



Representativeness of the European social partner organisations: Tanning and leather industry

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The European Foundation for the Improvement of Living and Working Conditions (Eurofound) is a tripartite European Union Agency, whose role is to provide knowledge in the area of social, employment and work-related policies. Eurofound was established in 1975 by Council Regulation (EEC) No. 1365/75, to contribute to the planning and design of better living and working conditions in Europe.

This study provides information designed to encourage sectoral social dialogue in the tanning and leather sector. The aim of Eurofound's series of studies on representativeness is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. The study identified IndustriAll Europe (representing employees) and the Confederation of National Associations of Tanners and Dressers of the European Community (COTANCE) (representing employers) as the most important European level social partner organisations in the sector.

Country codes EU28

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

Introduction

The aim of this [representativeness](#) study is to identify the relevant national and supranational social players (that is, the [trade unions](#) and [employer](#) organisations) in the field of industrial relations in the tanning and leather sector, and to show how these players relate to the sector's European interest associations of labour and business. The impetus for this study, and for similar studies in other sectors, arises from the European Commission's aim to identify the representative social partner associations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU) and to be eligible for participation in the European social dialogue committees. Hence, this study seeks to provide basic information needed to assess the existing sectoral [social dialogue](#) in the tanning and leather sector. The relevance and – probably – the efficiency of European social dialogue depend on whether its participants are sufficiently representative in terms of the sector's relevant national players across the EU Member States.

To accomplish this aim, the study first identifies the relevant national social partner organisations in the tanning and leather 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 level of interest representation. The study includes only organisations whose membership domain is classed as 'sector-related' (Table 1). In terms of territorial coverage, the study includes the EU28, with the exception of Cyprus, Ireland, Luxembourg and Malta where virtually no business activities in the tanning and leather sector can be found.

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

Scope	Question in the standardised questionnaire to all correspondents	Possible answers	Note and explanations
Domain of the organisation within the sector	Does the domain of the trade union/employer organisation potentially cover ...the entire tanning and leather sector, including all of its sub-activities as a whole?	Yes/No	This question refers to the economic sub-activities of the NACE code chosen. Some organisations may delimit their domain to only part of the sub-activities.
	... all occupations within the tanning and leather sector among both blue-collar workers and white-collar workers?	Yes/No	Some trade unions may delimit their domain to certain occupations or categories of workers only.
	...all forms and size classes of enterprises (for instance: public ownership, private ownership, multinationals, domestic companies and small and medium-sized enterprises (SMEs) –only insofar as they exist in the sector)?	Yes/No	Some organisations may delimit their domain, for instance, to public sector companies/employees or SMEs only.
	...employees/companies, within the sector, in all regions of the country?	Yes/No	Some organisations may delimit their domain to certain regions instead of the entire territory of the country.
Domain of the organisation outside the sector	...employees/companies/business activities outside the tanning and leather sector?	Yes/No	Some organisations may enlarge their domain to other activities not included in the tanning and leather sector.

Source: Standardised questionnaire sent to Eurofound's Network of European Correspondents (2017).

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

As regards the **national level associations**, classification as a sector-related social partner organisation implies fulfilling one of the following two criteria:

- be a party to sector-related collective bargaining;
- be a member of a sector-related European association of business or labour that is on the European Commission's list of European social partner organisations consulted under Article 154 of the TFEU and/or participates in the sector-related European social dialogue.

Taking affiliation to a European social partner organisation as a sufficient criterion for determining a national association as a social partner does not necessarily imply that the association is involved in industrial relations in its own country. Hence, this selection criterion may seem odd at first glance. However, if a national association is a member of a European social partner organisation, it becomes involved in industrial relations matters through its membership of the European organisation – through informal communication, consultation procedures and eventually the implementation of agreements concluded by the European social partners at national level.

Furthermore, it is important to assess whether the national affiliates to the European social partner organisations are engaged in industrial relations in their respective country. Affiliation to a European social partner organisation and/or involvement in national collective bargaining are of utmost importance to the European social dialogue, since they are the two constituent mechanisms that can systematically connect the national and European levels.

For the purpose of this study a **European association** is considered a relevant sector-related interest organisation if it meets the following criteria:

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

In addition, this study considers any other European association with sector-related national social partner organisations – as defined above – under its umbrella.

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

Definitions

For the purpose of this study, the sector is defined in terms of the [Statistical Classification of Economic Activities in the European Community](#) (NACE) to ensure the cross-national comparability of the findings. The NACE code reflects the field of activities covered by the relevant European Sectoral Social Dialogue Committee.

More specifically, the sector is defined as embracing the NACE (Rev. 2) class 15.11: Tanning and dressing of leather; dressing and dyeing of fur.

This class includes, in particular, the following activities (see also Eurostat 2008):

- tanning, dyeing and dressing of hides and skins;
- manufacture of chamois dressed, parchment dressed, patent or metallised leathers;
- manufacture of composition leather;
- scraping, shearing, plucking, currying, tanning, bleaching and dyeing of fur skins and hides with the hair on.

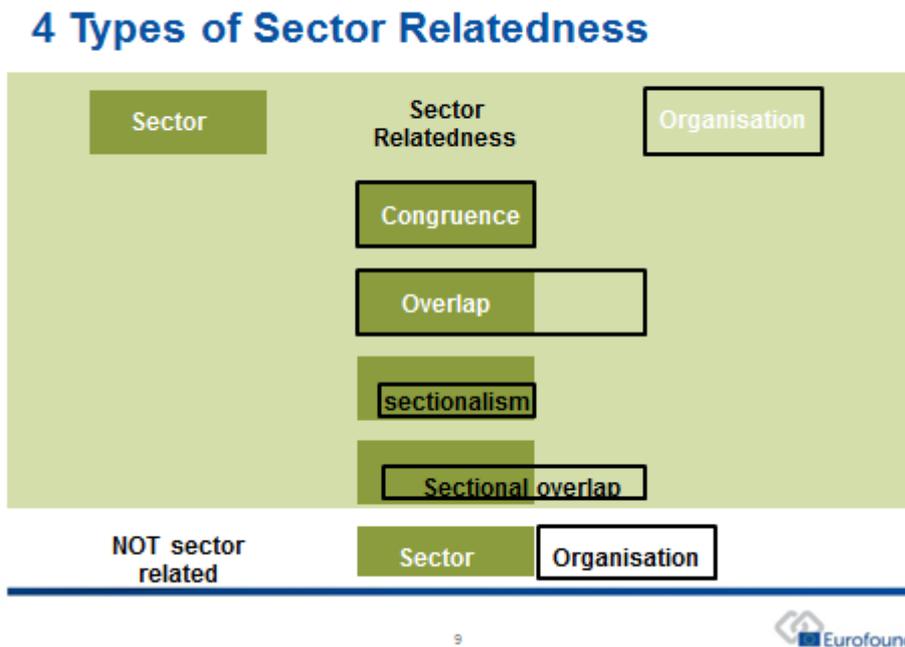
This class excludes:

- production of hides and skins as part of ranching;
- production of hides and skins as part of slaughtering;
- manufacture of leather apparel;
- manufacture of imitation leather not based on natural leather.¹

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

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

Figure 1: Sector-relatedness of social partner organisations: four possible domain patterns



¹ It should be noted that this class also excludes business activities that focus on the sale and distribution of leather goods (commerce activities).

Table 2: Domain pattern and purview of the organisation's domain

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the domain of the union/employer organisation embrace potentially all employees/companies in the tanning and leather sector?	Does the union/employer organisation also represent potentially employees/companies outside the tanning and leather sector?
Congruence (C)	Yes	No
Sectionalism (S)	No	No
Overlap (O)	Yes	Yes
Sectional overlap (SO)	No	Yes

European Sectoral Social Dialogue Committee

At European level, the European Sectoral Social Dialogue Committee for the tanning and leather industry was set up in 1999 further to a joint request by the then European Trade Union Federation: Textile, Clothing and Leather (ETUF:TCL), the predecessor organisation of the current IndustriAll European Trade Union (IndustriAll Europe), on the employees' side and the Confederation of National Associations of Tanners and Dressers of the European Community (COTANCE) on the employers' side. In line with the conceptualisation of this study as outlined above, affiliation to one of these two European organisations – namely IndustriAll Europe and COTANCE – is a sufficient criterion for classifying a national association of one of the 24 EU Member States scrutinised in this study as a relevant social partner organisation for the purpose of this study. However, it should be noted that the constituent criterion is one of sector-related membership. This is important, in particular, in the case of IndustriAll Europe due to its sector-overlapping membership domain. Thus, the study will include only those affiliates to IndustriAll Europe whose domain relates to the tanning and leather sector.

Collection of data

The collection of quantitative data, such as those on membership, is essential for investigating the representativeness of the social partner organisations. Unless cited otherwise, this study draws on country reports provided by Eurofound's Network of European Correspondents. These national industrial relations experts complete a standard questionnaire by contacting the sector-related social partner organisations in their countries. The contact is generally made via telephone interviews in the first place, but in certain cases might also be via email. In cases where no representative is available, the national correspondents are asked to fill out the relevant questionnaire based on secondary sources, such as information given on the social partner's website, or derived from previous research studies.

For various reasons it is often difficult to find precise quantitative data. Often the social partner organisations do not hold sectoral membership data themselves or are unwilling to provide them. In such cases, Eurofound's Network of European Correspondents are requested to provide rough estimates rather than leaving a question blank, given the practical and political relevance of this study. However, if there is any doubt over the reliability of an estimate, this is noted in the report.

In principle, quantitative data stems from three sources:

- official statistics and representative survey studies;
- administrative data such as membership figures provided by the respective organisations, which are then used to calculate the density rate on the basis of available statistical figures on the potential membership of the organisation;
- personal estimates made by representatives of the respective organisations or by Eurofound's Network of European Correspondents (on the basis of own research or other secondary sources).

While the data sources of the economic figures cited in the report are generally official statistics, the figures in respect of the organisations are usually either administrative data or estimations. Furthermore, several country studies also present data on trade unions and business associations that do not meet the definition given above of a sector-related social partner organisation, in order to give a complete picture of the sector's associational 'landscape'. For the above substantive reasons, as well as for methodological reasons of cross-national comparability, such trade unions and business associations are not considered in this overview report. However information on these organisations can be found in the national contributions available on demand from Eurofound. Table 22 and Table 23 in Annex 1 list all these national associations.

Quality assurance

In order to insure the quality of the information gathered, several verification procedures and feedback loops were included in the process of drawing up this study.

Firstly, 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 Eurofound's Network of European Correspondents.

Then the authors of this report and Eurofound research managers checked the consistency of the national contributions, and, if necessary, asked the national correspondents to revise them.

These (revised) national contributions were then sent to the European social partners, to allow their affiliates to double check and comment on the information provided. In addition, the national members of the Eurofound governing board were asked to check the consistency of the information in the national contributions to ensure that the bottom-up approach had completely reflected the situation, including whether it had included all the relevant sector-related organisations. This process can be considered as a mutual recognition exercise. Different trade unions can see the reported information of other trade union organisations in the same country and, if necessary, comment on the credibility or correctness of the information of other rival organisations. This is the same for the employer organisations, as well as the recognition aspect between trade unions and employer organisations. Feedback received from the sector-related organisations is taken into account, provided it is in line with the study's methodology.

An overview report was then drafted. After checked within Eurofound, the draft was sent to the European social partners and to the European Commission for feedback and comments.

The final report, taking account of these comments, was then evaluated by the European level sectoral social partners and Eurofound's Advisory Committee on Industrial Relations, which consists of representatives of both sides of industry, governments and the European Commission. After being adopted, the report is edited and published on the Eurofound website.

Structure of report

The report consists of three main parts, beginning with a brief summary of the sector's economic background. It then analyses the relevant social partner organisations in all EU Member States except Cyprus, Ireland, Luxembourg and Malta where the sector is (virtually) non-existent. The third part considers the representative associations at European level.

Parts two and three contain a brief introduction explaining the concept of representativeness in greater detail, followed by the study findings. As representativeness is a complex issue, it requires separate consideration at national and European level for two reasons. Firstly, the method applied by national regulations and practices to capture representativeness has to be taken into account (Eurofound, 2016). Secondly, the national and European organisations differ in their tasks and scope of activities. The concept of representativeness must therefore be suited to this difference.

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 admission to the European social

dialogue. The reason for this is that defining criteria for adequate representativeness is at the end of the day a matter for political decision, rather than an issue of research analysis.

1. Economic background

The tanning and leather industry, as defined within the NACE classification system (Rev. 2, class 15.11), is a small business branch that covers a range of diverse products and processes. Tanning activities involve the treatment of natural raw materials, namely the conversion of raw hides and skins into leather, as well as finishing activities that enable the leather to be used in the manufacture of a wide range of consumer products (European Commission, undated). The most important outlets for the European tanning and leather industry comprise the footwear, garment and gloves, upholstery (furniture and automotive) and leather goods industries (COTANCE and IndustriAll Europe, 2012).

The European tanning and leather sector, as defined for the purpose of this study, employs no more than about 40,000 workers in around 3,300 companies (Eurostat 2017: [sbs_na_ind_r2]). It is thus a very small business sector. Moreover, the business activities are very unevenly distributed across the EU Member States. While (virtually) no manufacturing activities in the tanning and leather sector can be found in countries such as Cyprus, Ireland, Luxembourg and Malta, more than half of all sectoral companies and of the industry's total turnover in the EU is concentrated in only one country – Italy.

Regional concentration is high and the tanning industry plays a key role in some local economies in countries such as France, Italy and Spain (European Commission, undated). While Italy counts for more than half of the sector's employment in the EU, a group of countries with sectoral employment of 2,000–3,300 workers can be identified, consisting of Austria, France, Germany, Poland, Portugal and Spain (Table 3). In a clear majority of countries, however, the tanning and leather sector employs less than about 500 workers (see Table 4). In a few countries, such as the Czech Republic and the UK, no recent employment data are provided by Eurostat Structural Business Statistics.

Table 3: EU Member States with highest tanning and leather production and employment greater than ~2,000 in 2014

Country	Turnover (€, thousands)	Proportion of EU turnover	Employment	Proportion of EU employment in the sector
IT	7,506,300	68%	22,511	54%
ES	647,300	6%	3,222	8%
AT	416,800	4%	2,362	6%
PT	296,900	3%	2,322	6%
DE	665,100	6%	2,274	5%
PL	135,800	1%	2,136	5%
FR	504,100	5%	1,928	5%

Notes: Percentages are rounded; n.a. = not available.

Source: Eurostat Structural Business Statistics [sbs_na_ind_r2] and authors' own calculations.

The European tanning and leather industry is characterised by a high proportion of small, often family-owned enterprises, with considerable variations across countries (Table 4). The average company size has fallen since 2000, a tendency that indicates stronger resilience among smaller business units compared with their bigger counterparts in times of crisis. Overall, in terms of company size, a geographical pattern can be observed according to which business units in southern Europe tend to be smaller than those in central and northern Europe. In countries such as France, Italy, Portugal and Spain, the manufacture of leather for the fashion sector is widespread, regularly requiring highly specialised craftsmanship often more easily provided in a small size setting. By contrast, tanning activities in the central and northern EU Member States are frequently aimed at the upholstery sector (in both furniture and automotive industries). This tends to require industrial processes that are better provided by larger companies, since economies of scale play a key role in this particular business segment (COTANCE and IndustriAll Europe, 2012).

In terms of production and turnover, the European tanning and leather industry recorded a steady increase from the 1970s to the early 2000s. In 2001, an all-time peak was reached when turnover exceeded €11 billion. Since then a gradual decrease in production and turnover can be observed, caused by many factors. Apart from unfavourable general economic developments (such as the economic crisis of 2007–2009, the emergence and spreading of animal diseases like bovine spongiform encephalopathy (BSE) and foot and mouth, and unfavourable exchange rates between the euro and the dollar affecting exports from the EU), there are also some sector-specific factors which account for falling leather production volumes in Europe. These include the decrease in EU leather footwear manufacturing as the main outlet of tanneries since the early 2000s, the rise of export barriers on raw materials in some of the most important non-EU producing countries such as Brazil, Russia and Ukraine, the global decline in consumption of leather garments, the poor availability of European raw materials and the ongoing tendency to relocate leather manufacturing and processing industries to non-EU labour markets with low costs (COTANCE and IndustriAll Europe, 2012). As a consequence, the EU tanning and leather industry lost almost half of its businesses and more than one-third of its workforce between 2000 and the early 2010s (COTANCE and IndustriAll Europe, 2014a).

