

Industrial relations

Representativeness of the European social partner organisations: Metal sector



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Contents

Country codes EU28	2
List of Tables and Figures.....	5
Introduction.....	7
Objectives of the study	7
European sectoral social dialogue committee for the metal sector.....	7
Definitions and methodology	8
Data collection.....	10
Quality assurance.....	10
The structure of the report	11
1. Economic background and employment trends in the sector	12
Employment trends since 2009.....	12
European metal sector workforce in 2015	14
Conclusions	16
2. National level of interest representation	17
Sector-relatedness of trade unions	17
Fragmentation of trade unions	19
Metal sector coverage and organisational density of trade unions	20
Trade union coverage of aerospace activities (NACE 30.3).....	24
Organisational density	25
Conclusions on sector-relatedness and sectoral coverage of metal sector trade unions	27
Trade union involvement in collective bargaining or social dialogue.....	27
Sector-relatedness of employer organisations	32
Fragmentation of employer organisations	34
Metal sector coverage of employer organisations and organisational density	35
Employer organisation coverage of the aerospace industries (NACE 30.3).....	38
Organisational density of employer organisations.....	38
Involvement of metal employer organisations in collective bargaining.....	39
Collective bargaining patterns and social dialogue practices	43
Participation in public policy.....	45
Trade unions or interest representations	46
Employer organisations or business associations	46
Tripartite and bipartite consultation.....	46
3. European level of interest representation.....	51
Membership domain of IndustriAll Europe.....	51
Membership domain of Ceemet.....	53
Metal sector representativeness of IndustriAll Europe and Ceemet.....	55
Other European trade union organisations	57
Other European employer organisations and EU business associations.....	60
Negotiating capacity of IndustriAll Europe and Ceemet.....	66
Effective participation of IndustriAll Europe and Ceemet in the metal European sectoral social dialogue committee.....	69

4. Representativeness of IndustriAll Europe and Ceemet in the Aerospace activities (NACE 30.3)	70
Aerospace activities covered by IndustriAll Europe membership domain.....	70
Aerospace industries covered by Ceemet membership domain	72
ASD Europe membership domain in Aerospace industries.....	73
Comparison of the ASD Europe and Ceemet aerospace membership domain.....	74
Comparing the membership domains of ASD Europe and of Ceemet	75
Conclusions on representativeness in the European aerospace industry	76
5. Conclusions	78
References.....	80
Annex 1: Details of individual organisations.....	81
Annex 2: Network of Eurofound Correspondents	105

List of tables and figures

Table 1: Demarcation of the metal sector with NACE codes
Table 2: Domain patterns of the members of an organisation
Table 3: Number and proportion of employees by NACE code, 2015
Table 4: Employment characteristics in the metal sector in the EU28, 2015
Table 5: Member States with the highest metal sector employment in 2015
Table 6: Countries where the proportion of the national workforce in the sector is highest
Table 7: Number of sector-related organisations per country, 2016–2017
Table 8: Demarcation of trade unions
Table 9: Reasons for fragmentation of trade unions
Table 10: NACE code coverage of trade unions
Table 11: Trade unions covering aerospace employees in their membership domain
Table 12: Sectoral density of trade unions per Member State
Table 13: Collective bargaining involvement of the 102 metal sector trade unions
Table 14: Demarcation of employer organisations
Table 15: NACE code coverage of employer organisations
Table 16: Employers organisations covering aerospace employees in their membership domain
Table 17: Sectoral density of employer organisations per Member State
Table 18: Collective bargaining involvement of employer organisations
Table 19: Collective bargaining, absolute figures
Table 20: Form/level of bargaining per country
Table 21: Collective bargaining coverage and collective bargaining level
Table 22: Consultation of organisations by country
Table 23: Tripartite and bipartite consultation per Member State
Table 24: Sector related trade unions in Member State affiliated to IndustriAll Europe
Table 25: Metal sector employer organisations affiliated to Ceemet and others not affiliated
Table 26: Membership structure in the metal sector of IndustriAll Europe and Ceemet
Table 27: Affiliations in Member States with largest metal sector employment, 2016
Table 28: Sector related trade unions affiliated to IndustriAll Europe
Table 29: Metal sector related employer organisations affiliated to other European associations
Table 30: Other EU associations with metal sector national employer organisations as member
Table 31: Agreed texts by Ceemet and IndustriAll Europe in the European social dialogue committee for the metal sector
Table 32: Sector related trade unions affiliated to IndustriAll Europe
Table 33: Metal sector employer organisations affiliated to Ceemet and other organisations not affiliated.
Table 34: Member States where Ceemet and ASD Europe represent aerospace industry
Table A1: List of abbreviations of trade union names
Table A2: Total companies and employment in the metal sector, 2010–2015 (approx.)
Table A3: Total employees in the metal sector, 2010–2015
Table A4: Collective bargaining, consultation and affiliations of trade unions in the metal sector, 2015–2017
Table A5: Domain coverage and membership of employer/business organisations in the metal sector

Table A6: Collective bargaining, consultation and affiliations of employer/business organisations in the metal sector, 2016

Table A7: The system of sectoral collective bargaining

Table A8: Reasons for fragmentation of trade unions

Table A9: Reasons for fragmentation of employer organisations

Table A10: Bipartite and tripartite sector specific boards

Table A11: IndustriALL Europe metal sector affiliates, 2017

Table A12: Ceemet membership, 2017

Table A13: Correspondents who contributed to the study

Figure 1: Four different types of sector relatedness

Figure 2: Evolution of employment, 2008–2016

Figure 3: Trends in the number of employees, 2010–2015 (difference in percentage)

Figure 4: Domain coverage of trade unions in the metal sector

Figure 5: Involvement of trade unions in different forms of collective bargaining (percentage of total)

Figure 6: Domain coverage of employer organisations in the metal sector

Figure 7: Involvement of employer organisations in different forms of collective bargaining (percentage of total)

Figure A1: Trends in the number of companies from 2010 to 2015 (difference in percentage)

Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners (that is, the trade unions and employer organisations) in the metal sector, and to show how they relate to the sector's European level organisations representing employees and employers. The report is divided into three parts: an overview of the economic specificities and the employment trends in the metal sector; an analysis of the social partner organisations in all the 28 EU Member States, and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

In this section, the objectives of the study are presented along with an introduction to the applied methodology. The context of this study is the European Sectoral Social Dialogue Committee (ESSDC) for the metal sector that was established in 2010.

Objectives of the study

Representativeness studies are conducted for three reasons:

- the European Commission's aims to confirm the representatives of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU);
- representativeness is a criterion to be eligible for setting up of an ESSDC, or the participation in one of them;
- representativeness means also having the capacity to negotiate agreements that can lead to an implementation by Council decision as provided by Article 155 of the TFEU.

Representativeness is defined by the Commission Decision on the establishment of European Sectoral Social Dialogue Committees (98/500/EC) (European Commission, 1998). It includes the following requirements for an organisation to be recognised as a representative European social partner organisation:

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

To accomplish the aim of the study, the study first identifies the relevant national social partner organisations in the metal 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 metal-'sector-related'. In terms of territorial coverage, the study includes the EU28.

European sectoral social dialogue committee for the metal sector

In 2006 Ceemet and the EMF¹ started an autonomous social dialogue structure with ad hoc working groups on 'competitiveness and employment' and on 'education and training'. This evolved into a permanent social dialogue body to 'seek to contribute to creating and maintaining an environment that ensures a competitive manufacturing sector able to deliver high quality and sustainable employment. Equipping workforces and companies in the metal sectors to meet the challenges arising from globalization and the need to cope with ever faster technological and organizational changes is of vital

¹ The EMF was the European Metalworkers' Federation. In 2012, it merged into IndustriAll Europe.

importance in this context' (ITC-ILO). Out of this cooperation, a formal European sectoral social dialogue committee was established on 14 January 2010 (European Commission, 2010).

Over the years, the cooperation of Ceemet and IndustriAll Europe in the European sectoral social dialogue committee for the metal sector, has resulted in a significant amount of activities and 15 agreed texts, including also views on European social dialogue in general. This illustrates the commitment to European social dialogue of both organisations separately, as well as their joint efforts in the committee. An example of this is the Ceemet position paper of March 2015 on the relaunch of European social dialogue (Ceemet, 2015). While in September 2016, IndustriAll Europe and Ceemet together agreed on 'how to promote a fit for purpose European sector social dialogue' (IndustriAll Europe, 2016).

In a letter of 2 February 2017, IndustriAll Europe and the Aerospace and Defence Industries Association of Europe requested the establishment of a European sectoral social dialogue committee for the aerospace sector. In the reply from the European Commission on 15 March 2017, reference was made to Commission decision 98/500/EC of 1998 (European Commission, 1998). As the existing metal sector already includes the manufacture of air and spacecraft and related machinery (NACE (rev.2) 30.3) the Commission did not see the need for a new committee. However, as promised in the Commission's reply, this representativeness study will look into the situation in more detail (in Chapter 4).

Definitions and methodology

The methodology applied is linked to the criteria identified in Commission Decision 98/500/EC: sector-relatedness, membership and organisational capacity. Each of these criteria will be defined successively here, starting with **sector-relatedness**, i.e. the demarcation of the metal sector.

In agreement with Ceemet, IndustriAll Europe and the Commission, the metal sector is described as covering the NACE² codes shown in Table 1.

Table 1: Demarcation of the metal sector with NACE codes

NACE codes	Corresponding economic activity	Detailed description
24.4	Manufacture of basic precious and other non-ferrous metals	24.41 Precious metals production; 24.42. Aluminium production; 24.43. Lead, zinc and tin production; 24.44. Copper production; 24.45. Other non-ferrous metal production; 24.46. Processing of nuclear fuel
25	Manufacture of fabricated metal products, except machinery and equipment	
26	Manufacture of computer, electronic and optical products	
27	Manufacture of electrical equipment	
28	Manufacture of machinery and equipment	
29	Manufacture of motor vehicles, trailers and semi-trailers	
30	Manufacture of other transport equipment	30.1 Building of ships and floating structures; 30.2. Manufacture of railway locomotives and rolling stock; 30.3 Manufacture of air and spacecraft and related machinery; 30.4. Manufacture of military fighting vehicles; 30.9. Manufacture of other transport equipment

Sources: Eurostat (2006), Eurostat (2008)

² NACE stands for the 'European statistical classification of economic activities'. Various NACE versions have been developed since 1970 and the version referred to in this report is NACE Rev 2.

