

Industrial relations

Representativeness of the European social partner organisations: Private security sector



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European social partner organisations:
Private security sector**

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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 private security sector and 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 and the employment trends in the private security sector; an analysis of the social partner organisations in all 28 EU Member States; and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

In this section, the objectives of the study are presented along with a brief introduction to the chosen methodology. The context of this study is the European sectoral social dialogue committee (ESSDC) for the private security sector, which was established in its current form in 1999.

Objectives of the study

Representativeness studies are conducted for three reasons, listed here.

- 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 a criterion to be eligible for setting up of an ESSDC, or the participation in one of them.
- 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 social dialogue committees promoting the dialogue between the social partners at European level (98/500/EC) (European Commission, 1998). It includes the following requirements for an organisation to be recognised as a representative EU social partner organisation:

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

To accomplish the aim of the study, it first identifies the relevant national social partner organisations in the private security sector before analysing the structure of the sector's relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both the national and European levels of interest representation. The study includes only organisations whose membership domain is classed as 'sector related'. In terms of territorial coverage, the study includes the EU28.

European sectoral social dialogue for the private security

Social dialogue for the private security sector started in 1992 on an informal basis. With European Commission Decision 500 of 1998, this informal social dialogue was given the shape of a formal European sector social dialogue committee in 1999.

The outcomes of the first 10 years of this social dialogue, the European social partners involved in it and the challenges and perspectives they identify are described in an article by UNI Europa policy officer Sabrina de Marchi (2005). During that time the Confederation of European Security Services (CoESS) had affiliates in 21 of the 25 EU Member States.¹ It had no affiliates in Latvia, Lithuania, Malta or Slovenia (de Marchi, 2005, p. 369). As for UNI Europa, there were members in all the EU15, but in the new Member States there were only sector-related affiliates in Hungary and Lithuania (de Marchi, 2005, p. 370). The weakness of links with trade union structures in other new Member States is described in this 2005 article as an important objective for future development of the social dialogue (de Marchi, 2005, p. 373).

Two joint declarations were produced during the informal social dialogue before 1999, while in the 20 years after the establishment of the formal ESSDC, 23 joint texts were agreed. A full list of all these texts can be found in Table 35. The implementation of the joint declarations in tangible outcomes for the workers in the sector is considered a factor that can vary between different initiatives. The 2003 code of conduct and ethics for the private security sector may be considered as a turning point, because for the first time this contained explicit follow-up provisions, ‘meeting the concern that outcomes of the European social dialogue should be made transparent’ (de Marchi, 2005, p. 372). Besides efforts to integrate representative organisations from new Member States, the ESSDC worked on issues related to sectoral policy, criteria for procurement and awarding contracts, training and working conditions in the sector (European Commission, 2010, p. 62).

Regulation is important for the private security sector, and a specific legal framework determining standards is provided in each EU Member State, without an overall European regulation. With the 2003 code of conduct and ethics, UNI Europa and CoESS have contributed in this perspective by somehow autoregulating standards for the private security sector.

The three main highlights of the ESSDC for the private security sector in the last five years are:

- a 2014 project updating the 1999 first version of the *Best Value Manual* – the resulting work (CoESS, 2014) is a point of reference for companies buying private security services and seeking to compare them on the basis of objective quality criteria
- a 2016 joint declaration on the role of the private security sector in light of the increasing number of refugees in Europe (a complete list of all joint texts can be found in Table 35)
- a 2018 project entitled ‘Anticipating, preparing and managing employment change in the private security industry’, the deliverables of which can be found on the CoESS website (CoESS, 2018a, 2018b)

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. Each of these criteria are defined successively in this section, starting with sector relatedness; that is, the demarcation of the private security sector in agreement with the social partners and the European Commission.

¹ Bulgaria, Croatia and Romania were not yet members of the EU in 2005: Bulgaria and Romania joined the EU in 2007 and Croatia in 2013.

Sector-relatedness

In this study, the private security sector is described as covering the following NACE² codes: 80.1 and 80.2 (Table 1).

Table 1: Demarcation of the private security sector with NACE codes

NACE code	Corresponding economic activity
80.1	Private security activities
80.2	Security systems service activities

Source: NACE (Rev. 2).

NACE code 80.1 includes activities such as armoured van services, bodyguard activities, fingerprinting services, guard activities, guard dog services, polygraph services, security guard services, watchman activities and security transport of valuables and money.

NACE code 80.2 includes activities such as alarm monitoring and activities, burglar and fire alarm monitoring including installation and maintenance, fitting and servicing security locks, installation and repair of electronic safes and security vaults with monitoring, locksmiths and installation and repair of biometric equipment.

Not included in the scope of this study are activities belonging to NACE code 80.3, investigation activities, which relates to detective agencies, enquiry agencies, private detectives, private investigator activities, surveillance activities and internet abuse monitoring. Also excluded from the scope of this report are private security activities related to the transport of valuables, the protection of cash in transit and close protection services such as bodyguards (which normally falls under NACE 80.1).

While there is not sufficient data for an analysis of the degree to which there is overlap with other sectors, it is clear that the trade unions active in the private security sector in 80% of the cases also cover employees in other sectors (see Figure 6), such as retail and cleaning, and in some cases overlap with transport sectors but also the wider services sector in general. For the employer organisations in the sector, 45% have affiliated organisations with member companies in sectors outside the private security sector (see Figure 8).

The membership domains of trade unions and employer organisations fall exactly together with this demarcation of the sector (i.e. covering all activities in NACE codes 80.1 and 80.2), which is a type of sector relatedness that we call 'congruent'. If the membership domain of an organisation goes beyond the private security sector as described here, we call that an overlap. 'Sectional' refers to an organisation covering a part of the private security sector (and nothing else), whereas 'sectional overlapping' is when an organisation covers part of the private security sector and has also membership in other sectors (see Table 2).

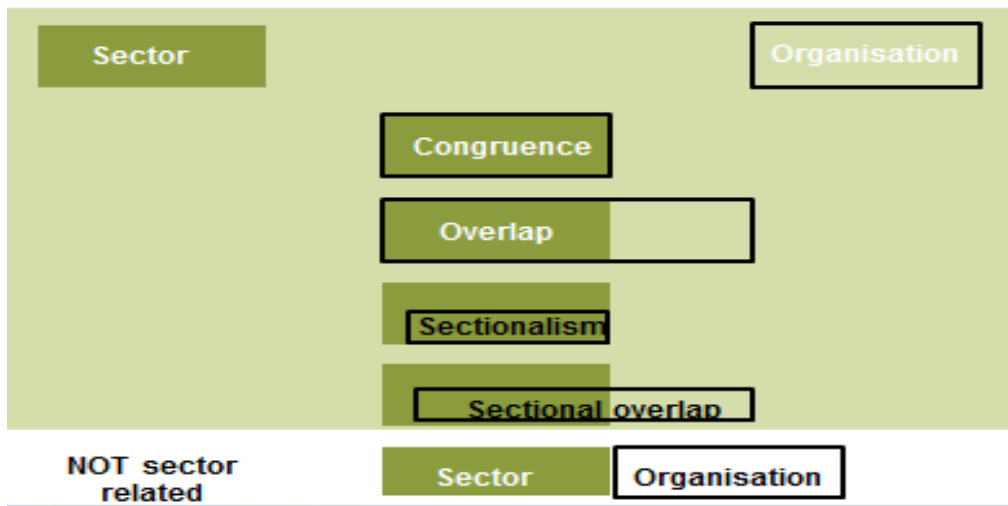
² European 'statistical classification of economic activities in the European Community' (NACE) (Rev. 2). For the demarcation of a specific sector, reference is made to a number of NACE codes.

Table 2: 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 embrace all employees/companies in the sector?	Does the trade union/employer organisation potentially represent employees/companies outside the sector?
Congruent	Yes	No
Overlap	Yes	Yes
Sectional	No	No
Sectional overlap	No	Yes

Figure 1 presents the four different 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 examined: first, the geographical coverage of the EU-level organisations (the number of Member States the EU-level trade union/employer organisation has affiliates in) and, second, the organisational density of the national affiliates. An important aspect to be assessed is whether the EU-level players organise most or at least the most significant national-level players (in relation to their membership strength in the sector and their involvement in collective bargaining) or whether there are major gaps in their membership domains.

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, for the purpose of this study, different membership statuses are not always distinguished in this report. The statutes of CoESS provide five different types of membership, of which three types are evident (active members, corresponding members and sponsors). Table 26 illustrates that all the national employer organisations in the EU that are affiliated to CoESS are in fact active members. The corresponding members are other European associations, while the sponsors are the three largest employers (multinational companies) in the sector: G4S, Prosegur and Securitas. Where possible, indirect membership is also 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. For this assessment of the capacity to negotiate, the actors, their objectives and the decision-making structures provided in their statutes are considered as well as the outcomes, in terms of texts agreed, and the processes through which the organisations obtained mandate, support and approval from their member organisations in the negotiation process.

The involvement of their members in national-level collective bargaining is important as it shows that they are able to obtain a mandate to negotiate on behalf of their members (at least at the national level, which could then also translate to a mandate to negotiate at EU level). Where such a mandate for European negotiations is in place either implicitly or explicitly, this allows for negotiations to take place at European level that could potentially result in binding agreements or the drafting of European autonomous agreements which require implementation by social partners at the 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.

The involvement in collective bargaining of national sector-related trade unions, and employer organisations, is also a factor that distinguishes them from professional associations and business associations that defend the interests of their members only in terms of unilateral lobbying activities without involving themselves in negotiating on working conditions in collective or social dialogue. Trade unions and employer organisations that do engage on behalf of their members in collective bargaining have a proven capacity to get a mandate from their members to negotiate and to make compromises and agreements with organisations representing different interests.

This report aims to distinguish both types of organisation in its analysis, even though for reader-friendliness the report calls the organisations ‘trade unions’ and ‘employer organisations’. The applied methodology in representativeness studies makes an exception for professional associations and business associations that are affiliated to European social partner organisations involved in social dialogue in the formal ESSDC. Because of their membership to a European social partner organisation involved in the ESSDC, all the affiliated organisations are considered as trade unions and as employer organisations even if, strictly speaking, this is via the relevant country professional associations or business associations.

In the bottom-up data collection for this study, a number of organisations were identified that are neither involved in collective bargaining nor affiliated to UNI Europa or CoESS. Traditionally, these organisations would not be labelled as trade unions or employer organisations, but to avoid all confusion, the associations where workers are represented are called ‘trade unions’ and the business associations are called ‘employer organisations’. In this report, the scope of their membership, their involvement in collective bargaining and their affiliation to other European associations are carefully analysed in order to compare the representativeness of UNI Europa and CoESS with those organisations not represented in the ESSDC as well as examining the extent to which they are represented by other European associations. We believe that to omit these organisations would preclude a fair assessment of representativeness. Their inclusion is justified on a case-by-case basis (see footnotes in Tables 8 and 11 for the trade unions and in Tables 12 and 15 for the employer organisations and see also ‘Methodological considerations’ in Chapter 2).

Finally, representativeness also depends upon the structures, resources and capacity of organisations to mobilise active participation of their members in order to aggregate different interests of member organisations and their ability to act autonomously at European level. Effective participation in the ESSDC meetings is assessed in terms of presence in the meetings for the two-year period before the year of publication of this report (2017 and 2018). Internal structures within the European organisations to prepare ESSDC meetings and discuss social affairs linked to EU-level dialogue can increase efficiency and ensures that more organisations feel represented than just those that directly participate in the meetings.³

Data collection and quality control measures

Representativeness studies combine top-down and bottom-up approaches. The top-down approach includes all sector-related affiliates of the European associations CoESS and UNI Europa, while the bottom-up approach looks for other organisations involved in private security sector-related collective bargaining in the EU Member States and their membership in other European-level organisations.

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 were provided rather than leaving a question blank.

Thus, quantitative data may stem from three sources:

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

Other sources included data and reports published by CoESS and its members, the social dialogue texts database and data from Eurostat (Structural Business Statistics and EU Labour Force Survey).

Quality assurance

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of drawing up this study. At the start, a preparation meeting was held in January 2018 with UNI Europa and CoESS at the premises of the European Commission.

First, combining the top-down with the bottom-up approach, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents between May and September 2018. 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 them in October 2018.

An overview of the national contributions was made available to the European social partners to allow their affiliates to double-check and comment. As different social partner organisations can see the reported information of other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information of other organisations representing similar membership, this process includes an element of mutual control and recognition.

Draft versions of the overview report were shared with CoESS, UNI Europa and the European Commission in March 2019 for feedback and comments. The final report, taking into account these comments, was then

³ More information on definitions of key terms can be found in Eurofound's Industrial Relations Dictionary, available at <https://www.eurofound.europa.eu/observatories/eurwork/industrial-relations-dictionary>

evaluated on 17 June 2019 and approved in Eurofound's Advisory Committee on Industrial Relations, which consists of representatives of both sides of industry, governments and the European Commission, in the presence of the European-level sectoral social partners identified in the report.

Structure of the report

The report consists of three main parts, beginning with a brief summary of economic background and specificities of the private security sector. The report then analyses the relevant social partner organisations in all EU Member States. The third part of the analysis 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 reach any definite conclusion on whether the representativeness of the European social partner organisations and their national affiliates is sufficient for participation in the European social dialogue. Based on the information and analyses provided in this report, actors and decision makers will, however, be enabled to draw further conclusions.

1. Economic background and employment trends in the sector

Private service companies mainly offer the protection of both private and public sites and buildings. This can also include nuclear power plants, military installations, airports, ports or public institutions such as parliaments. It can also include the setting up, maintenance and servicing of alarm response services and video surveillance. The sector also has start-ups and combines both large and very small companies. One example of recent activity in the sector is the company Verisure's opening of the largest remote monitoring centre in France, which is expected to lead to the creation of 500 new jobs in the coming years according to Eurofound's Restructuring Events Database. The proportion of private versus public clients of private security companies varies from 80% private clients in countries like Belgium and Portugal and 75% in France and 72% in Germany to 50% in both Greece and Croatia and 45% in Bulgaria (CoESS, 2017).

The links between private security companies and public policing can be problematic and sensitive in terms of conflicts of interest, and some Member States have introduced rules and regulations covering this (Weber, 2002). According to Button (2007, p. 111), for 2007, there were 50% more police staff than private security employees in the EU. Though in 2005, in countries like Estonia, Hungary, Ireland, Luxembourg and Poland, there were more private security employees than police officers (Van Steden and Sarre, 2005).

The degree of control and accountability of private security service providers depends on the legal framework, which differs very much from country to country (CoESS, 2013). The regulation of the selection of staff, but also their training, is vital for their professionalism and moral integrity. Wearing uniforms and identification badges is important, just as are strict rules regarding possession and use of firearms and possibility of search and seizure. Obviously, it is in the interest of companies to self-regulate according to certain quality standards, but accreditations and training administered purely by the company may not be sufficient (Born et al, 2007). Legal requirements regarding accreditation and how to operate in private security activities mean that self-employment and temporary agency work are not present in the sector.

At European level, self-regulation has taken the form of a European code of conduct agreed between CoESS and UNI Europa in 2003 (Eurofound, 2003). Button and Stiernstedt (2017, p. 13) argue that because of the huge variations in legal settings in the different Member States, a European regulatory framework with minimum standards might be meaningful, as such European regulations have already been introduced for other business services sectors such as banking, insurance and civil aviation. In this context it is relevant to note that Directive 2006/123/EC on services in the internal market excludes the private security sector from its scope.

In most of the EU Member States, employment in the private security sector has grown over the years up to about 1.5 million employees. Even though, in 2016, 79% of the companies in the sector had fewer than 10 employees (see Table 4), most employees worked in larger companies and 58% of sectoral employees worked in companies with more than 250 employees in 2015 (see Figure 4). In terms of companies, there is a clear trend of more being established over the years. The smaller companies, however, employed only 6% of the European sectoral workforce in 2015 (Figure 4).

Around 90% of the employment in the private security sector in Europe is registered under NACE code 80.1. Regional particularities can be observed for Italy and Romania, where NACE code 80.1 accounts for more than 95% of the sector, and Sweden, Latvia and Lithuania, where NACE code 80.2 reaches 20% or more (for details, see Table 39 in the Annex).

Employees in the private security sector

The private security sector in the EU employs some 1.5 million people, which is about 0.6% of the total EU workforce. Table 3 shows the total number of employees in the private security sector as well as the percentage of employees in the sector as a share of all employees in the country and as a share of the EU sector workforce. In absolute numbers, the sector is largest in Germany (257,724 employees), the United Kingdom (UK) (191,900), France (189,498), Spain (133,373), Romania (124,403) and Poland (120,973). Together, these countries have about 68% of the EU's total private security workforce. The largest share of the EU private security workforce is found in Germany (17.3% of the EU sector workforce) followed by the UK (12.9%) and France (12.7%). If Spain is added to these three countries, the combined private security workforce corresponds to exactly half of the EU28 sector workforce.

Considering only the EU27, without the UK, there is an overall workforce of 1.3 million employees in the sector, of which 19.5% is employed in Germany, 15% in France and 10% in both Spain and Romania. In this scenario, more than half of the EU27 workforce is found in these four Member States.

As a share of total employment in each Member State, the private security sector is largest in Luxembourg, with 1.5% of all employees working in the sector, followed by Bulgaria (1.2%), Romania and Latvia (0.9% each) and Malta (0.8%). These four countries also have the highest share of private security sector employees per inhabitant. The lowest shares in terms of total employment are found in Austria, Belgium, Denmark and Italy, all with about 0.2%. This can be compared to the EU average of 0.6%.

Table 3: Employees in the private security sector, 2016

Member State	Employees in the private security sector (number)	Share of total employment in each Member State (%)	Share of the total EU sector workforce (%)
DE	257,724	0.4	17.3
UK	191,900	0.4	12.9
FR	189,498	0.4	12.7
ES	133,373	0.4	9.0
RO	124,403	0.9	8.4
PL	120,973	0.5	8.1
IT	75,108	0.2	5.0
BG	56,058	1.2	3.8
CZ	44,262	0.5	3.0
PT	40,366	0.6	2.7
NL	34,081	0.3	2.3
HU	27,088	0.4	1.8
SE	26,182	0.3	1.8
EL	24,933	0.4	1.7
BE	18,963	0.2	1.3
SK	17,808	0.5	1.2
AT	15,422	0.2	1.0
IE	13,833	0.4	0.9
HR	13,280	0.5	0.9
LV	12,348	0.9	0.8
FI	12,255 ⁴	0.3	0.8
LT	10,981	0.5	0.7
DK	6,689	0.2	0.4
SI	6,201	0.4	0.4
EE	6,166	0.6	0.4
LU	3,490	1.5	0.2
MT	2,434	0.8	0.2
CY	1,533	0.3	0.1
EU	1,487,352	0.6	100.0

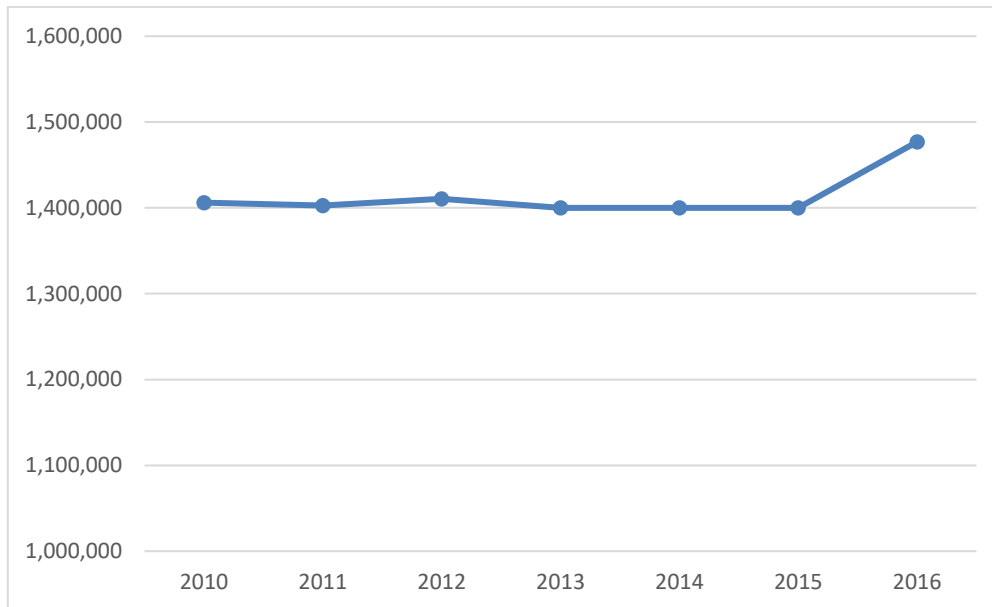
Note: Ordered by number of employees in the private security sector.

Source: Eurostat, Structural Business Statistics, 2016.

⁴ According to the Finnish Police Authority, the number of persons holding a security card was 17,460 in December 2017. Yet the number of persons in active employment in 2016 provided by Eurostat's Structural Business Statistics is 12,255. An explanation for these two different numbers could be that the system allows one to hold a security card without being in active employment. Once approved, a security card is valid for five years (Poliisi, undated). This may be why the security card holder data differ from the Eurostat employment data – as, besides everyone currently working as a security guard, they also cover all those who have worked as a guard at some point in the past five years.

Employment in the sector has remained on quite a steady level during the past few years, though with a slight increase between 2015 and 2016. In total, as shown in Figure 2, the number of employees in the private security sector in the EU increased by around 76,000 workers between 2010 and 2016.

Figure 2: Number of employees in the sector in the EU, 2010–2016



Notes: France is not included in the Eurostat data from 2008 to 2010. Due to the significant size of the French workforce, those years have been excluded from the graph so as not to skew the trend. There is no data for Malta.

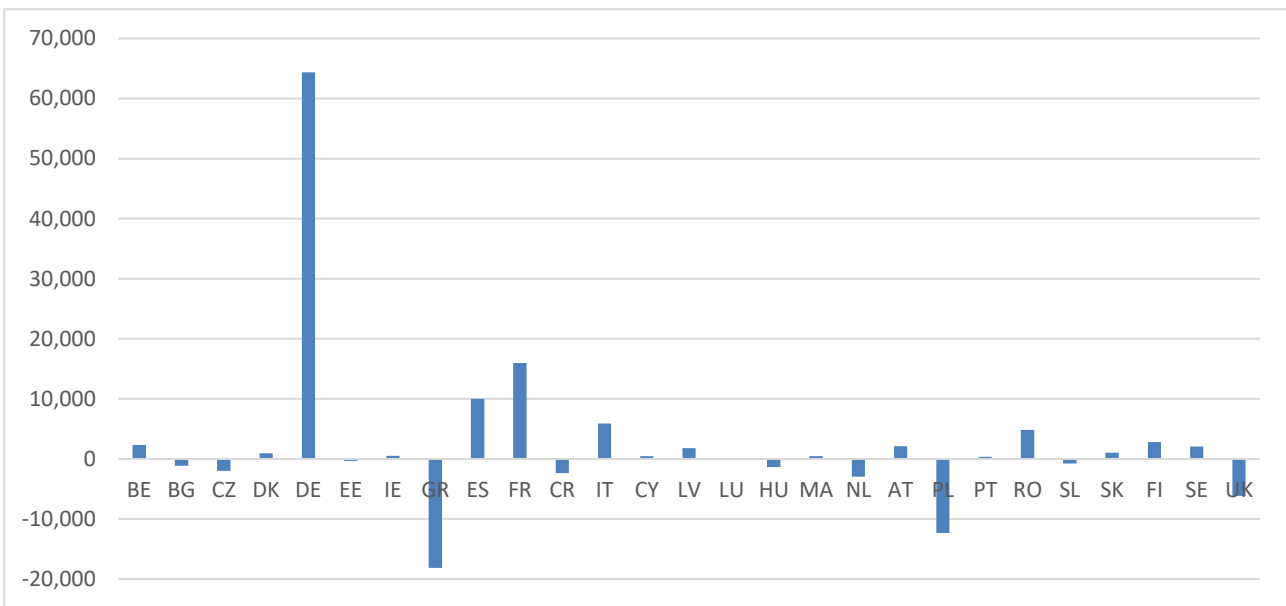
Source: Eurostat, Structural Business Statistics, 2016.

Figure 3 shows the changes in sector employment from 2012 to 2016, disaggregated by country. The increase was highest in Germany, followed by France, Spain, Italy and Romania. The biggest decrease occurred in Greece followed by Poland.

CoESS indicates that the main reasons why employment might have increased in recent years in certain countries are terrorist attacks and refugee flows.

- Terrorist attacks: while there is a rapid increase in demand in the aftermath of attacks, demand quickly decreases again in the subsequent weeks and months.
- Refugee flows: only those countries that have welcomed significant numbers of refugees into specific infrastructure, such as Germany and Sweden, have witnessed an important increase of employment in these areas. This is not the case in other countries.

Figure 3: Change in the number of employees in the private security sector, 2012–2016



Notes: For Malta, data is from 2011 to 2016. There is no data for Luxembourg.

Source: Eurostat, Structural Business Statistics, 2016.

Contributions from the Network of Eurofound Correspondents indicate that employment in the sector is characterised by a low share of female workers. We estimate this to be around 20% across all EU Member States (albeit with a wide range between 3% and 40%). This is significantly lower than the average share of female employees in the total EU workforce, which in 2017 was 46%. Furthermore, self-employment does not exist in the sector in most countries or is at least very rare. The available data indicates that the same is true for posted workers and employment through temporary work agencies. This is due to the fact that many countries have strict requirements for certification in order to be involved in sector-related activities.

Certain specificities of the sector make it more difficult for the trade unions to organise the workforce compared to other sectors. One such factor is that the workforce, particularly security guards, are spread out across many different worksites. Thus regular contact with union representatives is less common than when all company employees are gathered in only one or a few places. Related to this, it has been identified in Portugal that due to many private security guards working in isolation from their employer, a sense of loyalty often occurs towards the contracting client, which may interfere with the will and capacity of the employee to make demands vis-à-vis their employers.

Furthermore, organising workers in small and medium-sized enterprises (SMEs) is generally harder than in larger companies. In terms of companies, the share of SMEs in the sector is large; while in terms of workforce, only 19% of the sectoral workforce is employed in companies with fewer than 50 employees (see Figure 4). For instance, in Belgium all companies with more than 50 employees need to have a health and safety committee through which the unions are represented. Since there is a very large share of small companies in the sector below this threshold, the unions are not naturally represented in a significant part of the sector. On the other hand, as detailed in 'Companies in the private security sector and their economic development', in most countries the sector is dominated by a handful of very large companies. (This is particularly true for the activities covered by NACE code 80.1.) Thus, if only a few large companies choose to sign collective bargaining agreements, the coverage rate may be quite high even where the vast number of SMEs choose not to do so.

Companies in the private security sector and their economic development

Companies in the private security sector offer services to both the public and the private sectors, particularly to companies in banking and finance, construction work, distribution and transport, culture, energy, events, real estate, tourism, healthcare, public transport, retail and education to name only a few. Activities offered and the degree of specialisation naturally differ between companies, but the largest private security service providing companies (such as G4S and Securitas) are involved in a vast array of activities including: aviation security, corporate risk management, executive protection, fire and safety services, international security services, receptionist/concierge services, remote video solutions, response/call-out services, screening services, alarm services, security consulting, specialised guarding and track and trace services (see, for example, Securitas, undated). According to CoESS, although the main activity of the private security companies is still ‘static guarding’, the current trend is that traditional on-site guarding is to an increasing extent being integrated with remote and mobile guarding made possible by technological and electronic solutions (CoESS, 2015).