Since the tanning and leather sector is highly technology-driven and not as labour-intensive as the contiguous footwear and textiles and clothing industries, relocation of activities to lower-cost countries appears to be less of a threat than for the latter industries. Nevertheless, international competition is strong, in particular on prices for certain fashion leathers between manufacturers in the EU and those in Asia (China, India, Pakistan, Bangladesh). Also South American countries, notably Argentina, put pressure on prices. The fundamental problem for European tanners is the persistence of unfair trade practices by these extra-EU competitors. Trade barriers to the access to raw materials and foreign leather markets put EU operators in a systemic competitive disadvantage compared to foreign suppliers. According to the European sectoral social partner organisations, the EU ‘market access strategy’ (MAS) has so far failed to solve the trade problems of the European leather industry.

China is by far the prevailing leather producing country in the world, accounting for almost one-third of total world turnover (COTANCE and IndustriAll Europe, 2012). Since European producers cannot compete with Asian producers on labour costs, they have been seeking to compete on quality and innovation for many years. According to the same report, the EU tanning industry considers itself to be the global leader in terms of quality production with regard to innovation and technology, environmental sustainability, social commitment towards its workforce and design/style/fashion trends. Correspondingly, since quality production for the high-end fashion, automotive and interior furnishing sectors tends to be costly, about two-thirds of all EU leather sales are absorbed by the EU internal market (COTANCE and IndustriAll Europe, 2012).

Nevertheless, European tanners still face significant obstacles such as chronic difficulties in recruiting highly-skilled workers – a situation that is likely to worsen in future due to the sector’s ageing workforce and its low attractiveness to young people; the rising cost of raw materials, representing up to 50% of total leather production costs as a result of protectionist trade restrictions (COTANCE and IndustriAll Europe, 2014b); an insufficient and fragmented leather-labelling regulatory framework that leads to synthetic products being erroneously labelled and marketed as leather (COTANCE and IndustriAll Europe, 2016); and the absence of a level playing field at international level with regard to social and environmental standards as well as trade reciprocity, guaranteeing globally fair competition and equal access to raw materials (COTANCE and IndustriAll Europe, 2012).

Table 4: Economic and employment characteristics in the tanning and leather sector in the EU28, 2014

Country	Turnover (€, thousands)	Employment	Number of companies	Average employment per company
AT	416,800	2,362	30	78.7
BE	42,700 ^a	190 ^a	17 ^a	11.2 ^a
BG	3,300	141	22	6.4
CY	~0	~0	~0	---
CZ	n.a.	n.a.	n.a.	n.a.
DE	665,100	2,274	61	37.3
DK	19,500	80	7	11.4
EE	6,300	142	13	10.9
EL	22,900	455	193	2.4
ES	647,300	3,222	266	12.1
FI	19,400	194	28	6.9
FR	504,100	1,929	91	21.2
HR	15,800	151	10	15.1
HU	2,100	64	25	2.6
IE	~0	~0	~0	---
IT	7.506,300	22,511	1,878	12.0
LT	8,100	228	11	20.7
LU	0	0	0	---
LV	n.a.	43	9	4.8
MT	0	0	0	---
NL	n.a.	439	42	10.5
PL	135,800	2,136	209	10.2
PT	296,900	2,322	104	22.3
RO	39,500	518	49	10.6
SE	63,700	251	38	6.6
SI	39,000	323	11	29.4
SK	27,900	407	26	15.7
UK ^b	359,000 (255,000)	n.a. (1300)	43 (22)	n.a. (59.1)

Note: n.a. = not available. ^a Reference year is 2013. ^b Figures in parentheses stem from COTANCE member UKLF.

Source: Eurostat Structural Business Statistics [sbs_na_ind_r2] and authors' own calculations.

Employment characteristics

The tanning and leather sector is characterised by a clear majority of male workers. A survey carried out on behalf of the sectoral European social partners suggests that in 2011 approximately three-quarters of workers in the European tanning industry were men (COTANCE and IndustriAll Europe, 2012). Fewer women work in the sector, and their jobs appear to be equally distributed across production and administration. Data on the age breakdown of sectoral workers drawn from the same survey indicate that more than 60% of workers in the sector are aged 36–55, while less than 30% are under 35. This finding confirms the above-mentioned issue of the sector's low appeal among young people. With regard to educational attainment, about 70% of all workers have qualifications at International Standard Classification of Education (ISCED) levels 1 and 2, while only about 5% of workers have attained ISCED levels 5 and 6. This corresponds to the fact that about two-thirds of the workforce are low specialisation blue-collar workers, while managerial jobs are scarce, which is related to the predominance of SMEs (often family-run businesses) in the sector. The survey also reveals that the overwhelming majority of employees (more than 87%) seem to benefit from a permanent employment contract. Moreover, while a clear majority (around 85%) of sectoral workers are citizens of the nation state where the company is located, almost 10% come from non-EU foreign countries (COTANCE and IndustriAll Europe, 2012).

Due to its small size, the European tanning and leather sector faces difficulties maintaining professional education and training in the industry – a situation that is likely to worsen in the near future given the ageing workforce and the difficulties of attracting young workers. Therefore, the European sectoral social partners have launched a series of initiatives addressing the issue of education and training in the European leather sector. These efforts have resulted in the establishment of the European Skills Council, Sector Skills Alliances and other initiatives aimed at facilitating the provision of training and the modernisation of qualifications (COTANCE and IndustriAll Europe, 2014b).

Employment trends since 2008

Table 12 and Table 13 in Annex 1 (data provided by Eurofound's Network of European Correspondents) give an overview of the development from approximately 2009 to approximately 2015, presenting figures on companies, employment and employees in the sector and in relation to the national economy, stemming from both national sources and Eurostat. In only three of the 20 Member States, for which related data are available from Eurofound's Network of European Correspondents, the number of companies more or less increased. This group of countries includes Estonia, France (where, however, the respective figures do not contain self-employed persons) and the Netherlands. In 16 other countries figures declined, whereas in Latvia the number of companies remained stable in the period of observation (Table 5). Although in at least two countries one-person companies are not considered (such as in Croatia and France), and for a few countries the reliability of the data appears to be questionable (for example, the Netherlands), a tendency of a decline in the number of companies/business units can nevertheless be observed in the vast majority of countries. The decrease in relative terms is remarkable in several countries, such as Croatia, Finland, Romania, Slovakia and the UK, where the number of companies dropped by more than 30% within the six-year period.

Only two of the 17 countries with available data record a rise in overall employment within the sector in the six-year period 2009 to 2014–2015 (Austria and Portugal), while in 15 countries (Belgium, Bulgaria, Croatia, Denmark, Estonia, Finland, Italy, Latvia, Lithuania, the Netherlands, Poland, Slovakia, Slovenia, Sweden and the UK) employment fell. Losses in employment in relative terms were most outstanding in Bulgaria and Denmark, where more than half (Bulgaria) and almost two-thirds (Denmark) of the sectoral jobs were lost (Table 5). Interestingly, two Member States (Austria and Portugal) can be found where the number of companies fell while employment grew. Such a development may be explained by the fact that in these countries restructuring has resulted in both market adjustment (mergers and acquisitions, closures, delocalisations) and consolidation effects, in that product specialisation in niches has been increased and sales markets (mainly abroad) have been diversified. By contrast, there are two countries (Estonia and the Netherlands) where the number of companies grew and one country (Latvia) where the number of companies remained stable from 2009

to 2013–2014 while sectoral employment decreased. In these countries one or another significant player may have disappeared from the market while some smaller companies (including one-person companies) emerged. In terms of the number of sectoral employees, two countries record an increase and 14 a decrease during the period of study, while for eight countries no comparable data are available.

Table 5: Trends in the numbers of companies and employment, 2009–2015 (differences in %)

Country	AT	BE	BG	CZ	DE	DK	EE	EL	ES	FI	FR	HR
Change in number of companies	-17	-20	-29	n.a.	-7	-30	50	n.a.	n.a.	-32	12	-38
Change in employment	14	-12	-52	n.a.	n.a.	-62	-4	n.a.	n.a.	-24	n.a.	-31

Country	HU	IT	LT	LV	NL	PL	PT	RO	SE	SI	SK	UK
Change in number of companies	n.a.	-7	-8	0	8	-3	-19	-32	-8	-21	-36	-47
Change in employment	n.a.	-7	-1	-34	-15	-9	24	n.a.	-17	-4	-29	-14

Notes: Periods of observation may somewhat deviate from 2009–2015 in some countries. n.a. = not available.

Source: Network of Eurofound Correspondents national contributions to this study (2016–2017), national statistics. For detailed description of sources please refer to the national reports.

In most countries with available data on both measures, the number of employees with a contractual relationship only lags slightly behind the total number employed, if at all. Only in Belgium is the difference between the two measures significant. These findings indicate that overall in the European tanning and leather sector the incidence of self-employment and temporary agency work is low. Belgium is the notable exception to this, as only two larger companies are active in the sector and most specialist craftspeople are self-employed.

Table 12 and Table 13 in Annex 1 also corroborate the finding outlined above that men represent the majority of workers in the sector. In eight out of 10 countries with available data men clearly outnumber female employees. Of the other two countries with available data, women represent the majority of workers in Slovenia and there is an almost even split between men and women in Latvia.² The tables also indicate that the sector is very small. In terms of employment share, the sector proved quite dynamic during 2009 to 2014–2015 in some of the countries with available data, with two countries showing an upward trend and eight countries showing a downward trend in the share of sectoral employment to total employment in a national economy. In four countries this share remained largely unchanged over the six-year period.

The sector's share in the number of aggregate employment (employees, self-employed, agency workers and so on) ranges from 0.004% in the UK to 0.2% in Portugal, while for some countries no related data for 2015 or another comparable year have been reported. In terms of absolute numbers of sectoral workers, there are six countries recording more than 2,000 people who were gainfully employed in the sector in 2014–2015 (more recent figures are not available), that is Italy (standing out with about 22,500 workers or 0.1% of total employment), Austria (with almost 2,400 workers or 0.06% of total employment), France (with around 2,000–2,500 workers, according to different sources, and 0.01% of aggregate employment), Germany (with almost 2,300 workers, while the share

² COTANCE contends that there is not any tannery in Slovenia and also questions the existence of tanneries in Latvia. More principally, this organisation doubts the reliability of official statistics in relation to the sector.

in the number of aggregate employment of the entire national economy has not been provided), Poland (more than 2,100 workers, 0.1% of total employment) and Portugal (with employment ranging from around 2,300–4,400, according to different sources, and a share of total employment ranging from 0.1% to 0.2%). For Spain, no sector-related data have been provided by Eurofound's correspondent, while Eurostat Structural Business Statistics count more than 3,200 workers in the sector.

More detailed and country-specific reference to Eurostat data showing the development of employment by quarters of a year is problematic in the case of the tanning and leather sector, since Eurostat labour force survey data only provide employment data for the entire manufacture of leather and related products sector according to NACE (Rev.2) 15, of which tanning and leather according to the NACE class 15.11 forms only a small part. Own estimates on the basis of both national and Eurostat data suggest that employment in the sector under scrutiny accounts for less than 10% of total employment in the entire manufacture of leather and related products sector, comprising slightly more than half a million workers. Since the whole manufacture of leather and related products sector according to NACE 15 is composed of very diverse business activities, such as (aside from tanning and leather activities) footwear manufacturing, manufacture of luggage, handbags, saddlery and harness, it appears to be advisable to refrain from using the Eurostat database in the case of this representativeness study.

2. National level of interest representation

The method for conducting the representativeness studies combines a top-down and a bottom-up approach to identify national level sector-related organisations in the tanning and leather sector defined by NACE code 15.11. The top-down approach includes all the sector-related affiliates of the European associations COTANCE and IndustriAll Europe, while the bottom-up approach includes all the other associations with a sector-related membership domain involved in sector-related collective bargaining.

As such, 41 sector-related trade unions were identified in 19 EU Member States and 21 sector-related employer organisations were identified in 16 different EU Member States (Table 6).

Table 6: Number of sector-related organisations per country

Number of sector-related organisations	EU Member States with respective number of trade unions	EU Member States with respective number of employer organisations
0	BG, CZ, EE, EL, PL*	CZ, EE, EL, HR, LT, LV, PL, SK**
1	DE, DK, HR, HU, LT, LV, SI, SK, UK	BG, BE, DK, ES, FI, FR, HU, NL, PT, RO, SI
2	AT, FI, NL, RO	AT, DE, IT, SE, UK
3	ES, SE	---
4	IT, PT	---
5	BE, FR	---

Notes: All EU28 considered apart from Cyprus, Ireland, Luxembourg and Malta.

* *In all of these countries at least one trade union with a reference to the tanning and leather sector has been identified. However, these associations either do not organise members in the tanning and leather sector (any more) or are not affiliated to IndustriAll Europe and not involved in sector-related collective bargaining, such that they do not meet one of the necessary criteria for inclusion in the study (see Table 22 in Annex 1).* ** *In all of these countries but Slovakia at least one employer/business organisation with a reference to the tanning and leather sector has been identified. However, these associations either do not organise member companies in the tanning and leather sector (any more) or are not affiliated to COTANCE and not involved in sector-related collective bargaining, such that they do not meet one of the necessary criteria for inclusion in the study (see Table 23 in Annex 1).*

Source: Network of Eurofound Correspondents national contributions to this study (2016–2017).

In almost all Member States, statutory regulations explicitly refer to the concept of representativeness when assigning certain rights of interest representation and public governance to trade unions and/or employer organisations. The most important rights addressed by such regulations include:

- formal recognition as a party to collective bargaining;
- extension of the scope of a multiemployer collective agreement to employers not affiliated to the signatory employer organisation;
- participation in public policy and tripartite bodies of social dialogue.

Under these circumstances, representativeness is normally measured by the membership strength of the organisations. For instance, in many countries recognition of trade unions and/or employer organisations as a social partner organisation is contingent on membership strength. For example, a threshold of 10% of possible members at peak, sector, regional or workplace level must be reached in countries such as the Czech Republic, Hungary, Poland, Slovenia and Spain.

In several other countries, statutory extension provisions allow for [extension of collective agreements](#) to unaffiliated employers only when the signatory trade union and/or employer association represent a

certain proportion of the employees within the agreement's domain (for example, at least 50% in countries such as Finland, Germany, Latvia and Portugal) (Eurofound, 2016).

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. Hence, the role of the national players in collective bargaining and public policymaking constitutes another important component 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). Social partner organisations that are engaged in multiemployer bargaining are incorporated in state policies to a significantly greater extent than their counterparts in countries where multiemployer bargaining is lacking. This can be attributed to the fact that only multiemployer agreements matter in macroeconomic terms; this in turn gives governments an incentive to persistently seek the cooperation of the social partner organisations. If single-employer bargaining prevails in a country, none of the collective agreements will have a noticeable effect on the economy due to their limited scope. As a result, the basis for generalised tripartite policy concertation will be limited.

In the tanning and leather sector, in most countries with collective bargaining practices multiemployer bargaining as the predominant or exclusive mode of employment regulation prevails, according to the high number of small and micro companies that are not capable of conducting single-employer bargaining. Single-employer bargaining as the prevalent (and only) mode of employment regulation can be found in only three countries, namely Hungary, Romania and Slovakia, where multiemployer arrangements are fully absent (see in more detail below).

In summary, representativeness is a multidimensional concept that embraces three basic elements:

- the membership domain and strength of the social partner organisations;
- their role in collective bargaining;
- their role in public policymaking.

