO ČT v Praze	Nezávislá odborová organizace České televise v Praze	Independent Trade Union Organisation of Czech television in Prague

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Country	Abbreviation	Full name in original language	Full name in English
	SN ČR	Syndikát novinářů České republiky z. s.	Syndicate of Journalists of the Czech Republic
DE	ver.di	Vereinte Dienstleistungsgewerkschaft	United Services Union
	VRFF	Die Vereinigung der Rundfunk-, Film- und Fernsehschaffenden – Die Mediengewerkschaft	Association of Radio, Movie and TV Employees – the Media Trade Union
	DJV	Deutscher Journalistenverband	German Journalists' Association
	DOV	Deutscher Orchesterverband	German Orchestra Association
	BFFS	Bundesverband Schauspiel	Federal Actors' Association
DK	FAF	Film- og tv-arbejderforeningen	Trade Union for Film and Television Workers
	DJ	Dansk Journalistforbund	Danish Union of Journalists
	DMF	Dansk Musiker Forbund	Danish Musicians' Union
	DAF	Dansk Artist Forbund	Danish Artists' Union
	DSF	Dansk Skuespillerforbund	Danish Actors' Union
	Metal	Dansk Metal	Danish Metalworkers Union
	DM	Dansk Magisterforening	Danish Association of Masters and PhDs
	DJØF	Dansk Jurist og Økonomforbund	Danish Association of Lawyers and Economists
	MDR	Medieforbundet i DR	The Media Union in Danish Broadcasting Corporation
EE	ENL	Eesti Näitlejate Liit	Association of Professional Actors of Estonia
	EAL	Eesti Ajakirjanike Liit	Estonian Union of Journalists
	TLL	Televisiooni loovtöötajate ametiühing	Trade Union of Television Creative Workers
	TALO	Teenistujate Ametiühing Keskorganisatsioon	Estonian Employees' Unions' Confederation
EL	POSPERT	Πανελλήνια Ομοσπονδία Συλλόγων Προσωπικού Επιχειρήσεων Ραδιοφωνίας Τηλεόρασης	Pan-Hellenic Federation of Employees' Associations of Radio & Television Broadcasting Corporations
	SEI	Σωματείο Ελλήνων Ηθοποιών (ΣΕΗ)	Hellenic Actors' Union
	PMS	Πανελλήνιος Μουσικός Σύλλογος (Π.Μ.Σ.)	Pan-Hellenic Musicians' Union
	ETITA	Ένωση Τεχνικών Ιδιωτικής Τηλεόρασης Αττικής	Union of Greek Private Television Technicians of Attica
	ETER	Ένωση Τεχνικών Ελληνικής Ραδιοφωνίας	Hellenic Union of Radio Broadcasting Technicians
	ESIEA	Ενωσις Συντακτών Ημερησίων Εφημερίδων Αθηνών	Journalists' Union of the Athens Daily newspapers
	ESIEMTH	Ένωση Συντακτών Ημερησίων Εφημερίδων Μακεδονίας-Θράκης	Journalists' Union of Macedonia and Thrace Daily Newspapers
	ESPIT/PEPU	Ένωση Συντακτών Περιοδικού – Ηλεκτρονικού Τύπου	Periodical and Electronic Press Union
	POESI/PFJU	Πανελλήνια Ομοσπονδία Ενώσεων Συντακτών	Panhellenic Federation of Journalists' Union
	ETEKT OT	Ένωση Τεχνικών Ελληνικού Κινηματογράφου και Τηλεόρασης Οπτικοακουστικού Τομέα	Hellenic Film and Television Technicians' Association for the Audiovisual Sector

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Country	Abbreviation	Full name in original language	Full name in English
ES	FeSMC-UGT	Federación de Servicios, Movilidad y Consumo – Unión General de Trabajadores	Services, Mobility and Consumption Federation – General Workers Union
	FSC-CC.OO.	Federación de Servicios a la Ciudadanía – Comisiones Obreras	Citizens Services Federation – Working Commissions
	CONARTE	Confederación de Artistas-Trabajadores del Espectáculo	Artists Confederation – Show-business Workers
	FeSP	Federación de Sindicatos de Periodistas	Journalists' Unions Federation
FI	SJL	Suomen Journalistiliitto – Finlands Journalistförbund ry	Union of Journalists in Finland
	TEME	Teatteri- ja mediatyöntekijöiden liitto	Trade Union for Theatre and Media Finland
	PAM	Palvelualojen ammattiliitto PAM ry	Service Union United
	Suomen Näyttelijäliitto	Suomen Näyttelijäliitto – Finlands Skådespelarförbund ry	Finnish Actors Union
	YTN	Ylemmät toimihenkilöt YTN	Federation of Professional and Managerial Staff
	SML	Suomen Muusikkojen Liitto ry	Finnish Musicians' Union
	Pro	Ammattiliitto Pro	Trade Union Pro
FR	FNSAC-CGT	Fédération nationale des syndicats du spectacles, de l'audiovisuel, et de l'action culturelle – Confédération générale du Travail	National Federation of Trade Unions for Entertainment, Audiovisual and Cultural Action – General Confederation of Labour
	SNTPCT	Syndicat national des techniciens et travailleurs de la production cinématographique et de télévision	National Union of Technicians and Workers in Film and Television Production
	FASAP-FO	Fédération Force ouvrière des arts, spectacles, audiovisuel, presse, communication et multimédia	Federation for Arts, Entertainment, Audiovisual, Press, communication and Multimedia (Force Ouvrière Confederation)
	Journalistes FO	Syndicat général des journalistes Force ouvrière	General Union of Journalists (Force Ouvrière Confederation)
	F3C-CFDT	Fédération communication conseil culture – CFDT	Communication, Consulting, Culture Federation (CFDT Confederation)
	CFDT Journalistes	CFDT Journalistes	Union of Journalists (CFDT Confederation)
	SNJ	Syndicat national des journalistes	National Union of Journalists
	SNJ-CGT	Syndicat national des journalistes CGT	National Union of Journalists (CGT Confederation)
	Fedecom CFTC	Fédération Communication CFTC	Federation Communication CFTC
	FCCS CFE-CGC	Fédération de la culture, de la communication et du spectacle – CFE-CGC	Federation of Culture, Communication and Entertainment CFE-CGC
	UNSA	Fédération UNSA Spectacle et Communication	Federation UNSA Spectacle and Communication
HR	SNH	Sindikát novinara Hrvatske	Journalists Trade Union
	HSDK	Hrvatski sindikat djelatnika u kulturi	Croatian Trade Union of Workers in Culture
	SOMK	Sindikát obrazovanja, medija i kulture Hrvatske	Trade Union of Education, Media and Culture of Croatia
	SGNDH	Sindikát grafičke i nakladničke djelatnosti Hrvatske	Trade Union in Printing and Publishing Industry of Croatia