In 2016, a total of 56,729 companies were actively involved in the private security sector in the EU.⁵ Most of these companies were located in France, Germany, Hungary and the UK. Together, these four countries thus account for over half of all private security companies in the EU. However, it should be noted that the size of those companies varied greatly between countries, ranging from an average of 5 employees per company in Hungary to 42 in Germany.

Table 4 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 private security sector. In the EU overall, an average of 79% of companies had only 0–9 employees in 2016. However, there is a noticeable difference in this first size category between countries such as the Netherlands (95%) or Hungary (93%), where almost all companies are very small, and countries such as Croatia, Estonia, Germany, Lithuania and Romania, where only around half of the companies fall into this category. In absolute numbers, the most companies with 0–9 persons employed are found in France and the UK (both with more than 8,000).

A further 7% of companies in the EU overall employed 10–19 persons, 7% employed 20–49 persons, 5% employed 50–249 persons and only 2% employed 250 or more. The countries with the highest numbers of large companies (250+ workers) were Germany (189 companies), Poland (110) and Romania (100).

Table 4 shows that, in terms of the average number of persons employed per company, Croatia has the largest number (with an average of 80 workers per company), followed by Portugal (75) and Lithuania (67). In Hungary, on the other hand, companies employ only five people on average. 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.

⁵ Because Eurostat data cannot be disaggregated by three-digit NACE codes, the data presented in this section cover all of NACE code 80. This means that in addition to codes 80.1 and 80.2, on which this study focuses, 80.3 is also included. This obviously means that the figures describing the sector include a slight overestimation in relation to the actual sector definition.

Table 4: Companies in the sector by size, 2016

Member State	Total number of companies	0–9 persons employed (%)	10–19 persons employed (%)	20–49 persons employed (%)	50–249 persons employed (%)	250 or more persons employed (%)	Average number of persons employed per company
EU28	56,729	79	7	7	5	2	26
AT	397	68	12	11	8	2	39
BE	499	79	7	7	5	2	38
BG	1,337	60	13	14	10	3	42
CY	89	82	9	n.d.	4	n.d.	17
CZ	2,933	83	5	6	5	1	15
DE	5,944	54	17	15	11	3	42
DK	519	82	9	7	2	1	13
EE	103	55	18	15	7	5	60
EL	1,449	84	5	5	4	1	17
ES	2,891	81	6	6	5	2	46
FI	612	87	4	5	3	1	20
FR	8,795	82	7	6	4	1	22
HR	166	55	15	16	8	6	80
HU	5,214	93	3	2	n.d.	n.d.	5
IE	946	82	8	5	4	1	15
IT	2,582	68	13	9	8	2	29
LT	165	55	13	17	10	5	67
LU	51	78	2	4	8	8	n.d.
LV	764	76	10	8	5	1	16
MT	67	69	n.d.	n.d.	15	n.d.	36
NL	3,697	95	2	2	1	0.3	9
PL	3,847	84	3	4	6	3	31
PT	538	82	4	4	6	5	75
RO	2,168	53	9	15	18	5	57
SE	933	85	6	6	2	1	28
SI	199	71	8	9	9	3	31
SK	1,183	83	3	7	6	1	15
UK	8,641	84	6	5	4	1	22

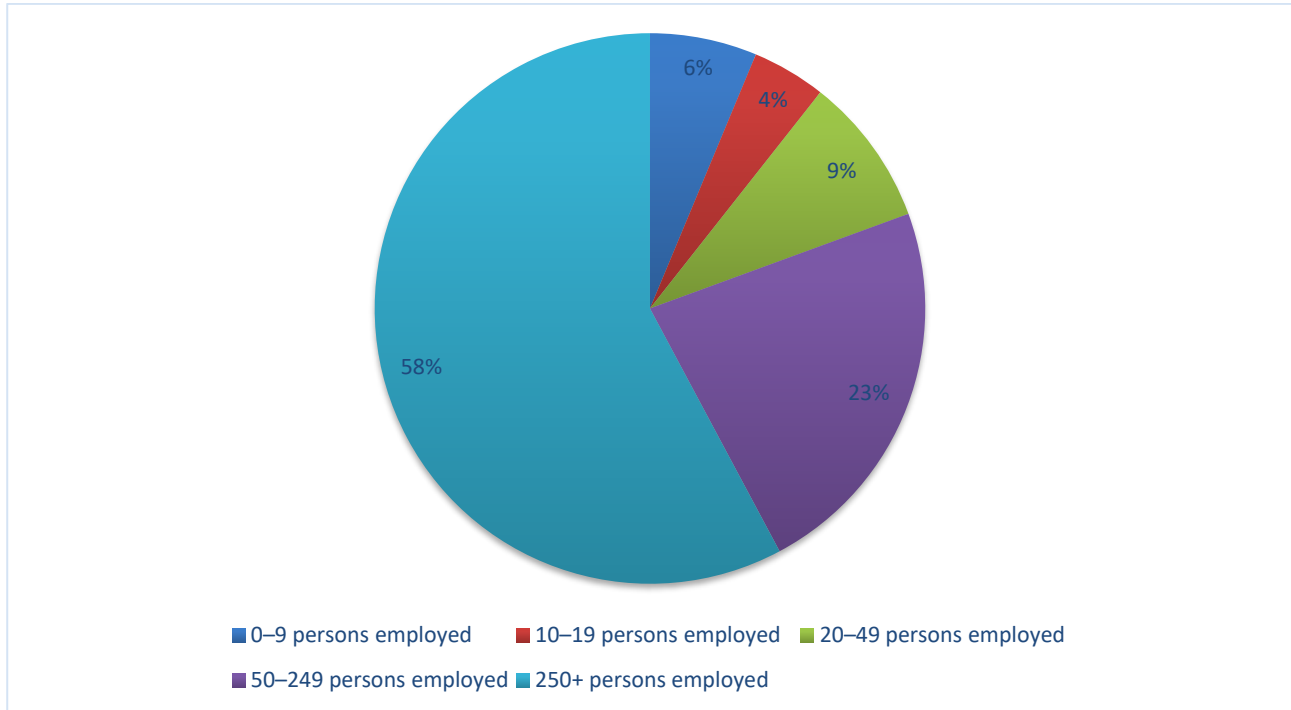
Note: n.d. = no data.

Source: Eurostat, Structural Business Statistics, 2016.

Between 2011 and 2016, the number of companies with 0–9 persons employed increased by 12%, companies in the 10–19 group increased by 5%, companies in the 20–49 group grew by 6%, companies in the 50–249 group were up by 10% and, lastly, companies in the 250+ group grew by 6%.

Table 4, SMEs clearly dominate in terms of number of companies, and as is the case with large employee numbers, vast numbers of SMEs in any given sector tend to make it more difficult to organise the employers in the sector.

Figure 4: Proportion of persons employed in private security companies of different sizes



Notes: The data have been deemed by Eurostat to have low reliability. For the 10–19 and 20–49 categories, data are for 2016.

Source: Eurostat, Structural Business Statistics, 2015.

Reading together Table 4 and Figure 4, we see that while 79% of the European companies in the private security sector have fewer than 10 employees, these employ only 6% of the European sectoral workforce. For the 7% of the companies that have between 10 and 19 employees, the share of the overall EU workforce is 4%. In the 7% of companies with between 20 and 49 employees, 9% of the European workforce are employed. The importance of the large companies becomes clear when we consider that the 5% of companies with 50–249 employees cover 23% of the sectoral workforce; and while the companies with more than 250 employees make up 2% of all companies in the sector, they employ 58% of the sectoral workforce.

When analysing the importance of company size according to turnover, it is clear that some very large companies account for a large proportion of the overall economic activity in the sector. Even so, the concentration varies between countries: in Belgium, Estonia and Luxembourg the five largest companies share more than 90% of the market turnover, while the five largest sectoral companies in Bulgaria cover about 10% of the turnover in the private security market. France and Germany range in the middle with shares of 33% and 25%, respectively (CoESS, 2015).

The importance of large companies in the sector is also apparent in relation to employment concentration. More than half of the employees (58%) work for companies that have more than 250 persons employed. Some of these larger employers are multinational companies. G4S is the largest employer in 13 EU Member

States, and the Securitas Group is the biggest player in 12 EU Member States. Both G4S and Securitas have established a European Works Council.

The significance of large companies is evident also when looking at the employment structure of the two largest companies active under NACE codes 80.1 and 80.2 in each of the Member States. Both Eurostat data on persons employed in companies of different sizes (Figure 4) and assessments made on the basis of national data of the importance of the two largest companies in the sector (Table 5) indicate that, in terms of share of total sector employment, the largest employers clearly cover a significant part of the sector. This is mostly true for the largest companies active in NACE 80.1 activities, for which more than 40% of the sectoral workforce is employed by the largest companies in Belgium, Cyprus, Estonia, Malta and Sweden. In 10 EU Member States, the largest employers active in NACE 80.1 and in NACE 80.2 are the same companies. This is the case for Austria, Croatia, Denmark, Estonia, Finland, Germany, Greece, Italy, Poland and Spain (Table 5).⁶ However, in the NACE 80.2 field, the two largest employers cover only around 5% of the sectoral workforce, indicating that the concentration of the workforce in the two largest companies is much weaker for NACE 80.2 activities compared to NACE 80.1 activities. This is illustrated in Table 5 where separate figures are provided for NACE 80.1 and NACE 80.2: in each case, there is a much higher proportion of the sector workforce active in NACE 80.1 than in NACE 80.2.

⁶ For estimations of significance disaggregated by company, please see in the Annex.

Table 5: Proportion of the sector's workforce in the two largest companies

Member State	Proportion in the two largest companies in NACE 80.1 (%)	Proportion in the two largest companies in NACE 80.2 (%)
AT	34.6†	
BE	43.6	1.2
BG	11.6	3.7
CY	78.4	3.6
CZ	12.0	6.2
DE	12.9†	
DK	28.4*†	
EE	56.4†	
EL	16.0†	
ES	20.5†	
FI	32.7	
FR	13.5	n.d.
HR	27.7†	
HU	8.4	3.4
IE	29.0	1.8
IT	19.9†	
LT	23.7	12.7*
LU	n.d.	n.d.
LV	15.6	8.9
MT	65.8	8.2*
NL	32.8	n.d.
PL	16.5*	
PT	27.5	1.9
RO	5.8	0.2*
SE	49.7	5.0
SI	37.3	1.1
SK	15.6	2.6
UK	19.8	n.d.

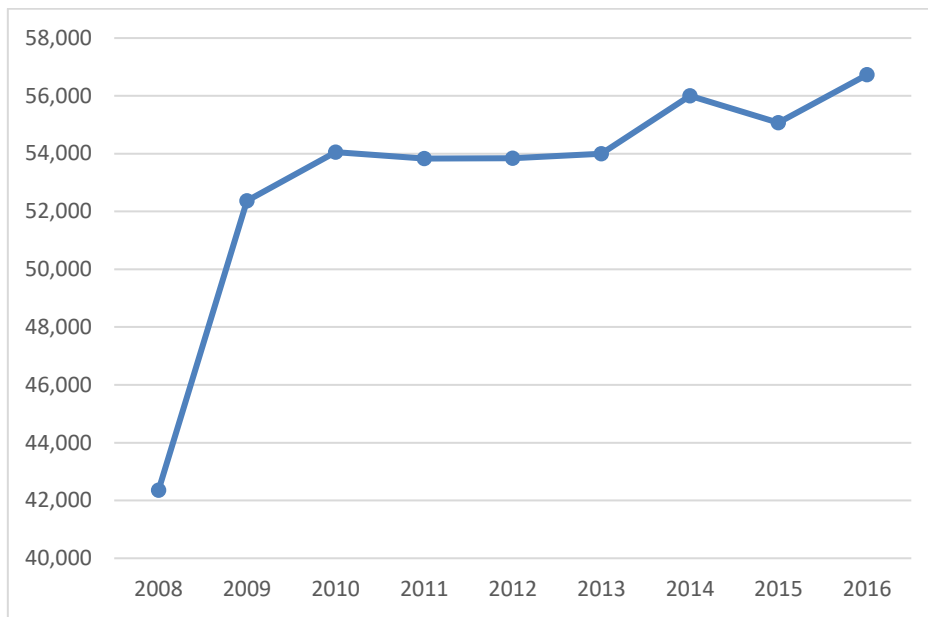
Notes: Company sizes have been estimated. * Only one company. † Same two companies for 80.1 and 80.2. n.d. = no data.

Source: Eurostat, Structural Business Statistics, 2016; Network of Eurofound Correspondents, 2018.

The total number of enterprises in the sector increased significantly between 2008 and 2010, as shown in Figure 5.

Since then, the growth rate has been slower but with a slight upward trend since 2013, reaching an all-time high of 56,729 companies in the EU in 2016.

Figure 5: Number of companies, 2008–2016



Source: Eurostat, Structural Business Statistics, 2016.

In 2016, the total turnover of the private security sector in the EU was around €44 billion, which corresponds to about 0.3% of the total turnover in the EU economy. The sector turnover was highest in France (€9.5 billion) and Germany (€8.76 billion) and, for obvious reasons, quite low in smaller countries like Estonia (€120 million) and Cyprus (€35 million).

Turnover in the private security sector rose steadily between 2012 and 2016, with a peak in 2015. However, there was a decrease between 2015 and 2016, and in 2016 turnover was down to almost the same level as it had been in 2010. The share of countries' total turnover was highest in central and eastern Europe. The private security sector in Hungary accounted for 0.94% of the total Hungarian economy. The corresponding figure in Latvia was 0.79% and in Bulgaria, 0.76%. Also, the sector had a significantly higher turnover in Czechia, Estonia, Poland and Romania than in other Member States. The sector's lowest economic influence was found in Austria (0.15%), Cyprus (0.19%), Greece, Italy and Denmark (all about 0.20%) (Eurostat, Structural Business Statistics, 2016).

2. National level of interest representation

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

The Network of Eurofound Correspondents identified 72 sector-related trade unions and 54 sector-related employer organisations in the 28 EU Member States in 2018 (Table 6).

Table 6: Number of sector-related organisations per country, 2018

Number of sector-related organisations	EU Member States with respective number of trade unions in the private security sector	EU Member States with respective number of employer organisations in the private security sector
0	LV, ⁷ SK	
1	BG, EE, EL, ⁸ FI, RO	BE, CY, EE, EL, FI, HU, LT, LU, LV, MT, PL, SI, SK, UK
2	AT, CZ, DE, DK, IE, LT, LU, MT, PL, SI, UK	AT, BG, CZ, DK, HR, NL, PT
3	CY, HR	DE, ES, IE, RO, SE
4	BE, ES, HU, NL	FR
5	IT, SE	
6	PT	
7	FR	IT

Source: Network of Eurofound Correspondents, 2018.

In each of the 28 Member States, there is at least one employer organisation active in the sector; in all but two (Latvia and Slovakia), there is at least one trade union. France and Portugal have the highest number of trade unions, while Italy has the most employer organisations. On the trade union side, workers in the sector are represented by a single trade union in Bulgaria, Estonia, Finland, Greece and Romania. On the employer side, half of the Member States have only one employer organisation active in the sector.

In the subsequent sections of this chapter, these trade unions and employer organisations are assessed on their sector relatedness (in Tables 8 and 12), whether they cover all activities in the sector, all types of workers and companies and all parts of the country. Additionally, their capacity to negotiate will be examined in terms of their involvement in collective bargaining (Tables 11 and 15). Their involvement in social dialogue will also be considered, as this may indicate some kind of mutual recognition (see 'Collective bargaining patterns and social dialogue practices').

The coexistence of several organisations in the same country is examined by looking closer at the reasons for fragmentation and pluralism in Chapter 2. While up to that point, all trade unions and employer organisations

⁷ It cannot be ruled out that there is in fact a company-level trade union in the sector in Latvia. However, if such a trade union exists, it is not eligible for sector-level collective bargaining, as that would require membership of the cross-sectoral LBAS. Based on the applied methodology, we conclude that there is no sector-related trade union in Latvia.

⁸ Besides the Federation of Security Staff Employees of Greece (OMPEA), which covers the entire private security sector, there are also company-level trade unions, as is illustrated for the largest two companies in Table 40 in the Annex. For example, the Union of the Employees of G4S Security Solutions (Σωματείο Εργαζομένων στην Εταιρία G4S Security Solutions) represents the approximately 2,000 employees of the largest private security employer in Greece, for whom it also participates in SEB. This company trade union is affiliated to OMPEA. For the second-largest company in Greece, ESA Security Solutions SA, there is also a company trade union participating in SEB.

are considered as equal, in ‘Methodological considerations’ at the end of Chapter 2, 6 trade unions and 10 employer organisations are assessed on their status – whether they might be better labelled as a professional association or business association as they are neither involved in collective bargaining nor affiliated to a European social partner organisation in the ESSDC. The relevance of organisations included in Tables 8 and 11 for the trade unions and in Tables 12 and 15 for the employer organisations is specified in footnotes.

Private security sector coverage, sector-relatedness and organisational density of trade unions

As can be seen in Table 7, out of the 72 trade unions active in the sector, 57 organise workers in both NACE codes encompassing the private security sector (in 23 Member States). Eleven trade unions only cover workers in the private security activities (NACE 80.1) sector, whereas three trade unions exclusively represent workers in security systems service activities (NACE 80.2). The data are not sufficient to determine sector coverage for one trade union (Protector in Romania), but it can be assumed that this trade union has members in activities related to both NACE 80.1 and NACE 80.2, which would bring the total number of trade unions that cover the entire sector to 58 (81%) in 24 Member States. It is only in Bulgaria and Ireland that none of the trade unions cover both NACE 80.1 and 80.2. In Latvia and Slovakia, no sector-related trade union was found.

Table 7: Proportion of the 72 sector trade unions covering NACE codes 80.1, 80.2 or both

	Trade unions covering NACE 80.1	Trade unions covering NACE 80.2
Trade unions covering both NACE codes	57 or 58 trade unions (79% or 81%) in 23 or 24 Member States	
Trade unions with members in only one of the NACE code activities	11 trade unions (15%) in BG, CZ, DE, DK, HU, IE, MT, NL, SE	3 trade unions (4%) in IE, SE
Total	69 trade unions (96%) in 26 Member States	61 trade unions (85%) in 25 Member States

There are 11 trade unions in 9 Member States, that only have members active in NACE 80.1. In Bulgaria, the VIP Security trade union operates in this one company. This company covers NACE 80.1 activities only and is the largest employer in the country; its management is also involved in the sectoral employer organisations.

There are also three other trade unions (one in Ireland and two in Sweden) that only have members involved in NACE 80.2 activities.

A detailed breakdown of trade union representation by NACE code is shown in Table 8.

Table 8: Sector coverage of the 72 private security sector trade unions

Member State	Trade union	NACE 80.1 – private security activities	NACE 80.2 – security systems service activities
AT	Vida*	Yes	Yes
	GPA-djp*	Yes	Yes
BE	ACV-CSC*	Yes	Yes
	CGSLB*	Yes	Yes
	AC-CG*	Yes	Yes
	BBTK-SETca*	Yes	Yes
BG	VIP Security ⁹	Yes	No
CY ¹⁰	OIYK-SEK*	Yes	Yes ¹¹
	SEBETTYK-PEO	Yes	Yes
	DEE EBY-DEOK	Yes	Yes
CZ	OS PPP*	Yes	Yes
	OS KOVO ¹²	Yes	No
DE ¹³	Ver.dj*	Yes	Yes
	GöD	Yes	No
DK ¹⁴	VSL*	Yes	Yes
	FOA*	Yes	No
EE ¹⁵	ETKA	Yes	Yes
EL	OMYPAE†	Yes	Yes
ES ¹⁶	CCOO CS*	Yes	Yes
	FeSMC-UGT*	Yes	Yes
	FTSP-USO	Yes	Yes
	CIG	Yes	Yes
FI	PAM*	Yes	Yes ¹⁷
FR	FS CFDT*	Yes	Yes
	FEETS-FO*	Yes	Yes
	CFTC-CSFV	Yes	Yes

⁹ This is a company-level trade union organisation established at VIP Security. This trade union is not affiliated to any branch or sector-level trade union organisation.

¹⁰ Since the previous representativeness study of the private security sector was published (2012), DEE EBY-DEOK has been identified as a sector-related trade union.

¹¹ The organisational domains of OIYK-SEK, SEBETTYK-PEO and DEE EBY-DEOK cover NACE 80.2. However, as at August 2019, they had no active members in that area of economic activity.

¹² Despite not being affiliated to UNI Europa and not being involved in collective bargaining, OS KOVO has been included as it has roughly as many members in the sector as OS PPP.

¹³ Since the previous representativeness study of the private security sector was published (2012), IG BAU has been identified as no longer being sector related.

¹⁴ Since the previous representativeness study of the private security sector was published (2012), FOA has been identified as a sector-related trade union.

¹⁵ Since the previous representativeness study of the private security sector was published (2012), ESTAL has been identified as no longer being sector related.

¹⁶ Since the previous representativeness study of the private security sector was published (2012), ELA-STV has been identified as no longer being sector related.

¹⁷ PAM potentially covers this code. According to PAM, they might have members working in companies under NACE 80.2, but they could not confirm this as their membership register did not provide that information.

Member State	Trade union	NACE 80.1 – private security activities	NACE 80.2 – security systems service activities
	FNECS/SNES	Yes	Yes
	UNSA	Yes	Yes
	CGT*	Yes	Yes
	SUD Prévention Sécurité	Yes	Yes
HR	SZH ¹⁸	Yes	Yes
	SSKH	Yes	Yes
	SZZD ¹⁹	Yes	Yes
HU ²⁰	VSZSZ	Yes	Yes
	G4SZ	Yes	No
	FVSZ ²¹	Yes	No
	ÖVDSZ	Yes	No
IE ²²	SIPTU*	Yes	No
	Connect	No	Yes
IT	Filcams – CGIL*	Yes	Yes
	Fisascat – CISL*	Yes	Yes
	Uiltucs – UIL*	Yes	Yes
	UGL Sicurezza Civile	Yes	Yes
	SINALV – CISAL	Yes	Yes
LT ²³	LPSDPS ²⁴	Yes	Yes
	JKUDPS	Yes	Yes
LU	CNSG/LCGB*	Yes	Yes
	OGB-L*	Yes	Yes
LV ²⁵	–	–	–
MT	GWU*	Yes	No

¹⁸ Despite not being affiliated to UNI Europa and not being involved in collective bargaining as at August 2019, SZH has been included as it is the largest trade union in the sector. Social dialogue in the sector is very weak, and SZH is thus not participating, although it would be able to in theory.

¹⁹ Despite not being affiliated to UNI Europa and not being involved in collective bargaining as at August 2019, SSZD has been included as it is a new and potentially increasingly significant actor in the sector. The trade union was established by workers unsatisfied with the situation in the security sector, especially regarding wages and other material rights of workers in security companies. The organisation aims to represent the interests and protection of all employees in security companies and security activities.

²⁰ Since the previous representativeness study of the private security sector was published (2012), the organisations G4SZ and FVSZ have been identified as sector-related trade unions.

²¹ Despite not being affiliated to UNI Europa and not being involved in collective bargaining as at August 2019, FVSZ has been included as it is one of the largest unions in the sector and is represented in the Sectoral Dialogue Committee of Private Security (Magánbiztonsági Ágazati Párbeszéd Bizottság).

²² Unlike the previous representativeness study of the sector (2012), this study also covers NACE 80.2, which is why Connect has been included this time.

²³ Since the previous representativeness study of the private security sector was published (2012), the organisation JKUDPS has been identified as a sector-related trade union.

²⁴ Despite not being affiliated to UNI Europa and not being involved in collective bargaining as at August 2019, LPSDPS has been included here as it is one of only two quite small trade unions in the sector. While its membership has been declining, it still has some members in the sector and used to be involved in bargaining. The union is sometimes consulted by the government on sector-related issues.

²⁵ Latvia was not part of the previous representativeness study for the sector (2012).

Member State	Trade union	NACE 80.1 – private security activities	NACE 80.2 – security systems service activities
	UHM	Yes	Yes
NL ²⁶	FNV*	Yes	Yes
	De Unie Security	Yes	Yes
	CNV Vakmensen	Yes	Yes
	LVB	Yes	No
PL ²⁷	MOZ NSZZ Solidarność POCS*	Yes	Yes
	OBZZPO	Yes	Yes
PT ²⁸	STAD*	Yes	Yes ²⁹
	SITese*	Yes	Yes ³⁰
	SINDELTELCO*	Yes	Yes
	SINDEL	Yes	Yes
	CESP	Yes	Yes
	SITAVA	Yes	Yes
RO ³¹	Protector*	n.d. ³²	n.d.
SE ³³	Transport*	Yes	No
	Seko	No	Yes
	SEF	No	Yes
	Unionen	Yes	Yes
	Ledarna	Yes	Yes
SI	SKVNS	Yes	Yes ³⁴
	SZS KS90	Yes	Yes ³⁵
SK	–	–	–
UK	GMB*	Yes	Yes
	Unite the Union*	Yes	Yes

Notes: * Member of UNI Europa. † Not member of UNI Europa, nor involved in collective bargaining. The reasons for inclusion are provided in footnotes. n.d. = no data.

Source: Network of Eurofound Correspondents, 2018.

The sector relatedness of trade unions has been assessed above in terms of whether their membership domains contain affiliates in the two main parts of the sector, NACE 80.1 and NACE 80.2. Additional factors

²⁶ Since the previous representativeness study of the private security sector was published (2012), the organisation LVB has been identified as a sector-related trade union.

²⁷ Since the previous representativeness study of the private security sector was published (2012), the trade union KP has been identified as no longer being sector related.

²⁸ The previous representativeness study (2012) only included STAD and SITESE.

²⁹ STAD's statutory domain covers NACE 80.1 and 80.2, but the organisation only has members in NACE 80.1.

³⁰ SITESE, SINDELTELCO, SINDEL, CESP and SITAVA have very few members in NACE 80.2.

³¹ No sector-related trade union was identified in Romania in the previous representativeness study (2012).

³² Information on sectoral coverage is not available. However, it is likely that the organisation covers NACE 80.1 at least, and probably also NACE 80.2.

³³ Unlike in the 2012 representativeness study, since this study also covers NACE 80.2, SEF and Seko have been included. Furthermore, as opposed to the previous study, Kommunal was not deemed to be sector related.

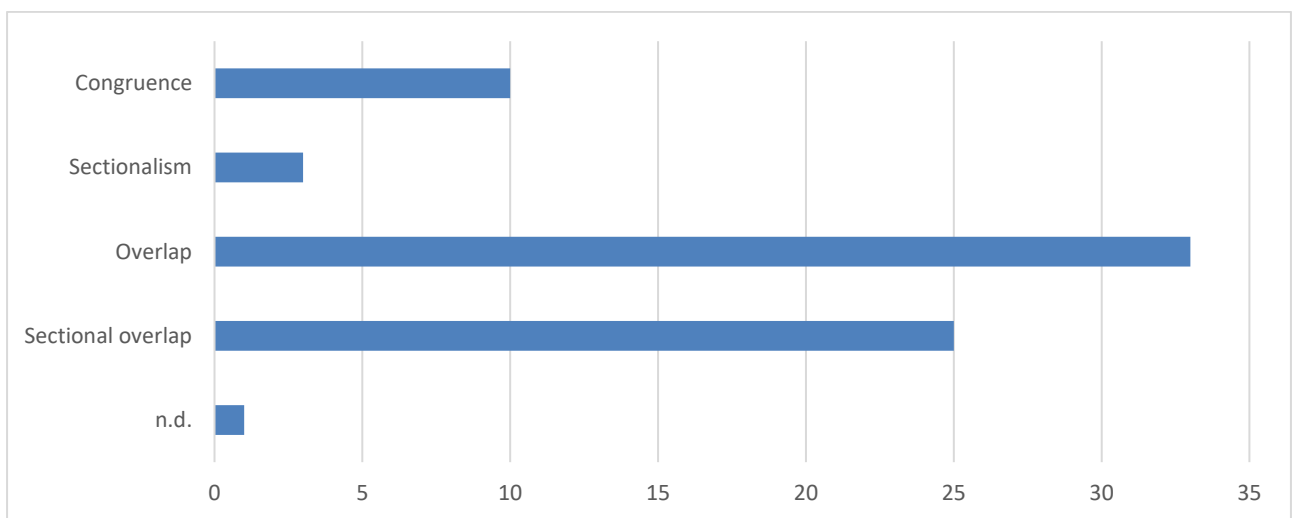
³⁴ SKVNS does cover NACE 80.2 in theory but has no actual members in the subsector.