These elements are discussed below.

Membership domains and strength

The membership domain of an organisation, as formally established by its constitution or name, distinguishes its potential members from other groups which the organisation does not claim to represent. This study considers only organisations whose domain relates to the tanning and leather sector. However, there is insufficient room in this report to describe the domain demarcations of all the organisations in detail. Instead, the report notes how they relate to the sector by classifying them according to the four patterns of sector-relatedness (see Figure 1 and Table 2).

There is a difference between strength in terms of the absolute number of members and strength in relative terms. Research usually refers to relative membership strength as the density; in other words, as regards the trade union side, the ratio of trade union members (in a sector) to all employees (in the sector).

A difference also arises between trade unions and employer organisations in relation to measuring membership strength. Trade union membership simply means the number of unionised persons. Measuring the membership strength of employer organisations is more complex since they organise collective entities, namely companies that employ employees. In this case, there are two possible measures of membership strength – one referring to the companies themselves and the other to the employees working in the member companies of an employer organisation.

For a sector study such as this, measures of membership strength of trade unions and employer organisations generally also have to consider how the membership domains relate to the sector. If a domain is not identical with the sector demarcation, the organisation's total density (that is, the

density referring to its overall domain) may differ from sector-specific density (that is, the organisation's density referring to the sector).

This report first presents data on the domains and membership strength of the trade unions in the sector and then considers those of the employer organisations. For sectoral membership numbers, sectoral densities can be calculated provided the number of employees within the sector is given.

Trade unions

Table 14 in Annex 1 presents data on trade union domains and membership strength. It lists all the trade unions that meet at least one of the two criteria for classification of a sector-related social partner organisation as defined above.

Nineteen of the 24 Member States considered in this study record at least one sector-related trade union. In total, 41 sector-related trade unions could be identified. This indicates that overall trade union presence tends to be relatively strong in what is a very small sector. In the other five countries – Bulgaria, the Czech Republic, Estonia, Greece and Poland – as far as data are available, only Poland records a significant number of workers higher than 2,000.

Information on the membership domain pattern relative to the tanning and leather sector is available for all of the 41 sector-related trade unions except for PELTRICONTEX FRATIA of Romania. None of the sector-related trade unions has a domain demarcation (largely) congruent to the sector as defined above. This is not a surprise, given the small size of the sector. It is unlikely that sector-related unions would organise only tanning and leather workers while disregarding workers of the contiguous textiles, clothing and footwear industries.

Almost two-thirds of the trade unions (a total of 25) organise a broader range of activities and thus 'overlap' the sector. Overlap by and large arises from three different modes of demarcation:

- general or at least cross-sectoral (covering several business sectors of the economy) domains, which is the case of CGSLB-ACLVB of Belgium, CO-industri of Denmark, FS CFDT of France, LIA of Latvia, FNV Procesindustrie and CNV of the Netherlands, SIMA of Portugal, FICA-UGT and CCOO-Industria of Spain and Community of the UK;
- domains covering the broader textile, clothing, leather and footwear sector or the so-called light industry business segment, as is the case of SIND TOKG of Croatia, CGT-THC of France, LIPS Solidarumas of Lithuania, FESETE of Portugal and STUPIS of Slovenia;
- domains including activities that are not directly related to the tanning and leather sector, such as the mining, energy and chemical sector (see CMTE-CFTC and FEDECHIMIE of France, IGBCE of Germany, BDSZ of Hungary, FILCTEM-CGIL, FEMCA-CISL, UILTEC-UIL and UGL Chimici of Italy), the agro-food sector (see CFE-CGC FNAA of France) and the construction and transport sector (as is the case of IOZ of Slovakia).

Sectional overlaps occur in 13 cases (almost one-third of the cases). This mode usually emanates from domain demarcations that focus on certain categories of employees or employees of a particular region which are then organised across several or all sectors. Employee categories are specified by various parameters, such as:

- employment status – for example, white-collar workers (as is the case of GPA-djp of Austria, CNE and SETCa-BBTK of Belgium, PRO of Finland and Unionen of Sweden) or blue-collar workers (as is the case of PRO-GE of Austria, FGTV-ABVV and CSC-ACV of Belgium, TEAM of Finland and IF Metall of Sweden);
- distinct occupations – such as managers and executives (as can be found with SETCa-BBTK of Belgium and Ledarna of Sweden);
- geographical region, as is the case of Spain's ELA IE which organises only workers in the Basque region.

In the case of CONFPELTEX of Romania the domain covers only part of the broader textile and leather sector in terms of type of company/firm size (rather than in terms of employee categories), in that it organises only workers in smaller companies, but not in multinationals.

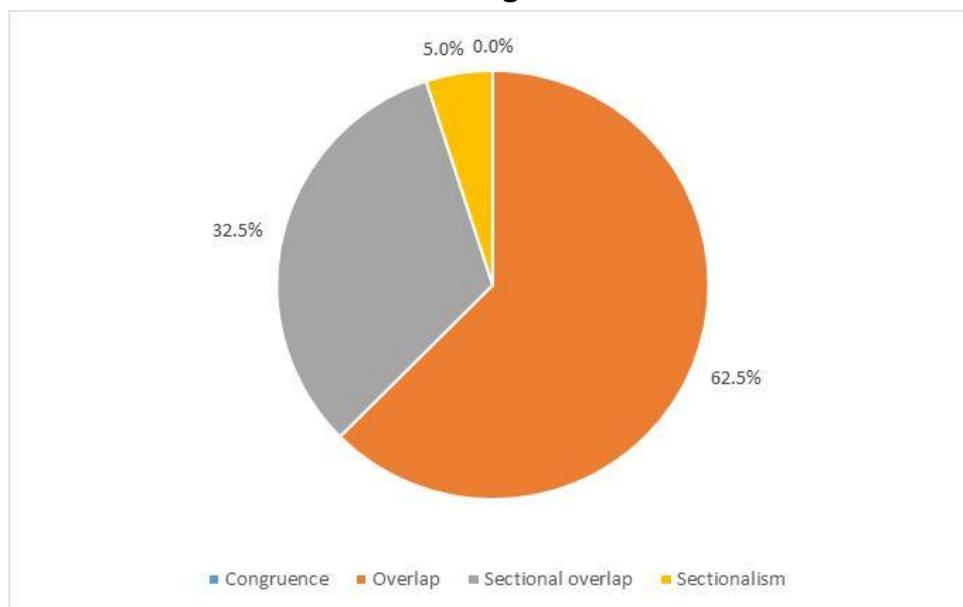
Last, but not least, two trade unions with a domain sectionalist relative to the sector can be found, namely SOIC and SOICB of Portugal. Both unions organise and represent only blue-collar workers in the tanning and leather sector. The former union organises employees from the entire country, while the latter's domain is limited to the city of Braga.

Those 15 trade unions, whose membership domain does not cover the entire tanning and leather sector, have delimited their domain primarily in terms of occupations/employee category rather than economic activities, (legal) form/size of enterprise and region. Thirteen out of the 15 trade unions with a domain sectionalist or sectionally overlapping relative to the sector have a domain which does not cover all occupations within the sector. Only Spain records a trade union (ELA IE) whose membership domain is confined to the Basque region. Apart from that, the membership domain of Romania's CONFPELTEX is confined to smaller textile and leather businesses and does not include multinational companies. Membership domains demarcated in terms of economic activity do not occur at all in the tanning and leather sector. This means that all sector-related trade unions organise sectoral workers of all economic sub-activities. This is due to the exceptionally small size of the sector such that trade union membership demarcations in terms of economic activities within the sector are, for practical reasons of interest representation, unlikely.

Of the 40 sector-related trade unions with available information, a total of 25 (62.5%) have a domain that includes the entire sector and 38 (95%) show a domain overlapping relative to the sector. In all of the Member States employing at least around 2,000 employees (according to the Eurostat Structural Business Statistics [sbs_na_ind_r2]), where a sector-related trade union could be identified, at least one trade union exists with a domain including the entire tanning and leather sector. Austria is the only exception to this.

There are many sector-related trade unions that cover – aside from tanning and leather activities – also the broader clothing, textiles and footwear sector, but also mining, energy-related and chemical activities. Alternatively, overlaps also arise due to cross-sectoral (general) domains of trade unions. Sectionalism (including cases of sectional overlap) in most instances means that trade unions largely organise the entire tanning and leather sector in terms of business activities but do not represent a particular employee group. Nevertheless, despite these findings (see Figure 2, and Table 14 in Annex 1), it cannot be concluded that overall the domains of the sector-related unions tend to be broad. This is because evidence only suggests that the trade unions' domains often go beyond what is a very narrowly defined and small sector. Only six trade unions (CGSLB-ACLVB in Belgium, LIA in Latvia, CNV in the Netherlands, SIMA in Portugal, CCOO-Industria in Spain and Community in the UK) can be identified as having a largely general membership domain. So despite almost two-thirds of the trade unions having a domain overlapping with regard to the sector, the domains of most of the unions do not tend to be very broad.

Figure 2: Distribution of membership domain patterns of sector-related trade unions for the tanning and leather sector



Notes: $N = 40$; percentages are rounded.

Source: Network of Eurofound Correspondents country reports (2016–2017).

Membership of the sector-related trade unions is voluntary in all cases.

The absolute numbers of members (within their overall membership domain) in the sector-related trade unions show considerable variation, ranging from 1.5 million (in the case of Belgium's CSC-ACV) to less than 800 (in the case of Lithuania's LPIPS Solidarumas). This variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the ability to attract members. Hence, density is the measure of membership strength that is more appropriate to a comparative analysis.³ Therefore this report considers densities referring to the sector (sectoral density), given that both a trade union's membership within the sector and the number of employees in the sector are provided. Sectoral density figures refer to net ratios, which means that they are calculated on the basis of active employees only, rather than taking all union members (those in job and those who are not) into account. This is mainly because research usually considers net union densities as more informative than gross densities, since the former measure tends to reflect actual union power and unionisation trends among the active workforce more appropriately than the latter. Only the active workforce is capable of taking industrial action and active members tend to pay higher membership fees than retirees, unemployed and students. (Traxler et al, 2001, p. 80; Vernon, 2006).

About 57% of the 23 trade unions with available data record a sectoral density (calculated as the ratio of the number of members within the sector to the total number of employees within the sector) lower than 10%. About 30% of the trade unions record a sectoral density of between 10% and 50%, whereas three trade unions (13%) record a sectoral density of higher than 50% (SIND TOKG of Croatia, TEAM of Finland and Community of the UK). Hence, with the exception of these three cases, overall the sectoral densities of the sector-related trade unions do not tend to be high. There are two possible explanations for the overall relatively moderate sectoral densities of the sector-related trade unions: (i) low densities with regard to the unions' sectoral domain⁴ and (ii) their generally small size (in terms of sectoral membership domain) in relation to the sector. Whereas no information is available for the

³ This holds true even though the density figures gathered and calculated for the purpose of this study may in some cases be unreliable.

⁴ The *sectoral domain* density (in contrast to the *sectoral* density) is the density referring only to that part of the sector as covered by the union's membership domain.

former measure, the latter appears to apply to at least some of the sector-related trade unions. This is indicated by two interrelated facts: First, more than one-third of the unions have a membership domain that is sectional or sectionally overlapping relative to the sector and thus covers only part of the sector. Second, a total of 41 sector-related trade unions can be identified, with 10 Member States recording a pluralist associational system on the side of organised labour in the sector. The sectoral densities of individual associations tend to fall with the emergence and growing number of sectoral competitors and thus become less significant as a measure for individual organisational strength relative to the sector. Correspondingly, the generally low density figures for the unions in countries with a pluralist/fragmented associational system in the sector, such as Belgium, France, Italy, Portugal, Spain and Sweden, strengthen this correlation. Overall, since for almost half of the 41 sector-related trade unions sectoral density data cannot be calculated, conclusions from the available figures on sectoral density have to be drawn with the utmost caution.

In conclusion, in the tanning and leather sector a number of occupational trade unions exist, whereas the incidence of trade unions with general/multisector domain demarcations is significantly lower. This is despite the fact that membership domains overlapping with regard to the sector by far prevail. These overlaps are generally the result of the very narrow demarcation of the sector under scrutiny rather than a product of overall broad membership domains of the sector-related trade unions. This means that most of the unions may pursue a fairly particularistic representation of collective interests on behalf of small professional groups – a strategy that is generally deemed favourable for member recruitment (Müller-Jentsch, 1988, pp. 177–178). Nevertheless, neither the quantitative data gathered in this study, nor – with the notable exception of the situation in the UK – anecdotal evidence drawn from the national reports, indicate high unionisation rates in the sector. This may partially be due to the shortcomings in data availability and the existing dataset. However, relatively low densities within the sector appear to be plausible and can be explained by several factors, in particular the small average size of the companies, that often fail to meet the criteria for setting up workplace representation. Apart from that, the relatively poor pay and/or working conditions reported for several countries (Austria, Bulgaria, Croatia, Hungary, Poland and Romania) as well as overall low levels of qualifications may serve as explanations for moderate unionisation rates in the sector. Non-standard and atypical work is – with the possible exception of Poland – no major issue in the sector and thus does not account for low density rates.

Employer organisations

Table 16 and Table 17 in Annex 1 present the membership data for the employer/business organisations in the tanning and leather sector. Overall, 21 sector-related employer/business organisations were identified. This is about half of the number of sector-related trade unions (41).

For 16 of the 24 Member States considered in this study at least one sector-related [employer organisation](#) is documented. No employer organisation matching at least one of the two criteria for inclusion in this study could be found in eight countries, that is Croatia, the Czech Republic, Estonia, Greece, Latvia, Lithuania, Poland and Slovakia (Table 6) – despite the fact that in at least one country, Poland, a considerable number of sectoral workers exists (see Table 4, and Table 12 in Annex 1). In 11 countries (Belgium, Bulgaria, Denmark, Finland, France, Hungary, the Netherlands, Portugal, Romania, Slovenia and Spain) only one sector-related employer organisation matching at least one of the two criteria for inclusion (see above) has been identified. In the remaining five countries (Austria, Germany, Italy, Sweden and the UK) pluralist associational systems exist, that is two sector-related employer/business organisations can be found. Thus, compared with the situation on the labour side, where pluralist associational systems exist in 10 Member States, on the employer side the number of countries with pluralist associational systems is significantly lower. This corresponds with the fact that the number of sector-related trade unions across the Member States clearly outweighs the number of sector-related employer/business associations. Overall, in those countries where sector-related organisations on the business side can be found, these organisations are relatively evenly distributed among the Member States. In all of the 16 countries recording employer/business organisations only one or two of them exist.

Six Member States record just one employer/business organisation that is not a party to collective bargaining (see Table 17 in Annex 1). These associations not involved in sector-related collective bargaining are classified as social partner organisations in this report only due to their affiliation to the sector-related European level employer organisation COTANCE. Conversely, in 13 Member States at least one organisation is engaged in sector-related collective bargaining. All associations that are not involved in collective bargaining according to Table 17 in Annex 1 are considered as trade associations⁵ in their country. Due to the decision to include all national affiliates to a recognised European social partner (COTANCE) they are included in this study. Overall, there are 13 employer/business organisations in 13 Member States that are directly or indirectly (via a lower-order unit as is the case of Denmark's DI and Hungary's AHLI) affiliated to COTANCE.

The membership domains of employer/business organisations tend to be narrower than those of the trade unions. One-third of these organisations have membership domains that overlap relative to the sector, while almost two-thirds of the unions do (Figure 3). Moreover, slightly less than one quarter of the associations rest on sectionally overlapping domains relative to the sector. Strikingly, about 43% of the associations show a membership domain that is more or less congruent with the sector definition. This means that the domain of these organisations focuses largely on the tanning and leather sector as defined for the purpose of this study and does not cover business areas outside the sector. Finally, sectionalism does not occur at all among the employer/business organisations in the sector.