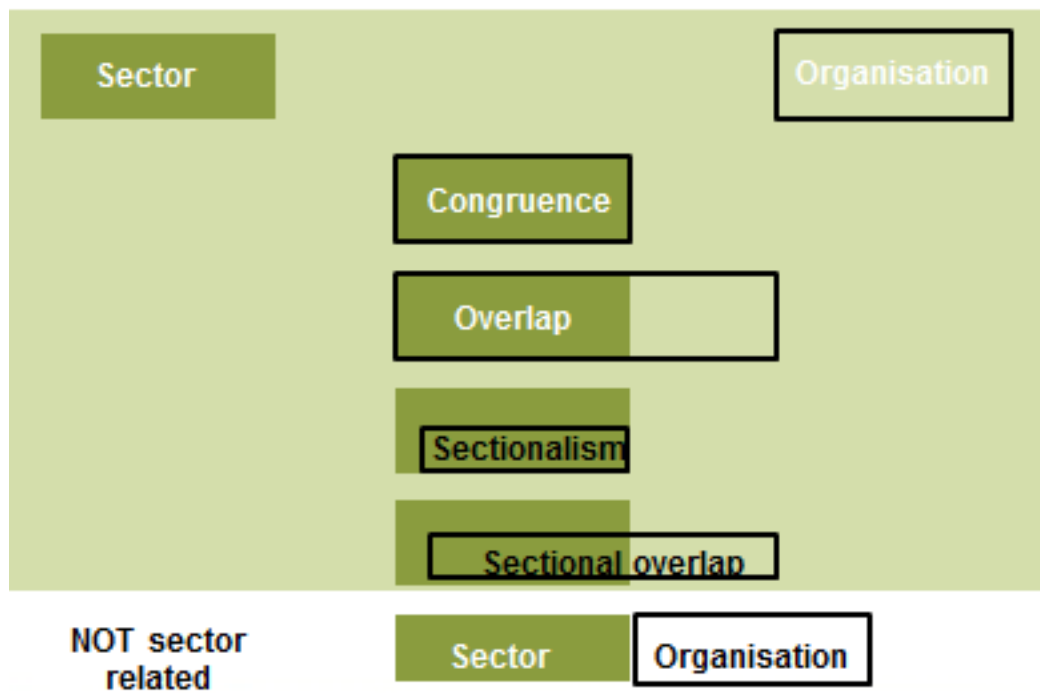
Both Table 2 and Figure 1 present the four different types of sector-relatedness. The membership domains of trade unions and employer organisations can coincide exactly with this demarcation of the sector, which is a type of sector-relatedness that we call ‘congruence’. If the membership domain of an organisation goes beyond the metal sector as described here, we call that an overlapping membership domain. ‘Sectional’ describes an organisation that covers a part of the metal sector (and nothing else), whereas ‘sectional overlapping’ is used to describe an organisation that covers part of the metal sector and has membership in other sectors.

Table 2: Domain patterns of the members of an organisation

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

Figure 1 presents the four different types of sector-relatedness graphically.

Figure 1: Four different types of sector-relatedness



Membership constitutes another important aspect of representativeness. There are two levels of membership to be looked at. First, the geographical coverage of the EU-level organisations (in how many Member States has the EU-level trade union/employer organisation affiliates?) and secondly,

the organisational density of the national affiliates. An important aspect to be looked at is the question of whether the EU-level players organise most of, or at least the strongest, national-level players, or whether there are major gaps.

Membership of a social partner organisation requires – as a rule – the payment of membership fees. However, some organisations are reluctant to inform third parties about such payments. Taking into account the limits of transparency, for the purposes of this study different membership statuses are not distinguished, and where possible indirect membership is also taken into account.

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

The involvement of their members in national-level collective bargaining is important, as it shows that the affiliates are able to obtain a mandate to negotiate on behalf of their members. Being able to do so, allows them to give this mandate further to the European level organisation and to implement agreements or other jointly agreed texts in an autonomous way. The capacity to act autonomously is important to contribute effectively to European Sectoral Social Dialogue.

Finally, representativeness also depends upon the **structures, resources and capacity of organisations to mobilise active participation of their members, aggregate different interests of member organisations and act autonomously at European level**. Effective participation in the European sectoral social dialogue committee is assessed in terms of presence at the meetings of the committee in the two-year period before the year of publication of this report. Internal structures within the European organisations to prepare committee meetings can increase efficiency and make organisations feel represented even if they are not among those directly participating in the meetings.

Data collection

The representativeness studies combine a top-down and a bottom-up approach. The top-down approach includes all sector-related affiliates of the European associations Ceemet and IndustriAll Europe. All these are included in the top-down approach in this study. The bottom-up approach looks for other organisations involved in steel-sector related collective bargaining in the Member States and their membership in European level organisations.

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

Thus, the quantitative data may stem from three sources:

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

Quality assurance

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of drawing up this study.

First, combining the top-down with the bottom-up approach, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents. Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions and, if necessary, asked the national correspondents to revise them.

An overview of the national contributions was made available to the European social partners, to allow their affiliates to double-check and comment. In addition, the national members of the Eurofound Governing Board were invited to check the consistency of the information in this report, so as to ensure that the bottom-up approach included all relevant sector-related organisations.

As different social partner organisations can see the information reported by other organisations in the same country and, if necessary, comment on the credibility or correctness of the information of other rival organisations, this process includes an element of mutual checking and recognition.

Draft versions of the overview report have been shared with Ceemet, IndustriAll Europe and the Commission for feedback and comments. The final report, taking into account these comments, was then evaluated and approved in Eurofound's Advisory Committee on Industrial Relations, which consists of representatives of both sides of industry, governments and the Commission, in the presence of the sectoral social partner organisations identified in the report.

The structure of the report

This report consists of four main parts. The first chapter looks into economic developments and specificities of the metal sector to better understand industrial relations in the sector. The second chapter takes stock of the national sector-related trade unions and employer organisations in the metal sector. The extent to which they cover the entire sector, their involvement in collective bargaining or social dialogue will be analysed there. The third chapter includes an assessment of the representativeness of the European social partners participating in the European sectoral social dialogue committee for the metal sector. The fourth chapter draws the conclusions.

1. Economic background and employment trends in the sector

The metal sector, as defined within the NACE classification system (Rev. 2, class 24.4, 25, 26, 27, 28, 29 and 30), makes up the largest industrial sector in Europe in terms both of jobs and of added value. In the EU, the metal industry accounts for 200,000 companies with some 13 million employees, mainly medium or highly skilled ones and spends 15% on R&D. It includes large parts of many European industries such as automotive, shipbuilding, electronics, machine tools, non-ferrous metals and many others. The sector is characterised by high export shares. As the metal industry produces many investment goods, the industry is exposed to substantial fluctuations in demand, along with business cycles and a strong dependence on world market developments such as metal and energy prices.

The characteristics of the labour force have traditionally echoed the archetype of industrial manufacturing – predominantly male and blue-collar, although this has been changing, with decreasing numbers of blue-collar workers. Proportionately fewer white-collar workers are organised in trade unions, although their membership numbers are growing in Europe, reflecting their growing importance in the sector (IndustriAll Global, n.d.). Blue-collars are still more highly unionised. Within the wider group of white-collar workers, it is clearly more difficult to unionise managers and professionals, as they often have a more personal, individual approach.

In 2008, the first signs of the Europe-wide economic crisis became apparent, which heavily affected the metal sector resulting in reduced production and consequent job losses. Particularly affected have been the production of motor vehicles and other transport equipment, the manufacture of basic metals and the manufacture of machinery. For the past 10 years, European policymaking has been focussed on restructuring and crisis management, while other countries outside the EU have been investing more in skills, infrastructure and R&D to increase their competitiveness. Since 2010, however, many European countries have seen growth in the sector or a return to pre-2008 levels. In Hungary for instance, by 2015, the sector had mostly recovered, and its production was higher than in 2008.

The crisis had a quite considerable effect on employment levels across Europe, with most countries noticing significant drops in the number of workers employed in the sector. In Belgium, for example, there was a decrease of 11% in aggregated employment in the sector between 2011 and the last quarter of 2014. However, several countries have noticed an increase in employment in the sector over the last few years.

In the metal sector, the effects on employment have been mixed, depending on the branch. The crisis also resulted in a range of other restructuring measures across the Member States, such as short-time working arrangements, moderate wage bargaining during the crisis period, and the use of other flexibilisation measures (such as opening clauses). In several Member States, this helped metal companies to weather the crisis and stabilise employment levels, and mass job reductions were avoided to some extent.

Employment trends since 2009

Tables A2 and A3 in Annex 1 give an overview of the developments in the sector from about 2009 to 2015. They present data from both national sources and Eurostat on the number of companies and employees in the sector, the proportion of female employees and how the sector relates to the national economy.

Figure 2 shows the nature of employment in the sector over the period 2008 to 2016. The level of employment by the end of 2016 was 12,668,865 compared with 13,375,500 in 2008. However, there has been a gradual increase in the levels of employment from the crisis of 2010.