³⁵ Like SKVNS, SZS KS90 covers NACE 80.2 in theory, but most likely has no members in the subsector.

regarding their sector relatedness are whether all categories of employees (white and blue collar) in both the larger and the smaller companies as well as those from all parts of the country can be part of the trade union. On the basis of all these factors, an organisation is marked as either congruent with the sector or as having an overlapping, a sectional or a sectional overlapping membership domain. An overlapping domain indicates links with other sectors, while sectionalism might contribute to fragmentation (where different organisations cover different parts of the sector) or pluralism (where different organisations have similar membership domains). A detailed analysis of this can be found in 'Reasons for fragmentation and pluralism in the private security sector'.

Figure 6 assesses trade unions on how they relate to the sector by classifying them according to the four patterns of sector relatedness (see Table 2).

Figure 6: Domain coverage of trade unions in the private security sector (number)



Note: N = 71 as there is no data for one trade union.

Source: Network of Eurofound Correspondents, 2018.

As can be seen in Table 9, 10 trade unions (14%) in eight Member States (Croatia, France, Greece, Hungary, Italy, Lithuania, Poland, Slovenia) show a congruent domain, but the vast majority of trade unions also cover other sectors in addition to the private security sector. The most common type of domain is 'overlap', that is, a union covers the whole of the private security sector (as defined in this study) and also parts of other sectors. This is the case for 33 of the trade unions in 13 Member States (Belgium, Croatia, Cyprus, Estonia, France, Germany, Italy, Lithuania, the Netherlands, Poland, Portugal, Spain, the UK), many of these being of a more 'general' character, covering many types of workers in many different sectors.

Combining trade unions with a membership domain that is congruent to the sector (as defined in this study) and those with a domain that overlaps with other sectors gives the trade unions that cover the entire sector. This is the case for 43 (60%) trade unions out of the total of 72. In 17 (61%) Member States, there is either a trade union with a congruent or an overlapping membership domain, thus covering the entire sector.

The 'sectional overlap' domain type is also fairly common among the trade unions in the sector. Twenty-five of them (found in Austria, Belgium, Czechia, Denmark, Finland, Germany, Hungary, Ireland, Malta, the Netherlands, Portugal, Slovenia, Spain and Sweden) cover only a part of the sector, often a specific occupation or type of worker, but cover those in all sectors.

Combining the trade unions with an overlapping membership domain with the ones with sectional overlap indicates the proportion that have members in other sectors. This is an indicator, together with the proportion of the trade unions that cover the entire sector, of how well the sector definition matches the reality of the membership domains of the trade unions. Altogether there are 58 (81%) trade unions with members in other sectors, found in 16 (57%) different EU Member States.

Three trade unions (in Bulgaria, Denmark and Hungary) cover only parts of the private security sector and have no members in any other sector, classified here as 'sectional'. For one union, there were not enough data to determine membership domain.

In summary, almost half (46%) of the unions have an overlap domain pattern, 35% cover parts of the sector as well as workers outside the sector (sectional overlap), for 14% there is a congruent pattern and, for the remainder (4%), the domain demarcation is sectional.

Table 9: Membership domain patterns of sector-related trade unions in the private security sector, 2018

Member State	Congruent	Sectional	Overlap	Sectional overlap
AT				Vida*, GPD-djp*
BE			ACV-CSC*, ACLVB-CGSLB*	AC-CG*, BBTK-Setca*
BG		VIP Security (company trade union)		
CY			OIYK-SEK*, SEBETTYK-PEO, DEE EBY-DEOK	
CZ				OS PPP*, OS KOVO†
DE			Ver.di*	GÖD
DK		VSL*		FOA*
EE			ETKA	
EL	OMYPAE†			
ES			CCOO CS*, FeSMC-UGT*, FTSP-USO	CIG
FI				PAM* ³⁶
FR	SUD Prevention and Security		FS CFDT*, UNSA, FNECS/SNES, FEETS-FO*, CGT*	CFTC CSFV ³⁷
HR	SZH†, SZZD†		SSKH	
HU	VSzSz	FVSZ†		G4SZ, ÖVDSZ
IE				SIPTU*, Connect
IT	UGL Sicurezza Civile, SINALV – CISAL		Filcams – CGIL*, Fisascat – CISL*, Uiltucs – UIL*	
LT			LPSDPS†, JKUDPS	
LU	CNSG/LCGB*		OGB-L*	
LV	–	–	–	–
MT				GWU*, ³⁸ UHM ³⁹

³⁶ According to PAM, they do not have members working with security shredding of information on any media (which is included under NACE 80.1).

³⁷ CFTC CSFV does not cover close protection officers/bodyguards.

³⁸ GWU does not cover security guards at nightclubs (aka 'bouncers').

³⁹ Coverage of NACE 80.2 cannot be confirmed.

Member State	Congruent	Sectional	Overlap	Sectional overlap
NL			FNV*, De Unie Security, CNV Vakmensen	LBV
PL	OZZPO		MOZ NSZZ Solidarność POCS*	
PT			STAD*, SITESE*, SINDELCO*, SINDEL, CESP	SITAVA
RO	n.d. ⁴⁰	n.d.	n.d.	n.d.
SE				Transport*, SEKO, SEF, Unionen, Ledarna
SI	SZS KS90 ⁴¹			SKVNS
SK	–	–	–	–
UK			GMB*, Unite the Union*	

Notes: * Member of UNI Europa. † Neither affiliated to UNI Europa nor involved in collective bargaining.
n.d. = no data.

Source: Network of Eurofound Correspondents, 2018.

In what follows, the membership strength (organisational density) of trade unions in the private security sector is assessed. Table 10 presents this information for trade unions for which this is available. The incompleteness of the available data means that it is difficult to compare the relative membership strength of each individual trade union. The next section therefore considers the relevance of each trade union in the sector depending on its involvement in sector-related collective bargaining. Due to issues with data availability, the table is also likely to underestimate the organisational density of sector trade unions.⁴² It should also be noted that because the employment data used in the table cover all of NACE code 80, while the data on union coverage only covers NACE codes 80.1 and 80.2, this contributes to further underestimation of the density rates, because total sector employment as defined in this study is actually lower than stated in the table.

Ranging from around 0.2% in Bulgaria up to 72% in Greece, the trade union density rate varies greatly between countries. In four countries – Denmark, Greece, Malta and the Netherlands – the trade union coverage rate is estimated at over 50%.

⁴⁰ Information about the membership domain of trade union Protector is not available.

⁴¹ SZS KS90 covers NACE 80.2 in theory, but probably has very few members involved in related activities, if any.

⁴² As there are trade unions that could not provide data regarding the number of their members in the sector, those members are not included in the calculations. However, there are many trade unions with an overlapping membership domain. This means that they also have members in other sectors. Additionally, their membership databases are not always linked to NACE codes or to categories congruent with the definition of the sector in this report, meaning that the numbers provided are estimations.

Table 10: Organisational density by Member State

Member State	Total sector employees ⁴³ (number)	Number of unions covered by data	Trade union members in the sector (number)	Density based on trade union data (%)
AT	15,422	1 out of 2	2,000	14
BE	18,963	All	6,330	33
BG	56,058	All	94	0.2
CY	1,533	All	611	40
CZ	44,262	All	200	0.5
DE	250,771	None	n.d.	n.d.
DK	6,689	All	3,939	59
EE	6,166	None	n.d.	n.d.
EL	24,933	All	18,000	72
ES	133,373	3 out of 4	3,962	3
FI	12,255	All	4,650	38
FR	189,498	1 out of 7	>4,000	2
HR	13,280	All	2,150	16
HU	27,088	All	5,648	21
IE	13,833	All	6,583	48
IT	75,108	3 out of 5	7,000	9
LT	10,981	All	100	0.9
LU	3,540	All	1,200	34
LV	12,348	None	n.d.	n.d.
MT	2,434	All	1,596	66
NL	34,081	3 out of 4	18,575	55
PL	120,973	1 out of 2	2,300	2
PT	40,366	All	4,477	11
RO	124,403	None	n.d.	n.d.
SE	26,182	4 out of 5	11,893	45
SI	6,201	All	2,100	34
SK	17,808	None	n.d.	n.d.
UK	191,900	None	n.d.	n.d.

Note: n.d. = no data.

Source: Eurostat, Structural Business Statistics, 2016; Network of Eurofound Correspondents, 2018.

Trade union involvement in collective bargaining or social dialogue

In the previous section, sector relatedness and membership strength of trade unions were considered. In this section, the involvement of trade unions in collective bargaining is analysed. Table 11 shows whether trade unions are involved in multi-employer collective bargaining (MEB) and/or single-employer collective bargaining (SEB). In SEB, only the workers employed by a specific employer are covered by the agreement,

⁴³ This includes Eurostat data for all of NACE code 80; that is, also including 80.3.

while in MEB, all employees of the member companies of the employer organisations are covered. Also included in the table is the share and the number of workers covered by such agreements.

The data presented in the table regarding the proportion of the workforce that is covered by collective bargaining are based on estimates which have either been provided by members of the Network of Eurofound Correspondents or inferred from general information about the level of collective bargaining coverage (particularly where such coverage is near universal) and systems for the extension of collective agreements (see, for example, Eurofound 2015; Oesingmann, 2016).

In the 26 Member States in which there are sector-related trade unions (all except Latvia and Slovakia), there is at least one trade union involved in collective bargaining in 25 Member States. In Greece, although there is a trade union, it is not involved in collective bargaining. For Romania there was no information available regarding the trade union Protector, but since the employers reported sector-related collective bargaining, it can be assumed that Protector is involved in this. Croatia has been included as a Member State with MEB as the potential for reaching agreements exists, although it appears that this is not practised in 2019.

In 15 Member States (Austria, Belgium, Denmark, Finland, France, Germany, Hungary, Ireland, Italy, Lithuania, the Netherlands, Portugal, Romania (probably), Slovenia and Sweden), there are trade unions involved in sector-related MEB. In nine other Member States (Bulgaria, Croatia, Cyprus, Czechia, Estonia, Lithuania, Malta, Poland, UK) there are trade unions that are only involved in SEB at the level of specific companies, mostly the largest ones. There are also 10 Member States where trade unions combine MEB and SEB (Belgium, France, Germany, Hungary, Ireland, Italy, the Netherlands, Slovenia, Spain, Sweden).

Table 11: Collective bargaining (CB) involvement of the 72 private security sector trade unions

Member State	Trade union	MEB	SEB	Percentage covered by CB (MEB + SEB) (%)	Workers covered by CB (number)	Percentage covered by MEB only (%)	Companies with SEB (number)
AT	Vida*	x		100 (ext.)	15,422	100	0
	GPA-djp*	x					
BE	ACV-CSC*	x	x	100 (ext.)	18,963	n.d. but mainly SMEs	n.d. ⁴⁴
	CGSLB*	x	x				
	AC-CG*	x	x				
	BBTK-SETca*	x	x				
BG	VIP Security		x				
CY	OIYK-SEK*		x	80	1,226	0	5
	SEBETTYK-PEO		x				
	DEE EBY-DEOK		x				
CZ	OS PPP*		x	3.7	1,638	0	2
	OS KOVO						
DE	Ver.di*	x	x	100 (ext.)	250,771	n.d.	n.d.
	GöD	x	n.d. ⁴⁵				
DK	VSL*	x		70	4,682	70	0

⁴⁴ According to social election results, about 16–17 have an H&S committee, in rule all those with more than 50 employees (it can be more if smaller companies have a trade union delegation, but this is quite rare).

⁴⁵ Information could not be supplied by the trade union.

Member State	Trade union	MEB	SEB	Percentage covered by CB (MEB + SEB) (%)	Workers covered by CB (number)	Percentage covered by MEB only (%)	Companies with SEB (number)
	FOA*	x					
EE	ETKA		x	≥50	≥3,083	0	n.d.
ES	CCOO CS*	x		70–85 (ext.)	93,000–113,000	70–75	n.d.
	FeSMC-UGT*	x					
	FTSP-USO	x	x				
	CIG	x					
FI	PAM*	x		100 (ext.)	12,255	100	n.d.
FR	FS CFDT*	x	x	100 (ext.)	189,498	100	n.d.
	FEETS-FO*	x	x				
	CFTC-CSFV	x	x				
	FNECS/SNES	x	x				
	UNSA	x	x				
	CGT*	x	x				
	SUD Prévention Sécurité		x				
HR ⁴⁶	SZH			0	0	0	0
	SSKH		x ⁴⁷				
	SZZD						
HU	VSZSZ	x		100 (ext.)	27,088	n.d.	3
	G4SZ		x				
	FVSZ						
	ŐVDSZ		x				
IE	SIPTU*	x	x	≥50 ⁴⁸ (except for security guards)	≥6,917	n.d.	20
	Connect		x				
IT	Filcams – CGIL*	x		n.d.	n.d.	n.d.	n.d.
	Fisascat – CISL*	x	x				
	Uiltucs – UIL*		x				
	UGL Sicurezza Civile	x					
	SINALV – CISAL	x					
LT	LPSDPS			1	110	0	≥2
	JKUDPS		x				
LU	CNSG/LCGB*	x		100 (ext.)	3,540	100	0
	OGB-L*	x					

⁴⁶ In Croatia, MEB is possible, but does not always take place or, when it does, does not always lead to collective agreements. In theory, the Croatian trade unions can be involved in collective bargaining, but there is almost no collective bargaining and no agreements in the sector. In practice, collective bargaining in this sector does not exist in Croatia.

⁴⁷ In theory SSKH can participate, but in practice there is no collective bargaining in the sector.

⁴⁸ This includes 100% of the guarding security sector (ERO covers all workers in that part of the sector and ensures MEB). SEB takes place in cash in transit and NACE 80.2, but over 50% collective bargaining coverage in both sectors.

Member State	Trade union	MEB	SEB	Percentage covered by CB (MEB + SEB) (%)	Workers covered by CB (number)	Percentage covered by MEB only (%)	Companies with SEB (number)
LV	–						
MT	GWU*		x	76	1,850	0	<10
	UHM		x				
NL	FNV*	x		n.d.	n.d.	n.d.	1
	De Unie Security	x	x				
	CNV Vakmensen	x	x				
	LVB	x					
PL	MOZ NSZZ Solidarność POCS*		x	7–8	9,000	0	4
	OZZPO		x				
PT	STAD*	x		98 ⁴⁹ (ext.)	38,000	98	0
	SITSESE*	x					
	SINDELTELCO*	x					
	SINDEL	x					
	CESP	x ⁵⁰					
	SITAVA	x ⁵¹					
RO	Protector*	52		n.d.	n.d.	n.d.	n.d.
SE	Transport*	x		95	24,873	80	2
	Seko	x					
	SEF	x	x				
	Unionen	x					
	Ledarna	x					
SI	SKVNS	x		100	6,201	n.d.	2–3
	SZS KS90		x				
SK	–						
UK	GMB*		x	10	19,190	n.d.	4
	Unite the Union*		x				

Notes: (ext.) = extension mechanism; MEB = Multi-employer bargaining; SEB = Multi-employer bargaining. * Member of UNI Europa. The fields marked in green indicate organisations involved in collective bargaining, while the fields marked in red indicate organisations that are not involved in

⁴⁹ The administrative extension of the two agreements signed in 2017 covers all workers in NACE 80.1, with the exception of the members of the two unions who opposed the extension (CESP and SITAVA).

⁵⁰ However, CESP decided not to sign the agreement in 2017 because it did not want to be part of a common negotiation of the CGTP and UGT unions.

⁵¹ SITAVA decided not to sign the agreement in 2017 because, like CESP, it did not want to be part of a common negotiation of the CGTP and UGT unions.

⁵² No information was provided on whether or not Protector is involved in collective bargaining. Because the Romanian employer organisation of the sector, all three reported being involved in both SEB and MEB at the sector level, it can be assumed that Protector is involved as it is the only sector-related trade union.

collective bargaining nor affiliated to UNI Europa. Justifications for their inclusion can be found in the respective footnotes and in 'Methodological considerations' in Chapter 2.

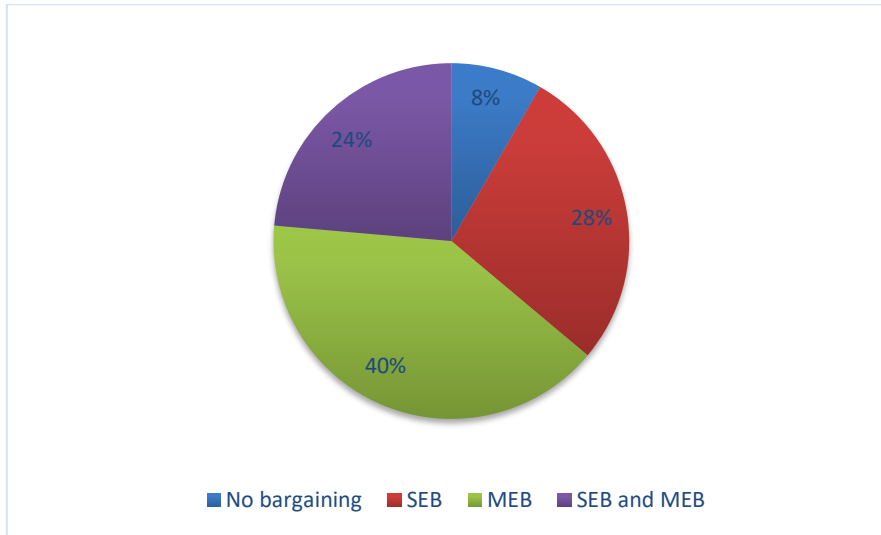
Source: Network of Eurofound Correspondents, 2018.

Figure 7 shows the involvement of sector trade unions in collective bargaining. Eight unions, found in Croatia, Czechia, Hungary, Lithuania and Romania, are not involved in any form of collective bargaining. The vast majority of trade unions – 66 (92%) – are involved in collective bargaining.

Seventeen (24%) trade unions in the private security sector are involved in both MEB and SEB. These are found in Belgium, France, Germany, Hungary, Ireland, Italy, the Netherlands, Slovenia, Spain and Sweden; although in Spain and Sweden MEB is more dominant.

In Bulgaria, Croatia, Cyprus, Czechia, Estonia, Lithuania, Malta, Poland and the UK, only SEB takes place.

Figure 7: Involvement of trade unions in different forms of collective bargaining



Note: N = 72.

Source: Author's calculations based on Network of Eurofound Correspondents, 2018.

Private security sector coverage, sector relatedness and organisational density of employer organisations

Fifty-four organisations, covering all 28 Member States, were identified in the private security sector by the Network of Eurofound Correspondents. The degree of fragmentation among employer organisations in the sector is fairly low, with the exception of a few countries, such as Italy.

Of the 52 organisations for which information is available, 10 do not qualify as employer organisations as they are neither involved in collective bargaining nor affiliated to CoESS. However, to give a fairly complete picture of the organisational situation in the sector, they have been included in Table 12.

Table 12: Sector coverage of employer/enterprise organisations

Member State	Employer organisation	NACE 80.1 – private security activities	NACE 80.2 – security systems service activities
AT	FVGD	Yes	No ⁵³
	VSÖ*	Yes	Yes
BE ⁵⁴	APEG/BVBO*	Yes	Yes
BG ⁵⁵	NAFTSO*	Yes	Yes
	NAFOTS ⁵⁶	Yes	Yes
CY	KYSEA ⁵⁷	Yes	Yes
CZ ⁵⁸	USBS ČR ⁵⁹	Yes	Yes
	ČKBS ⁶⁰	Yes	Yes
DE	BDSW*	Yes	Yes
	BDGW	Yes	Yes
	BDLS	Yes	Yes
DK	DI*	Yes	Yes
	Dansk Erhverv	Yes	Yes
EE	ESA*	Yes	Yes
EL ⁶¹	EOA*	Yes ⁶²	Yes

⁵³ The domain of FVGD is limited to NACE 80.1. However, some of its members may also cover activities falling within NACE 80.2.

⁵⁴ Another potentially relevant actor in this field is Associatie van Alarm Centrales (ACA). However, since it is neither a member of CoESS nor involved in collective bargaining, it has not been included here.

⁵⁵ NALSICOD and NBCSGD/BNBCSD, which were included in the previous representativeness study of the sector (2012), have not been included here as it has not been possible to confirm their representativeness in relation to the sector. BCPS/BKOS and UCPS/SFOS, both included in the previous study, were this time deemed not relevant as they are neither members of a European sector-related employer organisation nor participants in social dialogue.

⁵⁶ Although not affiliated to CoESS or involved in collective bargaining, NAFOTS (The National Association of Technical Equipment-Based Security Companies) represents companies which account for around 15% of the sectoral employment in Bulgaria. The organisation is regularly consulted by the government in sector-related issues. NAFOTS is affiliated to Euralarm.

⁵⁷ There are no employer organisations in the sector in Cyprus. The only organisation representing companies in the sector is KYSEA, which is a business association. As at August 2019, its member companies cover around 65% of the total sector employment.

⁵⁸ Security Club and ASBS, which were included in the previous representativeness study of the sector (2012), are both members of USBS ČR.

⁵⁹ There are no employer organisations in Czechia that are affiliated to CoESS and no sector-related organisations involved in collective bargaining. USBS ČR has been included here as it is the largest organisation representing companies in the sector, its members covering just over 20% of all sector employment.

⁶⁰ There are no employer organisations in Czechia that are affiliated to CoESS and no sector-related organisations involved in collective bargaining. ČKBS has been included here as it is almost as significant an actor in the sector as USBS ČR, its members covering around 20% of all sector employment.

⁶¹ Greece was not included in the previous study (2012).

⁶² The Hellenic Security Federation (EOA) could not be reached, but based on the apparent scope of the organisation, we make the assumption that its domain covers at least NACE 80.1 and likely also NACE 80.2.

Member State	Employer organisation	NACE 80.1 – private security activities	NACE 80.2 – security systems service activities
ES ⁶³	Aproser*	Yes	Partial ⁶⁴
	AES ⁶⁵	No	Yes
	FES	Yes	Yes
FI ⁶⁶	Palta/SVLL* ⁶⁷	Yes	Yes
FR	USP*	Yes	Yes
	SNES*	Yes	Yes
	SESA	Yes	No
	GPMSE	No	Yes
HR	CSA*	Yes	Yes
	HUP	Yes	Yes
HU	MBVMSZ	Yes	Yes
IE ⁶⁸	ISIA	Yes	Yes
	NUSE	Yes	No
	SEA ^{†69}	Yes	No
IT ⁷⁰	ANIVP ⁷¹	Yes	Yes
	UNIV ⁷²	Yes	Yes
	ASSIV	Yes	Yes

⁶³ Since the previous representativeness study of the private security sector was published (2012), the employer organisation ACAES is no longer found to be sector related. Another potentially relevant actor in this field is Asociación Española de empresas de Seguridad (AES), which is active in NACE 80.2. However, since it is neither a member of CoESS nor involved in collective bargaining, it has not been included here.

⁶⁴ Aproser focuses its activities on NACE 80.1 since that is the main area covered by collective bargaining. However, since activities under NACE 80.2 of companies also involved on NACE 80.1 are covered by the sectoral collective agreement, Aproser represents the interests of its members in this field. The representativeness of Aproser's members in NACE 80.2 is estimated at 20–25%.

⁶⁵ Asociación Española de empresas de Seguridad (AES) is reported by CoESS as the main representative association in the field of NACE 80.2. AES is affiliated to Euroalarm.

⁶⁶ Since the previous representativeness study of the private security sector was published (2012), the employer organisation ASSI has become a part of Palta.

⁶⁷ SVLL (Suomen Vartioliikkeiden Liitto ry) is a member of CoESS. SVLL is a trade association of the private security industry with the purpose of promoting the business interests of its members, member interests concerning employment contracts and cooperation of its members. Palta is the representative association for services sector businesses and organisations in Finland. Palta is an employer association and, based on the agreement, manages SVLL's affairs. Palta itself is not a member of CoESS, but as all member companies of SVLL are also members of Palta and because of the cooperation agreement between the two organisations, Palta and SVLL will be treated as one organisation for the purpose of this report.

⁶⁸ Since the previous representativeness study of the private security sector was published (2012), the employer organisation IBEC no longer represents members in the sector. The company SCI, which was also included in the previous study, ceased all operations in 2016.

⁶⁹ Despite not being affiliated to CoESS nor involved in collective bargaining, SEA has been included as it is a new actor in the sector organising a significant share of employers (around 10% in terms of employment) and seeking to challenge the Joint Labour Committee sectoral multi-employer pay negotiations system.

⁷⁰ The employer organisation Assvigilanza has merged with ANIVP since the previous representativeness study of this sector was published (2012).

⁷¹ ANIVP is affiliated to Federsicurezza and thus is indirectly represented by CoESS. It is listed separately as it is also directly involved in sector-related collective bargaining.

⁷² UNIV is affiliated to Federsicurezza and thus is indirectly represented by CoESS. It is listed separately as it is also directly involved in sector-related collective bargaining.

Member State	Employer organisation	NACE 80.1 – private security activities	NACE 80.2 – security systems service activities
	Legacoop	Yes	Yes
	Federlavoro and Services – Confcooperative	Yes	Yes
	Federsicurezza*	Yes	Yes
	AGCI	n.d. ⁷³	n.d.
LT ⁷⁴	AVG ⁷⁵	Yes	Yes
LU	FEDIL*	Yes	Yes
LV ⁷⁶	DNKA ⁷⁷	Yes	Yes
MT ⁷⁸	Malta Chamber ⁷⁹	Yes	Yes
NL ⁸⁰	NV*	Yes	Yes
	VBE NL	Yes	No
PL ⁸¹	PZP Ochrona ⁸²	Yes	Yes
PT	AES*	Yes	No
	AESIRF	Yes	No
RO ⁸³	FSS	Yes	Yes
	PSS	Yes	Yes
	RSIA*	Yes	Yes
SE ⁸⁴	Transportföretagen (Säkerhetsföretagen)*	Yes	Yes
	Almega Service Associations	No	Yes

⁷³ This could not be confirmed.

⁷⁴ No employer organisations were identified in Lithuania in the previous study (2012).

⁷⁵ Despite not being affiliated to CoESS and not involved in collective bargaining, AVG has been included here as it is the only actor representing companies in the sector. As at August 2019, its members cover almost half of the sector employment.

⁷⁶ Latvia was not included in the previous study.

⁷⁷ Despite not being affiliated to CoESS nor involved in collective bargaining as at August 2019, DNKA has been included here as it is the most significant actor representing companies in the sector. While only having four member companies, the members cover around a third of total sector employment. As at August 2019, the employer organisation is seeking partners for collective bargaining.

⁷⁸ No employer organisations were identified in Malta in the previous study (2012).

⁷⁹ Despite not being affiliated to CoESS and not involved in collective bargaining, The Malta Chamber of Commerce, Enterprise and Industry has been included here as it is the only organisation in the country known to represent companies in the sector. As at August 2019, its members cover just over half of total sector employment.