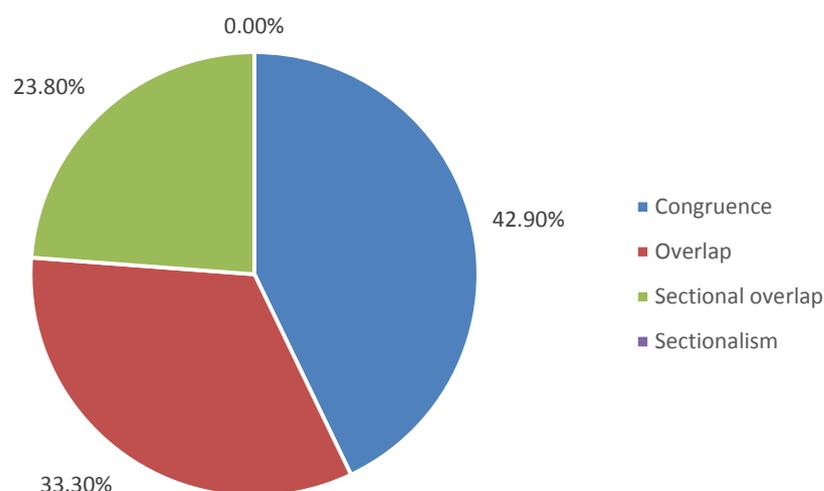
Cases of domain overlaps (in the case of organisations with domains either overlapping or sectionally overlapping relative to the sector) are caused by domains covering:

- the broader textiles, clothing and/or leather branch (including footwear) or the commerce sector of the economy (BULFFHI of Bulgaria, AFLSI of Finland, APIC of Portugal and UKLF of the UK);
- part of the tanning and leather sector plus (part of) the broader textiles and clothing branch (FV TBSL and BIMB of Austria);
- SMEs and/or the crafts segment of (part of) the economy (BIMB of Austria and Unionchimica of Italy);
- (part of) the tanning and leather sector plus (parts of) other sectors, such as the chemical and plastics/rubber sector (Unionchimica of Italy and IKEM of Sweden).

Moreover, cases of domain overlaps may also result from general or cross-sectoral membership domains, as is the case of Denmark's DI, Hungary's AHLI and Slovenia's ZDS-STU.

⁵ Put very simply, trade associations' main reference is the 'product' market (where business has interests in relation to customers and suppliers) rather than the labour market.

Figure 3: Distribution of membership domain patterns of sector-related employer organisations with regard to the tanning and leather sector



Notes: $N = 21$; percentages are rounded.

Source: Network of Eurofound Correspondents country reports (2016–2017).

Due to the small size of the tanning and leather industry, only relatively few employer/business organisations (less than one quarter) can be identified whose membership domain covers only part of the sector, in terms of either business activities, type of companies or territorial coverage (which thus have a domain sectionally overlapping with regard to the sector – sectionalism does not occur in the sector). Overall, there is only one out of the 21 employer/business organisations that has delimited its domain in terms of business activities and as such does not cover all activities within the tanning and leather sector. This is Germany's VDL, whose domain does not cover the business segment of dressing and dyeing fur. Three of the 21 organisations do not represent all legal forms or size classes of companies in the sector (they focus on either SMEs and small-scale craft enterprises or the 'industrial' segment of the sector), while the membership domain of Bulgaria's BULFFHI does not cover the whole country's territory. In turn, more than three quarters of the employer/business organisations have a membership domain covering the entire tanning and leather sector (relying on a domain congruent to or overlapping with regard to the sector). In four (that is France, Italy, Portugal and Spain) of the seven Member States with more than about 2,000 workers in the sector according to the Eurostat Structural Business Statistics [sbs_na_ind_r2] at least one employer/business organisation with a domain covering the entire sector can be found. In most cases of organisations with overlapping domains (one-third) the membership domains do not tend to be broad; rather, they mostly focus on the relatively small textiles, clothing and leather (including footwear) sector, and sometimes extend to contiguous economic branches such as commerce (retail) or the chemical industry. Organisations with very broad, cross-industry membership domains only occur in the cases of Denmark's DI and Slovenia's ZDS-STU. Hence, in most countries with sector-related employer/business associations, their domains tend to be tailor-made for the tanning and leather sector. This is most evident in those various cases (about 43%) where the domain largely coincides with the tanning and leather sector. Such a membership demarcation in relation to the sector may enable the players to perform a sector-specific or particularistic interest representation on behalf of their members, although their membership strength may vary widely from one organisation to the other. It is important to reiterate that for eight out of the 24 countries considered in this study no employer organisation active in the sector has been identified.

A comparison of the distribution of membership domain patterns of the sector-related employer organisations with that of the trade unions (Table 7) indicates that almost 43% of the former are congruent with the sector as defined for the purpose of this study, compared with no trade unions at all. The proportion of organisations covering the entire sector (congruence + overlap) is higher for

employer/business organisations (76.2%) than for trade unions (62.5%). In line with this, the proportion of organisations not covering the entire sector is higher for trade unions (37.5%) than for employer organisations (23.8%). Paradoxically, at the same time the proportion of organisations with domains overlapping with regard to the sector is much higher for trade unions (95%) than for employer organisations (57.1%). This indicates that overall the membership domains of the sector-related employer/business organisations tend to be narrower than those of the sector-related trade unions, even though overall the domains of the trade unions cannot be classified as broad either (see above).

Table 7: Distribution of membership domain patterns of sector-related organisations with regard to the tanning and leather sector

	Congruence	Overlap	Sectionalism	Sectional overlap
Trade unions	0.0%	62.5%	5.0%	32.5%
Employer organisations	42.9%	33.3%	0.0%	23.8%

Note: Percentages are rounded.

Source: Network of Eurofound Correspondents national contributions to this study (2016–2017).

As subunits of the Austrian Federal Economic Chamber (WKÖ), both FV TBSL and BIMB of Austria rely on compulsory membership. All other sector-related employer/business organisations are voluntary associations.

As the figures on membership totals (Table 16) and density (Table 17) indicate (both in Annex 1), membership strength in terms of both companies and employees varies widely with regard to the membership domain in general and the sector. Again, as outlined earlier in the context of the trade unions, density figures rather than absolute membership numbers are informative in terms of membership strength. In the case of the sector-related employer/business organisations, sectoral densities in terms of both companies and employees (employed by these companies) can be calculated. However, due to a lack of absolute numbers of sectoral members in terms of both companies and employees in the case of some associations (and due to a lack of sectoral company and employment data in some countries), sectoral densities can be calculated only for part of them. According to the figures available, only one case each (7% and 8%, respectively) of the employer/business organisations can be found which record a sectoral density in terms of companies and employees of 10% or below. About 83% of the employer/business organisations with available data record a sectoral density in terms of employees of 50% or higher. Whereas the median of the organisations' sectoral densities in terms of companies lies at 31%, the corresponding median in terms of employees stands at 74.5%. This indicates overall very high densities of the sector-related employer/business organisations and corresponds with the low level of associational pluralism in the sector, since in most countries only one sector-related employer/business organisation can be identified, and no country records more than two associations on the business side. (As outlined in the context of the trade unions, sectoral densities of individual associations tend to decline with increasing levels of associational fragmentation and pluralism.) Apart from the predominance of single-organisation systems on the business side in most Member States, also the finding that most membership domains of the employer/business organisations tend to be tailor-made for the tanning and leather sector may account for high densities within the sector. Higher sectoral densities in terms of employees compared with those in terms of companies indicate a higher propensity of the larger companies to associate, as compared with their smaller counterparts.

Collective bargaining and its players

The data presented in Table 18 in Annex 1 provide an overview of the system of sector-related collective bargaining in the 24 Member States under consideration. The importance of collective

bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (Traxler et al, 2001). Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

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

The second indicator considers whether statutory extension schemes have been applied to the sector. For reasons of brevity, this analysis is confined to extension schemes that widen the scope of a collective agreement to employers not affiliated to the signatory employer organisation: extension regulations targeting the employees are therefore not included in the research. Regulations concerning the employees are not significant to this analysis for two reasons. First, extending a collective agreement to those employees who are not unionised in the company covered by the collective agreement is a standard in most European countries. Secondly, employers have good reason to extend a collective agreement concluded by them, even when they are not formally obliged to do so, otherwise they would be providing an incentive for their workforce to unionise.

Schemes that target employers are significant for the strength of collective bargaining in general and multiemployer bargaining in particular. As the employers are capable of refraining from joining an employer organisation and entering single-employer bargaining in the context of a purely voluntary system, employer-related extension practices increase the coverage of multiemployer bargaining. Moreover, when it is pervasive, an extension agreement may encourage more employers to join the controlling employer organisation; such a move enables them to participate in the bargaining process and to benefit from the organisation's related services in a situation where the respective collective agreement will bind them in any case (Traxler et al, 2001).

Collective bargaining coverage

In terms of the tanning and leather sector's collective bargaining coverage (Table 18 in Annex 1), at least 10 of the 22 countries with available data record coverage of 80% and more. This group of countries comprises Austria, Belgium, Denmark, Finland, France, Germany, Italy, Slovenia, Spain and the UK. All of these countries except Germany and the UK register a coverage rate of almost 100%. For Portugal, the data provided are ambiguous, suggesting a high coverage rate, but it remains unclear whether full coverage is given or not.

Table 8: Distribution of Member States by size of workforce and collective bargaining coverage rate in tanning and leather

	CB coverage of 60%–100%	CB coverage of 40%–50%	CB coverage of 0%
EU MS with more than about 2,000 workers in the sector*	AT, DE, ES, FR, IT, PT		PL
EU MS with fewer than about 500 workers in the sector*	BE, DK, FI, SE, SI, SK	HU	BG, EE, EL, HR, LT, LV
EU MS with no available (recent) employment data*	UK		CZ

*Note: No collective bargaining (CB) coverage rate is available for the Netherlands and Romania. * According to the Eurostat Structural Business Statistics [sbs_na_ind_r2]*

Source: Eurostat Structural Business Statistics [sbs_na_ind_r2] and Network of Eurofound Correspondents national contributions to this study (2016–2017).

Eight countries with no collective bargaining in the sector have been identified, namely Bulgaria, Croatia, the Czech Republic, Estonia, Greece, Latvia, Lithuania and Poland (Table 8). Finally, a small group of countries can be identified that records medium to higher-range rates of about 40%–70%, including Hungary, Slovakia and Sweden. For the Netherlands and Romania, no precise data have been provided. In the case of Romania, collective bargaining in the sector is supposed to occur only scarcely, if at all. Like most other sectors of the economy, the tanning and leather sector is characterised by a high polarisation of countries with regard to collective bargaining across the EU, in that high collective bargaining rates are concentrated – with the only exception of Slovenia – among ‘old’ Member States, while a lack of sector-related collective bargaining can only be found – with the notable exception of Greece – among countries that have joined the EU since 2004.

In some countries (such as Bulgaria, Greece, Hungary, the Netherlands, Poland, Romania and – to a certain degree – Portugal and Sweden), the sectoral collective bargaining coverage (significantly) decreased or completely disappeared in the period 2006–2007 (the reference date of the 2009 predecessor representativeness study on the tanning and leather sector) to the mid-2010s (the reference date of this study). This is due to the shrinkage of the sector and, often as a consequence, the disappearance of representative organisations on at least one side of the industry in the sector, such that effective multiemployer bargaining has been severely disrupted. In the Netherlands, for instance, the decline of the sector has directly impacted on the strength of the sector-related social partners that have had to face dramatic membership losses over many years. As a consequence, they have not managed to renew the sectoral multiemployer agreement since the beginning of the 2010s. Since the last sectoral agreement expired in 2012, some companies have voluntarily followed its provisions, while other companies may have agreed single-employer settlements. In formal terms, however, no multiemployer agreement has been valid in the sector since 2012. Cases of vanishing or liquidated social partner organisations have been reported from other countries such as the Czech Republic, Greece, Portugal, Romania and Slovakia. In some countries such as Greece, Portugal and Romania, core labour law provisions and collective bargaining regulations have been curtailed and replaced by less stringent regulations, in the context of the recession and far-reaching measures to balance budgets. This has had direct implications on the collective bargaining coverage rate in the tanning and leather sector, as well as other sectors.

Up until 2009 in Greece the sectoral social partners would conclude a multiemployer collective agreement for the tanning and leather sector. Since then collective bargaining has been at a standstill

due to the crisis, the ongoing disappearance of the sector's businesses and as a direct result of new regulations on collective bargaining⁶ which led to the abolition of the existing collective agreement in the tanning and leather sector. Currently no sectoral collective agreement is in force. Thus, the sector's employees are only covered by the National General Collective Agreement, which regulates a range of qualitative matters such as health and safety and anti-discrimination issues, as well as legislative provisions on minimum wages and working time regulations.

In the case of Romania, the entire sector was covered by a multiemployer collective agreement concluded at branch level up until 2010. With the Social Dialogue Act 62/2011 very restrictive thresholds for recognition of social partners as representative parties to collective bargaining were introduced. As a consequence, the sectoral social partners lost recognition as representative social players and thus their capacity to conclude multiemployer collective agreements. Since 2011 only enterprise-level collective agreements can be signed in the tanning and leather sector. However, no information has been provided about the use and extent of single-employer arrangements in the sector.

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

- the predominance of multiemployer bargaining (Table 18 in Annex 1);
- the presence of (relatively) strong sector-related trade unions and employer/business organisations;
- the existence of pervasive extension practices (Table 18 in Annex 1).

The group of Member States where sector-related multiemployer bargaining is completely absent consists of the above-mentioned eight countries without any collective bargaining in the sector as well as Hungary, Romania and Slovakia, where coverage tends to be far from full and is based exclusively on company-level arrangements. This group of countries, with the exception of Greece, exclusively consists of 'new' Member States (that is, those countries that joined the EU in 2004, 2007 and 2013). Due to the lack of strong, encompassing social partners at least on one of the two sides of industry within the sector in virtually all of these countries, sectoral industrial relations tend to be poorly developed or absent.

However, there is a group of 12 countries (Austria, Belgium, Denmark, Finland, France, Germany, Italy, Portugal, Slovenia, Spain, Sweden and the UK) with exclusive or prevailing multiemployer arrangements in the sector (Table 18 in Annex 1). Most of them record very high or even full collective bargaining coverage rates in the sector. It is only in countries such as Germany and Sweden, and perhaps Portugal, that exclusive multiemployer arrangements in the sector do not prevent significant parts (20% or more of the employees) of the sector from remaining uncovered. This may result from a lack of extension procedures in the sector rather than a lack of comprehensiveness of the main industrial relations players in terms of membership domain relative to the sector in these three countries.

Taking the collective bargaining coverage rate and the share of multiemployer bargaining as indicators for the effectiveness and strength of sectoral industrial relations structures, one can infer from these findings that in about half of the 24 countries under consideration the sector's industrial relations structures are quite well-established. In three countries, namely Belgium, France and Italy, a multilevel bargaining system is established, which combines more or less comprehensive multiemployer bargaining with single-employer agreements. In such cases, the single-employer settlements either complement the multiemployer agreements in areas not regulated by the latter or contain more favourable employment terms than the multiemployer agreements.

The prevalence of multiemployer settlements in the sector is in some countries backed by a significant use of extension practices. Pervasive extension practices in the tanning and leather sector are reported

⁶ With the introduction of the Economic Stability Mechanism and the First and Second Memoranda of Understanding 2011 and 2012 agreed with the so-called Troika (see Eurofound, 2012), a package of measures curtailing labour law in general and overturning all valid collective agreements in particular was implemented.

for several countries, namely Belgium, Finland, France, Portugal, Slovenia and Spain (Table 18 in Annex 1). As the aim of extension provisions is to make multiemployer agreements generally binding, the provisions for obligatory membership in Austria should also be noted. Obligatory membership creates an extension effect, since WKÖ and its subunits are parties to multiemployer bargaining. Another functional equivalent to statutory extension schemes can be found in Italy. According to the country's constitution, minimum conditions of employment must apply to all employees. The country's labour court rulings relate this principle to multiemployer agreements, to the extent that they are regarded as generally binding (Vatta, 2007, p. 208).