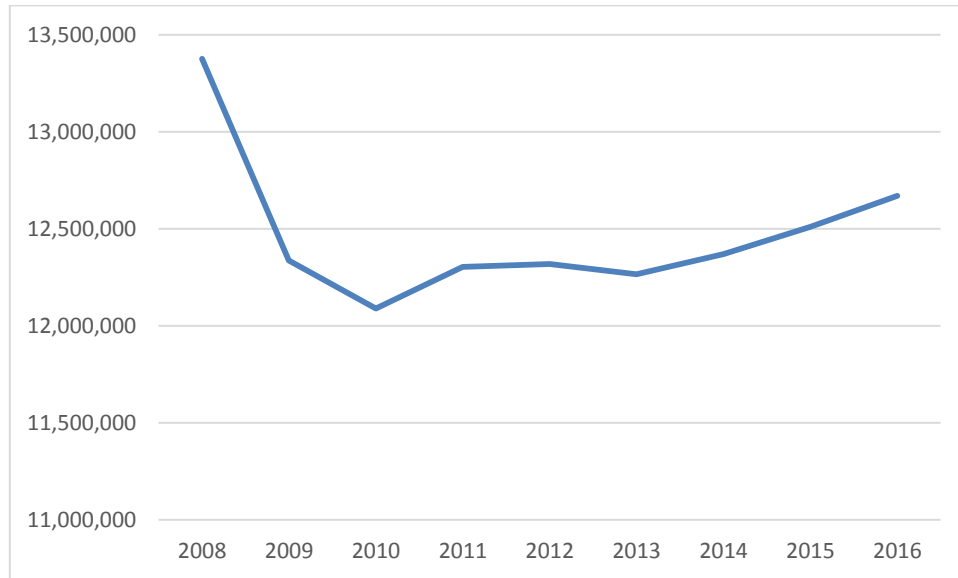
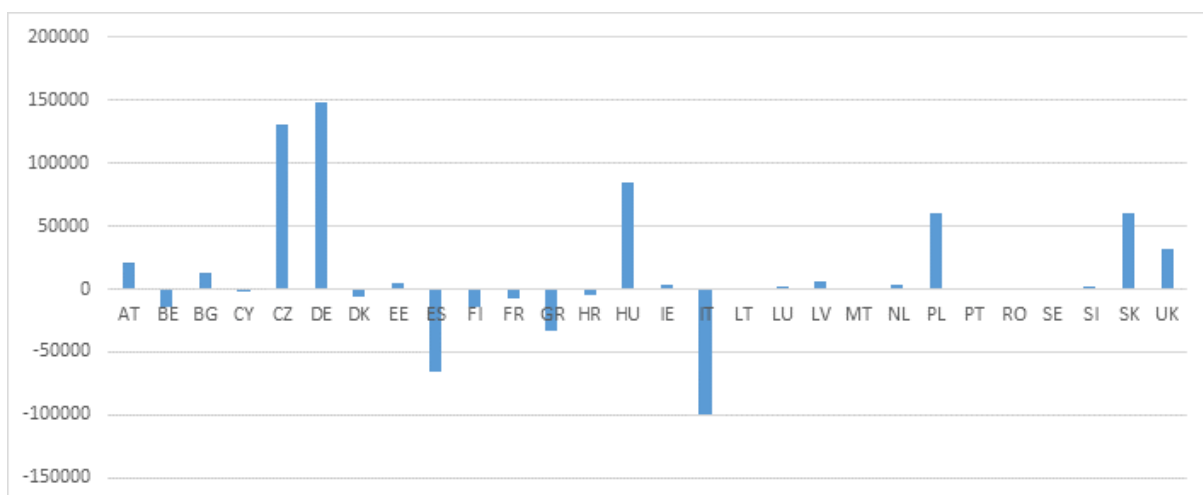
Figure 2: Evolution of employment, 2008–2016

Figure 2 shows that the level of employment in the metal sector was lowest in the years 2009 and 2010, with a recovery in 2015 and even more so in 2016. Figure 3 presents the difference between the years 2009 and 2010 in employment in the metal sector. We would thus expect to see significant increases of about 5 to 10% in employment between 2010 and 2015.

However, Figure 3 also demonstrates that not all Member States experienced an increase in the number of employees between 2010 and 2015. A large increase of almost 15,000 jobs was created in the metal sector in Germany and in the Czech Republic. An increase of about 6,000 to 8,000 jobs occurred in the metal sector in Hungary, Poland and Slovakia. But a reduction of more than 6,000 jobs occurred in Spain, and about 10,000 jobs were lost in the metal sector in the UK.

Figure 3: Trends in the number of employees, 2010–2015 (difference in percentage)

In 8 of the 28 Member States, the number of companies more or less increased. In 18 other countries, numbers declined. For some countries, the reliability of the data appears to be questionable. Nevertheless, a tendency of falling numbers of companies or business units can be observed in most

countries. Interestingly, in two Member States, the number of companies grew while employment fell: Spain and Romania. This may be explained by the fact that larger employers may have disappeared from the market or dismissed employees while some smaller companies (including one-person companies) emerged. The opposite is the case in Bulgaria, the Czech Republic, Germany, Hungary, Ireland, Slovenia and the UK.

European metal sector workforce in 2015

Within the sector, there are quite different levels of employment, depending upon the NACE code. Table 3 indicates the most recent employment figures based on the NACE code and the proportion of employees in the sector as a whole. The manufacture of fabricated metal products, except machinery and equipment (NACE 25) has over a quarter (28%) of employees in the sector. The manufacture of machinery and equipment (NACE 28) and manufacture of motor vehicles, trailers and semi-trailers (NACE 29) also make up large percentages of the total employment in the sector (24% and 20% respectively). According to the Eurostat data (2015), 388 978 employees worked in manufacture of air and spacecraft and related machinery (NACE rev.2 30.3), which corresponds to 3% of the entire European metal sector workforce.

Table 3: Number and proportion of employees by NACE code, 2015

NACE rev.2 code	24.4	25	26	27	28	29	NACE 30	
								30.3
No. of employees in the EU	199,127	3,338,972	973,306	1,410,000	2,878,349	2,425,564	738,757	
								388,978
Proportion of the total no. of employees in the metal sector	2%	28%	8%	12%	24%	20%	6%	
								3%

Source: Eurostat, 2015

Table 4 shows the employment characteristics of the metal sector in EU-28 countries, specifically the average number of employees per company. Most of the companies working within the metal sector are small or medium-sized enterprises (SMEs), of which the majority are family-owned or employ fewer than 50 people (EU-MERCI, n.d.). Table 4 demonstrates that this is the case, and that there are small variations in the size of companies among many of the Member States based upon the number of employees, although most countries have a small number of employees per company in the sector.

Table 4: Employment characteristics in the metal sector in the EU28, 2015

Member State	Number of companies	Total employment	Average workforce per company
AT	6,773	265,740	39
BE	3,231	155,728	48
BG	5,735	145,430	25
CY	1,348	4,480	3
CZ	113,172	716,300	6
DE	93,947	433,700	46
DK	5,823	117,063	20
EE	1,719	32,179	19
EL	16,351	65,516	4

ES	57,054	728,400	13
FI	7,444	133,524	18
FR	34,759	1,129,256	32
HR	5,386	68,867	13
HU	17,549	423,828	24
IE	3,757	78,900	21
IT	108,689	1,487,185	14
LT	2,142	n/a	n/a
LU	246	9,844	40
LV	1,613	23,339	14
MT	505	5,693	11
NL	18,175	272,000	15
PL	79,290	829,273	10
PT	15,185	169,962	11
RO	8,982	9,851	1
SE	17,379	n/a	n/a
SI	3,518	84,070	24
SK	31,851	30,3700	10
UK	48,625	1,152,000	24

The importance of the metal sector varies from country to country both in absolute numbers of employees and in terms of the proportion of the entire workforce of the country.

Table 5 illustrates the 10 Member States with the largest metal sector workforce. The list generally comprises larger Member States, such as Germany, France, Italy and the UK, which are likely to have a higher number of employees due to the relative size of the economy. A large number of employees can also be found in Poland, the Czech Republic, Spain and Hungary, indicating that the sector has significant importance in these Member States.

Table 5: Member States with the highest metal sector employment in 2015

Member State	Total employment	Total sectoral employment as percentage of total employment in economy
DE	4,337,000	10.8
IT	1,487,185	6.7
UK	1,152,000	3.7
FR	1,129,256	n/a
PL	829,273	5.2
ES	728,400	4.1
CZ	716,300	14.2
HU	423,828	10
SK	303,700	12.5
NL	272,000	3.1

Table 6 shows in which countries the proportion of the national workforce in the sector is the highest. In several countries, the metal sector makes up over 10% of the national workforce, suggesting that is an important sector to those Member States. In total, these 10 Member States account for over 80% of the total sectoral employment in Europe. The sector is of most relative importance to employment in the Czech Republic, Slovakia, Germany, Slovenia and Hungary, where the metal sector makes up over 10% of national employment, with 14% of the Czech workforce employed in the sector.

Table 6: Countries where the proportion of the national workforce in the sector is highest

Member State	Number of companies	Number of employees	Share of sectoral employees as percentage of the national workforce
CZ	113,172	716,300	14.2
SK	31,851	303,700	12.5
DE	93,947	4,337,000	10.8
SI	3,518	84,070	10.4
HU	17,549	423,828	10
EE	1,719	32,179	7.2
SE	17,379	+/- 357.500	7
IT	108,689	1,487,185	6.7

Although a large number of employees can be found in the UK and the Netherlands, the metal sector is of less relative importance to the share of the national workforce as a whole. In Greece and Cyprus, the share is the lowest of all Member States for which data are available. The sector has less relative importance also in Romania, Luxembourg, Lithuania, Malta and Latvia (all under 4% of the national workforce).

Conclusions

To summarise this chapter, the European metal sector accounts for a workforce of 13 million people, standing for an important share of the national labour force in certain countries, especially for those for which the share exceeds 10%.

The economic crisis has had different impacts in the various Member States. Therefore, different trends can be distinguished according to countries. During the five-year period studied, employment in the sector increased in 13 countries but decreased in 11.

There is a negative common trend regarding the number of companies established in the sector. This was particularly true for Slovenia and Ireland, where the number of companies decreased by 24% and 23% respectively. However, in a few countries, the number of companies rocketed during the same period, reaching a 40% increase in the case of Latvia.

The effect of the crisis on the characteristics of employment in the metal sector is that, as indicated by the 2015 statistics, there is a relatively low average of employees per company. For some countries, this situation entails a new collective bargaining context that brings with it new opportunities and challenges for trade unions and employer organisations in the metal sector. Historically, collective bargaining agreements reached in the metal sector may have a pattern-setting function for bargaining rounds in other industrial sectors in a number of countries.

2. National level of interest representation

This chapter presents an overview of the national-level trade unions and employer organisations within the scope of the metal sector. These are the affiliates of Ceemet and IndustriAll Europe (top-down data collection) but also all other national trade unions and employer organisations that have members in the sector and that are involved in sector-related collective bargaining (bottom-up data collection).