⁸⁰ Since the previous representativeness study of the private security sector was published (2012), the employer organisation VBE NL has become active in the sector and is involved in collective bargaining. Another potentially relevant actor in this field is VEBON NOVB. However, since it is neither a member of CoESS nor involved in collective bargaining, it has not been included here.

⁸¹ No employer organisations were identified in Poland in the previous study (2012).

⁸² Despite not being affiliated to CoESS and not involved in collective bargaining, PZP Ochrona has been included here as it is the only employer organisation in the sector. As at August 2019, its members cover around 60% of the total sector employment.

⁸³ PSS is now included in the representativeness study.

⁸⁴ Since the last representativeness study of the sector (2012), KFS is no longer found to be sector related and is thus not included in Table 12. Furthermore, employers in the sector have since formed a new organisation – Säkerhetsföretagen (official translation: The Security Companies) – and are now divided between Almega Service Associations and Säkerhetsföretagen.

Member State	Employer organisation	NACE 80.1 – private security activities	NACE 80.2 – security systems service activities
	Installatörsföretagen	No	Yes
SI	ZRSZV*	Yes	Yes
SK ⁸⁵	SKSB† ⁸⁶	Yes	Yes
UK	BSIA*	Yes	Yes

Notes: * Member of CoESS. † Not a member of CoESS nor involved in collective bargaining. The reasons for inclusion are provided in footnotes. n.d. = no data.

Source: Network of Eurofound Correspondents, 2018.

The sector relatedness of employer organisations has been assessed above in terms of whether their membership domain contains affiliates in the two main parts of the sector, NACE 80.1 and NACE 80.2. Additional factors regarding their sector relatedness are whether all types of companies (the larger as well as the smaller companies), companies of all types of ownership structure and from all parts of the country can be part of the membership domain of the organisation. On the basis of all these factors an organisation is marked as congruent with the sector or as having an overlapping, a sectional or a sectional overlapping membership domain. The 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 domains. Detailed analyses of how pluralism and sectionalism may explain the fragmentation in the sector can be found in ‘Reasons for fragmentation and pluralism in the private security sector’.

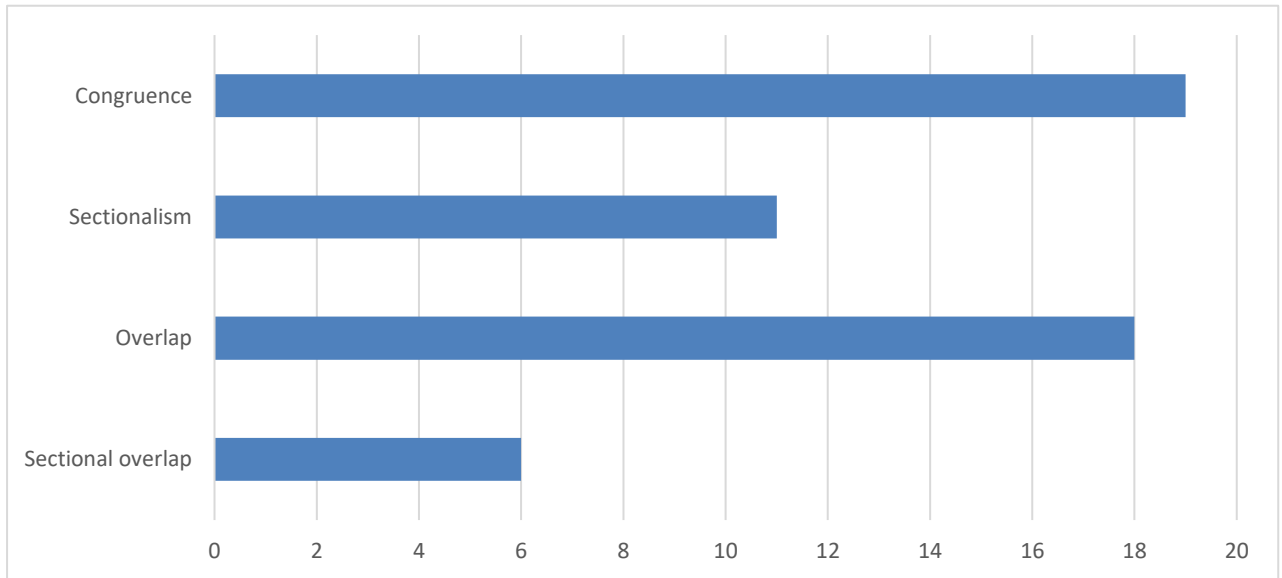
Combining the employer organisations with a congruent membership domain and those with an overlapping membership domain gives all those that cover the sector entirely. Over two-thirds of the employer organisations identified in this study – 37 (69%) – cover the whole sector, either exclusively (congruent) or alongside other sectors (overlap). In 25 EU Member States, there is at least one employer organisation covering the entire sector (Figure 8). The three Member States where this is not the case are Germany, Hungary and Portugal. However, in Germany and Portugal there are two different organisations that may have complementary membership domains, thereby allowing them to collectively cover the entire sector.

The other 17 organisations only cover a part of the sector. Eleven of these do not have membership outside the private security sector (sectionalism), while six have membership within as well as outside the private security sector (sectional overlap).

⁸⁵ No employer organisations were identified in Slovakia in the previous study (2012).

⁸⁶ Despite not being affiliated to CoESS and not involved in collective bargaining, SKBS (The Slovak Chamber of Private Security) has been included here as it is the only organisation in the country known to represent companies in the sector. As at August 2019, its members cover around 16% of total sector employment. SKSB (SK) reported it is a member of another European association called ESBOC. Those other European associations are analysed in ‘Other European employer organisations and EU business associations’.

Figure 8: Domain coverage of employer organisations in the private security sector (number)



Source: Network of Eurofound Correspondents, 2018.

Combining the employer organisations with an overlapping and a sectional overlapping domain gives all those that have members who are also active in other sectors. This is the case for 24 (45%) organisations from 16 different EU Member States.

If the 10 business associations that are not involved in collective bargaining nor affiliated to CoESS had not been included in Table 13, there would still be 28 (65%) organisations out of the 43 sector-related employer organisations that cover the entire sector (16 congruent and 12 overlap). With the inclusion of these 10 organisations, 70% of employer organisations cover the entire sector.

Table 13: Domain pattern of employer organisations

Member State	Congruent	Sectional	Overlap	Sectional overlap
AT			VSÖ*	FVGD ⁸⁷
BE	APEG-BVBO*			
BG	NAFTSO*		NAFOTS†	
CY	KYSEA†			
CZ	UBSS CR†		ČKBS†	
DE		BDSW*, BDGW, BDLS		
DK			DI*, Dansk Erhverv	
EE			ESA*	
EL	EOA*			
ES		Aproser*, AES	FES	
FI			Palta/SVLL*	
FR	USP*, SNES*	SESA, GPMSE		
HR	HUP (Branch Association for Security), CSA*			
HU				MBVMSZ
IE	ISIA	NUSE, SEA†		
IT	ASSIV, ANIVP, UNIV		Legacoop, Federlavoro and Services – Confcooperative, AGCI Servizi, Federsicurezza*	
LT			AVG†	
LU	FEDIL*			
LV	DNKA†			
MT			Malta Chamber†	
NL			NV*	VBE NL
PL			PZP Ochrona†	
PT		AES*, AESIRF		
RO	RSIA*		FSS	PSS
SE	Säkerhetsföretagen (Transportföretagen)*			Almega Service Associations, Installatörsföretagen
SI	ZRSZV*			
SK			SKSB†	
UK	BSIA*			

Notes: * Member of CoESS. † Neither affiliated to CoESS nor involved in collective bargaining.

Source: Network of Eurofound Correspondents, 2018.

In what follows, the membership strength (organisational density) of employer organisations in the private security sector is assessed. This can be assessed in two different ways: by looking at the share of employers in the sector represented by different organisations, or by the share of employees in the sector working in

⁸⁷ The correspondent is not fully clear to what extent NACE 80.2 is covered.

companies organised by specific employer organisations. The first way of measuring organisational strength treats each company equally, whereas in reality some companies are far more important for the sector than others. Therefore, it is most meaningful to combine the company-based calculation with the workforce-based calculation of organisational strength. This is done by dividing the total workforce of all the affiliated companies by the total number of employees within the sector.

As the employment data used in Table 14 cover all of NACE code 80, unlike the data on employer organisation coverage, this contributes to further underestimation of the density rates because the total sector employment as defined in this study is actually lower than stated in the table. However, in some countries (such as Austria) companies can be members of several employer organisations; this means that some companies will be counted more than once, thus resulting in overestimation of coverage.

Density in terms of employment is highest in Austria, where membership is mandatory for companies to the employers' organisation (thus amounting to 100%). Sweden and Slovenia follow closely at between 90% and 95%. The lowest density rates based on employment are found in Luxembourg and Romania with 3% and 10%, respectively. Density in terms of number of companies affiliated to employer organisations is again highest in Austria (100%), followed by Croatia at around 46%. The lowest density rates are found in Hungary and Latvia, both with 0.5%.

Table 14: Organisational density

Member State	Total sector employees* (number)	Organisations covered by employment data (number)	Density (employment) (%)	Total sector enterprises* (number)	Organisations covered by company data (number)	Enterprises covered by employer organisations in the sector (number)	Density (% of companies)
AT	15,422	All	100	397	All	525	100.0
BE	18,963	All	50	499	All	18	3.6
BG	56,058	All	80.5	1,337	All	72	5.4
CY	1,533	All	65	89	All	32	36.0
CZ	44,262	All	40–43	2,933	All	133	4.5
DE	257,724	All	82.1	5,944	All	1,039	17.5
DK	6,689	1 out of 2	72.2	519	1 out of 2	23	4.4
EE	6,166	All	76	103	All	7	6.8
EL	24,933	None	n.d.	1,449	None	n.d.	n.d.
ES	133,373	All	99	2,891	All	107	3.7
FI	12,255	All	80–90	612	All	29	4.7
FR	189,498	All	n.d.	8,795	All	426	4.8
HR	13,280	All	62	166	All	77	46.4
HU	27,088	All	16	5,214	All	26	0.5
IE	13,833	All	75	946	All	140	14.8
IT	75,108	1 out of 7	35	2,582	3 out of 7	181	7.0
LT	10,981	All	43	165	All	12	7.3
LU	n.d.	All	3	51	All	7	13.8
LV	12,348	All	30	764	All	4	0.5
MT	2,434	All	53	67	All	6	9.0
NL	34,081	None	n.d.	3,697	1 out of 2	86	2.3

Member State	Total sector employees* (number)	Organisations covered by employment data (number)	Density (employment) (%)	Total sector enterprises* (number)	Organisations covered by company data (number)	Enterprises covered by employer organisations in the sector (number)	Density (% of companies)
PL	120,973	All	60	3,847	All	95	2.5
PT	40,366	All	70	538	All	21	3.9
RO	124,403	1 out of 3	10	2,168	All	138	6.4
SE	26,182	2 out of 3	90–95	933	2 out of 3	207	22.2
SI	6,201	All	90	199	All	60	30.2
SK	17,808	All	16	1,183	All	32	2.7
UK	191,900	None	n.d.	8,641	All	570	6.6

*Note: * This includes Eurostat data for all of NACE code 80; that is, also including 80.3. In some countries, companies can be members of more than one organisation (e.g. in Austria), thus resulting in membership overlap. This means that sectoral density is likely to be overestimated in some countries.*

Source: Eurostat, Structural Business Statistics, 2016; Network of Eurofound Correspondents, 2018.

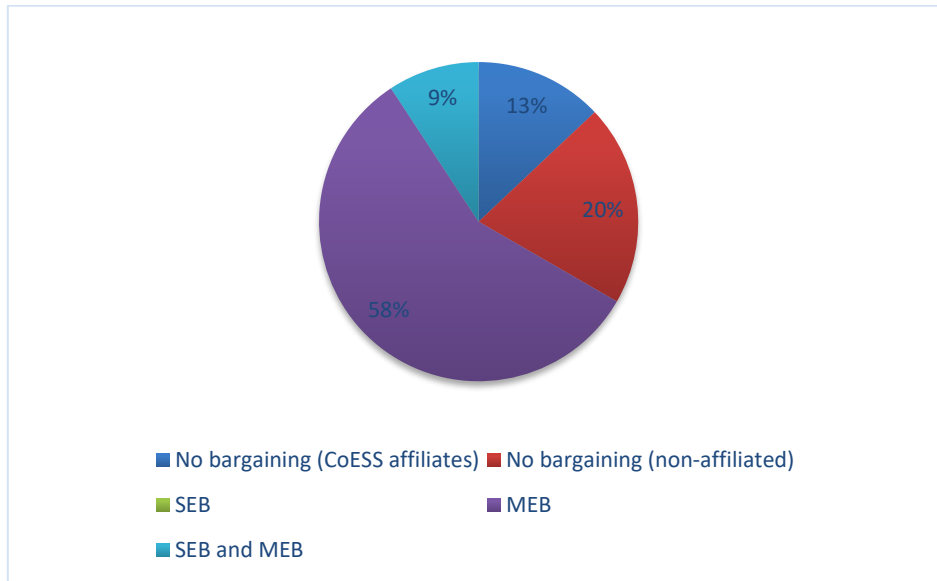
Private security employer organisation involvement in collective bargaining

This section considers the involvement of employer organisations in collective bargaining and the number of employees covered by collective bargaining agreements signed by the employer organisations in the sector. Figure 9 shows the extent of SEB and MEB in the sector. Thirty-one (58%) of the employer organisations are involved in MEB. Only five (9%) organisations are involved in both SEB and MEB. While it is still possible for bargaining to take place at the level of the individual employer, this generally happens without the involvement of employer organisations.

As is evident from Figure 9 and Table 15, employer organisations are generally not involved in SEB alone. In 17 Member States, there is at least one employer organisation involved in collective bargaining.

Overall, 17 (33%) of the 54 organisations do not participate in any form of collective bargaining. These are found in 11 Member States (Bulgaria, Cyprus, Czechia, Estonia, Greece, Lithuania, Latvia, Malta, Poland, Slovakia, UK).

Figure 9: Involvement of industry organisations in collective bargaining



Source: Authors' own calculations based on Network of Eurofound Correspondents, 2018.

There are employer organisations involved in sector-related MEB in 17 Member States (Austria, Belgium, Croatia, Denmark, Finland, France, Germany, Hungary, Ireland, Italy, Luxembourg, the Netherlands, Portugal, Romania, Slovenia, Spain and Sweden). For all these Member States, trade unions involved in MEB were also identified (see Table 11), even if for Croatia this is a possibility rather than an established practice that leads to agreements.

In nine other EU Member States (Bulgaria, Croatia, Cyprus, Czechia, Estonia, Lithuania, Malta, Poland, UK), there are trade unions that are only involved in SEB at the level of specific companies, mostly the largest ones. There are also 10 Member States where trade unions combine MEB and SEB (Belgium, France, Germany, Hungary, Ireland, Italy, the Netherlands, Slovenia, Spain and Sweden).

Table 15: Collective bargaining involvement of employer organisations

Member State	Employer organisation	Involved in CB	Companies covered (number)	Share of sector workforce covered by employer organisation ⁸⁸ (%)	Share of sector workforce covered by CB (%)
AT	FVGD	MEB	520	100	100
	VSÖ*	No bargaining	5	60	
BE	APEG/BVBO*	MEB	18	50	100
BG	NAFTSO*	No bargaining	58	65.5	0 ⁸⁹
	NAFOTS†	No bargaining	14	14	
CY	KYSEA†	No bargaining	34	65	80

⁸⁸ These are estimates by correspondents of the sectoral workforce employed by the companies affiliated to the organisation in question.

⁸⁹ However, negotiations in VIP Security are ongoing.

Member State	Employer organisation	Involved in CB	Companies covered (number)	Share of sector workforce covered by employer organisation ⁸⁸ (%)	Share of sector workforce covered by CB (%)
CZ	USBS ČR ⁹⁰	No bargaining	75	20–23	3.7
	ČKBS†	No bargaining	58	20	
DE	BDSW*	MEB	954	n.d. ⁹¹	100
	BDGW	MEB	32	4–6.5	
	BDLS	MEB	23	8	
DK	DI*	MEB	23	89	70
	Dansk Erhverv	MEB	n.d.	n.d. ⁹²	
EE	ESA*	No bargaining	7	76	50
EL	EOA*	No bargaining	n.d.	n.d.	40–50
ES	Aproser*	MEB	12	79	70–85
	AES	No bargaining			
	FES	MEB	100	20	
FI	Palta/SVLL*	MEB	29	80–90	100
FR	USP*	MEB	74	58	100
	SNES*	MEB	204	26	
	SESA	MEB	8	10	
	GPMSE	MEB	140	7	
HR	HUP	MEB ⁹³ and SEB	26	40	0
	CSA*	No bargaining	51	22	
HU	MBVMSZ	MEB	26	16	100
IE	ISIA	MEB	49	50	≥85
	NUSE	MEB and SEB	45	15	
	SEA†	No bargaining	45	10	
IT	ANIVP	MEB	42	n.d.	n.d. ⁹⁴
	UNIV	MEB	71	n.d.	
	ASSIV	MEB	68	n.d.	
	Legacoop	MEB	n.d.	n.d.	
	Federlavoro and Services – Confcooperative	MEB	n.d.	n.d.	
	AGCI	MEB	n.d.	n.d.	

⁹⁰ There are no employer organisations in Czechia that are affiliated to CoESS and no sector-related organisations involved in collective bargaining. ČKBS has been included here as it is almost as significant an actor in the sector as USBS ČR, its members covering around 20% of all sector employment.

⁹¹ However, BDSW is the largest employer organisation in the sector.

⁹² Dansk Erhverv is the second-largest employer organisation in the sector in terms of employees.

⁹³ HUP reported being involved in collective bargaining, although we were informed from other sources that, in Croatia, collective bargaining in the sector is possible in theory but not yet practised as of 2019.

⁹⁴ However, 100% are covered by the minimum pay agreement.

Member State	Employer organisation	Involved in CB	Companies covered (number)	Share of sector workforce covered by employer organisation ⁸⁸ (%)	Share of sector workforce covered by CB (%)
	Federsicurezza*	No bargaining ⁹⁵	700	35	
LT	AVG†	No bargaining	12	43	1
LU	FEDIL*	MEB	7	3	100
LV	DNKA†	No bargaining	4	30	n.d.
MT	Malta Chamber†	No bargaining	6	53	76
NL	NV*	MEB	n.d.	n.d.	n.d.
	VBE NL	MEB	85–88	n.d.	
PL	PZP Ochrona†	No bargaining	95	60	7–8
PT	AES*	MEB	8	50	98
	AESIRF	MEB	13	20	
RO	FSS	MEB and SEB	138	n.d.	n.d.
	PSS	MEB and SEB	23	n.d.	
	RSIA*	MEB and SEB	13	10	
SE	Transportföretagen (Säkerhetsföretagen)*	MEB	150	90	95
	Almega Service Associations	MEB	57	10	
	Installatörsföretagen	MEB	n.d.	0–5	
SI	ZRSZV*	MEB	60	95	100
SK	SKSB†	No bargaining	32	16	0
UK	BSIA*	No bargaining	570	n.d.	n.d.

Notes: * Member of CoESS. † Not involved in collective bargaining nor affiliated to CoESS. The justifications for inclusion can be found in the respective footnotes and in 'Methodological considerations' in Chapter 2. The fields marked in green indicate the organisations involved in collective bargaining. n.d. = no data.

Source: Network of Eurofound Correspondents, 2018.

Collective bargaining patterns and social dialogue practices

As outlined previously, the representativeness of the national social partner organisations is of interest to this study in terms of the capacity of their European umbrella organisations to participate in European social dialogue. Similarly, it is important for the implementation of any agreements made by European-level organisations at the national, regional and local levels. The role played by social partners in collective bargaining, social dialogue and the making of public policy are therefore important components of representativeness. The relevance of the European sectoral social dialogue tends to increase with the growing ability of the 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 is also borne out by analysis of

⁹⁵ However, member organisations UNIV and ANIVP are involved in collective bargaining.

the involvement of private security sector organisations in bipartite and tripartite bodies presented in this section. MEB tends to have greater significance in this regard, primarily because of the macroeconomic impact of such agreements (unless of course there are single-employer agreements in place with very large employers which serve to set an industry ‘standard’ or signalling effect). As well as looking at their formal role in bipartite and tripartite bodies, it is also important to ascertain the regularity of their involvement and whether they wield any significant influence in this arena.

As demonstrated above, the vast majority of the 72 trade unions identified in the sector are involved in collective bargaining, while on the employer side, around a third are not involved in any form of collective bargaining. The information on the coverage and nature of collective bargaining is summarised in Table 16.

Almost one in four trade unions in the private security sector are involved in both SEB and MEB. A further share of 38% engage only in MEB, and 28% only in SEB.

Among the employer organisations, two-thirds (67%) are involved in MEB or in both SEB and MEB. None of them engage solely in SEB.

Table 16: Collective bargaining in trade unions and employer organisations

	Trade unions			Employer organisations		
No CB involvement	6 (8%)		72 (100%)	18 (33%)		54 (100%)
SEB only	20 (28%)	64 (89%)		0 (0%)	36 (67%)	
MEB only	27 (38%)			31 (57%)		
Both SEB and MEB	17 (24%)			5 (9%)		
No data available	2 (3%)			0 (0%)		

Source: Network of Eurofound Correspondents, 2018.

Table 17 presents information on collective bargaining on a country-by-country basis, illustrating the different national collective bargaining patterns and collective bargaining coverage. It provides an impression of the level of bargaining, taking into account that SEB can also take place without the involvement of the employer organisation (which is not taken into account in Table 16).

Table 17: Form/level of bargaining per country

Form/level of bargaining	Member State
MEB (sector level)	AT, DK, FI, LU, PT
MEB and SEB	BE, DE, ES, FR, HR, HU, IE, IT, NL, SE, SI
SEB (company level)	BG, CY, CZ, EE, EL, ⁹⁶ LT, MT, PL, UK

⁹⁶ On the basis of the information on the two largest employers in the sector in Greece, about 15% of the sectoral workforce is covered by SEB, as is reflected in Table 18.

No collective bargaining	LV, RO, SK
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Source: Network of Eurofound Correspondents, 2018.

Table 18: Collective bargaining coverage and collective bargaining level

	CB coverage						Information not available
	95% or more	75–94%	50–74%	25–49%	1–24%	0%	
SEB – sole level		CY, MT	EE		CZ, EL, LT, PL	BG	UK
MEB – sole level	AT, FI, LU, PT		DK				
MEB in combination with SEB	BE, DE, FR, HU, SE, SI	ES, IE				HR	IT, NL
No CB						LV, RO, SK	

Source: Network of Eurofound Correspondents, 2018.

Participation in public policymaking

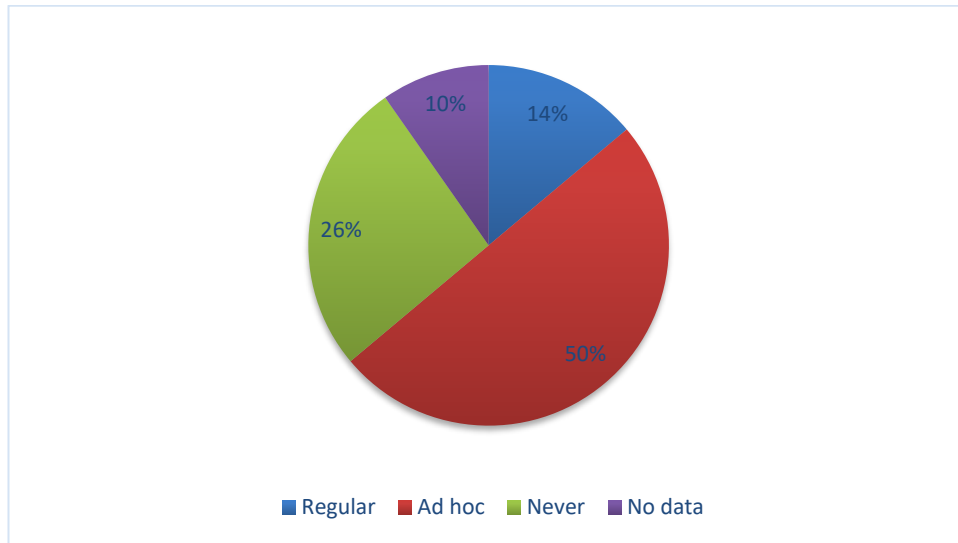
As indicated above, involvement in policymaking is another relevant indicator of representativeness of national social partner organisations. The consultation of social partners by policymakers, regarding sector-related policies, is a way through which those policymakers are somehow recognising the trade unions or employer organisations as representative actors for the sector. Policy dialogue can be formal or informal, and irrespective of their institutional set-up, the level of influence wielded by social partner organisations in this arena is an important point to consider. The members of the Network of Eurofound Correspondents were asked to provide information on involvement in the making of public policy.

In a significant number of Member States (particularly in northern and western Europe), the participation of social partners in the making of public policy has long been established. In a number of other countries (particularly in central and eastern Europe), such involvement is more recent, though in many countries it is rather formalised, for instance in tripartite bodies at the central level. For general policymaking, representation tends to be through peak organisations (sectoral federations). There is no involvement in the making of sectoral policy by trade unions and employer organisations in nine EU Member States (see Table 19).

Trade unions or interest representations

Figure 10 shows the involvement of social partner organisations in relevant policymaking at Member State level. This shows that only 10 (14%) of them are consulted on a regular basis by the government on issues related to working conditions or employment. However, 36 (50%) are consulted on an ad hoc basis. Nineteen (26%) trade unions are never consulted. In summary, 46 of the 72 trade unions are consulted at least occasionally. For seven (10%) trade unions there was not enough information to assess the regularity of consultations.

Figure 10: Consultation with trade unions

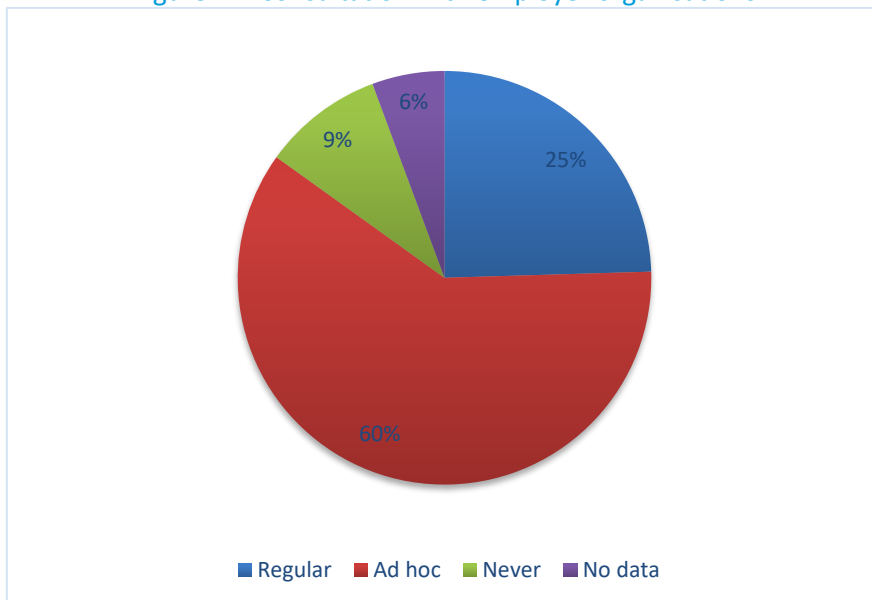


Note: N = 72.