Participation in public policymaking

Interest associations may partake in public policy in two basic ways. Firstly, they may be consulted by the authorities on matters affecting their members, or secondly, they may be represented on 'corporatist', in other words tripartite, committees and boards of policy cooperation. This study considers only cases of consultation and corporatist participation which explicitly relate to sector-specific matters. Consultation processes are not necessarily institutionalised and, therefore, the organisations consulted by the authorities may vary according to the issues to be addressed and also over time, depending on changes in government. Moreover, the authorities may initiate a consultation process on an occasional rather than a regular basis. Given this variability, Table 15 and Table 17 in Annex 1 flag up only those sector-related trade unions and employer organisations that are usually consulted.

Trade unions

In 15 of the 20 Member States recording at least one sector-related trade union at least some of the sector-related trade unions are usually (that is, on a regular basis or on occasion) consulted by the authorities. In total, 65% of the sector-related trade unions for which information is available are consulted, through participation in existing tripartite structures and/or in the form of unilateral consultation by the authorities. For 40% of those trade unions for which related information has been provided, consultation is carried out on a regular basis (generally at least once a year), and 60% are consulted occasionally. Since half of the 20 Member States with sector-related trade unions have a multiunion system, one cannot rule out the possibility that the authorities may favour certain trade unions over others or that the unions compete for participation rights. In at least two of the 10 countries with a multiunion system (Belgium and the Netherlands), any of the existing trade unions may take part in the consultation process. In contrast, in at least two other countries (Finland and France) only some of the sector-related trade unions are usually consulted, while at least another union is not. For several countries, such as Austria, Italy, Portugal, Romania and Sweden, no conclusions on possible un/equal consultation practices can be drawn due to a lack of information for at least one trade union. In the pluralist case of Spain, none of the sector-related trade unions is usually consulted by the authorities.

Employer organisations

The vast majority (about 82%) of sector-related employer/business organisations for which related information is available are involved in consultation procedures. In terms of consultation frequency, each half of the employer/business organisations for which information is available are consulted on a regular basis and on occasion. As outlined above, five countries with a multiorganisation system on the employer side in the sector have been identified. No country with a multiorganisation system could be identified where related data of all employer/business organisations are available and all of the sector's organisations are consulted or none of them is consulted. Adversely, two countries with a pluralist associational system with unequal consultation practices could be found: In both Germany and the UK one organisation is consulted by the authorities while another is not. However for all other countries with a pluralist system of employer representation, such as Austria, Italy and Sweden, no information about consultation practices is available for one organisation, so it remains unclear whether consultation rights are being attributed to the national organisations in a selective manner or not. Overall, in at least 14 of the 16 Member States recording at least one sector-related employer/business organisation at least one organisation is usually consulted.

As far as information is provided, in 11 countries which record sector-related associations of interest representation on both sides of industry consultation rights are symmetrically attributed to organised labour and business, in that at least one organisation on each side is consulted. This situation applies to Austria, Belgium, Denmark, Finland, Italy, the Netherlands, Portugal, Romania, Slovenia, Sweden and the UK. In Germany and Spain consultation rights are attributed to only one side, while on the other side no organisation is consulted. For France, no evidence can be provided in this respect due to a lack of information for one interest organisation on the employer side (FFTM).

Tripartite participation

The findings reveal that genuine sector-specific tripartite bodies have been established in only two countries, Croatia and Finland. Table 19 in Annex 1 lists a total of three bodies – one in Croatia and two in Finland. The legal basis of these tripartite bodies is either a statute or an agreement between the parties involved. Their tasks are not fully clear in all cases, but are supposed to largely comprise advice to and consultation of administrative bodies dealing with a broad range of different matters. In terms of their scope of activities, Finland's Occupational Safety Sector Group of the Centre for Occupational Safety for the Textiles and Shoe Industry plans and executes training and information campaigns on safety issues in the broader textile, clothing and leather industry. Another body in Finland, the National Education and Training Committee for the Textile and Clothing Industry, monitors and evaluates sector-specific education and training programmes on behalf of the relevant authorities. In the case of the Sectoral Council for the Textile, Footwear, Leather and Rubber Industries of Croatia, unfortunately, no specification of activities has been provided. The fact that only three sector-specific tripartite bodies can be found is likely to result from two main characteristics of the tanning and leather sector: its small size in terms of both companies and employees and the poorly developed industrial relations structures in most of the 'new' Member States on the other hand.

Other bodies listed in some national contributions have not been taken into account in this study, because they are either bipartite rather than tripartite in terms of composition or sector-unspecific (in other words cross-sectoral) tripartite bodies for discussions on economic and social policy. These bodies may also address the sector, depending on the particular circumstances and issues that may arise. Sector-specific bipartite (rather than tripartite) bodies, which are composed of sector-related representatives of the two sides of industry, exist in a few countries and are dealing with issues such as health and safety (in the UK) and vocational training and education (in France and Italy).

3. European level of interest representation

At European level, eligibility for consultation and participation in the social dialogue is linked to three criteria, as defined by the European Commission Decision on the establishment of sectoral dialogue committees promoting the dialogue between the social partners at European level (98/500/EC).

To be admitted to the European sectoral social dialogue, social partner organisations must have the following attributes:

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

Regarding social dialogue, the constituent feature is the ability of such organisations to negotiate on behalf of their members and to conclude binding agreements. This section on European associations of the tanning and leather sector will analyse these organisations' membership domain, the composition of their membership and their ability to negotiate.

As outlined in greater detail below, the study presents detailed data on two sector-related European associations – namely IndustriAll Europe on the employee side and COTANCE on the employer side. Both of them are listed by the European Commission as a social partner organisation to be consulted under Article 154 of the TFEU. Hence, the following analysis will concentrate on these two organisations, while providing supplementary information on others that are linked to the sector's national industrial relations actors.

Membership domain

IndustriAll Europe is affiliated to the European Trade Union Confederation (ETUC). As the European Federation of Industry and Manufacturing Workers, it organises European employees in the manufacturing, mining and energy sectors of the economy. Hence, its membership domain is multisectoral and by far extends beyond the small tanning and leather sector and therefore overlaps with regard to the sector under observation.

On the employers' side, according to its name and [web page](#), COTANCE represents the interests of national associations of tanners and dressers of the European Union. In terms of business activities, COTANCE organises the entire tanning and leather industry as demarcated for the purpose of this study; therefore, its membership domain largely coincides with the sector under scrutiny. Moreover, according to its name, COTANCE only organises employer and business associations rather than individual companies. However COTANCE does also have one company as a direct member that is Scan-Hide of Denmark.

Membership composition

Members of IndustriAll Europe are found in countries beyond the 24 Member States examined in this study. However, this report considers only those 24 Member States. By contrast, COTANCE organises associations only within the 24 countries considered in this study. With regard to IndustriAll Europe whose membership domain overlaps relative to the sector under examination, only those members with a domain related to the tanning and leather sector are included in this overview report.

IndustriAll Europe

Table 20 in Annex 1 lists the sector-related trade unions that are members of IndustriAll Europe.⁷ At least one direct affiliation is recorded in 19 countries, that is all countries recording at least one sector-

⁷ It should be noted that the list of sector-related affiliates to IndustriAll Europe as compiled on the basis of the national reports largely differs from the list of sectoral members as provided by the

related trade union. In five of the 24 EU Member States considered in this study there is no sector-related trade union – namely in Bulgaria, the Czech Republic, Estonia, Greece and Poland. This means that all of the 19 EU Member States with sector-related trade unions are covered through affiliations to IndustriAll Europe (Table 10).

Multiple memberships occur in 10 countries, namely Austria, Belgium, Finland, France, Italy, the Netherlands, Portugal, Romania, Spain and Sweden. On aggregate, 36 of the 41 sector-related trade unions at national level are directly affiliated to IndustriAll. IndustriAll Europe thus covers about 88% of the trade unions listed in Table 14 and Table 15 in Annex 1. All IndustriAll Europe members listed except for SIND TOKG of Croatia, LIA of Latvia, LPIPS Solidarumas of Lithuania, FNV Procesindustrie and CNV Vakmensen of the Netherlands, SIMA of Portugal and ELA IE of Spain are involved in collective bargaining related to the tanning and leather sector. They thus cover collective bargaining in all of the 15 Member States where there is a sector-related trade union involved in collective bargaining (Table 10).

Insofar as available data on sectoral membership of the national trade unions provide sufficient information on their relative strength, it can be concluded that IndustriAll Europe tends to cover the sector's most important labour representatives. No cases of uncovered major trade unions in the sector can be identified. At least one trade union affiliated to IndustriAll Europe can be identified in all seven EU Member States that have a workforce larger than about 2,000 in the tanning and leather sector, except for Poland. In these six countries there is at least one IndustriAll Europe affiliate that is involved in sector-related collective bargaining. Likewise, on the employer side affiliations to COTANCE can be found in the same six countries; only Poland does not record any affiliation to COTANCE. Furthermore, the COTANCE affiliate of Germany does not engage in sector-related collective bargaining. This means such that COTANCE affiliates cover collective bargaining in five of the seven Member States with the largest sectoral employment (Austria, France, Italy, Portugal and Spain) (Table 9).

Table 9: Affiliations in EU Member States with largest tanning and leather production and employment (greater than 2,000), 2014

	Employment	At least one trade union affiliated to IndustriAll Europe	At least one IndustriAll Europe affiliate involved in CB	One employer organisation affiliated to COTANCE	COTANCE affiliate involved in CB
IT	22,511	Yes	Yes	Yes	Yes
ES	3,222	Yes	Yes	Yes	Yes
AT	2,362	Yes	Yes	Yes	Yes
PT	2,322	Yes	Yes	Yes	Yes
DE	2,274	Yes	Yes	Yes	No
PL	2,136	No	n/a	No	n/a

European federation itself. On the one hand, this report includes a number of national trade unions whose domain – according to Eurofound's Network of European Correspondents – is related to the tanning and leather sector, although they were not considered as sector-related members in the initial membership list provided by IndustriAll Europe. This involves unions such as GPA-djp of Austria, CSC-ACV, CGSLB-ACLVB, CNE and SETCa-BBTK of Belgium, CO-industri of Denmark, FEDECHIMIE and CMTE-CFTC of France, ELA IE of Spain and IF Metall and Unionen of Sweden. On the other hand, Bulgaria's FOSIL and Podkrepa, Estonia's FEIWTU, Lithuania's LLPPS and Poland's FNSZZPL are not taken into account in this report, even though they are reported to be a sector-related member by IndustriAll Europe itself, since – according to the respective national correspondents – they do not organise any members in the tanning and leather sector.

	Employment	At least one trade union affiliated to IndustriAll Europe	At least one IndustriAll Europe affiliate involved in CB	One employer organisation affiliated to COTANCE	COTANCE affiliate involved in CB
FR	1,928	Yes	Yes	Yes	Yes

Source: Network of Eurofound Correspondents national contributions to this study (2016–2017).

COTANCE

On the employer side, Table 21 in Annex 1 lists the members of COTANCE. This European employer organisation has one direct associational affiliate in 12 EU Member States (Austria, Belgium, Bulgaria, France, Germany, Italy, the Netherlands, Portugal, Romania, Spain, Sweden and the UK) and one indirect associational affiliate (AHLI) in Hungary. The latter organisation is indirectly affiliated to COTANCE via a lower-order unit, the Hungarian Association for Leather and Shoe Industry (BCE) which is not only affiliated to AHLI but also a direct member of COTANCE. Denmark records a direct company member of COTANCE, which is Scan-Hide. Since Scan-Hide is concomitantly affiliated to DI of Denmark, the latter employer organisation is considered as indirectly (via a lower-order unit, namely Scan-Hide) affiliated to COTANCE in this study.⁸ In two Member States, Finland and Slovenia, sector-related employer organisations exist but have no affiliation to COTANCE. In eight of the 24 countries considered in this study no sector-related employer organisations can be identified (Croatia, the Czech Republic, Estonia, Greece, Latvia, Lithuania, Poland and Slovakia).

Multiple memberships to COTANCE in individual countries do not occur. Table 17 in Annex 1 indicates that associations affiliated to COTANCE and unaffiliated associations co-exist in several countries, such as Austria, Germany, Italy, Sweden and the UK. As far as they are available, sectoral membership data of the respective organisations of these countries suggest that the most important associations are affiliated, even though some actors engaged in sector-related collective bargaining in these countries are not. This involves BIMB of Austria, ADL of Germany, Unionchimica of Italy, IKEM of Sweden and LPA of the UK. In Finland and Slovenia, the sector-related employer organisations are involved in sector-related collective bargaining, but not affiliated to COTANCE.

In six countries (Bulgaria, Germany, Hungary, the Netherlands, Sweden and the UK⁹) the COTANCE affiliate is not engaged in sector-related collective bargaining. In the remaining eight countries with direct or indirect affiliations to COTANCE (Austria, Belgium, Denmark, France, Italy, Portugal, Romania and Spain) the affiliates are genuine social partner organisations in that they engage in bargaining. This means that eight of the 14 COTANCE members are involved in sector-related collective bargaining, covering collective bargaining in eight of the 13 Member States that record an employer organisation involved in sector-related collective bargaining (Table 10).

As can be seen from Table 17 in Annex 1, seven sector-related employer organisations across the EU involved in sector-related collective bargaining are not affiliated to COTANCE. Hence, only a relatively small number of relevant national players within the sector are not under the umbrella of this European organisation. Affiliations to COTANCE represent 67% of the total of sector-related employer/business organisations, among which appear to be the most important social partner organisations in those Member States where affiliations are recorded.

⁸ The initial list of members provided by COTANCE does not contain Scan-Hide/DI of Denmark and AHLI of Hungary. However, COTANCE's updated [website](#) does..

⁹ In the case of the UK, it should be noted that the COTANCE member UKLF holds the secretariat for another sector-related employer organisation, the LPA, the latter being involved in sector-related multiemployer bargaining (but no member of COTANCE).

Table 10 summarises the membership structure of both IndustriAll Europe and COTANCE with regard to the tanning and leather sector. It indicates that IndustriAll Europe represents – on the employee side – a higher share of sector-related associations (88%) than COTANCE on the employer side (65%). Likewise, the share of countries covered through affiliations from these countries of all Member States with sector-related associations is higher for IndustriAll Europe (100%) than for COTANCE (87%). This also holds true when considering only those organisations involved in sector-related collective bargaining.

Table 10: Membership structure of IndustriAll Europe and COTANCE

	Number of organisations	Number of Member States with organisation(s)	Number of Member States with organisation(s) involved in collective bargaining
All sector-related trade unions	41	19	15
Affiliates of IndustriAll Europe	36	19	15
% affiliated	88%	100%	100%
All sector-related employer organisations	21	16	13
Affiliates of COTANCE (direct and indirect)	14	14	8
% affiliated	67%	87.5%	62%

Note: Percentages are rounded.

Source: Network of Eurofound Correspondents national reports (2016–2017).

Capacity to negotiate

The third criterion of representativeness at the European level refers to an organisation’s capacity to negotiate on behalf of its members.

On the side of organised labour, IndustriAll Europe is not equipped with an explicit permanent mandate to negotiate on behalf of its members in matters of the European social dialogue. Rather, the IndustriAll Europe Statutes provide for detailed mandate procedures in relation to the nominations of the sectoral social dialogue committees in various sectors. According to Appendix II of the Statutes, the ‘affiliates concerned can nominate members depending on the number of mandates in the working groups and plenary of the SSD. The delegation shall be composed taking into account sectoral and regional representativeness’. Moreover, the Appendix also stipulates the procedure for platforms and statements in the sectoral social dialogue, obliging the sectoral social dialogue members to ‘propose and prepare possible platforms and statements in close cooperation with the Secretariat’ of IndustriAll Europe. Thereby, the ‘members of the SSD shall act in line with the policies and procedures as agreed by the Executive Committee and Congress’ as the highest bodies within the European federation, in order to guarantee the participation of all national member unions in matters of the European social dialogue.