As such, 102 sector-related trade unions were identified in 28 Member States and 71 sector-related employer organisations were identified in 27 different Member States (Table 7).

Table 7: Number of sector-related organisations per country, 2016–2017

Number of sector-related organisations	Member States with respective number of trade unions	Member States with respective number of employer organisations
0	--	EE *
1	EE, EL, HR, LT, LV, SK	BE, CY, DK, ES, FI, HR, HU, IE, LT, LU, LV, UK
2	AT, CZ, DE, HU, LU, MT	DE, MT, SI
3	IE	EL, NL, PL, RO, SE, SK
4	CY, NL, PL, SE, SI	FR, PT
5	DK, FR, PT	AT, BG, CZ
6	BG, RO, UK	--
7	BE, ES, FI, IT	--
8	--	--
9	--	--
10	--	--
11	--	--
12	--	IT

**In Estonia, there are three employer organisations, although none of them is involved in sector-related collective bargaining. Nor is any of them affiliated to a European social partner organisation. Therefore, none of the three is included in the scope of this study.*

In all 28 Member States, there is at least one trade union and in 27 Member States, there is at least one employer organisation included in this study. In Estonia, there are three employer organisations, although none is involved in collective bargaining or is a member of a sector-related European organisation. On this basis, none of the three is included in the scope of this study. There are 1,719 companies active in the metal sector in Estonia. The Federation of Estonian Engineering Industry (EML) has 54 metal sector companies affiliated, the Estonian Electronic Industries Association counts 38 metal sector companies among its member organisations and the Estonian Constructional Steelwork Association (ET) has 21 metal sector companies in affiliation.

Sector-relatedness of trade unions

The trade unions' domain will first be assessed by classifying them according to the four patterns of sector-relatedness explained in the methodological section in the introduction. This information is available for all of the 102 metal sector trade unions.

Table 8: Demarcation of trade unions

Countries	Congruence	Sectionalism	Overlap	Sectional overlap
AT				PRO-GE, GPA-djp
BE			ACLVB / CGSLB	ACV-CSC METEA, LBC-NVK, SETCa-BBTK, CNE-GNC, MWB (FGTB), ABVV Metaal
BG		CITUB NTUF Metal-Electro, FTUMIC		Podkrepa SFMM (MET), NFTINI, SFOEMI, CITUB Metalicy
CY				OVIEK-SEK, SEMMHK-PEO, BUILDERS UNION PEO, BUILDERS UNION SEK
CZ		Odbory KOVO MB		OS KOVO
DE			IG Metall, CGM	
DK			Metal, 3F	HK/Privat, IDA, Dansk El-forbund
EE				IMTAL
EL				POEM
ES			CCOO de Industria, UGT FICA, FI-USO	ELA Industria y Construcción, LAB Industria, CIG-Industria, IC Industria
FI				Metalli, Pro, TEK, Union of Professional Engineers in Finland DIFF, Ekonomit, YTN
FR			FGMM-CFDT, FTM-CGT, FO Métaux, CFTC Métallurgie, CFE-CGC Métallurgie-FCMTM	
HR			SSSH SMH IS (MET)	
HU			MSZSZ VDSZ (CE)	VASAS
IE			SIPTU	TEEU ³ , Unite
IT			Fiom Cgil, Fim Cisl, Uil M, UGL metalmeccanici, Fismic	SAVT/MET, USAS/ASGB
LT			LMPSS (LPSK Litmetal)	
LU			OGBL, LCGB	
LV			LIA	
MT			GWU, UHM	
NL			FNV Bondgenoten, CNV Metaal	VHP2, De Unie

³ In 2017 TEEU amalgamated with UCATT to form CONNECT trade unions

PL		FZZ 'Metalowcy', ZZPE	Sekretariat Metalowców NSZZ „Solidarność”, ZZIT	
PT			FIEQUIMETAL, SINDEL, SIMA, FETESE, SITESE	
RO		FSCM	FNSSM, FSAR, FS ELECTRON M III	FSS METAROM, FSLI- METAL
SE				IF Metall, Unionen, Sveriges Ingenjörer, Ledarna
SI				SKEI, SKEIE-KS 90, KNSS, Solidarnost
SK			OZ Kovo	
UK			Unite	Community, GMB, RMT, Prospect, USDAW

Information provided for trade unions where data are available.

Fragmentation of trade unions

Fragmentation is where different organisations cover different segments of the metal sector. This makes those organisations complementary, as their membership domain is not overlapping. Pluralism, on the other hand, is where organisations co-exist with about the same membership domain, representing the same group of employees.

Fragmentation among trade unions is due to a number of different reasons. Different trade unions exist for blue- and white-collar workers in Austria, Belgium, Denmark, Finland, the Netherlands, Poland and Sweden. A specific professional group, such as engineers, also has a specific trade union in Sweden and Finland. Specific trade unions covering only a specific region, or a part of the country, contribute to trade union fragmentation in Belgium, Bulgaria, Spain and Italy. In two Member States (Belgium and Romania), there are trade unions not covering the entire sector, though this does not contribute to the fragmentation in the sector, as it is not the case that different trade unions cover completely different segments of the metal sector.

Examples of trade union pluralism can be found for example in Belgium, with different national cross-sector affiliations to either the socialist (ABVV-FGTB), the catholic (ACV-CSC) or the liberal (ACLVB-CGSLB) federation, or in the Netherlands with the catholic CNV. The pluralism in Spain, with the ideologically different cross-sector pillar organisations UGT and CC.OO, is another example, like the one in Italy with the ideologically different cross-sector pillar organisations CGIL, CISL and UIL. Table 9 summarises the information from Table A8 in the annex.

Table 9: Reasons for fragmentation of trade unions

Trade unions that only cover white- or blue-collar employees or a specific professional group of workers	Trade unions that do not cover the entire metal sector, only part of the NACE codes	Trade unions that only cover some parts of the country	Trade unions that only cover some types of companies or size classes
AT: PRO-GE, GPA-djp BE: ACV-CSC METEA, LBC-NVK, SETCa-BBTK, ABVV Metaal, CNE-GNC, MWB (FGTB)	BE: ABVV Metaal BG: Podkrepa SFMM (MET), NFTINI, SFOEMI, CITUB TU Metalicy CY: BUILDERS UNION PEO, BUILDERS UNION SEK	BE: CNE, LBC, ABVV Metaal, MWB (FGTB) BG: Podkrepa SFMM (MET), SFOEMI, CITUB TU	CY: OBIK-SEK, SEMMHK-PEO, BUILDERS UNION PEO, BUILDERS UNION SEK CZ: Odborový svaz

DK: HK/Privat, IDA, Dansk El-orbund FI: Metall, PRO, TEK, Union of Professional Engineers in Finland, DIFF, Ekonomit, YTN NL: De Unie, VHP2 SE: IF Metall, Unionen, Sveriges Ingenjörer, Ledarna	EE: IMTAL EL: POEM HU: VASA IE: Unite RO: FSS METAROM, FSLI-METAL SI: SKEI, SKEIE-KS 90, KNSS, Solidarnost UK: Community, GMB, National Union of Rail, Maritime and Transport Workers (RMT), Prospect, USDAW	Metalicy ES: ELA Industria y Construcción, LAB Industria, CIG-Industria, IC Industria IT: SAVT/MET, USAS/ASGB	KOVO (OS KOVO) SE: Unionen
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Metal sector coverage and organisational density of trade unions

For all 102 sector-related trade unions, information is available on the NACE code activities of the metal sector that they cover within their membership domain. Of them, there are 86 trade unions (67%) that cover all activities in the metal sector. In 23 Member States, there is at least one trade union covering all activities. Table 10 illustrates the NACE coverage of each trade union.

Table 10: NACE code coverage of trade unions

	Trade union	24.4	25	26	27	28	29	C30	30.3
AT	PRO-GE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	GPA-djp	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
BE	ACV-CSC METEA	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	ACLVB / CGSLB	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	LBC-NVK	Yes	Yes	Yes	Yes	Yes	Yes	Yes	n/a
	SETCa-BBTK	Yes	Yes	Yes	Yes	Yes	Yes	Yes	n/a
	ABVV Metaal	Yes	Yes	Yes	Yes	Yes	Yes	Yes	n/a
	CNE-GNC	Yes	Yes	Yes	Yes	Yes	Yes	Yes	n/a
	MWB (FGTB)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	n/a
BG	CITUB NTUF Metal-electro	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Podkrepa SFMM (MET)	No	Yes	Yes	Yes	Yes	Yes	No	No
	NFTINI	No	No	Yes	Yes	Yes	Yes	No	No
	SFOEMI	No	Yes	Yes	Yes	Yes	No	No	No
	CITUB TU Metalicy	Yes	Yes	No	No	No	No	No	No
	FTUMIC	No	No	No	No	No	No	Yes	Yes
CY	OBIK-SEK	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
	SEMMHK-PEO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
	BUILDERS UNION PEO	Yes	No	No	No	No	No	No	No
	BUILDERS UNION SEK	Yes	No	No	No	No	No	No	No
CZ	Odborový svaz KOVO (OS KOVO)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Representativeness of the European social partner organisations: Metal sector

	Odbory KOVO MB	No	No	No	No	Yes	Yes	No	No
DE	IG Metall	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	CGM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
DK	Metal	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	3F	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	HK/Privat	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	IDA	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Dansk El-forbund	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
EE	IMTAL	Yes	Yes	Yes	Yes	Yes	No	No	n/a
EL	POEM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
ES	CCOO de Industria	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	UGT-FICA	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	FI-USO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	ELA Industria y Construcción	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	LAB Industria	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	CIG-Industria	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	IC Industria	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
FI	Metalli (referred to as 'SAK Metall' in IndustriAll contacts) (since May 2017: Teollisuusliitto) ⁴	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Pro	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	TEK	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Insinööriliitto (Union of Professional Engineers in Finland)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	DIFF	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Ekonomit	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	YTN	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
FR	FGMM-CFDT	Yes	Yes	Yes	Yes	Yes	Yes	Yes	n/a
	FTM-CGT	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	FO Métaux	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	CFTC Métallurgie	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	CFE-CGC	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
HR	SSH SMH IS (MET)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	n/a
HU	VASAS	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	VDSZ	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No

⁴ *Metalli* (old names *Metalliliitto* or *Metallityöväen Liitto* = Finnish Metalworkers' Union) is since May 2017, due to a merger, called *Teollisuusliitto ry* (Finnish Industrial Union).