Source: Authors' own calculations based on Network of Eurofound Correspondents, 2018.

As can be seen in Figure 11, among employer organisations, a total of 45 (85%) reported that they were consulted by the government on issues related to working conditions or employment. Thirteen (25%) of these stated that they were consulted on a regular basis. Five (9%) stated that they were never consulted. No information was available for three (6%) of the employer organisations.

Figure 11: Consultation with employer organisations



Note: N = 53.

Source: Authors' own calculations based on Network of Eurofound Correspondents, 2018.

In Bulgaria, Czechia, Denmark, Estonia and Romania, all trade unions indicated that they were never consulted. In all other Member States, at least one trade union considered that they are consulted.

Cyprus and Malta are the only countries where none of the employer organisations in the sector are consulted on working conditions and employment matters. However, it should also be noted in this case that they are the only organisations active in the sector.

Table 19 shows that there is no country where neither employer organisations nor trade unions are consulted, while in most Member States at least one organisation considers that it is consulted.

All trade unions in the sector consider that they are consulted in Belgium, Croatia, Cyprus, Finland, Greece, Lithuania, Luxembourg, Malta, Slovenia and the UK. Similarly, all employer organisations consider that they are consulted in Belgium, Bulgaria, Croatia, Czechia, Estonia, Finland, Germany, Greece, Hungary, Latvia, Lithuania, Luxembourg, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden and the UK.

Table 19: Consultation of employers and trade unions by country

	Trade unions consulted	No trade unions consulted
Employer organisations consulted	AT, BE, DE, EL*, ES, FI*, FR, HR*, HU, IE, IT, LT*, LU*, NL, PL, PT, SE, SI*, UK*	BG, CZ, DK, EE, LV†, RO, SK†
No employer organisations consulted	CY, MT	

*Note: * All trade unions and employer organisations are considered to be consulted at least occasionally.*

† There is no trade union to consult.

Source: Network of Eurofound Correspondents, 2018.

Tripartite and bipartite participation

Table 20 identifies tripartite and bipartite bodies in which sector-related topics are dealt with, or in which sector-related actors are involved. This common involvement implies some kind of mutual recognition. For EU Member States without established practices of MEB, this can be a way in which they are mutually recognised as representative counterparts. The table lists the participating trade unions and employer organisations in these social dialogue structures. In total, 19 countries have such sector-related bodies. In terms of sector relatedness, it is not always completely clear whether it is a strictly sector-related social dialogue setting or a wider multi-sectoral social dialogue setting in which issues are also dealt with that relate to the private security sector and in which sectoral social partners are involved.

Table 20: Tripartite and bipartite social dialogue bodies in which sector-related issues are dealt with, or in which sector-related social partners are involved

Member State	Name of body	Bipartite or tripartite	Scope of activity	Origin: agreement or statute	Trade unions participating	Employer organisations participating
BE	FSEG-FBZG	Bipartite	Provides allowances and benefits; similar bipartite organisations are present in many sectors, but this one is specific to Joint Committee 317	Statute	AC, BBTK-Secta, ACLVB-CGSLB, ACV Voeding en Diensten	APEG/BVBO
	Joint Committee 317	Bipartite	Negotiating and signing collective agreements specific to the sector (on a wide range of subjects: training, pensions, wage scales, wage increases, etc.)	Statute	AC, BBTK-Secta, ACLVB-CGSLB, ACV Voeding en Diensten	APEG/BVBO
BG	National Agreement for Cooperation between CITUB and NAFTSO	Bipartite	Amendments in legislation, labour and social security, improving working conditions	Agreement	CITUB	NAFTSO
CY	Technical Committee of Labour Advisory Body on Minimum Wage	Tripartite	Minimum wage	Statute	n.d.	The Cyprus Employers and Industrialists Federation (OEB)
DK	Det Faglige Udvalg for Serviceassistent-Uddannelsen – Uvalde for Vagt og Sikkerhed The Vocational Committee for Service Assistance Education – The Vocational Committee for Security	Bipartite	Education	Statute	VSL (Serviceforbundet), FOA	VSI (DI)
	BAR Service Branch work environment council in Service (sector health)	Tripartite	Working environment	Statute	VSL, FOA, United Federation of Danish Workers, 3F, The Police Union, The	DI, Ministry of Finance, HORESTA, Local Government Denmark, KL, The

Member State	Name of body	Bipartite or tripartite	Scope of activity	Origin: agreement or statute	Trade unions participating	Employer organisations participating
	and safety council)				Central Organisation of Regulars, Prison Employees' Union	Organisation of Managerial and Executive Staff in Denmark, LH
EE	Estonian Qualifications Authority (Kutsekoda) professional council	Tripartite	Developing a support structure for an occupational qualifications system to increase the competitiveness of Estonian employees and promote the development, assessment, recognition and comparison of their occupational competence; a professional council is an administrative body, the main objective of which is to develop and implement the professional system in its area of professional activity; the council consists, on an equal basis, of the representatives of employees, employers and professional associations in the same area of professional activity and the representatives of the state	Statute	None from the sector	ESA
EL	National Organisation for the Certification of Qualifications and Vocational Guidance (EOPPEP)	Tripartite	Vocational training	Statute	OMYPAE	SEV
ES	Observatorio Sectorial de Seguridad Privada (Sectorial Observatory of Private Security)	Bipartite	Deals with the main difficulties of the sector, such as the excessive prevalence of economic criteria over quality criteria in hiring processes, a breeding ground for	Agreement	FeSMC – UGT, Comisiones Obreras de Construcción y Servicios (CCOO), FTSP – USO	Aproser

Member State	Name of body	Bipartite or tripartite	Scope of activity	Origin: agreement or statute	Trade unions participating	Employer organisations participating
			inadequate use of some of the mechanisms facilitated by the latest labour reform, which generates job insecurity and increasingly widespread unfair competition			
FI	The Centre for Occupational Safety's sector group for the services sector (Työturvallisuuskeskuksen palveluryhmä)	Tripartite	Group promotes occupational safety and cooperation within the sector and develops working life at workplaces	Agreement	Service Union United, PAM	Palta/SVLL
	Finnish National Forum for Skills Anticipation (Opetushallituksen Osaamisen ennakointiryhmä)	Tripartite	Expert body for educational anticipation	Statute	Service Union United, PAM	Palta/SVLL
	The National Police Board's advisory board for the security sector (Poliisihallituksen turvallisuusalan neuvottelukunta)	Tripartite	Tripartite advisory board for the security sector promoting cooperation between authorities and service providers, proposing initiatives, issuing statements and defining guidelines for the sector	Statute	Service Union United, PAM	Palta/SVLL
FR	Commission Paritaire de négociation	Bipartite	Collective bargaining, social dialogue	Agreement	FNECS CFE-CGC, FS CFDT, CGT CDS, FEETS-FO, SNEPS CFTC, FMPS UNSA	USP, SNES
	CPNE FP	Bipartite	Vocational training issues	Agreement	FNECS CFE-CGC, FS CFDT, CGT CDS, FEETS-FO, SNEPS CFTC, FMPS UNSA	USP, SNES
	L'Observatoire des métiers	Bipartite	Employment, skills (forecasting studies)	Agreement	FNECS CFE-CGC, FS CFDT, CGT CDS, FEETS-FO,	USP, SNES

Member State	Name of body	Bipartite or tripartite	Scope of activity	Origin: agreement or statute	Trade unions participating	Employer organisations participating
					SNEPS CFTC, FMPS UNSA	
	Section Paritaire Professionnelle (SPP) de l'OPCA	Bipartite	Financing of vocational training	Agreement	FNECS CFE-CGC, FS CFTD, CGT CDS, FEETS-FO, SNEPS CFTC, FMPS UNSA	USP, SNES
HU	Sectoral Dialogue Committee of Private Security (Magánbiztonsági Ágazati Párbeszéd Bizottság, MBÁPB)	Bipartite	A consultative forum aimed at ensuring the smooth functioning of employer–employee dialogue, with a focus on vocational education, safety and health issues and speedy and smooth dispute settlement	Statute	Federation of the Property Protection Trade Unions (Vagyonvédelmi Szakszervezetek Szövetsége, VSzSz), Trade Union of Security Transport, Guard and Security Workers (Értékszállítási és Őrzésvédelmi Dolgozók Szakszervezete, ÉÖDSZ)	Employers' Association of Hungarian Security Companies (Magyar Biztonsági Vállalkozások Munkaadói Szövetsége, MBVMSZ)
IE	JLC (Joint Labour Committee)	Bipartite	Pay and working conditions	Statute	SIPTU	ISIA, NUSE
IT	EBINVIP	Bipartite	Labour market, training, health and safety, research and analysis of the sector	Agreement	Filcams – CGIL, Fisascat – CISL, Uiltucs – UIL	ANIVP, UNIV, ASSIV, Legacoop Servizi, Federlavoro e Servizi – Confcooperative, AGCI Servizi
LV	National Tripartite Cooperation Council (Nacionālās trīspusējās sadarbības padome, NTSP)	Tripartite	Social dialogue at national level	Statute	LBAS	LDDK
NL	Beveiligingsbranche (includes Servicecentrum Particuliere Beveiliging)	Tripartite	Private security, interest representation, education and training for workers; employees and	n.d.	CNV Vakmensen, De Unie, FNV	NV

Member State	Name of body	Bipartite or tripartite	Scope of activity	Origin: agreement or statute	Trade unions participating	Employer organisations participating
	and Sociaal Fonds Particuliere Beveiliging)		employers are represented directly within this organisation; the Beveiligingsbranche also cooperates with the government, establishing the workers' catalogue (Arbo Catalogus) for the sector			
	VEB	Bipartite	Private security interest representation, provision of quality assurance mark for the sector's enterprises	n.d.	n.d.	The VEB represents some 600 enterprises; they all use the VEB quality mark
PT	Observatory of Private Security	Bipartite	The Observatory of Private Security was created in February 2018 by the signatories of the two collective agreements (CCT AES/AESIRF-STAD 2017 and CCT AES/AESIRF-FETESE 2017) with the purpose of informing the broader public about 'bad practice' and undeclared work in the sector	Agreement	STAD, SITESE, SINDEL	AES, AESIRF
	Council of Private Security	Tripartite	The Council of Private Security is a tripartite body that publishes an Annual Report on Private Security (since 2005 at least)	Statute	STAD, SITESE, SINDEL	AES, AESIRF
RO	The Economic and Social Council (CES) – Administration and Public Order Committee	Tripartite	n.d.	Statute	All national trade union confederations (although the sector does not have any representative organisation)	All employer organisations representative at national level (as FSS and PATROSEC are affiliated members of UGIR 1909 and The Romanian Employers Organisation)
	Social dialogue committee within the	Tripartite	n.d.	Statute	All national trade union confederations (although	All employer organisations representative at national

Member State	Name of body	Bipartite or tripartite	Scope of activity	Origin: agreement or statute	Trade unions participating	Employer organisations participating
	Ministry of Labour and Social Justice				the sector does not have any representative organisation)	level (as FSS and PATROSEC are affiliated members of UGIR 1909 and The Romanian Employers Organisation)
	Social dialogue committee within the Ministry of Internal Affairs	Tripartite	n.d.	Statute	All national trade union confederations (although the sector does not have any representative organisation)	All employer organisations representative at national level (as FSS and PATROSEC are affiliated members of UGIR 1909 and The Romanian Employers Organisation)
	Social dialogue committee within the Ministry of National Defence	Tripartite	n.d.	Statute	All national trade union confederations (although the sector does not have any representative organisation)	All employer organisations representative at national level (as FSS and PATROSEC are affiliated members of UGIR 1909 and The Romanian Employers Organisation)
	Social dialogue committee within the Ministry of Education	Tripartite	n.d.	Statute	All national trade union confederations (although the sector does not have any representative organisation)	All employer organisations representative at national level (as FSS and PATROSEC are affiliated members of UGIR 1909 and The Romanian Employers Organisation)
SE	Bevakningsbranschens Yrkes- och Arbetsmiljönämnd (BYA) (The Security Sector's	Bipartite	Security guards' skills development and work environment	Agreement	The Transport Workers' Union and Unionen (although not as actively as the activities	The Swedish Security Industry Association

Member State	Name of body	Bipartite or tripartite	Scope of activity	Origin: agreement or statute	Trade unions participating	Employer organisations participating
	Occupation and Work Environment Board)				mainly concern blue-collar workers)	
SK	Economic and Social Council – HSR	Tripartite	Consults all relevant documents prepared by the government with social partners, including all issues concerning employment, working conditions, wages and social policy	Statute	None	SKSB is consulted on an ad hoc basis
UK	Skills for Security sector skills body	Bipartite	Skills and training	Statute	GMB	BSIA

Note: n.d. = no data.

Source: Network of Eurofound Correspondents, 2018.

Reasons for fragmentation and pluralism in the private security sector

Fragmentation is where different organisations cover different segments of the private security sector. This makes those organisations complementary. Pluralism, on the other hand, denotes a situation where organisations co-exist in the same domain (or very similar), representing the same types of employees. This section provides an overview of the reasons for organisational fragmentation and pluralism in the sector.

In the private security sector, there is an average of 2.5 trade unions per Member State. In half of the Member States, one reason for fragmentation among trade unions is that while several unions have similar membership domains, they differ in terms of ideology. One example of this is in Belgium, where trade unions have affiliations either to socialist, Catholic or liberal federations.

Another common reason for fragmentation is that the unions have members in different parts of the sector or organise workers in different types of economic activities (one reason could be if unions cover workers in the two NACE codes separately). As at August 2019, this is the case in nine Member States. A less common but related matter is fragmentation due to the unions covering different types of workers. For example, one of the Swedish sector-related trade unions (SEF) only covers electricians.

In some countries, trade unions are regional. In Croatia, Czechia and Spain, some unions are only active in certain regions of the country, and in four countries trade union fragmentation has to do with unions organising workers in different types of companies.

Bulgaria, Estonia, Greece and Romania only have one trade union active in the sector and thus no fragmentation.

Table 21: Reasons for fragmentation and pluralism of trade unions

Member State	They organise different categories of workers, only blue collar, only white collar or only management	Members in different parts of the country	Members in different types of company (in terms of size or ownership)	Members in different parts of the sector/types of activities	Similar membership domains but different in terms of ideology	Other reason
	How sectionalism can contribute to, or explain, some of the fragmentation in the sector				Reasons for pluralism	
AT	Yes					
BE					Yes ⁹⁷	
BG	Only one trade union in the sector					
CY					Yes	
CZ		Yes		Yes		
DE					Yes	
DK				Yes		
EE	Only one trade union in the sector					
EL	Only one trade union in the sector					
ES		Yes	Yes		Yes	
FI				Yes ⁹⁸		
FR					Yes	
HR	Yes	Yes	Yes	Yes	Yes	
HU						Yes ⁹⁹
IE				Yes		
IT					Yes	
LT				Yes		
LU					Yes	
LV					Yes ¹⁰⁰	
MT					Yes	
NL			Yes	Yes	Yes	
PL					Yes	
PT					Yes	Yes ¹⁰¹

⁹⁷ All Belgian unions in the sector represent the same group of employees. The pluralism of trade unions is ideological in nature, with ACV-CSC being part of the Christian-Democratic pillar within Belgium, ABVV-FGTB the socialist pillar and ACVLB-CGSLB the liberal one. Apart from some very rare exceptions (e.g. in the railway sector), this division is the same across all sectors in Belgium.

⁹⁸ There is more than one union active in the private security sector in Finland, but only one of them met the criteria for being included in this study.

⁹⁹ Pluralism in Hungary is partly due to the existence of workplace unions (the trade union of employees of one company).

¹⁰⁰ There are several trade unions active in the sector in Latvia, but none of them met the criteria for being included in this study.

¹⁰¹ Some of them have overlapping membership domains and differ in terms of ideology (STAD as a member of CGTP versus the UGT unions SITESE, SINDELCO and SINDEL and STAD as a union with a problem-solving approach versus the class struggle-oriented CGTP unions CESP and SITAVA). The UGT unions have different sectors as per their origin and have successively extended their domains. Nowadays their domains register multiple overlaps. The CGTP unions

RO	Only one trade union in the sector					
SE	Yes			Yes		
SI					Yes	
SK	No trade union in the sector					
UK			Yes	Yes		

Source: Network of Eurofound Correspondents, 2018.

In the private security sector, fragmentation can be found both among trade union and employer organisations. However, fragmentation among employer organisations in the sector is not quite as widespread as among trade unions. As at August 2019, there is an average of 1.9 employer organisations in the sector. CoESS has provisions in Article 7.2 of its statutes aiming to reduce fragmentation among its membership, while Article 7.2.4 states that all active member organisations will undertake to do everything to move towards one national body representing all these separate sectoral organisations.

Up to 2018, this article did not have an impact on reducing fragmentation in the sector. In the course of 2019, a merger is planned between SNES and USP. The main reason for this, indicated by CoESS, is to join forces and resources and make the associations more efficient and representative.

Table 22 shows that the main reason for the fragmentation of interest representation on the employer side within the private security sector is that the organisations have members in different types of companies in terms of size or ownership. However, the picture is complex, and only Portugal and Slovenia give this as the sole reason for fragmentation.

Another common reason is that the organisations have members in different sectors or in different types of activities, which is the case in nine of the Member States. Less common but still prevalent is fragmentation due to regional coverage or differences in ideology.

Belgium, Croatia, Estonia, Greece, Hungary, Latvia, Lithuania, Malta, Slovakia and the UK only have one employer organisation for the whole of the private security sector, and thus no fragmentation.

also have different sectors as per their origin (STAD in security and cleaning, CESP in commerce and SITAVA in airports and aviation), and their domains overlap private security.

Table 22: Reasons for fragmentation and pluralism of employer organisations

Member State	Members in different parts of the country	Members in different types of company (in terms of size or ownership)	Members in different parts of the sector/types of activities	Similar membership domains but different in terms of ideology	Other reason
	How sectionalism can contribute to, or explain, some of the fragmentation in the sector			Reasons for pluralism	
AT			Yes		
BE	Only one employer organisation in the sector				
BG	Yes	Yes		Yes	
CY					
CZ	Yes	Yes			
DE			Yes		
DK					Yes ¹⁰²
EE	Only one employer organisation in the sector				
EL	Only one employer organisation in the sector				
ES	Yes	Yes			
FI		Yes	Yes		
FR		Yes	Yes		
HR	Only one employer organisation in the sector ¹⁰³				
HU	Only one employer organisation in the sector				
IE		Yes		Yes	
IT		Yes		Yes	
LT	Only one employer organisation in the sector				
LU			Yes		
LV	Only one employer organisation in the sector				
MT	Only one employer organisation in the sector				
NL		Yes	Yes		
PL				Yes	
PT		Yes			
RO	Yes	Yes	Yes		
SE			Yes		
SI		Yes			
SK	Only one employer organisation in the sector				
UK	Only one employer organisation in the sector				

Source: Network of Eurofound Correspondents, 2018.

¹⁰² They have similar membership domains – but that is not a choice. They simply have the same type of membership, but do not differ in ideology as an employer organisation.

¹⁰³ HUP is the only employer organisation in the sector in Croatia. The other organisation included in this study, CSA, is a business organisation.

Methodological considerations

There are 6 trade unions and 11 employer organisations included in this chapter, even though they are not affiliated to the European organisations involved in the ESSDC and also not involved in sector-related collective bargaining. In footnotes in Tables 11 and 15, the (non-self-evident) inclusion of each of these organisations has been justified. Concepts regarding representativeness distinguish between professional associations and trade unions, and between business associations and employer organisations, on the basis of the involvement of the organisation in collective bargaining. In the applied methodology, an exception has always been made for organisations affiliated to the European social partner organisations involved in the ESSDC.

In this study, further exceptions were made for the 6 trade unions/worker associations and the 11 business associations/employer organisations¹⁰⁴ on the basis of five types of indicators:

- their involvement in bipartite or tripartite social dialogue bodies
- their membership strength in the sector, and whether the largest employers in the sector are affiliated
- their uniqueness (the organisations marked in Table 23 are the only ones identified in that country – without them there would not be any organisation included in this study)
- if they are not unique, their relative organisational strength can be compared with the other organisations
- their affiliation to another European association

Each of these five indicators will be assessed for these 6 trade unions and 11 employer organisations.

As none of these organisations are involved in collective bargaining, it is only their involvement in social dialogue that may grant them some kind of mutual recognition, which can be considered as comparable to those of affiliates of European social partners that are not involved in collective bargaining at national level. Having looked into this for each of these 16 organisations, only SKSB in Slovakia is involved in the Economic and Social Council (see Table 20). However, this appears to be more a cross-sectoral tripartite body in which sector-level actors can be involved rather than a strictly sector-related social dialogue body.

¹⁰⁴ To avoid unnecessary complexity in this report, all organisations representing the interests of workers are called trade unions and business associations are labelled as employer organisations.

Table 23: Worker associations and business associations also included in the report

Member State	Trade unions/worker associations	Employer organisations/business associations
BG		NAFOTS
CY		KYSEA†
CZ	OS KOVO	USBS ČR†, CKBS†
EL	OMYPAE*	
ES		AES
HR	SZH, SZZD	
HU	FVSZ	
IE		SEA
LT	LPSDPS	AVG†
LV		DNKA†
MT		Malta Chamber†
PL		PZP Ochrona†
SK		SKSB†

Notes: * The only trade union with members in the sector. † The only business association/s with members in the sector.

Source: Tables 8, 9 and 11 for the trade unions; Tables 12, 13 and 15 for the employer organisations.

In Table 23, if those organisations identified as having members in the sector had not been included in this report, no trade union for Greece and no employer organisations for Cyprus, Czechia, Latvia, Lithuania, Malta, Poland and Slovakia would have been included. In other words, instead of having a trade union identified in 26 EU Member States, this would have been reduced to 25, and for the employer organisations, some would have been identified in 21 Member States instead of 28 (see Table 26).

The unmarked organisations in Table 23 are not the only sector-related organisations in their country, therefore it is possible to assess their strength and representativeness in comparison to the other sector-related organisations. This assessment is made in Tables 23, 24 and 27. This comparison can indicate whether the trade union with most members in the sector is affiliated to UNI Europa and whether the employer organisation with the largest membership in terms of workforce of the affiliated companies is the one that is affiliated to CoESS.

In Tables 40 and 41 in the Annex, information is provided on the largest employers in the sector in each of the 28 Member States. For those companies with the largest private security workforce in each country, it is indicated which trade unions are organising the workers and to which national business associations these largest companies are affiliated. This allows us to check whether any of the 6 trade unions and 11 business associations considered here represent the largest companies in their country or their workforce, and whether there is SEB in those companies, which would contribute to their representativeness. Looking at the

trade unions organising the largest employers in NACE 80.1 in Table 37, and in NACE 80.2 in Table 38, for Croatia, Czechia, Greece, Hungary and Latvia none of the trade unions in Table 23 are organising the workforce of the largest employers in their country.

A similar assessment of the affiliation to business associations of the largest companies indicates that KYSEA (Cyprus), USBS ČR (Czechia), DNKA (Latvia), AVG (Lithuania), Malta Chamber (Malta), PZP Ochrona (Poland) and SKSB (Slovakia) all have among their member organisations the largest companies in the sector in their country, which gives them some representativeness in terms of membership. Furthermore, we see in Table 37 that the largest employers affiliated to KYSEA (Cyprus), AVG (Lithuania), Malta Chamber (Malta) and PZP Ochrona (Poland) are developing SEB. Normally, SEB is considered a company-related matter handled by management; however, given the importance of these large employers for the sector, it can be that these company-level negotiations are done in cooperation with the business associations/employer organisations these companies are affiliated to. Further research is needed to clarify this.

Finally, there is the question whether the 6 trade unions and 10 business associations in Table 23 are affiliated to any European trade union organisation or another European employer organisation other than UNI Europa and CoESS. For the trade unions, this appears not to be the case. None of the six trade unions is affiliated to a European trade union organisation, while for the business associations, NAFOTS (Bulgaria) and AES (Spain) reported being affiliated to Euralarm, and SKSB (Slovakia) is a member of ESBOC. Those other European associations are analysed in 'Other European employer organisations and EU business associations.

Without these organisations included in this report, there would be 66 trade unions in 25 Member States and 42 employer organisations in 21 Member States. To allow for separate calculations based on these numbers, they have also been included in Table 26.

3. European level of interest representation

In this chapter, the representativeness of the social partners at European level is assessed in three ways. First, the membership strength of both UNI Europa and CoESS is described, based on the collective coverage of their national affiliates in each of the EU Member States.

Second, the ‘capacity to negotiate’ of the European social partners is analysed; 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 through the support of their affiliates. This capacity to negotiate is impacted by the involvement of their affiliates in collective bargaining at national level, which not only ensures that they can provide an effective mandate for discussion and negotiation at European level, but also that they are also in a position to implement European-level agreements.

Finally, every representativeness study also measures the limits of the representativeness of social partners involved in ESSDC by weighting this against the representativeness of other European associations and the national organisations not represented by UNI Europa and CoESS in the ESSDC for the private security sector.

As outlined in greater detail below, the study presents detailed data on two sector-related European associations – namely UNI Europa on the employee side and CoESS on the employer side. Both are listed by the European Commission as social partner organisations to be consulted under Article 154 of the TFEU. Supplementary information is provided for other organisations (potentially) involved in social dialogue in the sector, where this information has become available in the course of the study.

UNI Europa membership domain

UNI Europa is affiliated to the European Trade Union Confederation (ETUC) at cross-sector level. Through its national affiliates, UNI Europa covers both of the relevant private security sector NACE codes (80.1 and 80.2). With regard to overall organisation, UNI Europa covers a wide range of services sectors. Besides its involvement in the ESSDC for the private security sector, it also operates in the ESSDC for the following sectors:

- audiovisual
- banking
- commerce
- personal services
- industrial cleaning
- insurance
- live performance
- post and logistics
- sports
- temporary and agency workers

As such, the membership domain of UNI Europa as a whole is multi-sectoral and, therefore, overlaps the private security sector under consideration in this report.

In the statutes of UNI Europa, Article 4 states that membership of UNI Europa is open to all members of national trade union centres affiliated to the ETUC that fall within its jurisdiction. The Regional Executive Committee makes recommendations to the UNI World Executive Board regarding affiliation of new organisations.

Of the 72 national private security sector-related trade unions, 33 (46%) are affiliated to UNI Europa. From the 26 Member States where a sector-related trade union was identified in the previous chapter, UNI Europa has an affiliate in 19 Member States. It can be seen from Table 24 that in each of these 19 Member States, the trade union(s) with most members in the sector are affiliated to UNI Europa. In Austria, Belgium, Denmark, Finland, Luxembourg, Romania and the UK, all unions representing workers in the sector are affiliated to UNI Europa. In the remaining 12 Member States, some but not all sectoral unions are UNI Europa members.

There are also 39 trade unions (from 19 different EU Member States) included in Table 24 (in the middle column) that are not affiliated to UNI Europa. In Bulgaria, Croatia, Estonia, Greece, Hungary, Lithuania and Slovenia, there are trade unions with members in the private security sector but no trade union affiliated to UNI Europa.

In Latvia and Slovakia there are no active trade unions in the sector.