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Country	Abbreviation	Full name in original language	Full name in English
	HDDU	Hrvatsko Društvo Dramskih Umjetnika	Croatian Association of Dramatic Artists
	HND	Hrvatsko novinarsko društvo	Croatian Journalists' Association
	HGU	Hrvatska Glazbena Unija	Croatian Musicians Union
HU	MZTSZ	Magyar Zeneművészek és Táncművészek Szakszervezete	Hungarian Musicians' and Dancers' Union
	SziDoSz	Színházi Dolgozók Szakszervezete	Hungarian Theatre Workers' Union
	EMSZ	Egyesült Média Szakszervezet	United Media Trade Union
	FFSZ	Filmművészek és Filmalkalmazottak Szakszervezete	Trade Union of Hungarian Film Authors and Employees of the Motion Picture Sector
	HPU/ Sajtószakszervezet	Sajtószakszervezet	Hungarian Press Union
	MMDSZ	Magyar Műsorszóró Dolgozók Szakszervezete	Hungarian Broadcasting Workers Trade Union
IE	SIPTU	Services Industry Professional Technical Union	Services Industry Professional Technical Union
	Connect	Connect Trade Union	Connect Trade Union
	Opatsi	Operative Plasterers and Allied Trades Society of Ireland	Operative Plasterers and Allied Trades Society of Ireland
	BATU	Building and Allied Trades' Union	Building and Allied Trades' Union
	NUJ	National Union of Journalists	National Union of Journalists
IT	SLC-CGIL	Sindacato Lavoratori della Comunicazione – Confederazione Generale Italiana del Lavoro	Union for Workers in the Communication Sector – Italian General Confederation of Labour
	Fistel-CISL	Federazione Informazione, Spettacolo e telecomunicazioni – Confederazione Italiana Sindacati Lavoratori	Federation for Information, Performance and Telecommunication – Italian Confederation of Workers' Trade Unions
	Uilcom-UIL	Unione Italiana Lavoratori della Comunicazione – Unione Italiana del Lavoro	Italian Union for Workers in the Communication Sector – Italian Union for Labour
	FNSI	Federazione Nazionale Stampa Italiana	National Federation of the Italian Media
	CISAL Comunicazione	CISAL Comunicazione	CISAL Communication
	Snater TLC	Sindacato Nazionale Autonomo Telecomunicazioni Radiotelevisioni e Società Consociate	National Autonomous Union for Telecommunications Radios and Televisions
	Libersind Confasal	Libero Sindacato – Confederazione Generale dei Sindacati Autonomi dei Lavoratori	Free Union – General Confederation of Autonomous Trade Unions
LT	LRTDPS	Lietuvos radijo ir televizijos darbuotojų profesinė sąjunga	Trade Union of Lithuanian Radio and Television Employees
	LŽS	Lietuvos žurnalistų sąjunga	Lithuanian Union of Journalists
LU	OGB-L	Syndicat imprimerie, medias et culture – FLTL	Printing, Media and Culture Union FLTL
	LCGB	Confédération luxembourgeoise des syndicats chrétiens	Luxembourg Confederation of Christian Trade Unions
	ALJP	Association luxembourgeoise des journalistes professionnels	Association of Professional Journalists in Luxembourg
LV	LKDAF	Latvijas Kultūras darbinieku arodbiedrība	Trade Union of Culture Sector of Latvia
	LSAB	Latvijas Sakaru darbinieku arodbiedrība	Communication Workers Trade Union

Representativeness of the European social partner organisations: Audiovisual sector

Country	Abbreviation	Full name in original language	Full name in English
	LŽA	Latvijas Žurnālistu asociācija	Latvian Association of Journalists
	LŽS	Latvijas Žurnālistu savienība	Latvian Union of Journalists
MT	GWU	General Workers Union	General Workers Union
	IĠM	Istitut tal-Ġurnalisti Maltin	Institute of Maltese Journalists
NL	FNV Media & Cultuur	Federatie Nederlandse Vakbeweging Media & Cultuur	Federation of Dutch Trade Unions Media & Culture
	Kunstenbond	Kunstenbond	Arts Association
	NVJ	Nederlandse Vereniging van Journalisten	Dutch Association of Journalists
	CNV Vakmensen	Christelijk Nationaal Vakverbond Vakmensen	Christian National Employees Movement for Professionals
	AVV	Alternatief voor Vakbond	Alternative for Unions
PL	FZZPKiS	Federacja Związków Zawodowych Pracowników Kultury i Sztuki	Federation of Trade Unions of Culture and Arts Workers
	ZASP	Związek Artystów Scen Polskich	Polish Association of Stage Artists
	ZZAP	Związek Zawodowy Aktorów Polskich	Trade Union of Polish Actors
	KSKiSP NSZZ 'Solidarnosc'	Krajowy Sekretariat Kultury i Środków Przekazu Niezależnego Samorządnego Związku Zawodowego 'Solidarnosc'	National Secretariat of Culture and Media of the Independent Self-governing Trade Union 'Solidarnosc'
	ZZ PAMO	Związek Zawodowy Polskich Artystów Muzyków Orkiestrowych	Trade Union of Polish Artists Orchestra Musicians
	SDP	Stowarzyszenie Dziennikarzy Polskich	Polish Journalists Association
	SDRP	Stowarzyszenie Dziennikarzy Rzeczypospolitej Polskiej	Association of Journalists of the Republic of Poland
	TD	Towarzystwo Dziennikarskie	Society of Journalists
	MZZPRiTV	Międzyzakładowy Związek Zawodowy Pracowników Radia i Telewizji	Interplant Trade Union of Radio and Television Employees
PT	Sinttav	Sindicato Nacional dos Trabalhadores das Telecomunicações e Audiovisual	National Union of Telecommunications and Audiovisual Workers
PT	Sitese	Sindicato dos Trabalhadores e Técnicos de Serviços, Comércio, Restauração e Turismo	Union of Workers and Technical Staff in Services, Commerce, Restaurants and Tourism
PT	CENA-STE	Sindicato dos Trabalhadores dos Espectáculos do Audiovisual e dos Músicos	Union of Performance and Audiovisual Workers and Musicians
	SJ	Sindicato dos Jornalistas	Union of Journalists
	STT	Sindicato dos Trabalhadores de Telecomunicações e Comunicação Audiovisual	Union of Workers in Telecommunications and Audiovisual Communication
	SMAV	Sindicato dos Meios Audiovisuais	Union of Audiovisual Media
	Sindelco	Sindicato Democrático dos Trabalhadores das Comunicações e dos Media	Democratic Union of Workers in Communications and Media
	FE	Federação dos Engenheiros	Federation of Engineers
	SPEue	Sindicato Português dos Engenheiros Graduados na União Europeia	Portuguese Union of Graduate Engineers in the EU
	Sicomp	Sindicato das Comunicações de Portugal	Union of Communications of Portugal
RO	USIS	Uniunea Sindicatelor din Instituțiile de Spectacole din România	Federation of Unions in Cultural Institutions