Representativeness of the European social partner organisations: Metal sector

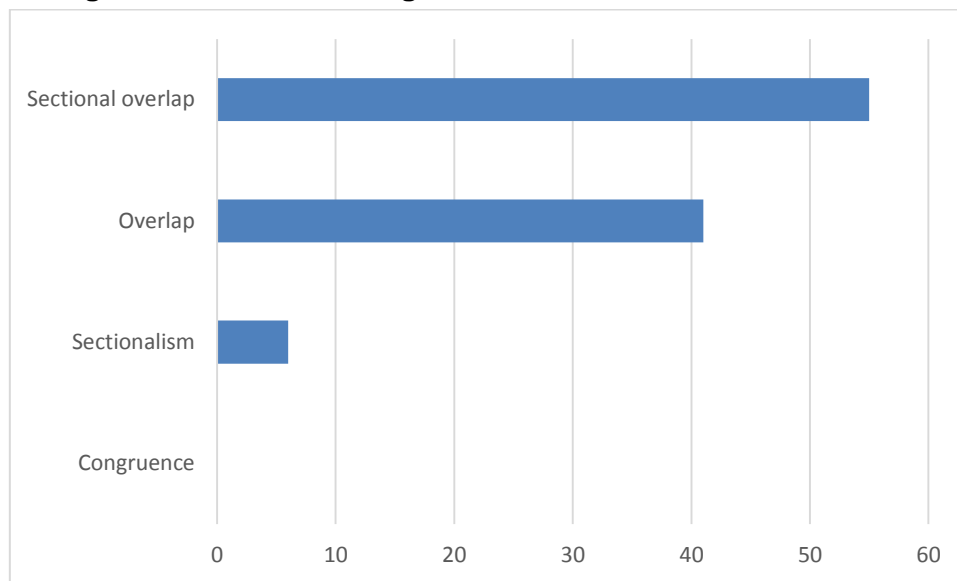
IE	SIPTU	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	TEEU ⁵	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes
	Unite	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes
IT	Fiom Cgil	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Fim Cisl	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Uilm Uil	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	UGL metalmeccanici	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Fismic	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	SAVT/MET	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	USAS/ASGB	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
LT	LMPSS (LPSK Litmetal)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
LU	OGBL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	LCGB	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
LV	LIA	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
MT	General Workers' Union (GWU)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Union Haddiema Maghqudin (UHM)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
NL	FNV	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	CNV Metaal	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	De Unie	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	VHP2	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
PL	Sekretariat Metalowców NSZZ „Solidarność”	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	FZZ ‘Metalowcy’	No	Yes	No	No	Yes	Yes	Yes	Yes
	ZZPE	No	Yes	Yes	No	Yes	No	Yes	Yes
	ZZIT	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
PT	FIEQUIMETAL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	SINDEL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	SIMA	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	FETESE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	SITESE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
RO	FNSSM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
	FSS METAROM	Yes	Yes	No	No	No	No	No	No
	FSLI-METAL (has become industriAll-BNS.)	No	Yes	No	Yes	Yes	Yes	Yes	Yes
	FSCM “Infratirea”	No	Yes	No	No	No	No	No	Yes

⁵ In 2017 TEEU amalgamated with UCATT to form CONNECT trade unions

Representativeness of the European social partner organisations: Metal sector

	FSAR	No	No	No	Yes	Yes	Yes	No	No
	FS ELECTRON M III	No	No	Yes	Yes	Yes	No	No	No
SE	IF Metall	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Unionen	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Sveriges Ingenjörer	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Ledarna	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
SI	SKEI	No	Yes	No	Yes	Yes	Yes	Yes	Yes
	SKEIE-KS 90	No	Yes	No	Yes	Yes	Yes	Yes	Yes
	KNSS	No	Yes	No	Yes	Yes	Yes	Yes	Yes
	Solidarnost	No	No	No	No	No	Yes	No	No
SK	OZ Kovo	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
UK	Community	No	No	No	Yes	No	Yes	No	No
	GMB	No	No	No	No	No	Yes	Yes	Yes
	National Union of Rail, Maritime and Transport Workers (RMT)	No	No	No	No	No	No	Yes	No
	Prospect	No	No	No	No	No	No	Yes	Yes
	Union of Shop, Distributive and Allied Workers (USDAW)	No	No	Yes	Yes	No	No	No	No
	Unite the Union (Unite)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Among the countries where not all trade unions individually cover the whole sector, some present a landscape where the trade unions, although not fully covering the sector, comprise a large part of it. This is the case in Hungary, Ireland and Germany. In some other countries, such as the UK, Cyprus and the Czech Republic there are one or two trade unions covering most of the sector parts, combined with other trade unions covering a few NACE codes. In Romania and Bulgaria, there are some trade unions covering most of the sector, some others covering a considerable part of it and others covering a smaller part.

Figure 4: Domain coverage of trade unions in the metal sector

As Figure 4 and Table 8 illustrate, sectional overlap and overlapping membership domains are the most frequent among trade unions in the metal sector. In fact, none of the 102 trade unions has a membership domain that is congruent with the demarcation of the metal sector here.

There are 6 trade unions with a sectionalism membership domain.

For 55 trade unions, the domain pattern is sectional overlap (54%) while for 41 trade unions (40%), it is overlapping due to membership in other sectors. Overlapping membership domains are thus common for trade unions in the metal sector. Overlap occurs where general unions are the most important pattern of union organisation. In various cases, it arises when unions cover (nearly) all sectors of economic activity (GWU in Malta, CNV and FNV in the Netherlands as well as GMB and Unite in the UK). Overlap also results from domain demarcations that include further or adjacent domains in addition to the metal sector, which are, for example:

- other manufacturing industries (CCOO de Industria in Spain; IG Metall in Germany)
- the energy sector (SINDEL in Portugal)
- electrical workers (SIMA in Portugal).

Gathering together trade unions with a sectional or sectional overlapping membership domain, gives a total of 61 trade unions (60%) that do not cover all activities, employees, companies or parts of the country. In Austria, the two sectional overlapping trade unions, PRO-GE and GPA-djp are fully complementary as together they cover the entire metal sector. The ProduktionsGewerkschaft (PRO-GE) covers blue-collar workers, and the GPA-djp all other white-collar workers. Both trade unions have clearly separated membership domains without any overlap. Sometimes, the sectional domain covered is not complementary but the same. This is, for example, the case in Belgium where two trade unions represent blue-collar workers in the metal sector, or France, where the two trade unions CGT FTM métallurgie and FO Métaux represent blue-collar and white-collar workers in the entire metal industry.

Trade union coverage of aerospace activities (NACE 30.3)

The 389,000 employees in aerospace activities count for about 3% of the overall European workforce of the entire metal sector. It appears that the trade unions representing the employees in the aerospace sector are generally speaking the same ones that represent the workers in the entire metal sector. The two exceptions to this are FSCM infratirea in Romania and Prospect in the UK, which only cover aerospace industries, or only NACE 30.

For 75 of the 102 trade unions (74%), it is certain that they do also have members in the aerospace industries. Whereas 19 trade unions (19%) reported that they did not have members in aerospace

industries, and 8 others could not give any information on this. Almost all trade unions that cover NACE 30, do also cover aerospace activities (NACE 30.3). The six exceptions are OBIEK-SEK and SEMMHK PEO in Cyprus, CGM in Germany, VDSZ in Hungary, FNSSM in Romania and RMT in the UK.

From Table 11, we can see that in 15 Member States, all the sector-related trade unions have confirmed that they do also cover the NACE 30.3 aerospace activities. In Belgium, France and Croatia, there are trade unions for which there is no specific information/confirmation that they do cover NACE 30.3, but they reported that they covered the entire NACE 30, so it can be assumed that in those four countries too, all these trade unions have aerospace employees in their membership domain.

There are seven Member States in which some trade unions do include aerospace employees in their membership domain, while for Cyprus none of the four trade unions includes them, and the one Estonian trade union IMTAL did not provide any information regarding NACE 30.3. However, since it reported that it does not cover the entire NACE 30, we can assume that for Estonia too, the one trade union does not have aerospace employees in its membership domain.

Table 11: Trade unions covering aerospace employees in their membership domain

19 Member States where all trade unions do cover NACE 30.3	7 Member States where some trade unions do cover NACE 30.3, some others not	Member States where none of the trade unions cover NACE 30.3
AT, DK, EL, ES, FI, IE, IT, LT, LU, LV, MT, NL, PT, SE, SK	BG, CZ, DE, HU, RO, SI, UK	CY
Probably also in BE, FR, HR, PL		Probably also in EE

Note: this table assumes that there are aerospace activities in all 28 Member States, which may not be the case (or only to a limited extent) in, for example, Cyprus and Estonia.

In Bulgaria, two of the six trade unions have members among aerospace employees. There is CITUB NTUF metal electro, which does cover most of the metal sector, including aerospace employees, while FTUMIC only covers NACE 30, and none of the other parts of the metal sector. Whereas none of the other four Bulgarian metal sector trade unions covers aerospace employees in its membership domain.

The Czech Republic, Germany and Hungary each have one trade union that includes members among aerospace employees, while another trade union does not. Odborový svaz KOVO (OS KOVO) in the Czech Republic, IG Metall in Germany, and VASAS in Hungary are the trade unions including members in aerospace activities. Whereas Odbory KOVO MB, in the Czech Republic, CGM in Germany and VDSZ in Hungary are the ones that reported that they do not have members in aerospace activities in their country.

In Slovenia, there are four trade unions, of which three do cover aerospace employees. Solidarnost is the one that does not. In Romania and the UK, half of the trade unions studied have aerospace members, while the other half do not. In Romania, two of the four trade unions cover aerospace members, while in the UK three of the six do so.

Organisational density

Table 12 shows the cumulative membership strength, in the metal sector, of all trade unions together in a country. As Table 12 indicates, a lot of membership strength information is missing for many trade unions and for many countries. The numbers in Table 12 are those that are provided. Within each country, some trade unions may have more members than others. Unfortunately, the incompleteness of the available data does not allow a comparison of the relative membership strength of each individual trade union. The next section will consider the relevance of each trade union in the sector, as regards its involvement in sector-related collective bargaining.