Table 24: Sector-related trade unions affiliated to UNI Europa

Member State	Trade unions affiliated to UNI Europa	Trade unions not affiliated to UNI Europa	Is the trade union with most members in the sector affiliated?
AT	Vida, GPA-djp*	None	Yes
BE	ACV-CSC, CGSLB, AC-CG, BBTK-SETca	None	Yes
BG	None	VIP Security	No
CY	OIYK-SEK*	SEBETTYK-PEO, DEE EBY-DEOK	Yes
CZ	OS PPP ¹⁰⁵	OS KOVO†	Yes
DE	Ver.di	GöD	Yes
DK	VSL*, FOA*		Yes
EE	None	ETKA	No
EL	None	OMYPAE†	No
ES	CCOO SS, FeSMC-UGT	FTSP-USO, CIG	Yes
FI	PAM	None	Yes
FR	CGT, FS CFTD, FEETS-FO	CFTC-CSFV, FNECS/SNES, UNSA, SUD	Yes
HR	None	SZH†, SSKH, SZZD†	No
HU	None	VSZSZ, G4SZ, FVSZ, ÓVDSZ	No
IE	SIPTU	Connect	Yes
IT	Filcams – CGIL, Fisascat – CISL, Uiltucs – UIL	UGL Sicurezza Civile, SINALV – CISAL	Yes

¹⁰⁵ The membership of OS PPP in UNI Europa is de facto focused on banking and insurance, meaning that UNI Europa represents workers in the security sector in Czechia only in a formal sense.

Member State	Trade unions affiliated to UNI Europa	Trade unions not affiliated to UNI Europa	Is the trade union with most members in the sector affiliated?
LT	None	LPSDPS†, JKUDPS	No
LU	CNSG/LCGB, OGB-L	None	Yes
LV	None	None	None
MT	GWU	UHM	Yes
NL	FNV	CNV, Unie Security, LVB	Yes
PL	MOZ NSZZ Solidarność POCS*	OZZPO	Yes
PT	STAD, SITESE, SINDELCO	SINDEL, CESP, SITAVA	Yes
RO	Protector	None	Yes
SE	Transport	Seko, SEF, Unionen, Ledarna	Yes
SI	None	SKVNS, SZS KS90	No
SK	None	None	None
UK	GMB, Unite the Union	None	Yes

Notes: the cells marked in green are countries where the trade union with most members in the sector is affiliated to UNI Europa. The cells marked in orange are cases where there are sector-related trade unions not affiliated to UNI Europa, while the trade union with most members in the sector is affiliated to UNI Europa. The cells marked in red are trade unions affiliated to UNI Europa, where there is no trade union affiliated to UNI Europa. * Pays a general fee to UNI Europa (which includes their workers in private security), but because their membership is small, they are not featured separately by UNI Europa. † Neither a member of UNI Europa nor involved in collective bargaining. See Table 8 for the reasons for inclusion (given in footnotes).

Source: Network of Eurofound Correspondents, 2018.

In Cyprus and Sweden, the members of UNI Europa only cover private security activities (NACE 80.1). For the majority (19 organisations) of UNI Europa members, the domain pattern is one of overlap, covering workers in the sector as well as beyond. Only one organisation (CNSG/LCGB in Luxembourg) is fully congruent. A further 11 organisations have a sectional overlapping domain – some because they only cover one NACE code and others because they only cover certain regions or only white- or blue-collar workers.

Out of the 70 trade unions in the sector for which there is data, 66 are involved in collective bargaining. Of these, 33 are members of UNI Europa. This means that all UNI Europa members in the sector are involved in collective bargaining. Twenty-five of the UNI Europa members are involved in MEB, either solely or alongside SEB. In Austria, Belgium, Denmark, Finland, Luxembourg, Malta and the UK, all trade unions involved in collective bargaining are affiliated to UNI Europa.

CoESS membership domain

The Confederation of European Security Services was established in 1989. Article 7 of its 2012 statutes distinguishes five membership categories: active members, associated members, company members, corresponding members and sponsors.

As can be seen in Table 25, of the 54 employer organisations (and business associations) in the private security sector, 20 (37%) are members of CoESS. In 19 of the Member States, there is at least one employer organisation affiliated to CoESS. In Belgium, Estonia, Finland, Greece, Luxembourg, Slovenia and the UK, all employer organisations in the sector are members of CoESS. In Cyprus, Czechia, Hungary, Ireland, Latvia, Lithuania, Malta, Poland and Slovakia, there is at least one employer organisation, but none are affiliated to CoESS.

In 18 of the Member States, the employer organisation with the most members in the sector (based on the data available) is a member of CoESS. Austria is the only country where there are both affiliated and non-affiliated employer organisations and where a non-affiliated organisation is larger in terms of members in the sector. However, while FVGD is a larger organisation in terms of employees in member companies due to membership being mandatory, its membership overlaps with that of VSÖ. This means that many members of FVGD are also members of VSÖ and, thus, are affiliated to CoESS.

In 16 Member States, the largest employer in the sector is a member of the CoESS affiliate.

Excluding those (business) associations that have member companies in the sector but which are not involved in collective bargaining and not affiliated to CoESS (see ‘Methodological considerations’), there remain only three organisations – two in Ireland (ISIA and NUSE) and one in Hungary (MBVMSZ) – that are involved in collective bargaining but are not affiliated to CoESS. All other associations from the Member States where CoESS has no affiliate are not involved in collective bargaining. This is the case for NAFOTS (Bulgaria), KYSEA (Cyprus), USBS ČR and CKBS (Czechia), SEA (Ireland), DNKA (Latvia), AVG (Lithuania), Malta Chamber (Malta), PZP Ochrona (Poland) and SKSB (Slovakia).

Table 25: Sector-related employer organisations affiliated to CoESS

Member State	Employer organisations affiliated as active members to CoESS	Employer organisations not affiliated to CoESS	Is the largest employer organisation a member of CoESS (based on number of employees in member companies)?	Is the largest employer in the sector a member of the CoESS affiliate?
AT	VSÖ	FVGD	No	Yes
BE	APEG/BVBO	None	Yes	Yes
BG	NAFTSO	NAFOTS*	Yes	Yes
CY	None	KYSEA*	Yes	Yes
CZ	None	USBs ČR*, ČKBS*	No	No
DE	BDSW	BDGW, BDLS	Yes	Yes
DK	DI	Dansk Erhverv	Yes	Yes
EE	ESA	None	Yes	Yes
EL	EOA	None	Yes	Yes (1 of 2)
ES	Aproser	FES, AES	Yes	Yes
FI	Palta/SVLL	None	Yes	Yes
FR	USP, SNES	SESA, GPMSE	Yes	n.d.
HR	CSA	HUP	Yes	No
HU	None	MBVMSZ	No	No

Member State	Employer organisations affiliated as active members to CoESS	Employer organisations not affiliated to CoESS	Is the largest employer organisation a member of CoESS (based on number of employees in member companies)?	Is the largest employer in the sector a member of the CoESS affiliate?
IE	None	ISIA, NUSE, SEA*	No	No
IT	Federsicurezza	ANIVP, UNIV, ASSIV, Legacoop, Federlavoro and Services – Confcooperative, AGCI	n.d.	No
LT	None	AVG*	No	No
LU	FEDIL	None	Yes	Yes
LV	None	DNKA*	No	No
MT	None	Malta Chamber*	No	No
NL	NV	VBE NL	Yes	Yes
PL	None	PZP Ochrona*	No	No
PT	AES	AESIRF	Yes	Yes
RO	RSIA	PSS	Yes	n.d.
SE	Transportföretagen	Almega Service Associations, Installatörsföretagen	Yes	Yes
SI	ZRSZV	None	Yes	Yes
SK	None	SKSB*	No	No
UK	BSIA	None	Yes	Yes

Notes: The cells marked in green are countries where the employers' organisation (EO) with most members in the sector is affiliated to CoESS. The cells marked in orange are cases where there are sector-related EOs not affiliated to CoESS, while the EO with most members in the sector is affiliated to CoESS. The cells marked in red are cases where the most representative EO is not affiliated to CoESS. * Neither a member of CoESS nor involved in collective bargaining. See Table 8, where the reasons for inclusion are outlined in footnotes. n.d. = no data.

Source: Network of Eurofound Correspondents, 2018.

According to Article 7.2.1 of its statutes, CoESS accepts only one active member organisation per country. The only country in which CoESS has more than one member is France, where both SNES and USP are members. So that all security services in all their forms are represented, Article 7.2.2 exceptionally allows two bodies to be represented if they are sufficiently distinct. As an exception, several member organisations within the same membership domain are permitted for a limited time, until unification can take place. The board of CoESS decides to which organisations this exception applies and the period of time and extensions of the latter. In Table 26, the members of CoESS are listed according to their type of membership.

Table 26: Members of CoESS according to their type of membership

Member State/non-EU	Employer organisations affiliated as active members of CoESS	Associated members of CoESS	Company members of CoESS	Corresponding members of CoESS	Sponsors of CoESS
EU				ASSA-I – Aviation Security Services Association International, ESTA – European Security Transport Association	G4S Europe, Prosegur Europe, Securitas Europe
AT	VSÖ				
BE	APEG/BVBO				
BG	NAFTSO				
CY	None				
CZ	None				
DE	BDSW				
DK	DI				
EE	ESA				
EL	EOA				
ES	Aproser				
FI	Palta/SVLL				
FR	USP, SNES				
HR	CSA				
HU	None				
IE	None				
IT	Federsicurezza				
LT	None				
LU	FEDIL				
LV	None				
MT	None				
NL	NV				
PL	None				
PT	AES				
RO	RSIA				
SE	Transportföretagen				
SI	ZRSZV				
SK	None				

Member State/non-EU	Employer organisations affiliated as active members of CoESS	Associated members of CoESS	Company members of CoESS	Corresponding members of CoESS	Sponsors of CoESS
UK	BSIA				
Non-EU	Chamber of the Republic of North Macedonia for Private Security, Association of Swiss Security Service Companies (ASSC) and Güvenlik Servisleri Organizasyon Birliği Derneği (GÜSOD)	The private security employer organisations of Norway (NHO) and Serbia (NCPSC)			

Out of the 54 employer organisations in the sector, 36 are involved in collective bargaining. Of these, 15 are affiliated to CoESS. All 15 are involved solely in MEB with the exception of the Romanian organisation RSIA, which also deals with SEB. Eight of the affiliated organisations are not involved in collective bargaining at all. Looking back at Table 15 in the previous chapter, it can be seen that there are 21 employer organisations involved in collective bargaining, in 13 Member States, that are also affiliated to CoESS. These are FVGD (Austria), HUP (Croatia), Dansk Erhverv (Denmark), SESA and GMPSE (France), BDGW and BDLS (Germany), MBVMSZ (Hungary), ISIA and NUSE (Ireland), ASSIV, Legacoop, Federlavoro and Services – Confcooperative, and AGCI (Italy), VBE NL (the Netherlands), AESIRF (Portugal), FSS and PSS (Romania), FES (Spain) and Almega Service Associations and Installatörsföretagen (Sweden). All these organisations are involved in MEB.¹⁰⁶

For the majority of CoESS members, their domain pattern is congruent (11 organisations). Three organisations have a sectional domain pattern, while six overlap. None of the CoESS affiliates have a sectional overlap domain pattern. With only one exception (AES in Portugal), all 23 CoESS members cover NACE codes 80.1 and 80.2.

¹⁰⁶ As for HUP in Croatia, it should be noted that even though it reported being involved in collective bargaining, this is merely a possibility which is apparently not established practice in 2019. Federsicurezza in Italy is not involved directly in collective bargaining, but through its member organisations ANIV and UNIVP.

Table 27: Sector-related employer organisations affiliated to CoESS

	NACE 80.1	NACE 80.2
Sector-related employer organisations (number)	49	46
Sector-related employer organisations affiliated to CoESS (number)	20	19
Sector-related employer organisations affiliated to CoESS (%)	41	41
Employer organisations involved in sector-related collective bargaining (number)	32	30
Of those, affiliated to CoESS	14	13
Percentage	44	43

Source: Authors' own calculations based on Network of Eurofound Correspondents, 2018.

Private security sector representativeness of UNI Europa and CoESS

Table 28 summarises the representativeness of both UNI Europa and CoESS in the private security sector with their respective affiliated trade unions and employer organisations. There are 72 trade unions in the private security sector. In 26 Member States, there is at least one trade union (the only exceptions being Latvia and Slovakia). Out of the 72 trade unions, 33 (46%) are members of UNI Europa. Of the 64 private security sector trade unions which are involved in collective bargaining, 50% are affiliated to UNI Europa. UNI Europa has sector-related members in 19 Member States, and all of its affiliates in the sector are involved in collective bargaining.

There are 54 employer organisations in the private security sector. In all 28 Member States, there is at least one employer organisation. Employer organisations in the private security sector are involved in collective bargaining in only 17 (61%) Member States. Of the 54 employer organisations, 20 (37%) are members of CoESS. Out of the 36 employer organisations which are involved in collective bargaining, 14 (39%) are affiliated to CoESS.

Table 28: Membership structure of UNI Europa and CoESS

	Number of organisations	Number of Member States with organisations	Number of organisations involved in CB	Number of Member States with organisations involved in CB
Sector-related trade unions	72	26 No trade unions in LV, SK	66	24 Not in ES, RO ¹⁰⁷
Affiliates of UNI Europa	33	19 Not in BG, EE, EL, HR, HU, LT, SI	32	18 Not in BG, EE, HR, HU, LT, SI

¹⁰⁷ Involvement of the Romanian trade union Protector in collective bargaining could not be confirmed. However, there are employer organisations in Romania stating that they are involved in collective bargaining, which makes it likely that there is some form of involvement.

Percentage affiliated	46	73	50	75
Sector-related trade unions either involved in CB or affiliated to UNI Europa¹⁰⁸	66	25		
Percentage of those trade unions involved in CB that are affiliated	50	72		
Sector-related employer organisations	54	28	36	17 Not in BG, CY, CZ, EE, EL, LT, LV, MT, PL, SK, UK
Employer organisations affiliated to CoESS (national members and affiliated members)	20	19 Not in CY, CZ, HU, IE, LT, LV, MT, PL, SK	14 ¹⁰⁹	13 Not in AT, HR, HU, IE
Percentage affiliated	37	68	39	76
Sector-related employer organisations either involved in CB or affiliated to an employer organisation¹¹⁰	43	21 Not in CY, CZ, HU, IE, LT, LV, MT, PL, SK ¹¹¹		
Percentage of those employer organisations involved in CB that are affiliated	33	62		

Source: Authors' own calculations based on Network of Eurofound Correspondents, 2018.

Table 29 provides more details on a country-by-country basis, demonstrating the importance of UNI Europa and CoESS members in terms of their coverage of employees in the sector and involvement in collective bargaining.

In 19 out of the 28 Member States the most representative trade union is a member of UNI Europa, and in 19 countries the most representative employer organisation is a CoESS member.

¹⁰⁸ Clarifications on these numbers can be found in 'Methodological considerations' at the end of the previous chapter. If the worker associations/trade unions that are not involved in collective bargaining nor affiliated to UNI Europa were not included in this report, there would be 54 sector-related trade unions in 25 different EU Member States.

¹⁰⁹ If the Italian organisation Federsicurezza, which is indirectly involved in collective bargaining through its member associations, is also included.

¹¹⁰ Clarifications on these numbers can be found in 'Methodological considerations' at the end of the previous chapter. If the business associations/employer organisations that are not involved in collective bargaining and nor affiliated to CoESS were not included in this report, there would be 43 sector-related employer organisations in 21 different EU Member States.

¹¹¹ Austria, Croatia, Hungary and Ireland have an employer organisation involved in collective bargaining that is not affiliated to CoESS (see Table 15). For Austria and Croatia, however, there is another organisation affiliated to CoESS but not involved in collective bargaining, while for Hungary and Ireland, there is no affiliate to CoESS.

Table 29: Importance of UNI Europa and CoESS members at national level

Member State	Most representative trade union	Sector coverage (NACE)	Involved in CB	Member of UNI Europa	Most representative employer organisation	Sector coverage (NACE)	Involved in CB	Member of CoESS
AT	Vida	All	Yes	Yes	FVGD	All	Yes	No ¹¹²
BE	AC-CG	All	Yes	Yes	APEG/BVBO	All	Yes	Yes
BG	VIP Security (company union)	80.1	Yes ¹¹³	No	NAFTSO	All	No	Yes
CY	OIYK-SEK	All	Yes	Yes	KYSEA	All	No	No
CZ	OS PPP	80.1	Yes	Yes	USBS ČR	All	No	No
DE	Ver.di	All	Yes	Yes	BDSW	All	Yes	Yes
DK	VSL	All	Yes	Yes	DI	All	Yes	Yes
EE	ETKA	All	Yes	No	ESA	All	No	Yes
EL	OMYPAE	All	No	No	EOA	All	No	Yes
ES	FeSMC – UGT	All	Yes	Yes	Aproser	80.1	Yes	Yes
FI	PAM	All	Yes	Yes	Palta/SVLL	All	Yes	Yes
FR	CGT	All	Yes	Yes	USP	All	Yes	Yes
HR	SZH	All	No	No	HUP	All	Yes	No
HU	VSZSZ	All	Yes	No	MBVMSZ	All	Yes	No
IE	SIPTU	80.1	Yes	Yes	ISIA	All	Yes	No
IT	Filcams – CGIL	All	Yes	Yes	ANIVP/UNIV	All	Yes	No ¹¹⁴
LT	LPSDPS	All	No	No	AVG	All	No	No
LU	OGB-L	All	Yes	Yes	FEDIL	All	No	Yes
LV	–	–	–	–	DNKA	All	No	No
MT	GWU	80.1	Yes	Yes	Malta Chamber	All	No	No
NL	FNV	All	Yes	Yes	NV	All	Yes	Yes
PL	NSZZ Solidarność	All	Yes	Yes	PZP Ochrona	All	No	No
PT	STAD	All	Yes	Yes	AES	80.1	Yes	Yes
RO	Protector	n.d.	No	Yes	FSS	All	Yes	Yes
SE	Transport Workers' Union	80.1	Yes	Yes	Swedish Security Industry Association	All	Yes	Yes
SI	SKVNS	All	Yes	No	ZRSZV	All	Yes	Yes
SK	–	–	–	–	SKSB	All	No	No
UK	GMB	All	Yes	Yes	BSIA	All	No	Yes

Note: n.d. = no data.

Source: Network of Eurofound Correspondents, 2018.

¹¹² However, VSÖ is a member of CoESS.

¹¹³ No collective bargaining agreement exists, but negotiations are ongoing.

¹¹⁴ Neither ANIVP nor UNIV are direct members of CoESS, but they are affiliated through their membership of Federsicurezza.

Other European trade union associations

There are sector-related trade unions which are not affiliated to UNI Europa (although some of them are involved in collective bargaining) in 19 countries, however some are members of other European sectoral and cross-sectoral trade unions. However, these organisations are generally not directly related to the private security sector. Three trade unions in three different countries (Czechia, the Netherlands and Portugal) indicate membership in IndustriALL. These are either minor actors in the sector or have a membership in IndustriALL which is mainly focused on sectors other than private security. The same is true for the ETUC (the Netherlands and Slovenia), CESI (Germany) and EPSU (Portugal and the UK). Neither IndustriALL Europe, the ETUC, CESI or EPSU claim any representativeness for the private security sector as they do not relate to it.

A review of the membership of the national trade unions can be derived from Table 30. Most have no or relatively few affiliations to European associations other than UNI Europa. Although the affiliations listed below are likely not exhaustive, this overview emphasises the principal status of UNI Europa as the sector's labour representative at European level.

Table 30: Sector-related trade unions affiliated to UNI Europa and other European associations

Member State	Trade unions affiliated to UNI Europa	Trade unions not affiliated to UNI Europa	Affiliation with European sectoral or cross-sectoral trade union organisations other than UNI Europa
AT	Vida, GPA-djp		None
BE	ACV-CSC, CGSLB, AC-CG, BBTK-SETca		None
BG		VIP Security*	None
CY	OIYK-SEK	SEBETTYK-PEO*, DEE EBY-DEOK*	None
CZ	OS PPP	OS KOVO	OS KOVO is affiliated to IndustriALL ¹¹⁵
DE	Ver.di	GöD*	GöD is affiliated to CESI
DK	VSL, FOA		None
EE		ETKA*	None
EL		OMYPAE	None
ES	CCOO SS, FeSMC-UGT	FTSP-USO*, CIG*	None
FI	PAM		None
FR	CGT, FS CFDT, FEETS-FO	CFTC-CSFV*, FNECS/SNES*, UNSA*, SUD*	None
HR		SZH, SSKH*, SZZD	None
HU		VSZSZ*, G4SZ*, FVSZ, ÓVDSZ*	None
IE	SIPTU	Connect*	None
IT	Filcams – CGIL, Fisascat – CISL, Uiltucs – UIL	UGL Sicurezza Civile*, SINALV – CISAL*	None
LT		LPSDPS, JKUDPS*	None
LU	CNSG/LCGB, OGB-L		None
LV			None
MT	GWU	UHM	None

¹¹⁵ The members of OS KOVO in the private security sector are covered by the organisation only in a formal sense.

Member State	Trade unions affiliated to UNI Europa	Trade unions not affiliated to UNI Europa	Affiliation with European sectoral or cross-sectoral trade union organisations other than UNI Europa
NL	FNV	CNV Vakmensen*, De Unie Security*, LVB*	FNV is affiliated to ETUC and IndustriALL CNV Vakmensen is affiliated to ETUC and the European Union of Christian Democratic Workers (EUCDW)
PL	MOZ NSZZ Solidarność POCS	OZZPO*	None
PT	STAD, SITESE, SINDETELCO	SINDEL*, CESP*, SITAVA*	SINDEL is affiliated to IndustriALL and EPSU ¹¹⁶
RO	Protector		None
SE	Transport	Seko*, SEF*, Unionen*, Ledarna*	SEF is affiliated to EFBWW
SI		SKVNS*, SZS KS90*	SKVNS is affiliated to ETUC (via ZSSS)
SK			None
UK	GMB, Unite the Union		Unite the Union is affiliated to EPSU

Note: The cells marked in green indicate countries with trade unions affiliated to UNI Europa. The cells marked in blue on the right indicate the trade unions that are affiliated to other European trade union organisations. * Involved in collective bargaining, but not affiliated to UNI Europa.

Source: Network of Eurofound Correspondents, 2018.

The trade unions marked with an asterisk are involved in collective bargaining, but are not affiliated to UNI Europa. As their affiliation to any other European association is assessed in the right-hand column, we conclude that none of them are members of a European trade union organisation that relates somehow to the private security sector. UNI Europa can thus be considered as the only representative European trade union organisation for the private security sector.

Other European employer organisations and EU business associations

In 21 countries, there are employer organisations present (some of them involved in collective bargaining) which are not affiliated to CoESS, but which are in some cases members of other European sectoral and cross-sectoral employer organisations.

For instance, three organisations (in Austria, Bulgaria and the Netherlands) are members of Euralarm, an organisation that in relation to the private security sector covers part of NACE code 80.2, security systems service activities, which CoESS covers to an extent, mainly managing alarm receiving centres and monitoring stations. Furthermore, two organisations (in Germany and Luxembourg) are members of The European Security Transport Association/The European Cash Management Companies Association (ESTA). Additionally, there are four organisations that each have one single member organisation in the sector. These organisations are summarised in Table 31.

¹¹⁶ SINDEL is a member of IndustriALL and EPSU. However, it should be pointed out that SINDEL is one of the smaller trade unions in the sector in Portugal, representing around 2% of workers in the sector.

Table 31: Sector-related national employer organisations affiliated to CoESS and other European associations

Member State	Employer organisations affiliated to CoESS	Employer organisations not affiliated to CoESS	Affiliation with European employer organisations other than CoESS
AT	VSÖ	FVGD*	VSÖ is affiliated to Euralarm and Eurosafe
BE	APEG/BVBO	ACA	None
BG	NAFTSO	NAFOTS	NAFOTS is affiliated to Euralarm
CY		KYSEA†	None
CZ		USBS ČR†	None
DE	BDSW	BDGW*	BDGW is affiliated to ESTA
DK	DI	Dansk Erhverv	None
EE	ESA		None
EL	EOA		None
ES	Aproser	FES*, AES	AES is affiliated to Euralarm
FI	Palta/SVLL		None
FR	USP, SNES	SESA*, GPMSE*	None
HR	CSA	HUP*	None
HU		MBVMSZ*	None
IE		ISIA*, NUSE*, SEA	None
IT	Federsicurezza	ASSIV*, Legacoop*, Federlavoro and Services – Confcooperative*, AGCI*, ANIVP, UNIV	None
LT		AVG†	None
LU	FEDIL		FEDIL is affiliated to ESTA
LV		DNKA†	None
MT		Malta Chamber†	None
NL	NV	VBE NL*, VEBON NOVB	VEBON NOVB is affiliated to Euralarm and EUSAS
PL		PZP Ochrona†	None
PT	AES	AESIRF*	None
RO	RSIA	FSS*, PSS*	None
SE	Säkerhetsföretagen (Transportföretagen)	Almega Service Associations, Installatörsföretagen*	Installatörsföretagen is affiliated to AIE
SI	ZRSZV		None
SK		SKSB	SKSB is affiliated to ESBOC
UK	BSIA		None

Notes: The cells marked in green indicate countries with employer organisations affiliated to CoESS. The cells marked in blue indicate employer organisations that are affiliated to other European employer organisations. * Involved in collective bargaining, but not affiliated to CoESS. † Has as a member company one of the two largest employers in the sector in that country (see also Table 40 in the Annex).

Source: Network of Eurofound Correspondents, 2018.

A review of the membership of the national employer/business associations can be derived from Table 31. Like the trade unions, most have few or no affiliations to European associations other than CoESS, and the

organisational inventory highlights the status of CoESS as the sector's primary employer representative at European level.

The employer organisations identified with an asterisk in the middle column in Table 31 are involved in collective bargaining but are not affiliated to CoESS. Two of them are affiliated to another European association. BDGW is affiliated to ESTA (although, ESTA in turn is affiliated to CoESS) and Installatörsföretagen is affiliated to AIE. Both of these European associations are further analysed below, among other European associations that somehow relate to the private security sector. The business associations identified with a dagger in the middle column in Table 31 are not involved in collective bargaining but have among the companies affiliated to them one of the two largest employers (see Table 37 in the Annex). This is the case for Cyprus, Czechia, Lithuania, Latvia, Malta and Poland.

Table 32: Other EU associations with private security sector national employer organisations as members

Other EU employer organisations/business associations		Sector-related employer organisations identified in Chapter 3 that are affiliated	EU Member States with an affiliate according to organisation website
Abbreviation	Full name	Assessment of sector relatedness	
AIE	European Association of Electrical Contractors	None of the sector-related employer organisations are affiliated Marginally related to NACE 80.2	AT, BE, DE, DK, FI, FR, LU, NL, SE, UK
ESBOC	European Security Branch Organisations Club	No information available No website	n.d.
ESTA	European Security Transport Association/European Cash Management Companies Association	Only corporate members In Bulgaria the company VIP Security is affiliated, which has a company trade union with the same name that appears in this report as a sector-related trade union ESTA is private security sector related It covers a specific section of the sector ESTA is a member of CoESS (corresponding member)	Company members in AT, BE, BG, CY, CZ, DE, DK, EE, ES, FI, FR, HU, IE, IT, LV, MT, NL, PL, PT, RO, SE, SI, SK, UK
Euralarm	Euralarm	No sector-related employer organisations are affiliated Only corporate members Related to NACE 80.2	AT, BE, BG, CZ, DE, DK, EL, ES, FI, FR, IT, NL, PT, RO, SE, UK
Eurosafe	European Association for Injury Prevention and Safety Promotion	Not sector related	AT, DE, DK, FI, LU, NL, PT, UK
EUSAS	European Society for Automatic Alarm Systems	No sector-related employer organisations affiliated, only corporate membership EUSAS is a European platform for discussion among professionals It relates to NACE 80.2	n.d.
IPSA	International Professional Security Association	No sector-related employer organisations affiliated, only corporate members This association provides training courses for companies	IE, UK
The Security Institute	The Security Institute	Not sector related	n.d.