Representativeness of the European social partner organisations: Audiovisual sector

Country	Abbreviation	Full name in original language	Full name in English
	FAIR-MediaSind	Federația Culturală și Mass-Media FAIR-MediaSind	Federation for Culture and Mass Media FAIR-MediaSind
SE	SJF	Sveriges Journalistförbund	Swedish Union of Journalists
	Unionen	Unionen	Unionen
	Scen & Film	Teaterförbundet	Swedish Union for Performing Arts and Film
	SYMF	Sveriges Yrkesmusikers förbund	Swedish Union of Professional Musicians
	Svenska musikerförbundet	Svenska musikerförbundet	Swedish Musicians' Union
	DIK	DIK – facket för kultur, kommunikation och kreativ sektor	Union for Culture, Communication and Creative Sector
	Teaterförbundet	Teaterförbundet	Swedish Union for Performing Arts and Film
SI	GLOSA	Sindikat kulture in narave Slovenije	Trade Union of Culture and Nature of Slovenia
	GLOSA SKG -	Sindikalna Konferenca Glasbenikov	Union Conference of Musicians
	SVIZ	Sindikat vzgoje, izobraževanja, znanosti in kulture Slovenije	Education, Science and Culture Trade Union of Slovenia
	SUKI GLOSA	Sindikalna konferenca samostojnih ustvarjalcev na področju kulture in informiranja	Union Conference of Freelance Workers in Culture and Media
	ZDUS	Združenje dramskih umetnikov Slovenije	Slovenian Association of Dramatic Artists
	SKUU RTV Slovenia	Sindikat kulturnih in umetniških ustvarjalcev RTV Slovenije	Union of Cultural and Artistic Creators of RTV Slovenia
	SDRS	Sindikat delavcev radiodifuzije Slovenije	Union of Workers in Broadcasting of Slovenia
	SNS	Sindikat novinarjev Slovenije	Slovenian Union of Journalists
	DNS	Društvo novinarjev Slovenia	Slovene Association of Journalists
SK	ŮNIA OZ PHS	Odborový zväz profesionálnych orchestralných hudobníkov Slovenska	Trade Union Association of Professional Musicians of Slovakia
	Sloves	Slovenský odborový zväz verejnej správy a kultúry	Slovak Trade Union of Public Administration and Culture
	SSN	Slovenský syndikát novinárov	Slovak Syndicate of Journalists
	OZ Masmédií	Masmédií – Odborový zväz masmédií	Trade Union Association of Mass Media
UK	BECTU	Broadcasting, Entertainment, Communications and Theatre Union	Broadcasting, Entertainment, Communications and Theatre Union
	Equity	Equity	Equity
	Musicians Union	Musicians Union	Musicians Union
	NUJ	National Union of Journalists	National Union of Journalists
	WGGB	Writers Guild of Great Britain	Writers Guild of Great Britain

Note: Orange shading indicates organisations that the correspondents described as not traditional trade unions.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table A2: Abbreviations and names of employer organisations/business associations in the audiovisual sector, 2019

Country	Abbreviation	Full name in original language	Full name in English
AT	FAMA	Fachverband der Film- und Musikwirtschaft	Film and Music Austria
	FVKKV	Fachverband der Kino-, Kultur- und Vergnügungsbetriebe	Association of Cinema, Cultural and Entertainment Companies

Representativeness of the European social partner organisations: Audiovisual sector

Country	Abbreviation	Full name in original language	Full name in English
	VÖP	Verband Österreichischer Privatsender	Association of Private Broadcasters in Austria
BE	VOFTP	Vlaamse Onafhankelijke Film en Televisie Producenten	Flemish Independent Film and Television Producers
	VOT	Vlaamse Onafhankelijke Televisie Facilitaire Bedrijven	Flemish Independent Television Facility Companies
	Febelav	Federatie der Belgische Audiovisuele Ondernemingen	Federation of Belgian Audiovisual Enterprises
	FEWEB	Federatie van Webbedrijven	Federation of Web Companies
	FCB	Federatie der Cinema's van België	Federation of Cinemas in Belgium
	UPFF	Union de Producteurs des Films Francophones	Union of French-Speaking Film Producers
BG	АБРО	Асоциация на българските радио-телевизионни оператори	Association of Bulgarian Broadcasters (ABBRO)
	АФТП	Асоциация на филмовите и телевизионни продуценти	Association of Film and TV Producers
	БАМП	Българска асоциация на музикалните продуценти	Bulgarian Association of Musical Producers
CY	None		
	APA	Asociace producentů v audiovizi	Audiovisual Producers' Association
	AKTV	Asociace komerčních televizi	Association of Commercial Television
	ATO	Asociace televizních organizací	Association of Television Organisations
DE	VTFB	Verband Technischer Betriebe für Film und Fernsehen	Association of Technical Operators for Film and TV
	Produzentenallianz	Allianz Deutscher Produzenten – Film & Fernsehen	German Producer Alliance – Film & TV
	HDF Kino	HDF Kino	HDF Cinema
	TPR	Tarifverband Privater Rundfunk	Collective Bargaining Association for Private Radio Stations
	Vaunet	Verband Privater Medien	Association of Private Broadcasters and Media Providers
	ProduzentenVerband	Verband Deutscher Filmproduzenten	Association of German Film Producers
DK	DMA	Danske Medier	Danish Media Association
	Producentforeningen	Producentforeningen	Danish Producers' Association
EE	ERPÜ	Eesti Rahvuslik Filmiproduktentide Ühing	Estonian National Producers Union
	EFK	Eesti Filmitööstuse Klaster	Estonian Film Industry Cluster
	ERL	Eesti Ringhäälingute Liit	Association of Estonian Broadcasters
	Ministry of Culture	Eesti Kultuuriministeerium	Estonian Ministry of Culture
EL	EIIRA	Ένωση Ιδιοκτητών Ιδιωτικών Ραδιοφωνικών Σταθμών Αθηνών	Association of Athens Radio Stations' Owners
	EITISEE	Ένωση Ιδιωτικών Τηλεοπτικών Σταθμών Εθνικής Εμβέλειας– ΕΙΤΗΣΕΕ	Union of National Private Television Stations
ES	AERC	Asociación Española de Radiodifusión Comercial	Spanish Association of Commercial Broadcasting
	AEC	Asociación Estatal de Cine	Producers Guild of Spain
FI	PALTA	Palvelualojen työnantajat PALTA ry	Service Sector Employers Palta
	APFI ry	APFI ry on av-tuottajien edunvalvoja	Audiovisual Producers Finland – APFI ry
	RadioMedia ry	RadioMedia ry	RadioMedia ry