Sectoral density in terms of companies, calculated for 14 countries for which data was available (see Table 15):

- 5 countries show a density of 1-10%.
- 4 countries show a density of 10-20%.
- 5 countries show a density higher than 20%.

Table 12: Sectoral density of trade unions per Member State

Countries	Total sector employees	Trade union members in the sector	Density
AT	261,501	n/a	n/a
BE	153,920	n/a	n/a
BG	140,688	n/a	n/a
CY	n/a	797	n/a
CZ	689,300	80,754	11.7%
DE	3,568,383	1,787,124 *	50.1%
DK	115,237	n/a	n/a
EE	31,915	1000	3.1%
EL	48,794	15,000	30.7%
ES	667,600	n/a	n/a
FI	1,129,256	190,635	16.9%
FR	n/a	n/a	n/a
HR	66,280	8,000	12.1%
HU	301,921	20,900	6.9%
IE	n/a	n/a	n/a
IT	1,345,267	n/a	n/a
LT	33,106	900	2.7%
LU	9,838	6,600	67.1%
LV	23,176	n/a	n/a
MT	5,323	n/a	n/a
NL	262,000	116,000	44.3%
PL	779,657	53,630	6.9%
PT	n/a	n/a	n/a
RO	395,000	n/a	n/a
SE	275,335	n/a	n/a
SI	80,372	10,100	12.6%
SK	285,600	25,500	8.9%
UK	1,099,600	319,775	29.1%

* IG Metall has about 2.2 million members, of whom about a half a million are no longer in active employment (retired workers). It can be assumed that this number also includes these retired workers, while for other countries the table only includes active members.

Conclusions on sector-relatedness and sectoral coverage of metal sector trade unions

To summarise, there are 102 sector-related trade unions, of which 86 (67%) cover all activities in the metal sector. In 23 Member States, there is at least one trade union covering all activities. In each Member State there is at least one metal sector trade union. The sectoral domain types that occur most are overlap and sectional overlap.

Generally speaking, all trade unions that have members in the aerospace industries also have members in most other parts of the metal sector. Only two trade unions are the exception here, as they cover only aerospace industries (NACE 30.3) or only NACE 30.

Trade union involvement in collective bargaining or social dialogue

In the previous section, the sector-relatedness and membership strength of trade unions was considered, while in this section their involvement in collective bargaining is analysed in Table 13. The two columns to the right of the trade unions' names show whether they are involved in multi-employer collective bargaining or single-employer bargaining. The percentage in the next column stands for the proportion of all employees in the sector in the country that is covered by a collective bargaining agreement. The column on the far right in Table 13 presents the number of employees covered by the collective bargaining agreements signed by the respective trade unions. A summarising overview of all this information is provided in Figure 6.

Four of the 102 trade unions are not involved in any kind of collective bargaining, which means that the other 98 (or 96%) do perform collective bargaining. In each of the 28 Member States, there is at least one trade union involved in collective bargaining. There are 66 trade unions (65%) from 18 different Member States that are involved in sector-related multi-employer bargaining.

Table 13: Collective bargaining involvement of the 102 metal sector trade unions

	Trade union	Multi-employer bargaining	Single-employer bargaining	Percentage covered	Number of workers covered by collective agreements (in absolute numbers)
AT	PRO-GE	x		100%	150,000
	GPA-djp	x			110,000
BE	ACV-CSC METEA	x	x	100%	122,719
	ACLVB / CGSLB	x	x		180,999
	LBC-NVK	x	x		65,600
	SETCa-BBTK	x	x		68,179
	ABVV Metaal	x	x		119,748
	CNE-GNC	x	x		68,179
	MWB (FGTB)	x	x		119,748
BG	CITUB NTUF Metal-electro	x		52%	58,000
	Podkrepa SFMM (MET)	x	x		58,000
	NFTINI	x	x		1,600
	SFOEMI	x	x		1,600

Representativeness of the European social partner organisations: Metal sector

	CITUB TU Metalicy	x	x		6,300
	FTUMIC				6,300
CY	OBIK-SEK		x	23%	621
	SEMMHK-PEO		x		863
	BUILDERS UNION PEO		x		53
	BUILDERS UNION SEK		x		53
CZ	Odborový svaz KOVO (OS KOVO)		x	9%	55,874
	Odbory KOVO MB		x		28,000
DE	IG Metall	x	x	53%	
	CGM		x		
DK	Metal	x		80%	79,225
	3F	x			79,225
	HK/Privat	x			79,225
	IDA				
	Dansk EI-forbund	x			79,225
EE	IMTAL		x	2%	
EL	POEM	x			27,500
ES	CCOO de Industria	x	x	17%	
	UGT-FICA	x	x		
	FI-USO	x	x		
	ELA Industria y Construcción	x	x		125,000
	LAB Industria	x	x		
	CIG-Industria	x	x		
	IC Industria	x	x		
FI	Metalli (since May 2017: Teollisuusliitto) ⁶	x		100%	
	Pro	x			23,000
	TEK		x		
	Union of Professional Engineers in Finland		x		
	DIFF		x		
	Ekonomit		x		
	YTN	x			55,000
FR	FGMM-CFDT	x	x	98%	340,621

⁶ *Metalli* (old names *Metalliliitto* or *Metallityöväen Liitto* = Finnish Metalworkers' Union) is since May 2017, due to a merger, called *Teollisuusliitto ry* (Finnish Industrial Union).

Teollisuusliitto ry is member of *IndustriAll*, according to the website.

Representativeness of the European social partner organisations: Metal sector

	FTM-CGT	x	x		1,377,629
	FO Métaux	x	x		134,621
	CFTC Métallurgie	x	x		134,0621
	CFE-CGC	x	x		134,0621
HR	SSH SMH IS (MET)		x	60%	35,000
HU	VASAS	x	x	32.5%	65,000
	VDSZ	x	x		70,000
IE	SIPTU		x	20%	6,000
	TEEU ⁷		x		6,000
	Unite		x		
IT	Fiom Cgil	x	x	n/a	1,500,000
	Fim Cisl	x	x		216,320
	Uilm Uil	x	x		1,500,000
	UGL metalmeccanici	x	x		1,500,000
	Fismic	x	x		1,500,000
	SAVT/MET	x	x		
	USAS/ASGB	x	x		
LT	LMPSS (LPSK Litmetal)		x		
LU	OGBL		x	70%	
	LCGB		x	70%	
LV	LIA	x	x		
MT	General Workers' Union (GWU) ⁸		x	58%	3,000
	Union Haddiema Maghqudin (UHM)		*		0
NL	FNV	x	X	90%	510,000
	CNV Metaal	x	X		510,000
	De Unie	x	X		510,000
	VHP2	x	X		510,000
PL	Sekretariat Metalowców NSZZ „Solidarność”	x	X	20%	
	FZZ ‘Metalowcy’	x	X		
	ZZPE	x	X		36,000
	ZZIT		X		

⁷ In 2017 TEEU amalgamated with UCATT to form CONNECT trade unions

⁸ The General Workers union (GWU) from Malta is affiliated to IndustriAll Europe, but according to the information provided it is not clear whether they are also affiliated for their members in the Metal sector.

Representativeness of the European social partner organisations: Metal sector

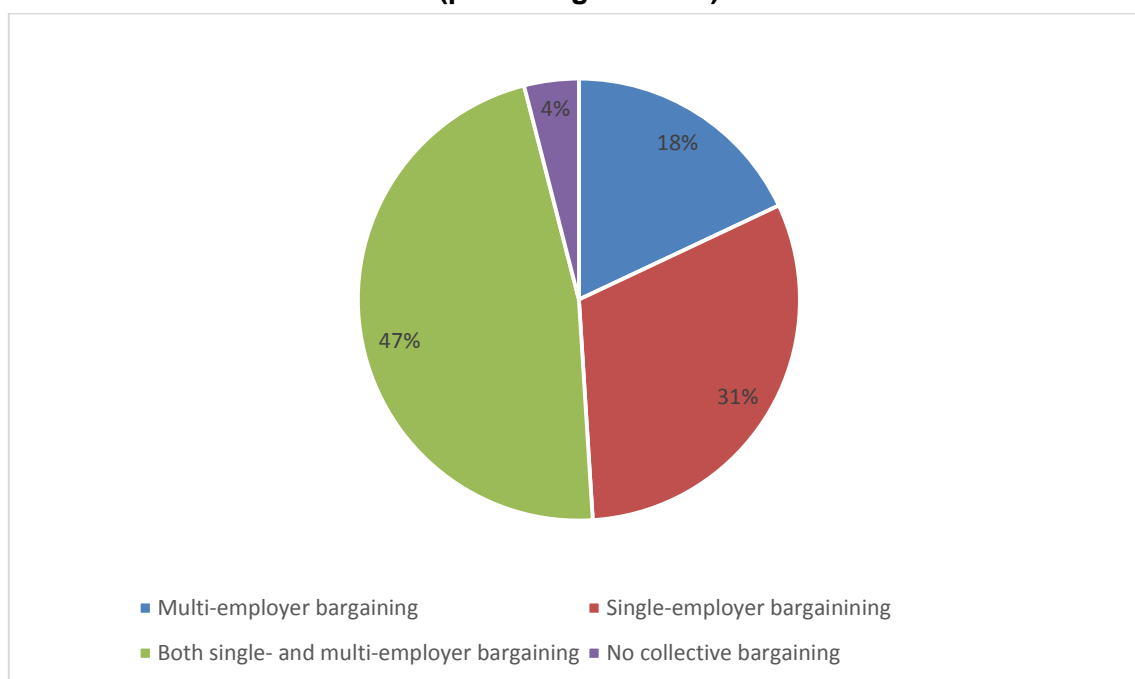
PT	FIEQUIMETAL	x	X	99%	15,000
	SINDEL	x	X		
	SIMA	x	X		
	FETESE	x	X		80,000
	SITESE	x	X		60,000
RO	FNSSM			50%	2,400
	FSS METAROM		x		18,300
	FSLI-METAL		x		3,000
	FSCM “Infratirea”		x		10,771
	FSAR		x		
	FS ELECTRON M III		x		
SE	IF Metall	x		90%	93,500
	Unionen	x			
	Sveriges Ingenjörer	x			
	Ledarna	x			
SI	SKEI	x	x	100%	73,601
	SKEIE-KS 90	x			73,601
	KNSS	x			73,601
	Solidarnost	x			73,601
SK	OZ Kovo	x	x	12.5%	25,500
UK	Community		x	25%	
	GMB		x		36,000
	National Union of Rail, Maritime and Transport Workers (RMT)		x		
	Prospect		x		19,000
	Union of Shop, Distributive and Allied Workers (USDAW)		x		1,250
	Unite the Union (Unite)		x		210,000

Note: The trade unions marked in red in the table are the ones that are not affiliated to IndustriAll Europe.