With regard to the internal mandate procedure for negotiations in the framework of the sectoral social dialogue, the Secretariat is responsible for informing the Executive Committee and the Social Dialogue Committee about the possibility of entering negotiations, while the ‘Executive Committee shall decide, in consultation with the Social Dialogue Committee members, whether negotiations should take place’. At the suggestion of the Secretariat the ‘decision on the platform for negotiations and the delegation shall be taken by the Executive Committee in consultation with the Social

Dialogue Committee and all the affiliates possibly via a written procedure and by a two-thirds majority'. Adoption of texts requires a qualified majority of at least two-thirds within the Executive Committee.

On the employer side, COTANCE and its relevant bodies is not equipped by its members with a general and permanent negotiating mandate in matters of the European social dialogue. The relevant bodies, in particular the Assembly General, decide on a case-by-case basis whether to engage in negotiations at European level and on the scope of the negotiating mandate. According to Article 16 of the Statutes, the 'Assembly is the decision body of the Confederation' and as such composed of 'the representatives of the national federations or individual tanner members'. Eventually, the affiliates have to sign and endorse all joint texts produced by the European social partners.

Finally, as a proof of the sectoral European social partner organisations' capacity to act, it should be noted that IndustriAll Europe and COTANCE have jointly produced a number of texts in the framework of social dialogue. Irrespective of their actual substance and effects in terms of collective employment regulation, the sectoral social partners at European level have proved quite productive in launching several initiatives and drawing up joint texts since 2000, producing 18 joint texts (Table 11). Most of these joint texts are non-binding joint declarations and statements addressed to the relevant European bodies and the public, dealing with various issues, such as the industry's image, (vocational) training, trade barriers, environmental issues and origin marking schemes.

Table 11: List of social dialogue texts jointly drawn up by the European social partners in the tanning and leather sector

Text title	Type of text	Year of signature
Manifesto of the social partners of the leather industry at EU level	Joint opinion	2015
Leather Industry's Social Partners' Joint Letter to Commission President Mr Juncker	Joint opinion	2014
Joint Declaration on the Defence of the European Leather Industry	Joint opinion	2014
Joint Statement on the Ban on Chromium(VI) in Leather and Leather Products	Joint opinion	2012
Joint Statement on the Free Trade Agreement between the EU and Ukraine	Joint opinion	2012
Joint Statement of the Social Partners of the European Leather Industry on the Greenpeace Report on the deforestation of the Amazon rain forest	Declaration	2009
Joint Declaration of the Social Partners of the European Leather Industry on the EU Origin Marking Scheme	Joint opinion	2006
Joint Declaration of the Social Partners of the European Leather Industry on EU Origin Marking Scheme – Proposal for a Council Regulation on the indication of the country of origin of certain products imported from third countries	Declaration	2006
Joint Declaration of the Social Partners of the European Leather Industry	Declaration	2005
Joint Declaration of the Social Partners on Mr Gazzoni's statement about tanneries in Corriere della Sera, 8 March 2005, p. 27	Joint opinion	2005

Text title	Type of text	Year of signature
Procedural rules of the sectoral dialogue committee in the leather/tanning sector	Procedural text	2004
EU Spring Summit: Contribution of the Social Partners of the European Leather Industry	Joint opinion	2004
Working document for the social partners on the social dialogue in the EU tanning sector	Tool	2003
Code of conduct in the leather and tanning sector	Code of conduct	2000
Programme d'action sociale	Joint opinion	2000
Contribution of the social partners in the leather industry to the preparation of the new social policy agenda	Joint opinion	2000
Lisbon Summit: contribution of the social partners of the European leather industry	Joint opinion	2000
Sectoral Dialogue Committee 'Tanning' Joint declaration by the social partners in the 'tanning sector' concerning, among other thing, training requirements in the context of modernising the organisation of work, improving the image of the sector and putting in place the observatory on industrial change	Joint opinion	2000

Source: European Commission, Social dialogue texts database.

Other European associations

To assess the weight of IndustriAll Europe and COTANCE, it is necessary to look at other European organisations that may represent the sector. This is done by reviewing other European organisations to which sector-related trade unions and employer organisations are affiliated.

The affiliations of the trade unions are listed in Table 15 in Annex 1. European organisations other than IndustriAll Europe represent eight of the 41 sector-related trade unions in six countries and thus a relatively small proportion of both unions and countries. All of these eight trade unions recording one or more affiliations to European organisations other than IndustriAll are simultaneously affiliated to the latter organisation. For practical reasons, only those European organisations which cover at least three trade unions are mentioned. This involves three organisations:

- Union Network International (UNI) Europa with four affiliations covering three countries;
- European Federation of Public Service Unions (EPSU), with three affiliations from three countries;
- European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT) with three affiliations in two countries.

Although the affiliations listed in Table 15 in Annex 1 are likely not to be exhaustive, this overview emphasises the principal status of IndustriAll Europe as the sector's labour representative at European level. This is not only due to the relatively low numbers of affiliations per organisation other than IndustriAll Europe, but also because the presence of these organisations usually results from the multisector domains of the respective trade unions.

A similar review of the membership of the national employer/business associations can be derived from Table 17 in Annex 1. All of them have no or only one affiliation to European associations other than COTANCE. Overall, not any 'alternative' European association with more than one affiliation can be identified. Nevertheless, one particular European organisation, namely the European Confederation of the Footwear Industry (CEC), is to be mentioned separately, since (in contrast to the

other alternative organisations) its membership domain may partially overlap with regard to the tanning and leather sector. CEC is the recognised European social partner organisation on the employer side in the footwear sector under the provisions of Article 154 of the TFEU. There is no indication that this organisation claims to represent businesses whose core activities are related to the tanning and leather rather than the footwear sector, and thus would contest the principal status of COTANCE in the tanning and leather sector. Moreover, in terms of both the number of affiliations and territorial coverage, CEC (or any other European organisation) does not challenge the position of COTANCE within the tanning and leather industry.

4. Conclusions

The European tanning and leather industry is a very small sector, employing no more than about 40,000 people. Most of the business activities are concentrated in a few countries, with Italy and Spain accounting for the largest production shares. The sector is facing increasing trade barriers in the access to raw materials and access to leather markets, and thus unfair competition from abroad, in particular Asia. Increasing competitive pressure as well as the reluctance of family members to take over the family business have resulted in cost-reduction and restructuring measures, including the closure of production sites and delocalisation of production abroad. As a consequence, employment in the sector fell by more than one-third in the decade after the millennium.

In terms of business structure, the sector is characterised by a high proportion of small and micro companies that are often family-run and which have – often through high specialisation in the top-quality segment of the market – proved to be more robust in times of crisis compared with their larger counterparts. In terms of the labour market, the vast majority of the sector's workforce enjoys standard employment relationships with permanent contracts. Male, lower-skilled, blue-collar workers prevail in the industry. Moreover, the sector faces an ageing workforce, due to severe difficulties in recruiting young and highly-skilled people.

The ongoing decline of the tanning and leather industry in terms of both businesses and employment has markedly disrupted the sector's industrial relations in several countries over the past one or two decades. This is mainly because the contraction of the industry has immediately affected the membership base of many of the sector's associations of interest representation and thus their capacity to act as relevant social partners.

While the 2009 representativeness study on the European social partners in the tanning and leather sector identified a clear majority of Member States with high collective bargaining coverage rates, regularly buttressed by the predominance of multiemployer agreements and strong social partner organisations, the situation appears to have significantly changed. The current study findings reveal that overall unionisation rates in the sector tend to be relatively low, which may be attributable to a multitude of factors, such as;

- the relatively low levels of qualification of the sector's workforce;
- the small size of most establishments (which consequently often do not meet the criteria for setting up workplace representation);
- the overall shrinkage of the sector.

Densities on the employer side, however, tend to be much higher. This may be explained by the fact that employer organisations – where they exist – frequently act in an unrivalled environment without any competitors for collective interest representation of domestic tanners and often benefit from a membership domain that is tailor-made for the tanning and leather industry.

Overall, in terms of industrial relations standards, the tanning and leather sector is characterised by a pronounced polarisation. In about half of the 24 Member States under consideration, comprising the 'old' EU15 (except for Greece) plus Slovenia, the sector's industrial relations are quite well organised, with high or even full collective bargaining coverage rates. On the other hand, a group of countries can be identified with no or only very moderate sector-related collective bargaining activities. This group mainly consists of the Member States that joined the EU in 2004, 2007 and 2014 with the exception of Slovenia. In these countries, representative social partner organisations are lacking on at least one of the two sides of industry. However, the findings do not suggest any correlation between the volume of production/turnover or the size of the sector in terms of employment on the one hand, and the extent/quality of organisation of industrial relations in the sector on the other. Accordingly, industrial relations in the group of the seven Member States with a sectoral employment larger than about 2,000 workers reflect the same polarisation along geographical and political boundaries as those in the total of the 24 Member States considered in this study.

Compared with the findings of the 2009 representativeness study on the tanning and leather sector, the share of countries with well-established industrial relations structures in the sector has diminished.

This is because in many Member States the social partner organisations have been weakened and in some of them, such as the Czech Republic, Greece, Portugal, Romania and Slovakia, relevant social partners (not necessarily all of them!) have lost their representativeness or vanished as a result of the sector's decrease in terms of companies and employees, such that effective (multiemployer) bargaining has been severely disrupted in these countries.

With regard to the European level social partner organisations, IndustriAll Europe and COTANCE tend to organise the most important national players in the sector. Through their affiliations, they cover 19 and 14 Member States, respectively, and represent almost 90% of the sector-related trade unions and two-thirds of the sector-related employer/business organisations, respectively.

Other European organisations challenging the position of IndustriAll Europe on the employee side and COTANCE on the employer side as the sector's unmatched representatives in social matters do not exist. Other European organisations may represent some individual sector-related trade unions and employer/business organisations, due to the latter's membership domains extending beyond the tanning and leather sector. However, such organisations do not claim to represent employees or businesses of the tanning and leather sector as such, and they clearly fall short of IndustriAll Europe and COTANCE in terms of both the number of affiliations and territorial coverage.

Thus, IndustriAll Europe and COTANCE can be regarded as the main and hitherto unchallenged EU-wide representatives of the sector's workforce and businesses. No other European organisations exist which can compare with them in terms of organising relevant sector-related trade unions and employer/business organisations across the EU Member States. In this respect, the situation has remained unchanged since 2009.

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Annex 1: Additional tables

Table 12: Total companies and employment in tanning and leather, 2009 and 2015 (or another comparable year)

Country	Year	Number of companies	Year	Total employment	Female employment	Female employment as % of total employment	Total sectoral employment as % of total employment in economy
AT	2009	36	2009	2,066	1,039	50%	0.05
AT	2014	30	2014	2,362	1,006	43%	0.06
BE	2009	189	2009	336	45	13%	0.007
BE	2015	152	2015	296	41	14%	0.006
BG	2009	31	2009	272	132	49%	0.01
BG	2014	22	2014	130	52	40%	0.01
CY	no						
CY	no						
CZ	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CZ	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DE	2009	15 ^a	2009	n.a.	n.a.	n.a.	n.a.
DE	2014	14 ^a	2015	n.a.	n.a.	n.a.	n.a.
DK	2009	10	2009	124	15	12%	0.0
DK	2013	7	2014	47	18	38%	0.0
EE	2009	8	2009	148	n.a.	n.a.	0.04
EE	2013	12	2014	142	n.a.	n.a.	0.03
EL	2009	n.a.	2009	n.a.	n.a.	n.a.	n.a.
EL	2015	n.a.	2015	n.a.	n.a.	n.a.	n.a.
ES	2009	n.a.	2009	n.a.	n.a.	n.a.	n.a.
ES	2015	n.a.	2015	n.a.	n.a.	n.a.	n.a.
FI	2009	41	2009	190	n.a.	n.a.	0.008
FI	2014	28	2014	144	n.a.	n.a.	0.006
FR	2009	125 ^b	2009	n.a.	n.a.	n.a.	n.a.
FR	2015	140 ^b	2015	n.a.	n.a.	n.a.	n.a.
HR	2009	16 ^b	2009	220	n.a.	n.a.	0.02
HR	2014	10 ^b	2014	151	n.a.	n.a.	0.01
HU	2009	n.a.	2009	n.a.	n.a.	n.a.	n.a.
HU	2015	34	2015	n.a.	n.a.	n.a.	n.a.
IE	no						
IE	no						
IT	2009	2,011	2009	24,098	n.a.	n.a.	0.11

Country	Year	Number of companies	Year	Total employment	Female employment	Female employment as % of total employment	Total sectoral employment as % of total employment in economy
IT	2014	1,878	2014	22,511	n.a.	n.a.	0.10
LT	2009	12	2009	231	n.a.	n.a.	0.02
LT	2014	11	2014	228	n.a.	n.a.	0.02
LU	no						
LU	no						
LV	2009	9	2009	65	33	51%	0.010
LV	2014	9	2014	43	22	51%	0.007
MT	no						
MT	no						
NL	2009	39	2009	515	n.a.	n.a.	n.a.
NL	2014	42	2014	439	n.a.	n.a.	n.a.
PL	2009	216	2009	2,353	n.a.	n.a.	0.1
PL	2014	209	2014	2,136	n.a.	n.a.	0.1
PT	2009	123	2009	3,532	n.a.	n.a.	0.1
PT	2015	100	2015	4,365	n.a.	n.a.	0.2
RO	2009	72	2009	n.a.	n.a.	n.a.	n.a.
RO	2014	49	2015	n.a.	n.a.	n.a.	n.a.
SE	2009	12	2009	302	n.a.	n.a.	n.a.
SE	2015	11	2014	251	n.a.	n.a.	n.a.
SI	2009	14	2009	276	98	36%	0.03
SI	2015	11	2015	265	158	60%	0.03
SK	2009	28	2009	700	300	43%	0.03
SK	2015	18	2015	500	0	0%	0.02
UK	2009	75	2009	1,400	100	7%	0.005
UK	2015	40 ^c	2015	1,200	300	25%	0.004

Note: n.a. = not available.^a Figure includes only companies with 20 or more employees.^b Figure does not include self-employed persons.^c 22 according to UKLF.

Source: Network of Eurofound Correspondents national contributions to this study (2016–2017), national statistics. For detailed description of sources please refer to the national reports.

Table 13: Total employees in tanning and leather, 2009 and 2015 (or another comparable year)

Country	Year	Total employees	Female employees	Female employees as % of total employees	Total sectoral employees as % of total employees in economy
AT	2009	2,043	1,039	51%	0.05
AT	2014	2,341	1,004	43%	0.06
BE	2009	154	23	15%	0.003
BE	2015	148	26	18%	0.003
BG	2009	252	127	50%	0.01
BG	2014	121	51	42%	0.01
CY					
CY					
CZ	n.a.	n.a.	n.a.	n.a.	n.a.
CZ	n.a.	n.a.	n.a.	n.a.	n.a.
DE	2009	n.a.	n.a.	n.a.	n.a.
DE	2015	n.a.	n.a.	n.a.	n.a.
DK	2009	116	15	13%	0.0
DK	2014	45	18	38%	0.0
EE	2009	148	n.a.	n.a.	0.04
EE	2013	145	n.a.	n.a.	0.03
ES	2009	n.a.	n.a.	n.a.	n.a.
EL	2009	n.a.	n.a.	n.a.	n.a.
EL	2015	n.a.	n.a.	n.a.	n.a.
ES	2015	n.a.	n.a.	n.a.	n.a.
FI	2009	n.a.	n.a.	n.a.	n.a.
FI	2015	n.a.	n.a.	n.a.	n.a.
FR	2009	1,908	586	31%	0.008
FR	2015	2,460	740	30%	0.009
HR	2009	203	n.a.	n.a.	0.02
HR	2014	145	n.a.	n.a.	0.01
HU	2009	n.a.	n.a.	n.a.	n.a.
HU	2015	~4,800	n.a.	n.a.	n.a.
IE					
IE					
IT	2008	23,283	n.a.	n.a.	0.14
IT	2014	20,287	n.a.	n.a.	0.12
LT	2009	229	n.a.	n.a.	0.02
LT	2014	225	n.a.	n.a.	0.02

Country	Year	Total employees	Female employees	Female employees as % of total employees	Total sectoral employees as % of total employees in economy
LU					
LU					
LV	2009	61	31	51%	0.010
LV	2014	42	21	50%	0.007
MT					
MT					
NL	2009	491	n.a.	n.a.	n.a.
NL	2015	420	n.a.	n.a.	n.a.
PL	2009	2,082	n.a.	n.a.	n.a.
PL	2014	1,906	n.a.	n.a.	n.a.
PT	2011	3,748	1,571	42%	0.1
PT	2015	n.a.	n.a.	n.a.	n.a.
RO	2009	n.a.	n.a.	n.a.	n.a.
RO	2015	n.a.	n.a.	n.a.	n.a.
SE	2009	294	n.a.	n.a.	0.0
SE	2013	254	n.a.	n.a.	0.0
SI	2009	269	98	36%	0.03
SI	2015	260	158	61%	0.03
SK	2009	700	300	43%	0.035
SK	2015	500	0	0%	0.024
UK	2009	1,400	100	7%	0.006
UK	2015	1,200	300	25%	0.005

Note: n.a. = not available.