Representativeness of the European social partner organisations: Audiovisual sector

Country	Abbreviation	Full name in original language	Full name in English
	Medialiitto ry	Medialiitto ry	Finnish Media Federation (Finnmedia)
FR	UPC	Union des Producteurs de Cinéma	Union of Film Producers
	API	Association des Producteurs Indépendants	Association of Independent Producers
	SPI	Syndicat des producteurs indépendants	Union of Independent Producers
	SPFA	Syndicat des producteurs de films d'animation	Union of Animated Film Producers
	SPECT	Syndicat des producteurs et créateurs d'émissions de télévision	TV Producers and Creators Union
	USPA	Union syndicale de la production audiovisuelle	Audiovisual Production Employer Organisation
	SNEP	Syndicat national de l'édition phonographique	National Union of Phonographic Publishers
	FICAM	Fédération des industries du cinéma, de l'audiovisuel et du multimédia	Federation of Film, Audiovisual and Multimedia Industries
	ACCeS	Association des chaînes conventionnées éditrices de services	Association of Thematic Channels
	TLSP	Locales TV	Local TV
	CNRA	Confédération nationale des radios associatives	National Confederation of Community Radio Broadcasters
	SIRTI	Syndicat des radios indépendantes	Independent Radio Union
	SNRL	Syndicat National des Radios Libres	National Union of Free Radios
	SNRC	Syndicat National des Radios Commerciales	National Commercial Radio Union
SMPS (formerly SEPP)	Syndicat médias service public	Public Media Service Union	
HR	Ministry of Culture	Ministarstvo kulture	Ministry of Culture
	HUP KKKI	Hrvatska udruga poslodavaca – Koordinacije kulturnih i kreativnih industrija	Croatian Employers' Association – Coordination of Cultural and Creative Industry
	HAVC	Hrvatski audiovizualni centar	Croatian Audiovisual Centre
	HRUP	Hrvatska udruga producenata	Croatian Producers Association
	HDFD	Hrvatsko društvo filmskih djelatnika	Croatian Film Workers Association
	HURIN	Hrvatska udruga radijskih naknadnika	Croatian Association of Radio Publishers
	HDU	Hrvatska diskografska udruga	Croatian Federation of the Phonographic Industry
	HDNP	Hrvatsko društvo nezavisnih producenata	Croatian Association of Independent Producers
	HDDU	Hrvatsko Društvo Dramskih Umjetnika	Croatian Association of Dramatic Artists
	HND	Hrvatsko novinarsko društvo	Croatian Journalists' Association
	HGU	Hrvatska glazbena unija	Croatian Musicians' Association
HU	None		
IE	SPI	Screen Producers Ireland	Screen Producers Ireland
	Ibec/Audiovisual Ireland	Audiovisual Ireland (branch of Ibec)	Audiovisual Ireland (branch of Ibec)
	IBI	Independent Broadcasters of Ireland	Independent Broadcasters of Ireland
IT	FIMI	Federazione Industria Musicale Italiana	Italian Federation of the Music Industry
	Univideo	Unione Italiana Editoria Audiovisiva – Media Digitali e Online	Italian Union for the Audiovisual Publishing – Digital and Online Media

Representativeness of the European social partner organisations: Audiovisual sector

Country	Abbreviation	Full name in original language	Full name in English
	Aeranti-Corallo	Associazione delle radio e tv locali, satellitari, via internet, agenzie di informazione e concessionarie pubblicitarie radiotelevisive	Association of Local, Satellite and Internet Radio and TV, News Agencies and Radio and Television Advertising Agencies
	ANICA	Associazione Nazionale Industrie Cinematografiche Audiovisive	National Association of the Cinema, Audiovisual and Multimedia Industry
	APA	L'Associazione Produttori Audiovisivi-APA (formerly called Associazione Produttori Televisivi)	Association of Television Producers
	ANEC	Associazione Nazionale Esercenti Cinema	National Association of Cinema Companies
	CRTV	Confindustria Radio e Televisione	Confederation of Industries in the Radio and Television Sector
LT	None		
LU	ALJP	Association luxembourgeoise des journalistes professionnels	Luxembourg Association of Professional Journalists
LV	None		
MT	MEA	Malta Employers' Association	Malta Employers' Association
NL	NPO	Nederlandse Publieke Omroep	Dutch Public Broadcasters
	FPN	Filmproducenten Nederland	Film Producers in the Netherlands
	NVBF	Nederlandse Vereniging van Bioscopen en Filmtheaters	Dutch Association of Cinemas and Film Theatres
	RPO	Regionale Publieke Omroep	Regional Public Broadcasters
PL	None		
PT	APIT	Associação de Produtores Independentes de Televisão	Association of Independent Television Producers
	APR	Associação Portuguesa de Radiodifusão	Portuguese Broadcasting Association
	APEC	Associação de Empresas Cinematográficas	Portuguese Association of Cinematographic Companies
RO	None		
SE	Medieföretagen	Medieföretagen (Almega)	Media Companies (Almega)
	Film & TV-producenterna	Film & TV-producenterna	The Swedish Film & TV Producers
SI	DFPS	Društvo filmskih producentov Slovenije	Associations of Slovene Film Producers
SK	SAPA	Slovenska asociácia producentov v audiovizii	Slovak Audiovisual Producers Association
	ANP	Asociácia nezávislých producentov	Association of Independent Producers
UK	PACT	Producers Alliance for Cinema and Television	Producers Alliance for Cinema and Television
	Radiocentre	Radiocentre	Radiocentre

Note: Orange shading indicates organisations that the correspondents described as not traditional employer organisations. This list includes organisations that are not included in the present study as they are professional associations not engaged in collective bargaining or social dialogue, and not affiliated to a European social partner organisation.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Representativeness of the European social partner organisations: Audiovisual sector