Note: n.d. = no data.

Source: Authors' own research based on Network of Eurofound Correspondents, 2018.

A detailed analysis of the other European associations with members in the sector in Table 32 indicates that they all have only companies as members. None of the national sector-related employer organisations or business associations identified in this report are found among the members of these other European associations. For ESTA, VIP Security from Bulgaria appears as a member company. While there is a trade union with the same name within this company, it is included in this report as a sector-related (company) trade union. ESTA also issued joint statements together with CoESS on topics regarding the transport of

valuables and cash. Although these specific activities were excluded from this report, it should be noted that there are joint opinions of UNI Europa and CoESS on such topics included in Table 33. ESTA is a corresponding member of CoESS.

Summary of the Member States with the largest sectoral workforce

This section first looks at the membership structure in the six Member States with the largest private security sector workforce in absolute numbers. Subsequently, the situation of the membership of UNI Europa and CoESS is examined for the Member States where the proportion of the private security workforce corresponds to 0.5% (or more) of the total number of employees in the entire economy of that country.

Tables 33 and 34 demonstrate that the organisations affiliated to UNI Europa and CoESS are those with the highest number of members and greatest collective bargaining coverage in their country (where collective bargaining exists in the sector). With a few exceptions, the Member States with the largest private security sector workforce are represented by UNI Europa and CoESS in the ESSDC for the private security sector.

Table 33: Affiliations in EU Member States with employment exceeding 100,000 in the private security sector

Member State	Total employment (2016) (number)	At least one trade union affiliated to UNI Europa	At least one UNI Europa affiliate involved in CB	At least one employer organisation affiliated to CoESS	At least one CoESS affiliate involved in CB
DE	250,771	Yes	Yes	Yes	Yes
UK	191,900	Yes	Yes	Yes	No
FR	189,498	Yes	Yes	Yes	Yes
ES	133,373	Yes	Yes	Yes	Yes
RO	124,403	Yes	Could not be confirmed ¹¹⁷	Yes	Yes
PL	120,973	Yes	Yes	No	No

Note: Ordered by total employment.

Source: Eurostat, Structural Business Statistics, 2016; Network of Eurofound Correspondents, 2018.

In contrast, when it comes to the EU Member States with the highest proportion of the national workforce in the private security sector, it appears that in more than half of the countries where the sector makes up at least 0.5% of the workforce, there are no trade unions affiliated to UNI Europa (Table 34). The same is true on the employer side for CoESS. However, it should be pointed out that in several of the countries included in the table, collective bargaining traditions are fairly weak. For example, in Czechia and Lithuania, there are no employer organisations or trade unions in the sector involved in collective bargaining at all.

¹¹⁷ The involvement of the Romanian trade union Protector could not be confirmed. However, as there are employer organisations claiming to be involved, some form of trade union involvement is likely.

Table 34: Affiliations in EU Member States where the private security sector makes up at least 0.5% of overall employment

Member State	Share of employment (2016) (%)	Total employment (2016) (number)	At least one trade union affiliated to UNI Europa	At least one UNI Europa affiliate involved in CB	At least one employer organisation affiliated to CoESS	At least one CoESS affiliate involved in CB
LU	1.5	3,530	Yes	Yes	Yes	Yes
BG	1.2	56,058	No	No	Yes	No
RO	0.9	124,403	Yes	No	Yes	Yes
LV	0.9	12,348	No	No	No	No
MT	0.8	2,434	Yes	Yes	No	No
PT	0.6	40,366	Yes	Yes	Yes	Yes
EE	0.6	6,166	No	No	Yes	No
PL	0.5	120,973	Yes	Yes	No	No
CZ	0.5	44,262	Yes	Yes	No	No
SK	0.5	17,808	No	Yes	No	No
HR	0.5	13,280	No	No	Yes	No
LT	0.5	10,981	No	No	No	No

Note: Ordered by share of employment and total employment.

Source: Eurostat, Structural Business Statistics, 2016; Network of Eurofound Correspondents, 2018.

Capacity to negotiate of UNI Europa and CoESS

Since the establishment of the private security sector ESSDC in 1998, 25 joint texts have been agreed (Table 35).

Table 35: Texts agreed by UNI Europa and CoESS in the private security sector ESSDC

Date	Title
15 February 2016	Joint declaration on the role of the private security sector in light of the increasing number of refugees in Europe
21 August 2014	Joint statement on public procurement
25 May 2012	Joint position on the revision of the public procurement directive
24 November 2010	Training of cross-border cash-in-transfer staff [to become an 'agreement council decision' in case of full adoption by the legislator]
28 September 2009	Private Security European Sectoral Social Partners statement to Expert Group on cross border transport of the euro cash
9 June 2008	Joint declaration by CoESS and UNI Europa on work-related stress
15 December 2006	Development of a European Educational Toolkit for three Private Security Activities/Profiles: 1. Mobile Patrolling, 2. Alarm Response Centres, 3. Airport Security
15 December 2006	Rules of procedure – of the social dialogue committee for private security
25 August 2006	Overview of the legislation governing cash in transit in the 25 Member States
6 April 2006	UNI Europa and CoESS joint position against undeclared work in the private security sector
22 March 2006	Appeal of social partners in the security sector of the Baltic states to the national administrations of Estonia, Latvia and Lithuania responsible for private security issues
14 November 2005	UNI Europa and CoESS joint position against undeclared work in the private security sector
15 October 2004	Joint declaration: Towards a European Model of Private Security
1 September 2004	Preventing occupational hazards in the private security sector
18 July 2003	Code of conduct and ethics for the private security sector
13 December 2001	Joint declaration of CoESS and UNI Europa on the European harmonisation of legislation governing the private security sector
11 July 2000	Modernising of organisation of work in the private security sector. Joint declaration by CoESS and UNI Europa
31 December 1999	European vocational training manual for basic guarding
11 June 1999	Joint declaration of CoESS and Euro-FIET on the future enlargement of the European Union to include the central and eastern European countries
10 June 1999	Memorandum of CoESS and Euro-FIET on the award of contracts to private security companies in the public sector
10 June 1999	Joint declaration on the mutual recognition of CoESS and Euro-FIET and the social dialogue
10 June 1999	Selecting best value – a manual for organisations awarding contracts for private guarding services
15 December 1998	Agreement between the CoESS and Euro-FIET with a view to setting up a sectoral social dialogue committee for the private security sector (Rules of procedures)
24 September 1996	Joint Opinion of the European social partners in the private security industry on regulation and licensing
24 September 1996	Vocational training in the European security industry

Although European social dialogue is not specifically mentioned as an objective of UNI Europa, in its October 2011 statutes their role in the ESSDC can be understood as part of its fundamental objective to build a social and democratic Europe.

The statutes of UNI Europa provide a mandate for a regional organisation of UNI to negotiate on behalf of its members in relation to the ESSDC (though the latter is not specifically referred to). The statutes in Article 3 oblige UNI Europa to fulfil its obligations in relation to its objectives in:

- deciding policy and action with respect to the institutions of the EU to ensure that there is a social and democratic dimension to European integration
- representing affiliates in European institutions whose activities affect the social, economic and cultural conditions of affiliates and their members
- coordinating the activities of UNI affiliates in Europe and offering assistance and support as appropriate
- undertaking crucial collective bargaining and negotiating agreements in the region upon mandate of the UNI Europa Executive Committee

It is therefore the UNI Europa Regional Executive Committee, which meets once a year, that has the power to provide a mandate. The composition of the Regional Executive Committee is clearly outlined in Article 9 of the statutes. This article also states that 'where issues of concern to a particular sector are involved, a nominee or nominees of the group concerned may be invited to attend meetings of the Regional Executive Committee in an advisory capacity'. Article 10 of the statutes also provides the opportunity to establish a Regional Management Committee.

There are no clear provisions regarding responsibility for the approval of texts agreed within the remit of the ESSDC. UNI Europa has specific working group structures for its property services members, which covers both private security and industrial cleaning.

In the CoESS statutes of October 2012, social dialogue is not specifically mentioned as one of the objectives of the organisation, though its role in the ESSDC can be understood as part of its objective 'to establish, develop and conduct cooperation with other European organisations' active in the field of private security.

The structural body of CoESS is its General Assembly, which meets once per year and in which all active members have voting rights. Associated members, corporate members, corresponding members and sponsors can attend, albeit without voting rights. The board of directors is composed of representatives of the active members, while the executive committee of four persons is formed by the chair of the board of directors, the first and second vice chair and the treasurer.

In general, the two levels involved are the CoESS Social Dialogue Committee¹¹⁸ and the CoESS Board of Directors. The current chair of the CoESS Social Dialogue Committee is also a member of the CoESS Board of Directors. If a text or draft opinion were to relate to a specific subject addressed by a CoESS committee, then this committee would also be consulted. All the committee chairpersons are also members of the CoESS Board of Directors, thus facilitating the process.

The CoESS procedure to adopt joint opinions is as follows.

1. The Social Dialogue Committee discusses and drafts a text.
2. The Social Dialogue Committee proposes the text to UNI Europa and negotiates with the latter until a common text is agreed.
3. The agreed text is submitted to the CoESS Board of Directors for adoption.
4. The board approves/rejects or suggests changes (rejections have not occurred in the last five years).

¹¹⁸ One of the CoESS committees deals with social dialogue matters in the ESSDC.

The CoESS General Assembly receives a full debrief of each of the CoESS committees, verbally and in writing (PowerPoint) by their respective chairs, and the General Assembly is invited to make any comments at the meeting. The discharge of the board is considered as approval of the activities.

With these procedures provided, CoESS has a clear capacity to negotiate. For the implementation and dissemination of joint opinions of the ESSDC, these texts will be sent by CoESS to:

- the CoESS Social Dialogue Committee
- the CoESS Board of Directors
- any CoESS committee of relevance – based on the subject covered
- the secretaries-general and/or presidents of the associations affiliated to CoESS

They are also published on the CoESS website. Recently, its eNewsletter has been (re)started, and articles are generally dedicated to any joint declaration, joint text or position papers.

Effective participation in the private security sector ESSDC

The effective participation in the ESSDC for the private security sector over the years 2017 and 2018 is summarised in Table 36. Trade unions from 15 Member States have participated, primarily from western Europe (12) and delegates from only 3 central and eastern European Member States. Employer organisation delegates came from 13 Member States, including 8 delegates from western Europe and 5 from central and eastern Europe.

Table 36: Effective participation in the ESSDC for the private security sector

Member States with trade union participation in the ESSDC for the private security sector in 2017–2018	AT, BE, CZ, DE, DK, EE, ES, FI, FR, IE, IT, PT, RO, SE, UK
Member States with employer organisation participation in the ESSDC for the private security sector in 2017–2018	BE, BG, DE, EE, ES, FR, HR, IT, PT, RO, SE, SI, UK

Source: Eurofound; European Commission.

UNI Europa and CoESS each have affiliates in 19 Member States. UNI Europa does not have affiliates in Bulgaria, Croatia, Estonia, Greece, Hungary, Latvia, Lithuania, Slovakia or Slovenia. Although this study did not record a private security sector-related trade union affiliated to UNI Europa in Estonia, there was an Estonian trade union delegate participating in four of the five meetings of the ESSDC in 2017 and 2018.

UNI Europa has an affiliated sector-related trade union in Cyprus, Luxembourg, Malta, the Netherlands and Poland, although no delegates participated in ESSDC meetings in 2017 or 2018.

CoESS has no affiliates in Cyprus, Czechia, Hungary, Ireland, Latvia, Lithuania, Malta, Poland or Slovakia. However, CoESS does have a member organisation in Austria, Denmark, Finland, Greece, Luxembourg and the Netherlands, although no delegates participated in any ESSDC meeting in 2017 or 2018.

Member organisations that were not directly represented in meetings of the ESSDC are normally kept informed about developments in the ESSDC via their participation in the meetings of statutory bodies of their European organisation, or via its respective intranet or website.

4. Conclusions

In the EU, the private security sector is made up of almost 60,000 companies, together employing around 1.5 million workers. In terms of company size, the sector is dominated by small businesses, with four in five companies employing only 0–9 workers. However, in terms of both employment and turnover, a large part of the sectoral activities in NACE 80.1 are provided by large companies, while this is not the case for the companies only active in NACE 80.2. More than half (58%) of the employees work for companies that have more than 250 employees. Some of these larger employers are multinational companies. G4S is the largest employer in 13 EU Member States, and the Securitas Group is the largest employer in 12 EU Member States. Both G4S and Securitas have established a European Works Council.

Employment in the sector has been stable over the past few years. In absolute numbers, the sector is largest in Germany, the UK, Spain, Romania and Poland. Together, these countries make up about 68% of the EU's total private security workforce. As a share of total employment, the private security sector is largest in Luxembourg (with 1.5% of all employees working in the sector) and Bulgaria (1.2%), followed by Romania and Latvia (0.9% each) and Malta (0.8%). Particular features of the sector are its low share of female workers (around 20%) and low union density.

Regulation and training are important for the sector, and each EU Member State has provided for its own legal framework to regulate private security providers, while at European level, where no regulation provides for minimum standards, the social partners have developed some kind of self-regulation.

The assessment of the sector relatedness of the national social partner organisations in Chapter 2 indicates that a large majority of them cover the entire sector. This is the case for 60% of the sector-related trade unions and 69% of the employer organisations. In terms of overlapping membership domains, 31% of the employers also have member companies in other sectors, while this is the case for 81% of the trade unions. In Latvia and Slovakia, no sector-related trade unions were identified. From the remaining 26 EU Member States, there are 24 in which there are trade unions involved in collective bargaining. Indeed, 92% of the trade unions are involved in collective bargaining. While there are employer organisations or business associations in all EU Member States, there is only involvement from their side in collective bargaining in 17 EU Member States, for 68% of the organisations.

At European level, UNI Europa and CoESS are the mutually recognised sectoral social partners in the ESSDC for the private security sector.

This study identified 72 national trade unions organising in the private security sector, of which 66 were recently involved in collective bargaining. There are 33 (46%) trade unions from 19 EU Member States affiliated to **UNI Europa**, all of which are involved in collective bargaining. Among these 19 countries are the 6 with the highest sectoral workforce. And in each of these 19 EU Member States, the trade union with the most members in the sector (based on the data available) is a member of UNI Europa (see 'Private security sector representativeness of UNI Europa and CoESS').

In 17 EU Member States, UNI Europa has a member organisation covering the entire sector. In Cyprus and Sweden, only NACE 80.1 is covered. However, 98% of the sectoral workforce in Cyprus and 78% in Sweden are employed in activities related to NACE 80.1. The trade unions affiliated to UNI Europa have, in most cases, a membership domain which is broader than the social security sector; thus, UNI Europa's membership domain can be seen as overlapping, as it covers the entire sector but also has representativeness in other sectors (see 'Membership domain UNI Europa').

There are seven EU Member States where there is a trade union in the private security sector but not one affiliated to UNI Europa (Bulgaria, Croatia, Estonia, Greece, Hungary, Lithuania, Slovenia). For Latvia and Slovakia, no sector-related trade unions were identified. For Greece and Romania, there are trade unions but none are involved in collective bargaining. From the 24 EU Member States where there are trade unions involved in collective bargaining, there is no affiliate in UNI Europa in six countries: Bulgaria, Croatia, Estonia, Hungary, Lithuania and Slovenia (Table 26).

As there are no other sector-related organisations at the European level with sector-related trade unions affiliated, we must conclude that **UNI Europa is the only representative European trade union organisation for the private security sector.**

UNI Europa has the capacity to participate effectively in the ESSDC and to negotiate on behalf of its members. It has proven its ability to participate in and contribute effectively to the ESSDC (see 'UNI Europa and CoESS capacity to negotiate' and 'Effective participation in the private security sector ESSDC').

The CoESS membership domain can be considered congruent with the sector. This study identified 44 employer organisations in 21 Member States, of which 36 are involved in collective bargaining in 17 countries. CoESS has 20 (37%) member organisations in 19 of the 28 EU Member States. As corresponding members, there are pan-European associations related to the sector, and the three largest multinational companies in the sector are sponsors of CoESS. In 16 of the Member States, CoESS also covers the largest employer in the sector. Out of the 34 employer organisations in the sector that are involved in collective bargaining, 14 are affiliated to CoESS, in 13 Member States (see 'Membership domain CoESS' and 'Private security sector representativeness of UNI Europa and CoESS').

CoESS does not affiliate 22 sector-related associations in 13 Member States. There are four Member States where there is an employer organisation involved in collective bargaining but not affiliated to CoESS: Austria, Croatia, Hungary and Ireland. CoESS has one member organisation in Austria and one in Croatia, neither of which are involved in collective bargaining (at least, not as at August 2019 in the case of Croatia), while the employer organisations that are involved in collective bargaining are not affiliated. In Hungary and Ireland, CoESS has no member organisations.

Beyond that, the report found 10 national organisations which bring together enterprises in the sector that are not involved in sector-related collective bargaining nor affiliated to CoESS and, as a result, are not considered as employer organisations (see 'Methodological considerations'). At the European level, a number of other sector-related organisations were identified, but none qualified as a social partner organisation.

CoESS is thus the only representative European employer organisation for the private security sector.

CoESS has clearly developed procedures proving its capacity to negotiate on behalf of its members and to participate in and contribute effectively in the ESSDC (see 'UNI Europa and CoESS capacity to negotiate' and 'Effective participation in the private security sector ESSDC').

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Annex 1: Supplementary information

Table 37: Trade unions in the private sector

Member State	Abbreviation	Full name in English	Full name in original language
AT	Vida	Vida Trade Union	Vida – Die Lebensgewerkschaft
	GPA-djp	Union of Salaried Employees, Graphical Workers and Journalists	Gewerkschaft der Privatangestellten – Druck, Journalismus, Papier
BE	ACV-CSC	Christian Federation for Food and Services	Centrale Chrétienne de l’Alimentation et des Services/Christelijke Centrale Voeding en Diensten
	CGSLB	Confederation of Liberal Trade Unions in Belgium	Algemene Centrale der Liberale Vakverbonden van België/Centrale Générale des Syndicats Libéraux de Belgique
	AC-CG	General Federation	Algemene Centrale/Centrale Générale
	BBTK-SETca	Union of White Collar Workers, Technicians and Managerial Staff	Bond van Bedienden, Technici en Kaderleden/Syndicat des Employés, Techniciens et Cadres
BG	VIP Security (organised at company level) ¹¹⁹	VIP Security Union	ВИП СЕКЮРИТИ, Синдикална организация на фирмено ниво
CY	OIYK-SEK	Cyprus Federation of Private Employees – SEK	Ομοσπονδία Ιδιωτικών Υπαλλήλων Κύπρου – ΣΕΚ
	SEBETTYK-PEO	Cyprus Industry, Commerce and Press-Printing Houses and General Services Trade Union – PEO	Συντεχνία Εργατοϋπαλλήλων Βιομηχανίας, Εμπορίου, Τύπου-Τυπογραφείων και Γενικών Υπηρεσιών Κύπρου – ΠΕΟ
	DEE EBY-DEOK	Democratic Workers and Employees Union in Commerce and Industry – DEOK	Δημοκρατική Εργατοϋπαλληλική Ένωση Εμπορικών και Βιομηχανικών Υπαλλήλων – ΔΕΟΚ
CZ	OS PPP	Trade Union of Banking and Insurance Workers	Odborový svaz pracovníků v bankovníctví a pojišťovnictví
	OS KOVO	The Czech Metalworkers’ Federation	Odborový svaz KOVO
DE	Ver.di	United Services Union	Vereinte Dienstleistungsgewerkschaft
	GöD	Public Sector and Services Union	Gewerkschaft öffentlicher Dienst und Dienstleistungen
DK	VSL	Salaried Security Employees’ Union (correspondent’s translation)	Vagt- og Sikkerhedsfunktionærerne
	FOA	Trade and Labour	Fag og Arbejde
EE	ETKA	Estonian Trade Union of Commercial and Service Employees	Eesti Teenindus- ja Kaubandustöötajate Ametiühing
EL	OMYPAE	Federation of Security Staff Employees of Greece	Ομοσπονδία Υπαλλήλων Προσωπικού Ασφαλείας Ελλάδας
ES	CCOO CS	Construction and Services Workers’ Commissions	Comisiones Obreras de Construcción y Servicios
	FeSMC-UGT	General Workers Union, Service Federation	Unión General de Trabajadores, Federación de Servicios

¹¹⁹ This is a company-level trade union organisation, established in VIP Security. This trade union is not affiliated to any branch or sector-level trade union organisation.

Member State	Abbreviation	Full name in English	Full name in original language
	FTSP-USO	Private Security Workers' Federation – USO	Federación de Trabajadores de Seguridad Privada de la Unión Sindical Obrera
	CIG	Galician Interconfederal Trade Union – Service Federation	Confederación Intersindical Galega – Federación dos Servizos
FI	PAM	Service Union United PAM	Palvelualojen ammattiliitto
FR	FS CFTD	Federation for Services French Democratic Confederation of Labour	Fédération des Services CFTD
	FEETS-FO	Federation of Equipment, Transport and Services	Fédération de l'Équipement, des Transports et des Services
	CFTC-CSFV	–	Fédération CFTC Commerce service et forces de vente
	FNECS/SNES	National Federation of Managerial Staff of the Retail and Services Sectors – French Confederation of Professional and Managerial Staff/General Confederation of Professional and Managerial Staff/Trade Union of Services Management Staff	Fédération nationale de l'encadrement du commerce et des services – Confédération Générale de l'Encadrement/Confédération générale des cadres/Syndicat National de l'Encadrement des Services
	UNSA	Federation UNSA Commerce and Services	Fédération des Commerces et des Services UNSA
	CGT	CGT Federation Retail and Services	Fédération CGT Commerce et Services
	SUD	SUD Prevention and Security	SUD Prévention et sécurité
HR	SZH	Trade Union of Security Workers in Croatia	Sindikata zastitara Hrvatske
	SSKH	Autonomous Trade Union of Workers in Public Utilities and Related Services of Croatia	Samostalni sindikat radnika u komunalnim i srodnim djelatnostima Hrvatske
	SZZD	Trade Union of Employees in the Security Sector of Croatia	Sindikata zaposlenih u zastitarskoj djelatnosti Hrvatske
HU	VSZSZ	Federation of Property Protection Trade Unions	Vagyonvédelmi Szakszervezetek Szövetsége
	G4SZ	Trade Union of G4	G4 Szakszervezete
	FVSZ	Independent Trade Union of Property Protection	Független Vagyonvédelmi Szakszervezet
	ŐVDSZ	Trade Union of Security Workers	Őrészvédelmi Dolgozók Szakszervezete
IE	SIPTU	Services Industrial Professional and Technical Union	Services Industrial Professional and Technical Union
IT	Filcams – CGIL	Italian Federation of Retail, Tourism and Service Workers	Federazione Italiana Lavoratori Commercio, Turismo e Servizi
	Fisascat – CISL	Italian Federation of Trade Unions of Retail and Tourism	Federazione Italiana Sindacati Addetti Servizi Commerciali, Affini e del Turismo
	Uiltucs – UIL	Italian Union of Tourism, Retail and Service Workers	Unione Italiana Lavoratori Turismo Commercio e Servizi
	UGL Sicurezza Civile	General Union of Labour – Civil Security	Unione Generale del Lavoro – Sicurezza Civile
	SINALV – CISAL	National Autonomous Trade Union of Security Workers – Italian Confederation of Free Trade Unions	Sindacato Nazionale Autonomo Lavoratori Vigilanza - Confederazione italiana sindacati autonomi lavoratori

Member State	Abbreviation	Full name in English	Full name in original language
LT	LPSDPS	Lithuanian Service Workers Trade Union	Lietuvos paslaugų sferos darbuotojų profesinė sąjunga
	JKUDPS	United Trade Union of Communal Economy Employees	Jungtinė komunalinio ūkio darbuotojų profesinė sąjunga
LU	CNSG/LCGB	National Committee for Security and Guarding/Luxembourg Confederation of Christian Trade Unions	Comité national de la sécurité et du gardiennage/Confédération luxembourgeoise des syndicats chrétiens/Lëtzebuurger Chrëschtleche Gewerkschaftsbond
	OGB-L	Trade Union 'Services and Energy' (OGB-L: Independent Trade Union Confederation-Luxembourg)	Syndicat « Services et Energie » (OGB-L: Confédération syndicale indépendante-Luxembourg/Onofhängege Gewerkschaftsbond – Lëtzebuerg)
LV	–	–	–
MT	GWU	General Workers Union	General Workers Union
	UHM	Union of United Workers	Union Ħaddiema Magħqudin
NL	FNV	Dutch Federation Labour Organisation	Federatie Nederlandse Vakbeweging
	De Unie Security	The Union Security	De Unie Security
	CNV Vakmensen	Christian National Labour Union Vakmensen	Christelijk Nationaal Vakverbond Vakmensen
	LVB	National Interest Representor	Landelijke Belangen Vertegenwoordiger
PL	MOZ NSZZ Solidarność POCS	Intercompany Union Organisation of Independent Self-Governing Trade Union Solidarność of Security, Catering and Cleaning Workers	Międzyzakładowa Organizacja Związkowa NSZZ Solidarność Pracowników Ochrony, Cateringu i Sprzątania
	OBZZPO	All-Poland Trade Union of Security Employees	Ogólnopolski Związek Zawodowy Pracowników Ochrony
PT	STAD	Union of Workers in Reception Services, Private Security, Cleaning, Housekeeping and Diverse Services	Sindicato dos Trabalhadores dos Serviços de Portaria, Vigilância, Limpeza, Domésticas e Atividades Diversas
	SITese	Union of Workers and Service Technicians, Trade, Restoration and Tourism	Sindicato dos Trabalhadores e Técnicos de Serviços, Comércio, Restauração e Turismo
	SINDETELCO	Democratic Union of Communications and Media Workers	Sindicato Democrático dos Trabalhadores das Comunicações e dos Media
	SINDEL	National Trade Union of Industry and Energy	Sindicato Nacional da Indústria e da Energia
	CESP	Union of Workers in Commerce, Administration and Services of Portugal	Sindicato dos Trabalhadores do Comércio, Escritórios e Serviços de Portugal
	SITAVA	Union of Aviation and Airport Workers	Sindicato dos Trabalhadores da Aviação e Aeroportos
RO	Protector	Protector Trade Union Federation in the Security Industry	Federatia Protector a Sindicatelor din Industria de Securitate
SE	Transport	The Swedish Transport Workers' Union	Svenska Transportarbetareförbundet
	Seko	Swedish Union for Service and Communications Employees	Service- och kommunikationsfacket
	SEF	Swedish Electricians' Union	Svenska Elektrikerförbundet
	Unionen	The Union	Unionen

Member State	Abbreviation	Full name in English	Full name in original language
	Ledarna	Sweden's Organisation for Managers	Ledarna
SI	SKVNS	Trade Union of Communal Services, Private Security and Real Estate Workers	Sindikát komunale, varovanja in poslovanja z nepremičninami Slovenije
	SZS KS90	Private Security Trade Union Confederation of Trade Unions '90 of Slovenia (KS90)	Sindikát zasebnega varovanja KS- 90
SK	–	–	–
UK	GMB	General and Municipal Boilermakers Union	General and Municipal Boilermakers Union
	Unite the Union	Unite the Union	Unite the Union

Source: Network of Eurofound Correspondents, 2018.