Source: Network of Eurofound Correspondents national contributions to this study (2016–2017), national statistics. For detailed description of sources please refer to the national reports.

Table 14: Domain coverage, membership and density of trade unions in tanning and leather, 2015/16/17

	Trade union	Type of membership	Domain coverage*	Membership		Density	Members in largest companies
				Members active	Members sector active	Sector density (%)	
AT	PRO-GE	voluntary	SO	230,127 ^a	940	40%	yes
AT	GPA-djp	voluntary	SO	276,632 ^a	n.a.	n.a.	n.a.
BE	FGTB-ABVV	voluntary	SO	430,000	n.a.	n.a.	yes
BE	CSC-ACV	voluntary	SO	1,500,000	n.a.	n.a.	yes
BE	CGSLB-ACLVB	voluntary	O	300,000	10	7%	yes
BE	CNE	voluntary	SO	163,000	n.a.	n.a.	yes
BE	SETCa/BBTK	voluntary	SO	425,000	n.a.	n.a.	yes
BG	no						
CY	no						
CZ	no						
DE	IGBCE	voluntary	O	651,181 ^a	<1,000	<34%	yes
DK	CO-industri	voluntary	O	228,890	n.a.	n.a.	yes
EE	no						
ES	FICA-UGT	voluntary	O	250,000	300	n.a.	yes
EL	no						
ES	CCOO-Industria	voluntary	O	134,303	<1,503	n.a.	yes
ES	ELA IE	voluntary	SO	98,000	n.a.	n.a.	no
FI	TEAM	voluntary	SO	33,900	120	>80%	yes
FI	Pro	voluntary	SO	100,000	30	<20%	yes
FR	FS CFDT	voluntary	O	80,000	<60	2%	n.a.
FR	CGT-THC	voluntary	O	4,000	<100	<4%	yes
FR	FEDECHIMIE	voluntary	O	n.a.	<50	<2%	n.a.
FR	CFE-CGC FNAA	voluntary	O	n.a.	about 10	<1%	n.a.
FR	CMTE-CFTC	voluntary	O	n.a.	<10	<1%	n.a.
HR	SIND TOKG	voluntary	O	5,000	100	69%	yes
HU	BDSZ	voluntary	O	4,100	772	~16%	yes
IE	no						
IT	FILCTEM-CGIL	voluntary	O	224,447	n.a.	n.a.	yes
IT	FEMCA-CISL	voluntary	O	126,585	n.a.	n.a.	yes

	Trade union	Type of membership	Domain coverage*	Membership		Density	Members in largest companies
				Members active	Members sector active	Sector density (%)	
IT	UILTEC-UIL	voluntary	O	111,000	1,600	8%	yes
IT	UGL Chimici	voluntary	O	n.a.	n.a.	n.a.	yes
LT	LPIPS Solidarumas	voluntary	O	784	35	16%	yes
LU	no						
LV	LIA	voluntary	O	3,430	2	5%	n.a.
MT	no						
NL	FNV Procesindustrie	voluntary	O	33,000	34	8%	yes
NL	CNV Vakmensen	voluntary	O	160,000	12	3%	yes
PL	no						
PT	FESETE	voluntary	O	35,000	600	16%	yes
PT	SOIC	voluntary	S	n.a.	n.a.	n.a.	n.a.
PT	SOICB	voluntary	S	n.a.	n.a.	n.a.	n.a.
PT	SIMA	voluntary	O	n.a.	n.a.	n.a.	n.a.
RO	CONFPELT EX	voluntary	SO	3,000	850	n.a.	yes
RO	PELTRICON TEX FRATIA	n.a.	n.a.	1,700	n.a.	n.a.	n.a.
SE	IF Metall	voluntary	SO	250,500	n.a.	n.a.	yes
SE	Unionen	voluntary	SO	510,000	34	13%	yes
SE	Ledarna	voluntary	SO	92,000	16	6%	yes
SI	STUPIS	voluntary	O	n.a.	16	6%	yes
SK	IOZ	voluntary	O	10,159	10	2%	yes
UK	Community	voluntary	O	27,266 ^a	800	67%	yes

Note: n.a. = not available. * Domain coverage: C = Congruence; O = Overlap; SO = Sectional Overlap; S = Sectionalism (for details see Table 2);^a Figure includes non-active members

Source: Network of Eurofound Correspondents national contributions to this study (2016–2017), administrative data and estimates.

Table 15: Collective bargaining, consultation and affiliations of trade unions in tanning and leather, 2015/16/17

	Trade union	Collective bargaining (CB)*	CB coverage (total)**	Consultation/ frequency	<i>National and European affiliations***</i>
AT	PRO-GE	M	1,700	regularly	ÖGB; IndustriAll Europe, EFFAT
AT	GPA-djp	M	700	n.a.	ÖGB; IndustriAll Europe, EFFAT, EPSU, EFJ, UNI Europa
BE	FGTB-ABVV	M+S	148	ad hoc	ABVV; IndustriAll Europe
BE	CSC-ACV	M+S	148	regularly	IndustriAll Europe
BE	CGSLB-ACLVB	M+S	148	regularly	IndustriAll Europe
BE	CNE	M+S	n.a.	regularly	CSC-ACV; IndustriAll Europe, UNI Europa, EPSU, ETF
BE	SETCa/BBT K	M+S	n.a.	regularly	FGTB-ABVV; IndustriAll Europe, UNI Europa, CEC
BG	No				
CY	No				
CZ	No				
DE	IGBCE	M	<1,000	no	DGB; IndustriAll Europe
DK	CO-industri	M	110	ad hoc	LO; IndustriAll Europe
EE	No				
EL	No				
ES	FICA-UGT	M	2,200	no	UGT; IndustriAll Europe
ES	CCOO-Industria	M	2,200	no	CCOO; IndustriAll Europe
ES	ELA IE	no	0	no	IndustriAll Europe
FI	TEAM	M	150	no	SAK, TP; IndustriAll Europe
FI	Pro	M	30	ad hoc	STTK, SASK, TP; IndustriAll Europe
FR	FS CFTD	M+S	2,267	no	CFTD; IndustriAll Europe, UNI Europa
FR	CGT-THC	M+S	2,267	ad hoc	CGT; IndustriAll Europe
FR	FEDECHIMIE	M+S	2,267	no	CGT-FO; IndustriAll Europe
FR	CFE-CGC FNAA	M+S	2,267	no	CGE-CGC
FR	CMTE-CFTC	M+S	2,267	no	CFTC; IndustriAll Europe
HR	SIND TOKG	no	0	no	NHS; IndustriAll Europe
HU	BDSZ	S	2,000	no	MASZSZ; IndustriAll Europe
IE	No				

	Trade union	Collective bargaining (CB)*	CB coverage (total)**	Consultation/ frequency	<i>National and European affiliations***</i>
IT	FILCTEM-CGIL	M+S	22,000	n.a.	<i>CGIL</i> ; IndustriAll Europe, EPSU
IT	FEMCA-CISL	M+S	22,000	n.a.	<i>CISL</i> ; IndustriAll Europe
IT	UILTEC-UIL	M+S	22,000	ad hoc	<i>UIL</i> ; IndustriAll Europe
IT	UGL Chimici	M	n.a.	n.a.	<i>UGL</i>
LT	LPIPS Solidarumas	no	0	ad hoc	<i>LTU Solidarumas</i> ; IndustriAll Europe
LU	No				
LV	LIA	no	0	regularly	<i>LBAS</i> ; IndustriAll Europe, EFFAT
MT	No				
NL	FNV Procesindustrie	no	0	ad hoc	<i>FNV</i> ; IndustriAll Europe
NL	CNV Vakmensen	no	0	ad hoc	<i>CNV</i> ; IndustriAll Europe
PL	No				
PT	FESETE	M	1,841	ad hoc	<i>CGTP-IN</i> ; IndustriAll Europe
PT	SOIC	M	164	n.a.	
PT	SOICB	M	164	n.a.	
PT	SIMA	no	0	n.a.	IndustriAll Europe
RO	CONFPELT EX	S	n.a.	regularly	<i>Cartel Alfa</i> ; IndustriAll Europe
RO	PELTRICON TEX FRATIA	S	100	n.a.	IndustriAll Europe
SE	IF Metall	M	120	ad hoc	<i>LO</i> ; IndustriAll Europe
SE	Unionen	M	50	n.a.	<i>TCO</i> ; IndustriAll Europe
SE	Ledarna	M	50	n.a.	
SI	STUPIS	M	260	ad hoc	<i>ZSSS</i> ; IndustriAll Europe
SK	IOZ	S	320	regularly	<i>KOZ SR</i> ; IndustriAll Europe, EFBWW
UK	Community	M	1,050	ad hoc	<i>TUC, GFTU</i> ; IndustriAll Europe

Note: n.a. = not available. * Collective bargaining involvement: S = single-employer bargaining; M = multiemployer bargaining. ** Number of employees covered by collective agreements concluded by the union within the tanning and leather sector. *** National affiliations put in italics; for the national level, only cross-sectoral (i.e. peak-level) associations are listed; for the European level sectoral associations only.

Source: Network of Eurofound Correspondents national contributions to this study (2016–2017), administrative data and estimates.

Table 16: Domain coverage and membership of employer/business organisations in tanning and leather, 2015/16/17

	Employer organisation	Domain coverage*	Membership				
			Type	Companies	Companies in sector	Employees	Employees in sector
AT	FV TBSL	SO	obligatory	453	4	22,501	2,033
AT	BIMB	SO	obligatory	4,518	28	8,858	200
BE	UNITAN	C	voluntary	2	2	130	130
BG	BULFFHI	SO	voluntary	46	5	n.a.	n.a.
CY	no						
CZ	no						
DE	ADL	C	voluntary	16	16	1,174	1,174
DE	VDL	SO	voluntary	60	25	n.a.	3,000
DK	DI	O	voluntary	10,000	1	1,000,000	110
EE	no						
EL	no						
ES	ACEXPIEL	C	voluntary	51	51	1,441	1,441
FI	AFLSI	O	voluntary	24	4	1,100	100
FR	FFTM	C	voluntary	60	60	1,731	1,731
HR	no						
HU	AHLI	O	voluntary	n.a.	n.a.	n.a.	n.a.
IE	no						
IT	UNIC	C	voluntary	200	200	n.a.	n.a.
IT	Unionchimica	SO	voluntary	3,800	n.a.	n.a.	n.a.
LT	no						
LU	no						
LV	no						
MT	no						
NL	FNL	C	voluntary	13	13	260	260
PL	no						
PT	APIC	O	voluntary	46	40	2,000	1,960
RO	APPBR	C	voluntary	18	18	n.a.	n.a.
SE	SG	C	voluntary	4	4	200	200
SE	IKEM	O	voluntary	1,400	7	70,000	70
SI	ZDS-STU	O	voluntary	n.a.	n.a.	n.a.	n.a.
SK	no						
UK	LPA	C	voluntary	9	9	1,050	1,050
UK	UKLF	O	voluntary	30	20	2,700	1,200

Note: n.a. = not available. * Domain coverage: C = Congruence; O = Overlap; SO = Sectional Overlap; S = Sectionalism (For details see Table 2 / page 4).

Source: Network of Eurofound Correspondents national contributions to this study (2016–2017), administrative data and estimates.

Table 17: Density, collective bargaining, consultation and affiliations of employer/business organisations in tanning and leather, 2015/16/17

	Employer organisation	Density		Members in largest companies	Collective bargaining (CB)*	CB coverage**		Consultation/frequency	National and European affiliations***
		Companies	Employees			Companies	Employees		
		Sector (%)	Sector (%)						
AT	FV TBSL	13%	87%	yes	M	4	2,033	n.a.	WKÖ; COTANCE
AT	BIMB	93%	9%	no	M	28	200	regularly	WKÖ
BE	UNITAN	1%	88%	yes	M	2	110	regularly	FEB; COTANCE
BG	BULFFH I	23%	n.a.	yes	no	0	0	ad hoc	BIA; COTANCE
CY	no								
CZ	no								
DE	ADL	n.a.	n.a.	yes	M	16	1,174	no	BDA
DE	VDL	n.a.	n.a.	yes	no	0	0	ad hoc	BDI; COTANCE
DK	DI	14%	100%	yes	M	1	110	ad hoc	DA; (COTANCE)
EE	no								
EL	no								
ES	ACEXPI EL	n.a.	n.a.	yes	M	99	2,200	regularly	COTANCE
FI	AFLSI	14%	<69%	yes	M	4	<180	ad hoc	EK; CEC
FR	FFTM	43%	70%	yes	M	140	2,267	n.a.	CGPME; COTANCE
HR	no								
HU	AHLI	n.a.	n.a.	no	no	0	0	no	MGYOSZ; (COTANCE)
IE	no								
IT	UNIC	11%	n.a.	yes	M	1,243	17,843	regularly	Confindustria; COTANCE
IT	Unionchmica	n.a.	n.a.	no	M	n.a.	n.a.	n.a.	CONFAPI; CEA-PME
LT	no								
LU	no								

	Employer	Density		Members	Collect	CB coverage**		Consultati	<i>National and</i>
LV	no								
MT	no								
NL	FNL	31%	62%	yes	no	0	0	ad hoc	COTANCE
PL	no								
PT	APIC	40%	52%	yes	M	52	2,300	regularly	<i>AEP</i> ; COTANCE
RO	APPBR	37%	n.a.	yes	S	n.a.	n.a.	regularly	COTANCE
SE	SG	36%	79%	yes	no	0	0	ad hoc	COTANCE
SE	IKEM	64%	28%	yes	M	7	120	n.a.	<i>SN</i>
SI	ZDS- STU	n.a.	n.a.	yes	M	11	260	ad hoc	<i>ZDS</i>
SK	no								
UK	LPA	23%	88%	no	M	9	1,050	no	
UK	UKLF	50%	almost 100%	yes	no	0	0	regularly	COTANCE

Notes: n.a. = not available. * Collective bargaining involvement: S = single-employer bargaining; M = multiemployer bargaining. ** Number of companies/employees covered by collective agreements concluded by the employer organisation within the tanning and leather sector. *** National affiliations put in italics; for the national level, only cross-sectoral (i.e. peak-level) associations are listed; for the European level, sectoral associations only; affiliation put in parenthesis means indirect affiliation via lower-order unit.

Source: Network of Eurofound Correspondents national contributions to this study (2016–2017), administrative data and estimates.