Table A3: Total number of employees in the audiovisual sector by country

Country	Total employment	Total number of employees	Number of persons employed in NACE 59.1	Number of persons employed in NACE 59.2	Number of persons employed in NACE 60.1	Number of persons employed in NACE 60.2	Musicians 90.1	Performers 90.2	Journalists 90.3	Technicians 90.4
AT	14,900	9,706	3,993	381	665	4,667	n.a.	n.a.	n.a.	n.a.
BE	n.a.	12,355		4,866		6,489	n.a.	n.a.	n.a.	n.a.
BG	11,165	7,978	5,050	537	1,860	3,718	~ <2.5%	~ <1.25%	~ <20%	~ <70%
CY	1,745	1,745	468	17	198	1,063	n.a.	~150	~400	~1,200
CZ	19,800	14,700	7,300	2,100	3,500	6,900	n.a.	n.a.	n.a.	n.a.
DE	137,000	42,585	65,000	27,000	24,000	21,000	n.a.	n.a.	n.a.	n.a.
DK	16,522	11,853	8,170	1,326	970	6,056	n.a.	n.a.	n.a.	n.a.
EE	3,119	n.a.	1,196	147		1,776	n.a.	n.a.	n.a.	n.a.
EL	16,243	14,115	8,049	540	2,229	5,425	n.a.	n.a.	n.a.	n.a.
ES	89,600	77,800	33,800	1,087	6,080	22,155		n.a.	4,140	960
FI	10,700	8,000	~72%	~13%	~6%	~9%	n.a.	400	3,000	n.a.
FR	~242,000	~237,000	146,536	36,218	13,067	41,430	n.a.	n.a.	n.a.	n.a.
HR	7,000	5,990	1,493	285	911	3,937	200	500	3,000	500
HU	7,679	7,437	2,430	229	106	1,566	n.a.	n.a.	n.a.	n.a.
IE	16,930	10,560	5,210	1,000	1,000	890	<1,000	<1,000	<1,000	<1,000
IT	43,805	34,266	26,839	1,766	2,910	12,290	n.a.	n.a.	n.a.	n.a.
LT	~2,500	1,206	1,747	240	118	383	n.a.	n.a.	n.a.	n.a.
LU	~940	940	370	10	290	280	~100	~100	~310	~430
LV	3,145	2,766	1,365	200	514	1,075	n.a.	n.a.	n.a.	n.a.
MT	1,204	844	718	114	97	275	39	13	41	709
NL	32,310	20,970	9,250	810	2,410	4,320	n.a.	n.a.	n.a.	n.a.
PL	41,800	22,475	12,717	2,491	3,930	12,555	n.a.	5,000	n.a.	n.a.
PT	10,073	8,082	4,065	466	1,115	2,436	n.a.	n.a.	n.a.	n.a.
RO	15,508	14,445	5,244	721	2,836	6,676	n.a.	n.a.	n.a.	n.a.
SE	43,053	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
SI	4,413	3,631	894	69	774	1,894		50%	20%	30%
SK	4,499	3,364	2,318	180	71	1,933	n.a.	n.a.	10/15%	n.a.
UK	193,000	132,000	80,000	n.a.	n.a.	53,000	n.a.	n.a.	10,220	n.a.

Note: n.a., not available.

Representativeness of the European social partner organisations: Audiovisual sector

Table A4: Total number of companies in the audiovisual sector by country

Country	Total number of companies in NACE 59 and 60	Number of companies with <10 employees	Number of companies with 10–49 employees	Number of companies with >250 employees	Number of companies in NACE 59.1	Number of companies in NACE 59.2	Number of companies in NACE 60.1	Number of companies in NACE 60.2	Number of companies employing musicians ^{90.1}	Number of companies employing performers ^{90.2}	Number of companies employing journalists ^{90.3}	Number of companies employing technicians ^{90.4}
AT	2,888	~50%	~20%	A few	2,076	727	43	42	n.a.	n.a.	n.a.	n.a.
BE	1,032	Most	n.a.	A few	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
BG	1,291	Many	Many	A few	919	168	61	143	1	2	204	1,291
CY	184	152	25	1	117	12	37	18	None	~10	~40	~150
CZ	4,483	4,442	35	6	1,312	1,907	57	119	n.a.	n.a.	n.a.	n.a.
DE	11,206	10,161	857	152	8,244	2,405	335	222	n.a.	n.a.	n.a.	n.a.
DK	3,034	n.a.	n.a.	2	2,908		126		n.a.	n.a.	n.a.	n.a.
EE	758	674	23	0	635	98	10	4	n.a.	n.a.	n.a.	n.a.
EL	2,565	1,615	94	59	1,454	284	622	205	n.a.	n.a.	n.a.	n.a.
ES	9,824	9,081	605	13	7,847	367	963	647	n.a.	n.a.	n.a.	n.a.
FI	1,827	~1,774	~54	~1	1,177	585	46	19	n.a.	n.a.	n.a.	n.a.
FR	9,816	9,319	405	17	7,157	1,954	560	145	n.a.	n.a.	n.a.	n.a.
HR	846	~95%	5.00%	1	400	240	150	40	200	500	3,000	500
HU	5,615	6,283	100	3	5,144	471	785		n.a.	n.a.	n.a.	n.a.
IE	~500	Most	n.a.	1	250	n.a.	55	2	Very few	Very few	2	n.a.
IT	9,083	8,452	538	15	6,353	1,200	759	771	n.a.	n.a.	n.a.	n.a.
LT	1,510	176	21	0	1,212	205		37	n.a.	n.a.	n.a.	n.a.
LU	235	~200	~29	6	185	24	10	16	~15	~45	~50	~125
LV	718	674	38	2	479	117	41	81	n.a.	n.a.	n.a.	n.a.
MT	445	Most	Very few	0	10	17	12	7	39	3	3	218
NL	19,915	19,710	145	15	16,360	3,255	240	60	n.d.	n.d.	n.d.	n.d.
PL	15,719	15,436	233	12	7,069	1,090	130	255	n.a.	n.a.	n.a.	n.a.
PT	8,827	8,600	200	10	7,000	1,050	650	130	n.a.	n.a.	n.a.	n.a.
RO	3,828	2,702	107	7	2,758	564	194	312	n.a.	n.a.	n.a.	n.a.
SE	13,556	13,349	201	6	8,474	4,717	177	188	n.a.	n.a.	n.a.	n.a.
SI	1,630	1,605	24	1	1,147	167	157	159	~10%		~10%	~80%
SK	2,461	1,058	16	2	2,265	135	16	38	n.a.	n.a.	n.a.	n.a.
UK	29,485	~93%	~3.7%	~0.2%	23,950	3,585	795	1,155	n.a.	n.a.	n.a.	n.a.