** In Malta there is only single-employer bargaining in the sector. Regarding the UHM, the second trade union from Malta, it was reported that there are no companies within the sector in which the trade union has at least 50%+1 of the employees as members, which is the threshold required for a trade union to be able to participate in collective bargaining in a particular company. Its inclusion here as a sector-related trade union can be justified through its affiliation to European trade union organisations ETUC (at cross-sector level) and Eurofedop (mostly in the public sector) and FERPA (for pensioners). As none of these three European affiliations is metal sector-related, the UHM's inclusion can also be questioned.*

As shown in Figure 5, nearly half of all trade unions are involved in both single- and multi-employer bargaining (47%). Single-employer bargaining is the only form of collective bargaining for 31% of all trade unions, with 18% only involved in multi-employer bargaining.

Figure 5: Involvement of trade unions in different forms of collective bargaining (percentage of total)



Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2015).

A wide heterogeneity can be found in the industrial relations landscape of the metal sector in the 28 Member States. In some countries, such as Cyprus, there are no agreements taking place at the sectoral level. This is also the case for Lithuania and Luxembourg, where agreements in the metal sector are exclusively organised at single-employer level. However, in other countries, collective bargaining takes place at multi-employer level as well as at single-employer level in individual companies, as is the case for Slovakia. In Belgium, where most large metal companies are represented in one business organisation, both collective bargaining at sector level and single-employer bargaining are common. Moreover, the metal sector in Belgium has a historic tradition of some particular sub-sector bargaining and bargaining by region. The same is true for Spain, where collective bargaining tends to happen at both national and regional level, coordinated by national and regional trade unions and an umbrella employer organisation in the sector and sub-sector. In France, for instance, collective agreements are usually negotiated on a regional level, except for some that are dealt with at national level, such as the agreement for engineers and managers in the metal sector. The differences in coverage can also be linked to business tradition, as in Croatia, where in privately owned and mostly small companies, trade unions are not present and collective bargaining does not exist and/or is sporadic.

In some Member States, the presence of collective bargaining in the metal sector is particularly strong. In Sweden, the organisation rate in the metal sector is high; coverage rate of collective agreements is estimated to be slightly higher than 90%. In Slovenia, all employees in the sector are covered by inter-sectoral collective agreements with extended validity, and 30% of employees are also covered by company collective agreements, which exist in 40-50% of companies. In Austria, where membership is compulsory for all employees, the collective bargaining coverage is 100%.

Coverage is also high in Germany, where 82% of the workers are covered by a collective agreement and those who are not covered hold managerial positions not covered by collective agreements.

There are different reasons for the absence or paucity of agreements in the metal sector among the countries studied. In Poland, employer organisations refuse to enter multi-employer collective bargaining. Collective agreements only cover sub-activities related to the defence and aviation industry. In Romania, collective agreements at branch level have expired, and single-employer agreements are taking over, now involving about 50% of employees covered in the metal sector. The case in Estonia is, however, that there is one trade union and few employer organisations in the sector. The result of this is several company-level agreements and no sectoral bargaining.

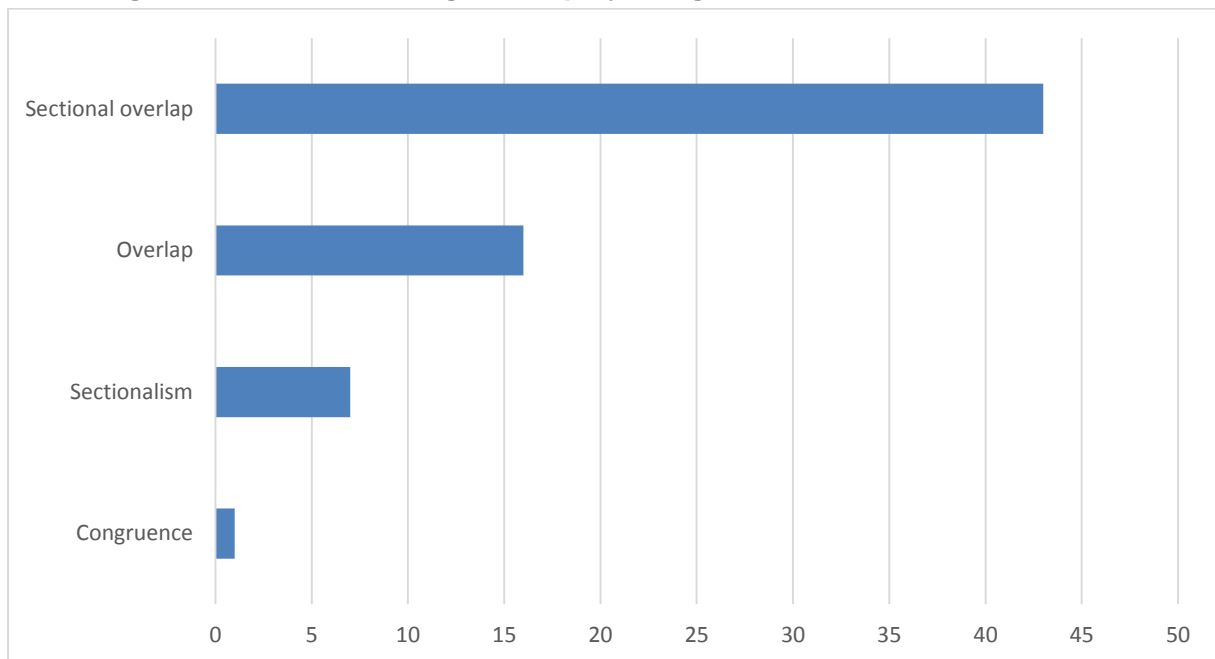
In many countries, the activities that fall under the metal sector are also represented by another sector. In Cyprus, for example, workers and employees in the metal sector are also covered by collective agreements concluded at company level. In Germany, collective agreements concluded by affiliates of the country's biggest trade union and employer organisations cover the metal as well as the electrical engineering sector.

The impact of the last economic crisis on collective bargaining differs in each country. In countries such as Sweden, Finland, the Netherlands, Slovakia and Poland, the economic crisis does not seem to have had a very significant impact on the social partner organisations. In other countries, such as Slovenia, trade unions report that collective bargaining continued also during the crisis, but that after the crisis, interest in social dialogue decreased. The employers prefer to negotiate at company level rather than the sectoral level, as they have a better negotiating position at the former level and can influence collective bargaining more. A similar case occurs in Estonia, where trade unions mention that it is difficult to conclude collective agreements, because on the one hand, the employers are not interested in concluding them, but on the other hand in some companies the trade union members themselves are afraid of concluding an agreement, as they feel under pressure to please the employer. In Spain, the crisis has accelerated a pattern among trade unions of having a federation of industry and a federation of services, sometimes split into public and private services. This is a trend already initiated before the crisis, but it has accelerated since its onset.

Sector-relatedness of employer organisations

Detailed data and information on employer organisations and corporate actors identified as relevant to this study are presented in Table A5 in Annex 1. The top-down and bottom-up screening carried out in the context of this study identified a total of 71 organisations in 27 Member States as relevant. No sector-related employer organisations are included for Estonia. None of the three Estonian employer organisations with members in the metal sector, the Federation of Estonian Engineering Industry (EML), the Estonian Electronic Industries Association and the Estonian Constructional Steelwork Association (ET) is involved in sector-related collective bargaining or affiliated to an EU social partner organisation. Therefore, none of them is included in this study.

Domain patterns of sector-relatedness show certain differences but also similarities to trade unions. While the pattern of sectional overlap is also the most frequent domain pattern of sector-relatedness, followed by overlap, one specific difference, compared with trade unions, is one employer organisation demarcating their domain pattern as congruent (BVM in Germany). A quite dominant domain pattern is overlap. Sectionalism occurs in seven employer organisations in five countries.

Figure 6: Domain coverage of employer organisations in the metal sector

Overlap is the second most frequent domain pattern of employer organisations in the metal sector, occurring in 20% of the cases (16 out of 67 organisations for which data is available). This results from the principle of employer associations organising not only companies of the metal sector but further activities within the metalworking and machinery industries, such as Gesamtmetall in Germany or Federmeccanica in Italy.

Sectionalism occurs in five countries – Austria, the Czech Republic, Greece, Portugal and Romania (in 10% of the cases, 7 out of 67 organisations for which data is available). In this study's sample, these seven relevant employer organisations are from countries where a multiple domain pattern exists. This usually results from the domain demarcation, which excludes some activities or subsectors within the metal sector.

Sectional overlap occurs with 64% of organisations (43 out of 67 organisations for which data are available in 16 countries). This mainly results from domain demarcations of employer organisations excluding certain activities or subsectors within the metal sector and, at the same time, representing companies of additional or adjacent sectors. There is a group of employer organisations that are regionally operating associations, representing companies in only one particular region within their country. Table 14 shows the reason for fragmentation in employer organisations that show sectional overlap.