Table 18: The system of sectoral collective bargaining (2017)

Country	Collective bargaining coverage (CBC) (%) (estimates)	Share of multiemployer bargaining (MEB) in total CBC (%) (estimates)	Extension practices ^a
AT	100%	100%	(2)
BE	100%	MEB prevailing	2
BG	0%	n.a.	n.a.
CY			
CZ	0%	n/a	n.a.
DE	80%	100%	0
DK	100%	100%	0
EE	0%	n.a.	n.a.
EL	0%	n.a.	n.a.
ES	100%	100%	2
FI	100%	100%	2
FR	100%	MEB prevailing	2
HR	0%	n.a.	n.a.
HU	42%	0%	n.a.
IE			
IT	100%	100% ^b	(2)
LT	0%	n.a.	n.a.
LU			
LV	0%	n.a.	n.a.
MT			
NL	n.a. ^c	n.a.	0
PL	0%	n.a.	n.a.
PT	60%-100%	100%	2
RO	n.a.	0%	n.a.
SE	70%	100%	0
SI	100%	100%	2
SK	64%	0%	0
UK	~88% ^d	100%	0

Notes: ^a 0 = no practice, 1 = limited/exceptional, 2 = pervasive. Cases of functional equivalents are put in parentheses. ^b Complemented by single-employer bargaining. ^c Sectoral agreement not renewed since 2010 and expired in 2012. (Part of) the sector covered through after-effect of the sectoral agreement and single-employer settlements. ^d 82% according to the latest UKLF estimate. CBC = collective bargaining coverage: employees covered as a percentage of the total number of employees in the sector; MEB = multiemployer bargaining; SEB = single-employer bargaining. Extension practices (including functional equivalents to extension provisions, i.e. obligatory membership and labour court rulings): n.a. = not available.

Source: Network of Eurofound Correspondents national contributions to this study (2016–2017), administrative data and estimates.

Table 19: Tripartite sector-specific boards of public policy, 2016–2017

Country	Name of the body and scope of activity	Origin	Trade unions participating	Business associations participating
FI	Occupational Safety Sector Group of the Centre for Occupational Safety for the Textile and Shoe Industry – plans and executes training and information campaigns concerning occupational safety in the textile, clothing, leather and footwear industries	Agreement	JHL, TEAM, PRO	YTL, AFLSI, FTF
FI	National Education and Training Committee for the Textile and Clothing Industry – monitors and evaluates sector-specific education and training and makes development proposals to authorities	Statutory	TEAM, PRO, OAJ	FTF, AFLSI, SY
HR	Sectoral Council for Textile, Footwear, Leather and Rubber Sectors	Agreement	SIND TOKG	HUP UTKI

Source: Network of Eurofound Correspondents national contributions to this study (2016–2017).

Table 20: IndustriAll Europe Membership (2017)⁺

Country	IndustriAll Europe
AT	PRO-GE*, GPA-djp*
BE	FGTB-ABVV*, CSC-ACV*, CGSLB-ACLVB*, CNE*, SETCa/BBTK*
BG	---
CY	---
CZ	---
DE	IGBCE*
DK	CO-industri*
EE	---
EL	---
ES	FICA-UGT*, CCOO-Industria*, ELA IE
FI	TEAM*, PRO*
FR	FS CFDT*, CGT-THC*, FEDECHIMIE*, CMTE-CFTC*
HR	SIND TOKG
HU	BDSZ*
IE	---
IT	FILCTEM-CGIL*, FEMCA-CISL*, UILTEC-UIL*
LT	LPIPS Solidarumas
LU	---
LV	LIA
MT	---
NL	FNV Procesindustrie, CNV Vakmensen
PL	---
PT	FESETE*, SIMA
RO	CONFPELTES*, PELTRICONTEX FRATIA*
SE	IF Metall*, Unionen*
SI	STUPIS*
SK	IOZ*
UK	Community*

Notes: + Membership list confined to the sector-related associations of the countries under consideration; * Involved in sector-related collective bargaining.

Source: Network of Eurofound Correspondents (NEC) national contributions to this study (2016–2017).

Table 21: COTANCE membership, 2017⁺

Country	COTANCE
AT	FV TBSL*
BE	UNITAN*
BG	BULFFHI
CY	---
CZ	---
DE	VDL
DK	(DI*)
EE	---
EL	---
ES	ACEXPIEL*
FI	---
FR	FFTM*
HR	---
HU	(AHLI)
IE	---
IT	UNIC*
LT	---
LU	---
LV	---
MT	---
NL	FNL
PL	---
PT	APIC*
RO	APPBR*
SE	SG
SI	---
SK	---
UK	UKLF

Notes: + Affiliation put in parenthesis means indirect affiliation via lower-order unit. In the case of Denmark's DI, this association is indirectly affiliated to COTANCE via its individual company member Scan Hide, which is simultaneously affiliated to COTANCE.

* Involved in sector-related collective bargaining.

Source: Network of Eurofound Correspondents national contributions to this study (2016–2017).

Table 22: Trade unions listed in the national reports but not included in this study

Country	Trade union	Reason for non-inclusion
BG	FOSIL – Federation of Independent Trade Union Organisations in the Light Industry	No members in the tanning and leather sector
BG	FLI Podkrepa – Federation of Light Industry Podkrepa	No members in the tanning and leather sector
CZ	OS TOK – Trade Union of Workers in the Textile, Clothing and Leather Industries of Bohemia and Moravia	No members in the tanning and leather sector
DK	IDA – Danish Society of Engineers	No members in the tanning and leather sector
EE	ETTAF – Federation of Estonian Industry Workers' Trade Unions	No members in the tanning and leather sector
EL	OEKIDE – Greek Textile, Clothing and Leather Workers' Federation	Neither affiliated to IndustryAll Europe nor involved in sector-related collective bargaining
LT	LLPPS – Lithuanian Trade Union of Manufacturing Workers	No members in the tanning and leather sector; neither affiliated to IndustriAll Europe nor involved in sector-related collective bargaining
PL	FNSZZPL – Federation of Independent Self-governing Trade Unions of the Light Industry	No members in the tanning and leather sector
PT	CESP – Union of Workers in Retail, Administration and Services of Portugal	Neither affiliated to IndustryAll Europe nor involved in sector-related collective bargaining
PT	SINDEQ – Union of Industries and Related Activities	No members in the tanning and leather sector
RO	Speranta – Trade Union of Hope	Neither affiliated to IndustryAll Europe nor involved in sector-related collective bargaining
SE	Sveriges Ingenjörer – Swedish Association of Graduate Engineers	No members in the tanning and leather sector
SE	Naturvetarna – Swedish Association of Professional Scientists	No members in the tanning and leather sector

Table 23: Employer organisations listed in the national reports but not included in this study

Country	Employer organisation	Reason for non-inclusion
CZ	COKA – Czech Footwear and Leather Association	No members in the tanning and leather sector
CZ	ATOK – Czech Association of Textile, Clothing and Leather Industries	No members in the tanning and leather sector
DE	HDS/L – Federal Association of the Footwear and Leather Industry	No members in the tanning and leather sector
EE	EK – Estonian Fur Association	Neither affiliated to COTANCE nor involved in sector-related collective bargaining
EL	HTA – Hellenic Tanners Association	Neither affiliated to COTANCE nor involved in sector-related collective bargaining
FI	AFT – Association of Finnish Tanners	Neither affiliated to COTANCE nor involved in sector-related collective bargaining
HR	HUP UTKI – Croatian Employers' Association of the Textile and Leather Industry	Neither affiliated to COTANCE nor involved in sector-related collective bargaining
LT	LATIA – Lithuanian Apparel and Textile Industry Association	Neither affiliated to COTANCE nor involved in sector-related collective bargaining
LT	LOGVA – Association of Lithuanian Leather Producers and Consumers	Neither affiliated to COTANCE nor involved in sector-related collective bargaining
LV	VRUA – Association of Textile, and Clothing Industry	No members in the tanning and leather sector; neither affiliated to COTANCE nor involved in sector-related collective bargaining
PL	OIBS – Polish Chamber of Leather Industry	Neither affiliated to COTANCE nor involved in sector-related collective bargaining
PL	SWP – Polish Textile Association	Neither affiliated to COTANCE nor involved in sector-related collective bargaining
SI	GZS-ZTOUPI – Chamber of Commerce and Industry of Slovenia – Textile, Clothing and Leather Processing Association	Neither affiliated to COTANCE nor involved in sector-related collective bargaining

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Annex 3: List of organisations and abbreviations

Country	Abbreviation	Full Name
AT	BIMB	Federal Guild of Fashion and Clothing Engineering
	FV TBSL	Austrian Association of the Textile, Clothing, Shoe and Leather Industry
	GPA-djp	Union of Salaried Employees, Graphical Workers and Journalists
	ÖGB	Austrian Trade Union Federation
	PRO-GE	Production Trade Union
	WKÖ	Austrian Federal Economic Chamber
BE	CGSLB-ACLVB	Federation of Liberal Trade Unions of Belgium
	CNE	National Federation of White-Collar Workers
	CSC-ACV	Confederation of Christian Trade Unions
	FEB	Belgian Companies Federation
	FGTB-ABVV	Belgian General Federation of Labour
	SETCa-BBTK	Belgian Union of White-collar, Technical and Executive Employees
	UNITAN	Belgian Federation of Tanning and Leather
BG	BIA	Bulgarian Industrial Association
	BULFFHI	Branch Union of Leather, Furriers, Footwear and Haberdashery Industries
CY	---	
CZ	---	
DE	ADL	Federal Employer Association for the German Leather Industry
	DGB	Confederation of German Trade Unions
	IGBCE	Mining, Chemicals and Energy Industrial Union
	VDL	German Leather Federation
DK	CO-industri	Central Organisation for Industrial Employees in Denmark
	DA	Confederation of Danish Employers
	DI	Confederation of Danish Industry
	LO	Danish Confederation of Trade Unions
EE	---	
EL	---	
ES	ACEXPIEL	Spanish Tanners Association
	CCOO	Trade Union Confederation of Workers' Commissions
	CCOO-INDUSTRIA	Trade Union Confederation of Workers' Commissions –
	ELA IE	Basque Workers' Solidarity
	FICA-UGT	Industry Federation and Agricultural Workers of the General Workers' Confederation

Country	Abbreviation	Full Name
	FICE	Spanish Federation of the Footwear Industry
	UGT	General Workers' Confederation
FI	AFLSI	Association of Finnish Leather and Shoe Industry
	EK	Confederation of Finnish Industries
	PRO	Trade Union PRO
	SAK	Central Organisation of Finnish Trade Unions
	SASK	Trade Union Solidarity Centre of Finland
	STTK	Finnish Confederation of Professionals
	TEAM	Industrial Union TEAM
	TP	Industrial Employees
FR	CFDT	French Democratic Confederation of Labour
	CFE-CGC	French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	CFE-CGC FNAA	French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff – National Agrofood Confederation
	CFTC	French Christian Workers' Confederation
	CGPME	
	CGT	General Confederation of Labour
	CGT-FO	General Confederation of Labour – Force ouvrière
	CGT-FO PCH	Federation of Pharmacy Trades and Laboratories of Analysis and Medical Biology, Leather and Clothing of the General Confederation of Labour – Force ouvrière
	CGT-THC	Textile, Clothing and Leather Federation of the General Confederation of Labour
	CMTE-CFTC	Chemicals, Mining, Textiles and Energy Federation of the French Christian Workers' Confederation
	CP CFE-CGC	Tanning and Leather Union of the French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	CSNB	National Federation of Bootmakers
	FEDECHIMIE	National Federation of Workers of the Nuclear, Rubber, Chemical, Leather and Skins, Oil, Plastics, Textile and Glass Industries
	FFTM	French Federation of Tanning Tawery
	FS CFDT	Services Federation of the French Democratic Confederation of Labour
HR	NHS	Independent Trade Union of Croatia
	SIND TOGK	Trade Union of Textile, Footwear, Leather and Rubber Sectors of Croatia
HU	AHLI	Association of Hungarian Light Industry

Country	Abbreviation	Full Name
	BDSZ	Mining, Energy and Industry Workers' Trade Union Confederation
	MASZSZ	Hungarian Trade Union Confederation
	MGYOSZ	Confederation of Hungarian Employers and Industrialists
IE	---	
IT	CGIL	General Confederation of Italian Workers
	CISL	Italian Confederation of Workers' Unions
	CONFAPI	Italian Confederation of Private Small and Medium-sized Enterprises
	Confindustria	General Confederation of Italian Industry
	FEMCA-CISL	Federation of Energy, Fashion, Chemical and Related Sector Workers
	FILCTEM-CGIL	Italian Federation of the Chemical, Textile, Energy and Manufacturing Workers
	UGL	General Union of Labour
	UGL Chimici	UGL National Federation of Chemical Workers
	UIL	Union of Italian Workers
	UILTEC-UIL	Italian Union of Textile, Energy and Chemical Workers
	UNIC	Italian Tanners Association
	Unionchimica	National Association of Small and Medium-sized Enterprises in the Chemical, Plastics, Rubber and Related Products Sector
LT	LPIPS Solidarumas	Lithuanian Trade Union of Industry Workers 'Solidarity'
	LTU Solidarumas	Lithuania Trade Union 'Solidarity'
LU	---	
LV	LBAS	Latvian Free Trade Union Confederation
	LIA	Latvian Industrial Workers Trade Union
MT	---	
NL	CNV	Christian Trade Union Federation
	FNV	Federation of Dutch Trade Unions
	FNV Procesindustrie	Federation of Dutch Trade Unions Processing Industry
	FNL	Federation of Dutch Leather Producers
PL	---	
PT	AEP	Entrepreneurial Association of Portugal
	APIC	Portuguese Leather Association
	CGTP-IN	General Confederation of Portuguese Workers
	FESETE	Federation of Unions of the Workers in Textile, Wool, Clothing, Shoe and Leather of Portugal
	SIMA	Union of Metal and Allied Industries

Country	Abbreviation	Full Name
	SOIC	Union of Workers in the Tanning Industry
	SOICB	Union of Workers in the Tanning Industry of Braga
RO	APPBR	Association of Leather and Fur Producers of Romania
	CNS Cartel Alfa	National Trade Union Confederation Cartel Alfa
	CNSLR Fratia	National Confederation of Free Trade Union Fraternity of Romania
	CONFPELTEX	Federation of Workers of the Light Industry
	PELTRICONTEX FRATIA	Federation PELTRICONTEX FRATIA
	Sfera Factor	Romanian Leather Manufacturers' Association
SE	IF Metall	Union of Metalworkers
	IKEM	Innovation and Chemical Industries in Sweden
	Ledarna	Confederation of Executives and Managerial Staff
	LO	Swedish Trade Union Confederation
	SG	Swedish Tanning Trade Association
	SN	Confederation of Swedish Enterprise
	TCO	Swedish Confederation of Professional Employees
	Unionen	Union of White-collar Workers
SI	STUPIS	Slovenian Trade Union of the Textile and Leather-processing Industry
	ZDS	Slovenian Employers' Association
	ZDS-STU	Slovenian Employers' Association – Section for the Textile and Leather Industry
	ZSSS	Association of Free Trade Unions of Slovenia
SK	IOZ	Integrated Trade Union Association
	KOZ SR	Central Confederation of Trade Unions
UK	Community	General Trade Union
	GFTU	General Federation of Trade Unions
	LPA	Leather Producers' Association
	TUC	Trades Union Congress
	UKLF	United Kingdom Leather Federation
EUROPE	CEA-PME	European Entrepreneurs – Confédération Européenne des Associations de Petites et Moyennes Entreprises
	CEC	European Confederation of the Footwear Industry
	CEC European Managers	CEC European Managers
	COTANCE	European Confederation of National Associations of Tanners and Dressers
	EFBWW	European Federation of Building and Woodworkers
	EFFAT	European Federation of Food, Agriculture and Tourism

Country	Abbreviation	Full Name
		Trade Unions
	EFJ	European Federation of Journalists
	EPSU	European Federation of Public Service Unions
	ETF	European Transport Workers' Federation
	IndustriAll Europe	IndustriAll European Trade Union
	UNI Europa	Union Network International – Europe

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