Note: n.a., not available; n.d., no data.

Table A5: Trade unions and professional associations not included in this study

Country	Name/ abbreviation	Notes
CY	Συδιπρο-PIK	In the Cyprus Broadcasting Corporation (CyBC), another two company-level trade unions are active: (1) Managerial Personnel Trade Union – CyBC (Συδιπρο-PIK, Sydipro-RIK) and (2) Trade Union of Self-Employed, Fixed-Term and Indefinite-Term Employees and Contract Employees Ισοτητα (Isotito, Equality). They have about 10 members each and are not signatory parties of the corporation’s collective agreements. Isotita was established in December 2017 to organise employees with atypical employment contracts in the broader public sector. It has recently been recognised by the Board of CyBC.
	Ισοτητα	
CZ	OS NPM	The Trade Union of Journalists and Media Employees (OS NPM) was contacted in this study, but provided no response. According to the information available on the website of this organisation, its sectoral importance and membership domain are considered to be negligible.
DE	VdO and GDBA	VdO and GDBA are member organisations of FIA, and according to the information provided they only have members in the live performance sector, not in the audiovisual sector.
DK	IDA	IDA is not a member of EURO-MEI, but of UNI Europa P&M. Its members are professionals and managers from various sectors, but not from the audiovisual sector.
EE	TLL and RTTTA	TLL and RTTTA are company-level trade unions, representing only one public service media organisation (ERR). They were included in the 2013 audiovisual representativeness study, which also states that they represent employees of only one company.
	EKL	The Estonian Filmmakers Union has 332 members, who are filmmakers. It calls itself a guild. It is a professional organisation that represents filmmakers and the creative interests of its members, but it is not involved in collective bargaining or in matters related to working conditions.
	EDG	The Estonian Documentary Guild has 51 members, who are documentary filmmakers. It is a professional association, not involved in collective bargaining.
	ESC	The Estonian Camera Operators Association combines TV and film camera operators. The survey did not receive any information from it. It is mentioned on the internet, but could not be found in the business register (where unions and associations should be registered), so it is uncertain how official a union it is.
	EKTL/Estonian Ballet Union	The Estonian Professional Dancers Union (EKTL) did not have members in the audiovisual sector. The EKTL was a member of FIA. It is now the Estonian Ballet Union and no longer a member of FIA (or any other EU-level organisation). It is not engaged in collective bargaining and is considered part of the live performance sector, not of the audiovisual sector.
ES	SPME	Sindicato Profesional de Músicos de España (SPME) is not involved in collective bargaining processes and has only a very low level of affiliation within the sector.
	ELA	Eusko Langileen Alkartasuna (ELA) is not representative in the sector and does not participate in collective bargaining in the sector.
FI	ERTO	The Union of Private Sector Professionals did not want to participate in the study (as indicated in several emails during September and October 2019) and thus there is no information on it. It was included in the previous audiovisual representativeness study of 2013, with some 200 active sectoral members, and is thus probably one of the smaller organisations in the sector. It has no European sector-related affiliation.
HU	MMDSZ	The Trade Union of Hungarian Broadcast Workers (Magyar Műsorszóró Dolgozók Szakszervezete) only represents workers at the state-owned Antenna Hungária. Out of 557 employees, about 250 are in the audiovisual sector and trade union members. Their activities are in NACE 59.1, 59.2, 60.1 and 60.2. No journalists, actors or musicians are included. The MMDSZ is not a member of any EU organisation, only the

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		Hungarian confederation MASZSZ. It is a signatory to the collective agreement at Antenna Hungária.
	FS	Filmművész Szövetség is a professional organisation with both individual members and organisations interested in influencing matters concerning the film industry. It is not involved in collective bargaining and is not EU affiliated.
	MJE	The Association of Hungarian Film Directors (Magyar Játékfilmrendezők Egyesülete) is a new organisation that represents filmmakers, mainly those making feature films. It wanted to be organised as a trade union but the law in Hungary makes it impossible to establish a trade union for filmmakers who are typically working in their own small companies, according to the chair of MJE. If they were to set up a trade union, they would be fighting against themselves, as there is no employer side. The MJE wants to influence working conditions by overseeing contracts and offering advice to members. It is not involved in collective bargaining.
	MS	The Federation of Artists' Unions (Művészeti Szakszervezetek Szövetsége) is an umbrella organisation with three trade unions as members in the sector for different professions (film, theatre, music). It is not a member of any EU organisation; only its members are. It is not involved in collective bargaining.
IE	IFWA	The Irish Film Workers Association is a non-ICTU body formed in 2015, out of a dispute with SIPTU. It claims a membership of around 300 but this is disputed. ICTU ordered it to relinquish its membership in the film industry.
LV	TTDA and LTV	The Television Technical Employees Union (Televīzijas Tehnisko Darbinieku arodbiedrība) and the Trade Union of Latvian Television (Latvijas Televīzijas arodbiedrība) are two company-level trade unions operating in Latvian Television. They are not eligible for sector-level collective bargaining; however, they do have a company-level agreement.
	LRA	The Trade Union of Latvian Radio (Latvijas Radio Arodbiedrība) is a company-level trade union operating in Latvian Radio. It is not eligible for sector-level collective bargaining; however, it has a company-level agreement and a cooperation agreement with the sector-level trade union LKDAF.
PL	ZZPTIT TVP Wizja	The Trade Union of the Creative and Backstage Employees of TVP 'Vision' (Związek Zawodowy Pracowników Tworzących i Technicznych TVP Wizja) is not involved in collective bargaining, and not affiliated to any European-level federations/organisations.
	ZZP TVP	The Trade Union of the TVP Company 'Woronicza' in Warsaw (Związek Zawodowy Pracowników TVP S.A. 'Woronicza' w Warszawie) is not involved in collective bargaining, and not affiliated to any European-level federations/organisations.
	NSZZPPR	The Independent Self-Governing Trade Union of Polish Radio Employees (Niezależny Samorządny Związek Zawodowy Pracowników Polskiego Radia) is a small organisation present in only one company (Polskie Radio), and not representative according to national statutory criteria. No information was provided about this organisation.
	ZZDPPDTPR	The Trade Union of Journalists and Employees of the Second and Third Stations of Polish Radio (Związek Zawodowy Dziennikarzy i Pracowników Programów Drugiego i Trzeciego Polskiego Radia) is a small organisation present in only one company (Polskie Radio), and not representative according to national statutory criteria. No information was provided about this organisation.
	NSZZSLPR	The Independent Self-Governing Trade Union of the Polish Radio Speakers and Presenters (Niezależny Samorządny Związek Zawodowy Spikerów i Lektorów Polskiego Radia) is a small organisation present in only one company (Polskie Radio), and not representative according to national statutory criteria. No information was provided about this organisation.
	ZZPRP	The Trade Union of Public Radio Employees of the Polish Radio Company 'Our Radio' (Związek Zawodowy Pracowników Radia Publicznego – Polskiego Radia SA 'Nasze Radio') is a small organisation present in only one company (Polskie Radio), and not representative according to national statutory criteria. No information was provided about this organisation.