Table 38: Employer organisations in the private security sector

Member State	Abbreviation	Full name in English	Full name in original language
AT	FVGD	Association of Commercial Service Providers	Fachverband Gewerbliche Dienstleister
	VSÖ	Association of Austria's Security Companies	Verband der Sicherheitsunternehmen Österreichs
BE	APEG/BVBO	Professional Association of Security Firms	Association professionnelle des entreprises de gardiennage/Beroepsvereniging van Bewakingsondernemen
BG	NAFTSO	National Association of Industrial Security Companies	Национална Асоциация На Фирми За Търговска Сигурност И Охрана
	NAFOTS	National Association of Technical Equipment-Based Security Companies	Национална Асоциация На Фирмите, Охраняващи С Технически Средства
CY	KYSEA	Cyprus Association of Security Companies	Κυπριακός Σύνδεσμος Επιχειρήσεων Ασφαλείας
CZ	USBS ČR	Union of the Private Security Services of the Czech Republic (UPSS CR)	Unie Soukromých Bezpečnostních Služeb ČR
DE	BDSW	Federal Association of the German Security Industry	Bundesverband der Sicherheitswirtschaft
	BDGW	Federal Association of German Transport Companies for Valuables and Money	Bundesvereinigung Deutscher Geld- und Wertdienste
	BDLS	Federal Association of Aviation Security	Bundesverband der Luftsicherheit
DK	DI	Confederation of Danish Industry	Dansk Industri
	Dansk Erhverv	Danish Chamber of Commerce	Dansk Erhverv
EE	ESA	Estonian Security Association	Eesti Turvaettevõtte Liit
EL	EOA	Hellenic Security Federation	Ελληνική Ομοσπονδία Ασφάλειας
ES	Aproser	Professional Association of Private Security Services Companies	Asociación Profesional de Compañías Privadas de Servicios de Seguridad
	FES	Spanish Security Business Federation	Federación Empresarial Española de Seguridad
FI	Palta/SVLL	Service Sector Employers Palta	Palvelualojen työnantajat Palta ry/Suomen Vartioliikkeiden Liitto ry

Member State	Abbreviation	Full name in English	Full name in original language
FR	USP	Union of Private Security Companies	Union des entreprises de sécurité privée
	SNES	National Union of Private Security Companies	Syndicat national des entreprises de sécurité
	SESA	Union of Airport Security Companies	Syndicat des entreprises de sûreté aéroportuaire
	GPMSE	Union of Professional Training Companies Operating in Electronic Security	Groupement Professionnel de la Formation des Métiers de Sécurité Electronique
HR	CSA	Croatian Security Association – Professional Security Chamber	Hrvatski ceh zastitara – Strukovna zastitarska komora
	HUP	Croatian Employers’ Association – Branch Association for Security	Hrvatska udruga poslodavaca – Udruga zastitarske djelatnosti
HU	MBVMSZ	Employers’ Association of Hungarian Security Companies	Magyar Biztonsági Vállalkozások Munkaadói Szövetsége
IE	ISIA	Irish Security Industry Association	Irish Security Industry Association
	NUSE	National Union of Security Employers	National Union of Security Employers
	SEA	Security Employers Association	Security Employers Association
IT	ANIVP	National Association of Private Security Institutes and Security	Associazione Nazionale Istituti di Vigilanza Privata e dei Servizi Fiduciari di Sicurezza
	UNIV	National Union of Security Companies	Unione Nazionale Imprese di Vigilanza
	ASSIV	Italian Association of Private Security and Fiduciary Services	Associazione Italiana Vigilanza e Servizi Fiduciari
	Legacoop	Legacoop Production and Services	Legacoop produzione e servizi
	Federlavoro and services – Confcooperative	Federlavoro and Services – Confcooperative	Federlavoro e servizi – Confcooperative
	Federsicurezza	–	Federazione del Settore della Vigilanza e Sicurezza Privata
	AGCI	General Association of Italian Cooperaives – Services	Associazione Generale Cooperative Italiane – Servizi
LT	AVG	Security Business Group	Apsaugos verslo grupė
LU	FEDIL	FEDIL Security Services	FEDIL Security Services
LV	DNKA	Association of Security Industry Companies	Drošības nozares kompāniju asociācija
MT	Malta Chamber	The Malta Chamber of Commerce, Enterprise and Industry	The Malta Chamber of Commerce, Enterprise and Industry
NL	NV	Dutch Security Sector	Nederlandse Veiligheidsbranche
	VBE NL	Dutch Association of Security Organisations	Vereniging Beveiligingsorganisaties Nederland
PL	PZP Ochrona	Polish Employers’ Union Security	Polski Związek Pracodawców Ochrona
PT	AES	Association of Private Security Companies	Associação de Empresas de Segurança
	AESIRF	National Association of Security Companies	Associação Nacional das Empresas de Segurança

Member State	Abbreviation	Full name in English	Full name in original language
RO	FSS	The Romanian Security Services Federation	Federatia Serviciilor de Securitate din Romania
	PSS	The Security Services Employer Organisation	Patronatul Serviciilor de Securitate
	RSIA	The Romanian Association of Security Industries	Asociatia Romana a Industriei de Securitate
SE	Transportföretagen (Säkerhetsföretagen)	The Swedish Security Industry Association (part of The Swedish Confederation of Transport Enterprises)	Säkerhetsföretagen (Transportföretagen)
	Almega Service Associations	Almega Service Associations	Almega Tjänsteförbunden
	Installatörsföretagen	The Installation Business Organisation (unofficial name – the organisation is new and does not yet have an official English name)	Föreningen Installatörsföretagen
SI	ZRSZV	The Chamber for Slovenian Private Security Development	Zbornica za razvoj slovenskega zasebnega varovanja
SK	SKSB	Slovak Chamber of Private Security	Slovenska komora sukromnej bezpecnosti
UK	BSIA	British Security Industry Association	British Security Industry Association

Source: Network of Eurofound Correspondents, 2018.

Table 39: Total companies, employment and employees in the private security sector, NACE 80.1 and 80.2, 2016

Member State	Number of companies (80.1 and 80.2)	Employment ¹²⁰ (number)		Employees (number)			
		80.1	80.2	80.1	80.2	80.1 + 80.2 = sector as defined in this report	80*
AT	253	14,523	n.d.	14,312	n.d.	n.d.	15,047
BE	147	n.d.	n.d.	17,904	n.d.	n.d.	17,293
BG	3,115	46,491	6,923	43,699	6,510	50,209	n.d.
CY	79	1,495	27	1,473	27	1,500	n.d.
CZ	2,622 ¹²¹	34,500	3,200	32,400	2,600	35,000	n.d.
DE	5,667	127,000	27,000	170,057 ¹²²	6,905 ¹²³	176,962	n.d.
DK	519*	2,939	2,491	n.d.	n.d.	n.d.	5,385
EE	102	6,032	134 (est.)	6,023	122 (est.)	6,145 (est.)	6,145 (est.)
EL	1,671	16,138	1,629	14,414	1,467	15,881	n.d.
ES	1,947	124,975	7,183	n.d.	n.d.	129,515	n.d.
FI	612	8,683	1,322	n.d.	n.d.	n.d.	n.d.

¹²⁰ This includes employees, self-employed and temporary agency workers.

¹²¹ Of these, 1,147 are companies and 1,475 are self-employed persons.

¹²² This does not include 37,713 exclusively on mini job contracts.

¹²³ This does not include 1,273 exclusively on mini job contracts.

FR	10,639	n.d.	n.d.	167,800– 208,293	13,000– 16,738	n.d.	n.d.
HR	110	n.d.	n.d.	n.d.	n.d.	12,664	n.d.
HU	8,453	n.d.	n.d.	14,426	3,351	17,777 ¹²⁴	n.d.
IE	500 (est.)	13,500 (est.)	2,500 (est.)	13,000 (est.)	1,500 (est.)	14,500 (est.)	n.d.
IT	1,476†	65,037†	1,930†	64,196†	1,805†	66,001	n.d.
LT	151†	7,806†	3,305†	7,797†	3,297†	11,094	n.d.
LU	46	3,500	40	3,490	40	3,530	3,540
LV	748	6,488	5,833	6,282	5,620	11,902	11,924
MT	78	2,494*	n.d.	n.d.	n.d.	2,452	n.d.
NL	3,095	30,000– 60,000 (est.)	8,500 (est.)	n.d.	n.d.	30,000 (est.)	n.d.
PL	3,393	n.d.	n.d.	n.d.	n.d.	n.d.	167,000– 250,000 (est.)
PT	482	38,376	1,931	n.d.	n.d.	38,376	n.d.
RO	2,016	n.d.	n.d.	120,238	3,129	123,367	n.d.
SE	906	n.d.	n.d.	15,439	4,373	19,812	n.d.
SI	106	5,760	127	5,753	120	5,873	n.d.
SK	1,106	20,600	1,300	19,800	1,000	20,800	n.d.
UK	11,500	186,000 ¹²⁵	n.d.	169,000	n.d.	n.d.	n.d.

Notes: * Data cover all of NACE code 80 (includes 80.1, 80.2 and 80.3). † data from 2015. n.d. = no data.

Source: Network of Eurofound Correspondents, 2018.

Table 40: Characteristics of the largest companies in private security activities (NACE 80.1)

Member State	Largest companies in the sector	Number of employees	Share of total sector employment (%)	Trade unions involved	Employer organisations involved	CB (SEB/MEB/both/none)
AT	G4S	ca 3,000*	19.5	Vida	FVGD, VSÖ	MEB
	Securitas	ca 2,300*	15.1	Vida	FVGD, VSÖ	MEB
BE	Securitas	4,758	25.1	All	APEG-BVBO	Both
	G4S Secure Solutions	3,505	18.5	All	APEG-BVBO	Both
BG	VIP Security EOOD- Sofia	3,600	6.4	CITUB	NAFTSO	Under negotiation as of August 2019
	BODU OOD – Sofia	2,900	5.2	n.d.	NAFTSO	Under negotiation as of August 2019

¹²⁴ However, trade union officials believe the number of employees in the sector to be much higher than indicated by the official data. They estimate the actual number of employees in the private security sector (NACE 80.1. and 80.2.) to be between 50,000 and 65,000.

¹²⁵ Data are disaggregated by occupation (not NACE code) and, thus, indicate the number of security guards (and related occupations) in the UK in 2017 (plus 21,000 elementary security occupations not classified elsewhere).

Member State	Largest companies in the sector	Number of employees	Share of total sector employment (%)	Trade unions involved	Employer organisations involved	CB (SEB/MEB/both/none)
CY	G4S Secure Solutions (Cyprus) Ltd	750	49.0	OYIK-SEK, SEBETTYK-PEO	KYSEA	SEB
	ICTS Airports Security Ltd	450	29.4	OIYK-SEK, PASEY-PEO	None	SEB
CZ	Securitas ČR sro	3,500 (mostly in NACE 80.1)	8.0	OS PPP ¹²⁶	USBS ČR (through Security Club) and indirectly in the Confederation of Industry of the Czech Republic (also through Security Club)	None
	Mark2 Corporation Czech as	1,500–2,000 (est.)	4.0	None	USBS ČR (through Security Club) and indirectly in the Confederation of Industry of the Czech Republic (also through Security Club)	None
DE	Securitas Holding	ca 20,500*	8.2	Ver.di	BDSW	MEB
	Kötter Unternehmensgruppe	ca 11,900*	4.7	Ver.di	BDSW	MEB
DK	G4S Security Services	1,900*	28.4	VSL	DI	MEB
	Securitas	n.d.*	n.d.	VSL	DI	MEB
EE	G4S Eesti AS	2,451*	39.8	ETKA (most likely)	ESA	SEB
	USS Security Eesti AS	1,026*	16.6	n.d.	ESA	None
EL	G4S Secure Solutions SA	ca 2,000*	8.0	Company-based employee union	None	SEB
	ESA Security Solutions SA	ca 2,000*	8.0	Union of ESA Solutions SA Employees	EOA	SEB
ES	Prosegur	15,000 in Spain*	11.2	UGT, CCOO, USO, ATES	Aproser	Both
	Securitas	12,417*	9.3	UGT, CCOO, USO, SUTRASE	Aproser	Both
FI	Securitas Oy	2,400 (est.)	19.6	PAM	Palta/SVLL	MEB
	Avarn Security Oy	1,600 (est.)	13.1	PAM	Palta/SVLL	MEB
FR	Securitas	17,000	9.0	CFDT Services, FEETS-FO, CGT Commerce Distribution	n.d.	Both

¹²⁶ However, as at August 2019, an exclusion procedure is underway.

Member State	Largest companies in the sector	Number of employees	Share of total sector employment (%)	Trade unions involved	Employer organisations involved	CB (SEB/MEB/both/none)
				Services, SNEPS-CFTC, FNECS CFE-CGC, Fédération des Métiers de la Prévention et de la Sécurité UNSA		
	Seris	8,600	4.5	CGT Commerce Distribution Services, SNES CFE-CGC, CFDT Services, FEETS-FO, SNEPS-CFTC	USP	Both
HR	Sokol Maric	2,400*	18.1	None	None	None
	Securitas Hrvatska	1,270*	9.6	None	None	None
HU	CRITERION Képzéningozishti kai Korlátolt Felelősségű Társaság (former G4 S)	1,214	4.5	Trade Union of G4 (G4 Szakszervezete)	Employers' Association of Hungarian Security Companies (Magyar Biztonsági Vállalkozások Munkaadói Szövetsége, MBVMSZ)	SEB
	ATOMIX Kereskedelmi és Szolgáltató Korlátolt Felelősségű Társaság	1,069	3.9	n.d.	n.d.	n.d.
IE	G4S	2,000	14.5	SIPTU	ISIA	Both
	Noonan	2,000	14.5	SIPTU	ISIA	Both
IT	Securitalia	7,750*	10.3	Filcams – CGIL, Fisascat – CISL, Uiltucs – UIL	None	MEB
	IVRI	7,200*	9.6	Filcams – CGIL, Fisascat – CISL, Uiltucs – UIL	UNIV	MEB
LT	Saugos tarnyba 'Argus'	1,316	12.0	Trade Union of UAB Argus	AVG	SEB
	Ekskomisarų biuras	1,284	11.7	Trade Union of UAB Ekskomisarų biuras	–	SEB
LU	G4S	ca 1,200	n.d.	LCGB, OGB-L	Fedil	MEB
	Brinks Security	ca 850–900	n.d.	LCGB, OGB-L	Fedil	MEB
LV	G4S Latvia AS	1,085	8.8	n.d.	DNKA	None
	G4S Cash Services Latvia AS	810	6.6	n.d.	n.d.	None

Member State	Largest companies in the sector	Number of employees	Share of total sector employment (%)	Trade unions involved	Employer organisations involved	CB (SEB/MEB/both/none)
MT	G4S Security	1,000	41.1	GWU	Malta Chamber	SEB
	Security Services Malta Ltd	600	24.7	GWU	n.d.	SEB
NL	Trigion	6,000	17.6	FNV, CNV, De Unie	NV	MEB
	Securitas	5,183	15.2	FNV, CNV, De Unie	NV	MEB
PL	Konsalnet (group)	20,000*	16.5	Międzypaczkadowa Organizacja Związkowa NSZZ Solidarność Pracowników Ochrony, Cateringu i Sprzątanania/Intercompany Union Organisation of Independent Self-Governing Trade Union Solidarność of Security, Catering and Cleaning Workers, OZZPO/Ogólnopolski Związek Zawodowy Pracowników Ochrony/All-Poland Trade Union of Security Employees	Polski Związek Pracodawców Ochrona/Polish Employers' Union Security; Polska Izba Ochrony/Polish Chamber of Security	SEB
	Solid Security	n.d.	n.d.	Międzypaczkadowa Organizacja Związkowa NSZZ Solidarność Pracowników Ochrony, Cateringu i Sprzątanania/Intercompany Union Organisation of Independent Self-Governing Trade Union Solidarność of Security, Catering and Cleaning Workers	Polski Związek Pracodawców Ochrona/Polish Employers' Union Security	SEB
	Grupa Impel	n.d.	n.d.	Międzypaczkadowa Organizacja Związkowa NSZZ Solidarność Pracowników Ochrony, Cateringu i Sprzątanania/Intercompany Union Organisation of	Polski Związek Pracodawców Ochrona/Polish Employers' Union Security	SEB

Member State	Largest companies in the sector	Number of employees	Share of total sector employment (%)	Trade unions involved	Employer organisations involved	CB (SEB/MEB/both/none)
				Independent Self-Governing Trade Union Solidarność of Security, Catering and Cleaning Workers, Związek Zawodowy Pracowników Spółek Grupy Impel/Trade Union of Impel Group Employees		
PT	Prosecur	5,700	14.1	STAD, SITESE, SINDELCO, SINDEL, CESP, SITAVA	AES	MEB
	Securitas	5,400	13.4	STAD, SITESE, SINDELCO, SINDEL, CESP, SITAVA	AES	MEB
RO	G4S Secure Solutions SRL	3,729†	3.0	n.d.	n.d. Although, the company is a founding member of the Professional Association of Security Companies (APCS)/Asociația Profesională a Companiilor de Securitate	n.d.
	Civitas PSG SRL	3,518†	2.8	n.d.	The Romanian Employers/Patronatul National Roman	SEB
SE	Securitas Sverige AB	10,000 (est.)	38.2	Transport Workers' Union, Unionen, Ledarna	The Swedish Security Industry Association	MEB
	Avarn Security Services AB	3,000 (est.)	11.5	Transport Workers' Union, Unionen, Ledarna	The Swedish Security Industry Association	MEB
SI	SINTAL doo/SINTAL GROUP	1,000–2,000	24.2	Sindikat zsebnega varovanja-KS90	ZRSZV, ZDS	Both
	Aktiva Varovanje dd	813	13.1	SKVNS	ZRSZV, GZS	Both
SK	BONUL, sro	2,063	11.6	None	SKSB	None
	Securitas SK. sro	720	4.0	None	SKSB	None
UK	G4S	28,000 (est.)	14.6	GMB	BSIA	SEB; covers parts of the workforce

Member State	Largest companies in the sector	Number of employees	Share of total sector employment (%)	Trade unions involved	Employer organisations involved	CB (SEB/MEB/both/none)
	Securitas Security Services	10,000 (est.)	5.2	GMB	BSIA	SEB; covers parts of the workforce

Notes: * In NACE 80.1 and 80.2 together. † Data for 2017. n.d. = no data.

Source: Network of Eurofound Correspondents, 2018.

Table 41: Characteristics of the largest companies in security systems activities (NACE 80.2)

Member State	Largest companies in the sector	Number of employees	Share of total sector employment (%)	Trade unions involved	Employment organisations involved	Involved in CB
AT	G4S	ca 3,000*	19.5	Vida	FVGD, VSÖ	MEB
	Securitas	ca 2,300*	15.1	Vida	FVGD, VSÖ	MEB
BE	Seris Technology	158	0.8	n.d.	APEG-BVBO	MEB (SEB unclear)
	Stanley Security Belgium	73	0.4	n.d.	APEG-BVBO	MEB (SEB unclear)
BG	TEKRA EOOD – Sofia	1,200	2.1	n.d.	Through NAFTSO in the Confederation of Employers and Industrialists in Bulgaria	n.d.
	RAK OOD – Sofia	890	1.6	n.d.	Through NAFTSO in the Confederation of Employers and Industrialists in Bulgaria	n.d.
CY	MT Piperaris Trading Ltd	30	2.0	None	KYSEA	None
	Krypto Security Cyprus Ltd	25	1.6	None	KYSEA	None
CZ	Securitas ČR sro	1,500 (est.)	3.4	OS PPP ¹²⁷	USBS ČR through Security Club, Confederation of Industry of the Czech Republic	None
	DI Seven Facility sro ¹²⁸	1,000–1,499	2.8	None	None	None
DE	Securitas Holding	20,500* (est.)	8.2	Ver.di	BDSW	MEB
	Kötter Unternehmensgruppe	11,900* (est.)	4.7	Ver.di	BDSW	MEB
DK	G4S Security Services	1,900*	28.4	VSL	DI	MEB

¹²⁷ However, as at August 2019, an exclusion procedure is underway.

¹²⁸ The whole DI Seven group (including sister company DI Seven Service) has over 2,000 employees.

Member State	Largest companies in the sector	Number of employees	Share of total sector employment (%)	Trade unions involved	Employment organisations involved	Involved in CB
	Securitas	n.d.*	n.d.	VSL	DI	MEB
EE	G4S Eesti AS	2,451*	39.8	ETKA (most likely)	ESA	SEB
	USS Security Eesti AS	1,026*	16.6	n.d.	ESA	None
EL	G4S Secure Solutions SA	2,000* (est.)	8.0	Company-based employee union	None	SEB
	ESA Security Solutions SA	2,000* (est.)	8.0	Union of ESA Solutions SA Employees	EOA	SEB
ES	Prosegur	15,000*	11.2	UGT, CCOO, USO, ATES	Aproser	Both
	Securitas	12,417*	9.3	UGT, CCOO, USO, SUTRASE	Aproser	Both
FI	Securitas Oy	n.d.	n.d.	PAM	Palta/SVLL	MEB
	Avarn Security Oy	n.d.	n.d.	PAM	Palta/SVLL	MEB
FR	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
HR	Sokol Maric	2,400*	18.1	None	None	None
	Securitas Hrvatska	1,270*	9.6	None	None	None
HU	PATENT őr ZRT	462	1.7	n.d.	Employers' Association of Hungarian Security Companies (Magyar Biztonsági Vállalkozások Munkaadói Szövetsége, MBVMSZ)	n.d.
	Multi Alarm ZRT	452	1.7	n.d.	None	n.d.
IE	Chubb Fire & Security	154	1.1	Connect	ISIA	Both (the industry tends to follow the same rates as the electrical contracting services sector)
	ADT Fire & Security	100 (est.)	0.7	Connect	ISIA	Both (the industry tends to follow the same rates as the electrical contracting services sector)

Member State	Largest companies in the sector	Number of employees	Share of total sector employment (%)	Trade unions involved	Employment organisations involved	Involved in CB
IT	Securitalia	7,750*	10.3	Filcams – CGIL, Fisascat – CISL, Uiltucs – UIL	None	MEB
	IVRI	7,200*	9.6	Filcams – CGIL, Fisascat – CISL, Uiltucs – UIL	UNIV	MEB
LT	G4S Lietuva	1,397	12.7	Trade Union of UAB G4S Lietuva	AVG	SEB
	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
LU	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
LV	GRIFS AG SIA	583	4.7	n.d.	DNKA	None
	Guard Services SIA	518	4.2	n.d.	n.d.	None
MT	Alberta Group	200	8.2	None	Malta Chamber	None
	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
NL	Chubb Fire & Security	Part of UTC Climate, Controls & Security, which has 196,200 employees; no figures are available for number of employees in the Netherlands	n.d.	CNV, FNV	It is unknown which Dutch employer organisation Chubb is affiliated with; we do know that Chubb is affiliated with Euralarm, the European employer organisation	Most likely SEB
	Johnson Controls (Taiko)	n.d.	n.d.	n.d.	It is unknown which Dutch employer organisation Chubb is affiliated with; we do know that Johnson Controls is affiliated with Euralarm, the European employer organisation	Most likely SEB
PL	Konsalnet (group)	20,000 (total number of employees in the entire group)*	n.d.	Międzypaczkowa Organizacja Związkowa NSZZ Solidarność Pracowników Ochrony, Cateringu i Sprzątania/Interc ompany Union Organisation of Independent Self-Governing Trade Union Solidarność of Security, Catering and Cleaning Workers,	Polski Związek Pracodawców Ochrona/Polish Employers' Union Security, Polska Izba Ochrony/Polish Chamber of Security	SEB

Member State	Largest companies in the sector	Number of employees	Share of total sector employment (%)	Trade unions involved	Employment organisations involved	Involved in CB
				OZZPO/Ogólnopolski Związek Zawodowy Pracowników Ochrony/All-Poland Trade Union of Security Employees		
	Solid Security	n.d.	n.d.	Międzyzakładowa Organizacja Związkowa NSZZ Solidarność Pracowników Ochrony, Cateringu i Sprzątania/Interc ompany Union Organisation of Independent Self-Governing Trade Union Solidarność of Security, Catering and Cleaning Workers	Polski Związek Pracodawców Ochrona/Polish Employers' Union Security	SEB
	Grupa Impel	n.d.	n.d.	Międzyzakładowa Organizacja Związkowa NSZZ Solidarność Pracowników Ochrony, Cateringu i Sprzątania/Interc ompany Union Organisation of Independent Self-Governing Trade Union Solidarność of Security, Catering and Cleaning Workers, Związek Zawodowy Pracowników Spółek Grupy Impel/Trade Union of Impel Group Employees	Polski Związek Pracodawców Ochrona/Polish Employers' Union Security	SEB
PT	Securitas Direct Portugal	600	1.5	STAD and all other unions with fact sheet	APSEI	n.d.
	Stanley Security Portugal	150	0.4	STAD and all other unions with fact sheet	n.d.	n.d.
RO	Piros Security Systems SRL	257	0.2	n.d.	n.d.	n.d.
	Advance SRL	52	n.d.	n.d.	n.d.	n.d.

Representativeness of the European social partner organisations: Private security sector

Member State	Largest companies in the sector	Number of employees	Share of total sector employment (%)	Trade unions involved	Employment organisations involved	Involved in CB
SE	Stanley Security	800 (est.)	3.1	Swedish Electricians' Union, Unionen	Almega Service Associations	Both
	Verisure	500 (est.)	1.9	Swedish Electricians' Union, Unionen	The Swedish Security Industry Association	MEB
SI	DAT-CON doo	50	0.8	n.d.	ZRSZV	SEB
	STINGER doo	20	0.3	n.d.	ZRSZV	SEB
SK	Ochrana a bezpecnost SE, as	350	2.0	None	None	None
	G4S Fire Services (SK), sro	110	0.6	None	None	None
UK	ESG Security	n.d.	n.d.	n.d.	n.d.	n.d.
	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.

Notes: * In NACE 80.1 and 80.2 together. n.d. = no data.

Source: Network of Eurofound Correspondents, 2018

Annex 2: Network of Eurofound Correspondents

Table 42: Members of the Network of Eurofound Correspondents who contributed to the study

Member State	Correspondent	Organisation
AT	Georg Adam	FORBA
BE	Dries Van Herreweghe	HIVA – KU Leuven
BG	Violeta Ivanova	
CY	Pavlos Kalosinatos	Cyprus Labour Institute
CZ	Petr Pojer	Research Institute for Labour and Social Affairs
DE	Sandra Vogel Birgit Kraemer	German Economic Institute Hans-Böckler-Stiftung
DK	Carsten Jorgensen	FAOS, University of Copenhagen
EE	Ingel Kadarik	Praxis Centre for Policy Studies
EL	Sofia Lampousaki	
ES	Oscar Molina	
FI	Rasmus Firon	Oxford Research
FR	Frédéric Turlan	IR Share
HR	Predrag Bejakovic Irena Klemencic	Institute of Public Finance
HU	Zsanna Nyírő	Hungarian Academy of Sciences Centre for Social Sciences
IE	Colman Higgins	IRN Publishing
IT	Lisa Dorigatti	Department of Social and Political Sciences, University of Milan
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Franz Clément	Luxembourg Institute of Socio-Economic Research
LV	Raita Karnite	EPC Ltd
MT	Louis Rech	
NL	Amber van der Graaf Mandy Goes	Panteia BV
PL	Marta Trawinska	
PT	Reinhard Naumann	
RO	Valentina Vasile Cristina Boboc	
SE	Anna-Karin Gustafsson	Oxford Research
SI	Samo Pavlin Bogumila Plachtej	
SK	Ludovit Cziria	
UK	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 private security 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 representativeness studies is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. This study identified the Confederation of European of Security Services (CoESS) (representing employers) and UNI Europa Private Security (representing employees) as the most representative European-level social partner organisations in the private security 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.