Source: Network of Eurofound Correspondents

Table A6: Business associations and other organisations not included in this study

Country	Name/ abbreviation	Notes
BG	АБРО	The Association of Bulgarian Broadcasters (ABBRO) is included in Table 17. As it is not involved in collective bargaining, not considered to be an employer organisation that is involved in the regulation of working conditions of employees in the sector, and also not involved in national or European social dialogue, it is not counted in this study.
	БАМП	The Bulgarian Association of Musical Producers-(BAMP) is a business association that is important for the activities in NACE 59.2. It does not, however, operate as an employer organisation and it does not participate in social dialogue. It is a member of IFPI.
CZ	ATO	The Association of Television Organisations (ATO) in Czechia was established by TV stations exclusively in connection with an electronic audience measurement project (Peoplemetry). The ATO provided an umbrella organisation for this project and provides end-users with unified data on the viewing figures of Czech television stations. It is not an employer organisation involved in collective bargaining, social dialogue or matters related to working conditions of employees in the sector.
EE	EFÜ and EAAL	The Estonian Association of Phonogram Producers and Estonian Association of Audiovisual Authors are organisations whose main purpose is to collect and pay out author fees and represent the rights of authors. They are not employer organisations or business associations, even though they are involved in paying employees in the sector.
	EFL	The Estonian Film Producers Association refused to answer the questionnaire, stating that its members belong to the Estonian Film Industry Cluster. According to internet-based information, it has around 12 members (film studios) and is a business organisation.
	EAL	The Estonian Animation Association is a business organisation/professional association that organises animation filmmakers, but is not involved in collective bargaining etc. No information was provided.
EL	PACT (Media Producers Association), SAPOE (Audiovisual Producers' Association of Greece), ESPEK (Association of Greek Film Producers – Directors), SEPKT&P (Association of Greek Producers for Cinema – TV & Video), EPEK (Union of Regional televisions of Greece) and PEIRAS (Panhellenic Association of Radio station Owners)	These organisations used to be active as employer organisations, but, given the termination of collective bargaining in the sector in Greece, based on a legislative act, these organisations have been inactive in recent years.
ES	UTECA	The Free-to-Air Commercial Television Union (Unión de Televisiones Comerciales en Abierto) is a business organisation rather than an employer organisation
	FAPAE	The Confederation of Spanish Audiovisual Producers (Confederación de Productores Audiovisuales Españoles) went bankrupt. ACE, the main member of FAPAE, now leads the employer side in industrial relations in motion picture activities.
FR	SMSP	Synpase is a professional organisation active only in the live performance sector.
	STP	No information is available on the SMSP or STP.
	Synpase	

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HR	HAVC	The Croatian Audiovisual Centre (Hrvatski audiovizualni centar) is the government-backed strategic agency for the audiovisual sector in Croatia. This organisation is a member of the European Film Agency.
	HDFD	Croatian Film Workers Association (Hrvatsko društvo filmskih djelatnika).
	HURIN	The Croatian Association of Radio Publishers (Hrvatska udruga radijskih naknadnika) is a professional association, not an employer organisation.
	HDU	The Federation of the Phonographic Industry Croatia (Hrvatska diskografska udruga) is a member of IFPI.
HU	Filmművész Szövetség	This is a professional organisation with both individual members and organisations interested in influencing matters concerning the film industry. It is not involved in collective bargaining and is not EU affiliated.
LT	Association of Lithuanian Radio and Television, Association of Regional Radio Stations, Independent Producers Association, Vilnius Film Cluster and Lithuanian Filmmakers Union	There are a number of associations operating in the sector. None of them regards itself as a social partner (employer organisation) and none of them participates in collective bargaining. Some of them are members of various European organisations/associations (e.g. Eurimages, European Council of Artists); however, these are not social partner organisations.
LV	LRA	The Latvian Association of Broadcasting Organisations (Latvijas Raidorganizāciju asociācija) unites 12 broadcasting companies. It calls itself a lobbying association. It does not deal with collective bargaining, and is not an employer organisation by law.
	LKPA	The Film Producers Association of Latvia has 56 members, who are individual film producers. It is not an employer organisation by law and does not operate like an employer organisation.
	Olffi	The Film Service Producers Association of Latvia organises five companies. It is also not an employer organisation by law and does not operate like one.
MT	MEA	The Malta Employers' Association is a member of SGI Europe (formerly CEEP) and has 103 sectoral companies affiliated, but is not involved in collective bargaining
PL	ZPPM	The Private Media Employer Organisation (Związek Pracodawców Prywatnych Mediów) is not involved in collective bargaining, and not affiliated to any European-level federations/organisations.
	ZPMP	The Public Media Employer Organisation (Związek Pracodawców Mediów Publicznych) is not involved in collective bargaining, and not affiliated to any European-level federations/organisations.

Annex 2: Largest employer organisations in the sector

In Table 46, all employer organisations and all countries are considered equal. There are, however, countries with a larger workforce in absolute numbers (see Table 49) and as a proportion of the total national workforce employed in the audiovisual sector (see Table 50).

Moreover, employer organisations are not all equal in terms of membership strength. Table A7 illustrates the countries for which the largest and second largest employer organisations are affiliated to one of the European employer organisations. The largest employer organisation for each of the four NACE code activities was also assessed separately. As there are many microfirms, and as the exact workforce of some companies fluctuates over time because of project-based activities, assessing which employer organisation represents the largest cumulative part of the sectoral workforce in a country is rather difficult. Therefore, Table A7 and its assessment cannot be considered complete. The table was taken out of the report and remains here in the annex only for general guidance.

More striking, however, is the assessment in the far-right column of the table, indicating that in eight EU Member States (Austria, Belgium, Bulgaria, Czechia, Germany, Ireland, Italy, Portugal) and the UK all activities in the audiovisual sector are represented by the collective of CEPI, the EBU, the FIAPF, ACT and AER. There are thus 14 EU Member States where there are employer organisations or companies represented by one of the European employer organisations on the audiovisual ESSDC, although they do not represent all audiovisual activities. These 14 EU Member states are Croatia, Denmark, Estonia, Finland, France, Greece, Latvia, Lithuania, Malta, the Netherlands, Slovakia, Slovenia, Spain and Sweden.

The middle of Table A7 assesses whether the largest employer organisations in each of the four parts of the sector is represented. Regarding the production of film, TV and video programmes (NACE 59.1), the largest employer organisation from 20 EU Member States is represented on the ESSDC. For 14 countries this is the case through CEPI, for 7 through the EBU and for 12 through the FIAPF. The largest employer organisations covering sound recording and music publishing activities (NACE 59.2) from only five EU Member States are represented on the ESSDC, while the largest employer organisations for radio broadcasting (NACE 60.1) and television broadcasting (NACE 60.2) are represented on the ESSDC for 21 EU Member States. In 19 EU Member States the largest organisation representing radio broadcasting is affiliated to the EBU, and in 16 Member States the largest organisation representing television broadcasting is affiliated to the EBU. These are, however, mainly large companies and not employer organisations. In Table A7 the largest employer organisations affiliated to the respective European organisations are marked in orange and the largest individual companies in yellow.

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Table A7: European affiliation of the largest and second largest employer organisations

Country	Affiliation of the two most important employer organisations in the audiovisual sector					Affiliation of the most important employer organisation in NACE 59.1					Affiliation of the most important employer organisation in NACE 59.2					Affiliation of the most important employer organisation in NACE 60.1					Affiliation of the most important employer organisation in NACE 60.2					Do the employer organisations affiliated to CEPI, the EBU, the FIAPF, ACT and AER cover the entire audiovisual sector?						
	Largest			Second largest		CEPI	EBU	FIAPF	ACT	AER	CEPI	EBU	FIAPF	ACT	AER	CEPI	EBU	FIAPF	ACT	AER	CEPI	EBU	FIAPF	ACT	AER							
	CEPI	EBU	FIAPF	ACT	AER																						CEPI	EBU	FIAPF	ACT	AER	CEPI
AT	Orange		Orange			Orange		Orange			Orange					Orange						Orange					Orange					Yes
BE	Orange		Orange			Orange		Orange			Orange					Orange						Orange					Orange				Yes	
BG						Orange					Orange					Orange						Orange					Orange				Yes	
CY	No employer organisation in the sector																															
CZ	Orange		Orange						Orange		Orange	Yellow																		Yes		
DE			Orange																											Yes		
DK	Orange		Orange																											No		
EE			Orange																											No		
EL					Orange																									No		
ES	Orange																													No		
FI			Orange																											No		
FR																														No		
HR			Orange																											No		
HU	No employer organisation in the sector																															
IE	Orange																													Yes		
IT	Orange																													Yes		
LT																														No		
LU	No employer organisation in the sector																															
LV			Orange																											No		
MT																														No		
NL		Orange																												No		
PL	No employer organisation in the sector in 2019. KIPA became an affiliate of CEPI and of the FIAPF at the end of 2020.																															
PT	Orange																													Yes		
RO	No employer organisation in the sector																															
SE	Orange		Orange																											No		
SI																														No		
SK			Orange																											No		
EU27	12	1	11	0	1	1	0	2	1	2	14	8	12		2	4					3	19	0	0	1	3	16	1	1	0		
UK	Orange		Orange							Yellow																				Yes		

Note: Employer organisations are marked orange; companies and public service media organisations (single-employer affiliation) are marked yellow.

Annex 3: Network of Eurofound Correspondents

Table A8: Correspondents who contributed to the study

Country	Correspondent	Organisation
Austria	Bernadette Allinger	Forschungs- und Beratungsstelle Arbeitswelt (FORBA)
Belgium	Dries Van Herreweghe	Research Institute for Work and Society, KU Leuven
Bulgaria	Ekaterina Ribarova	Institute of Social and Trade Union Research
Croatia	Predrag Bejakovic Irena Klemencic	Institute of Public Finance (IPF)
Cyprus	Pavlos Kalosinatos	Cyprus Labour Institute (INEK-PEO)
Czechia	Petr Pojer	Research Institute for Labour and Social Affairs
Denmark	Carsten Jorgensen	Employment Relations Research Centre (FAOS), University of Copenhagen
Estonia	Ingel Kadarik	Praxis Centre for Policy Studies
Finland	Rasmus Firon	Oxford Research AB
France	Frédéric Turlan	IR Share
Germany	Sandra Vogel	German Economic Institute
	Birgit Kraemer	Institute for Economic and Social Research, Hans Boeckler Foundation
Greece	Penny Georgiadou	General Confederation of Greek Workers (GSEE) Labour Institute
Hungary	Nóra Krokovay	Kopint-Tárki Institute for Economic Research
Ireland	Andy Prendergast	IRN Publishing
Italy	Anna Mori	Department of Social and Political Sciences, University of Milan
Latvia	Krišs Karnītis	EPC Ltd
Lithuania	Inga Blaziene	Lithuanian Social Research Centre
Luxembourg	Franz Clément	Luxembourg Institute of Socio-Economic Research
Malta	Charles Tabone	University of Malta
Netherlands	Amber van der Graaf	Panteia BV
Poland	Maciej Pańków	Foundation Institute of Public Affairs

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Portugal	Reinhard Naumann	Dinâmia'cet-IUL
Romania	Victoria Stoiciu Nicoleta Voicu	European Institute of Romania
Slovakia	Ludovit Cziria	Institute for Labour and Family Research
Slovenia	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
Spain	Alejandro Godino	Institute for Labour Studies, Universitat Autònoma de Barcelona
Sweden	Sirin Celik	Oxford Research AB
United Kingdom	Claire Evans	Warwick Business School

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This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the audiovisual sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue and their capacity to negotiate agreements.

The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. This study identifies EURO-MEI, EFJ, FIA and FIM – representing employees – and ACT, AER, CEPI, the EBU and the FIAPF – representing employers – as the representative European-level social partner organisations in the audiovisual sector.

The European Foundation for the Improvement of Living and Working Conditions (Eurofound) is a tripartite European Union Agency established in 1975. Its role is to provide knowledge in the area of social, employment and work-related policies according to Regulation (EU) 2019/127.