Table 14: Demarcation of employer organisations

Countries	Congruence	Sectionalism	Overlap	Sectional overlap
AT		FVNE		FMMGI, FEEI, FVFI, WKO - BSI
BE			Agoria	
BG				BBKMB, BAMl
CY				SYMEBIK
CZ		Elektrotechnická asociace České republiky (EIA)		AutoSAP, ALV CR skoda Auto, a. s., AOBP
DE	BVM		Gesamtmetall	

Representativeness of the European social partner organisations: Metal sector

DK			DI	
EE				
EL		POVAS		GSEVEE, HASDIG
ES			Confemetal	
FI			Teknoliogiateollisuus	
FR			UIMM, GIM, UIMM MP	A3M
HR			HUP-UMI (CEA)	
HU				MAGEOSZ
IE			Ibec	
IT				Federmeccanica, Assital, Unionmeccanica – Confapi, CONFIMI Impresa meccanica, Cna Metalmeccanica di Produzione, Confartigianato, Casartigiani, CLAAI, ANCPPL, Federlavoro e servizi – Confcooperative, AGCI Produzione e Lavoro
LT			Linpra	
LU			Fedil Metal	
LV				MASOC
MT			Malta Employer Association (MEA), The Malta Chamber of Commerce, Enterprise and Industry (Malta Chamber)	
NL				FME, Metaalunie, Uneto-Vni
PL				ZPPPOiL, IGMNiR, SPPL
PT		ANEME, ANIMEE		FENAME, AIMMAP
RO		FEPA – CM, FP METALURGIA		APREL
SE			Teknikföretagen	Industriarbetsgivarna, IKEM
SI				ZKovI-GZS, ZDS
SK				ZSP SR, ZHTPG, ZEP SR
UK			EEF	

Fragmentation of employer organisations

Fragmentation on the employers' side is most of all explained by the fact that some employer organisations focus only on large companies, and others only on the SMEs (see Table A9 in Annex 1). This appears to be the case in Austria, the Czech Republic, Italy, Greece, the Netherlands, Poland, Portugal and Romania (marked in red in Table A9). That different employer organisations cover companies in different segments or economic activities of the metal sector appears to contribute to

fragmentation in Austria, Bulgaria, Cyprus, the Czech Republic, France, Greece, Hungary, Italy, Latvia, the Netherlands, Poland, Portugal, Sweden, Slovakia and Slovenia (marked in blue in Table A9).

Fragmentation also exists for employer organisations. A common occurrence is that employer organisations do not cover the entire sector as defined by the relevant NACE classifications. Limitations also exist on the types of enterprise that are covered. For example, in Poland IGMNiR only covers the manufacture of basic precious and other non-ferrous metals (NACE C24.4) and enterprises must have at least one year of presence in the manufacturing of non-ferrous metals and a recycling branch.

Metal sector coverage of employer organisations and organisational density

For all 70 sector-related employer organisations, information is available on the NACE code activities of the metal sector that they cover with their membership domain. Of them, 25 trade unions (36%) cover all activities in the metal sector. In 15 Member States, there is at least one employer organisation covering all activities. Table 15 illustrates the NACE coverage of each trade union.

Table 15: NACE code coverage of employer organisations

	Organisation	24.4	25	26	27	28	29	30	30.3
AT	FMMGI	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	FVNE	Yes	No	No	No	No	No	Yes	Yes
	FEEI	No	No	Yes	Yes	No	Yes	No	No
	FVFI	No	No	No	No	Yes	Yes	Yes	Yes
	WKO - BSI	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
BE	Ag	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
BG	BBCMB	No	Yes	Yes	No	Yes	Yes	Yes	Yes
	BASSEL	No	No	Yes	Yes	No	No	No	No
	BBAEII	No	No	Yes	Yes	No	No	No	No
	BAMI	Yes	No	No	No	No	No	No	No
	BDIA	No	No	No	Yes	No	Yes	Yes	Yes
CY	SYMEBIK	Yes	Yes	No	Yes	Yes	Yes	Yes	No
CZ	Sdružení automobilového průmyslu (AutoSAP)	No	No	Yes	Yes	Yes	Yes	Yes	No
	Elektrotechnická asociace České republiky (EIA)	No	No	Yes	Yes	No	No	No	No
	Asociace leteckých výrobců ČR (ALV ČR)	No	No	No	Yes	Yes	No	Yes	Yes
	skoda Auto, a. s.	No	No	No	No	No	Yes	No	No
	Asociace obranného a bezpečnostního průmyslu České republiky (AOBP)	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
DE	Gesamtmetall	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	BVM	No	Yes	No	No	Yes	No	No	No

Representativeness of the European social partner organisations: Metal sector

DK	DI	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
EL	GSEVEE	No	Yes	No	No	n/a	n/a	No	No
	POVAS	No	Yes	No	No	n/a	n/a	No	No
	HASDIG	No	Yes	Yes	No	No	Yes	Yes	Yes
ES	CONFEMETAL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
FI	Teknologiateollisuus	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
FR	UIMM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	GIM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	UIMM MP	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	A3M	Yes	No	No	No	No	No	No	No
HR	HUP-UMI (CEA)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	n/a
HU	MAGEOSZ	Yes	Yes	No	Yes	Yes	No	No	No
IE	Ibec	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
IT	Assolombardo	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Federmeccanica	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Assistal	No	Yes	No	Yes	No	No	No	No
	Unionmeccanica – Confapi	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	CONFIMI Impresa meccanica	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Cna Metalmeccanica di Produzione	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
	Confartigianato	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
	Casartigiani	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
	CLAAI	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
	ANCPL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Federlavoro e servizi - Confcooperative	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	AGCI Produzione e Lavoro	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
LT	Linpra	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
LU	Fedil Metal	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
LV	Masoc	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes
MT	Malta Employer Association (MEA)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	The Malta Chamber of Commerce, Enterprise and Industry (Malta Chamber)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
NL	FME	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Metaalunie	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes

	Uneto-Vni	No	No	Yes	Yes	No	No	No	No
PL	ZPPPOiL	No	Yes	No	No	Yes	No	Yes	Yes
	IGMNiR	Yes	No	No	No	No	No	No	No
	SPPL	No	No	No	No	n/a	No	Yes	Yes
PT	ANEME	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	FENAME	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	AIMMAP	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	ANIMEE	No	No	Yes	Yes	No	No	No	Yes
RO	FEPA - CM	No	Yes	No	No	Yes	Yes	Yes	No
	FP METALURGIA	Yes	Yes	No	No	No	No	No	No
	APREL	No	Yes	Yes	Yes	Yes	Yes	Yes	n/a
SE	Teknikföretagen	Yes	Yes	Yes	Yes	Yes	Yes	Yes	n/a
	Industriarbetsgivarna	Yes	Yes	No	No	No	No	No	No
	IKEM	Yes	Yes	Yes	Yes	No	Yes	Yes	No
SI	ZKovI-GZS	No	Yes	No	No	Yes	Yes	Yes	No
	ZDS	No	Yes	No	Yes	Yes	Yes	Yes	No
SK	ZSP SR	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	ZHTPG	Yes	No	No	No	No	No	No	No
	ZEP SR	No	Yes	Yes	Yes	No	No	No	No
UK	EEF	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

As Table 15 shows, while in some countries the tendency is to cover the whole sector or most of it, in others employer organisations cover few parts of it. In countries with one employer organisation operating in the sector, it tends to cover most of the sector. This the case for Cyprus, where the only employer organisation leaves NACE codes 26 and 30.3 uncovered. In Latvia, only NACE 26 remains uncovered by its only employer organisation. However, in Hungary, the only employer organisation present in the metal sector only covers half of it.

There is a wide heterogeneity concerning the coverage of employer organisations in countries with two, three and four employer organisations operating in the sector. In Slovenia, NACE codes 24.4, 26 and 30.3 are not covered by any employer organisation. The same is true for Greece regarding NACE codes 24.4 and 27 and for Poland for NACE codes 26, 27 and 29. In countries such as Germany, France, the Netherlands and Slovakia there exist notable differences of coverage by the employer organisations functioning in the sector. Some of them cover most of the sector whereas others cover only a small part of it.

In countries with five employer organisations, no NACE code is left uncovered, except for NACE code 25 in the Czech Republic. Overall, there are also important differences among the employers organisations in terms of coverage. In Austria, Bulgaria and the Czech Republic there are some employer organisations covering most of the sector, some others covering a considerable part of it and others still covering a smaller part.

The most striking case is Italy. Among its 11 employer organisations, there is a tendency to leave few NACE codes of the metal sector uncovered.

Employer organisation coverage of the aerospace industries (NACE 30.3)

From Table 16, we can see that in 12 Member States, all the sector-related employer organisations have confirmed that they do also cover the NACE 30.3 aerospace industries. For the one employer organisation in Croatia, there is no specific information/confirmation that they do cover NACE 30.3, but they reported that they cover the entire NACE 30, so that it can be assumed that for Croatia too, aerospace companies can be considered to be covered in their membership domain.

There are 12 other Member States in which some employer organisations do include aerospace companies in their membership domain, while Romania and Sweden each have three metal sector employer organisations, of which two reported that they did not cover NACE 30.3, while a third does cover NACE 30, implying that 30.3 is also covered. The employer organisations in Cyprus, Hungary and Slovenia reported that they do not cover aerospace industries. For Estonia, none of the three existing employer organisations with member companies in the metal sector are included in this study.

Table 16: Employer organisations covering aerospace employees in their membership domain

12 Member States where all employer organisations cover NACE 30.3	12 Member States where some employer organisations cover NACE 30.3, and others not	4 Member States where none of employer organisations cover NACE 30.3
BE, DK, ES, FI, IE, LT, LU, LV, MT, PT, UK	AT, BG, CZ, DE, EL, FR, IT, NL, PL, SK	CY, HU, SI
Probably also in HR	Probably also RO, SE	For EE there is no employer organisation included in this study

Note: this table assumes that there are aerospace activities in all 28 Member States, which may not be the case (or only to a limited extent) in, for example, Cyprus, Hungary, Slovenia and Estonia.

Organisational density of employer organisations

So far, each employer organisation has been considered to be equal, which of course is not the reality of the matter. In Table 17, the cumulative membership strength, in the metal sector, of each of the 70 metal sector employer organisations is shown. In the next section, in Table 18, a distinction is made between those involved in collective bargaining and those not.

The membership strength of employer organisations can be calculated in two different ways. One way is to divide the number of affiliated companies by the total number of companies in the sector. This method treats each individual company as equal, while in reality some companies are far more important for the sector than others. So the most meaningful approach is to combine the company-based calculation with a workforce-based calculation of organisational strength. This is done by dividing the total workforce of all the affiliated companies by the total number of employees within the sector.

Table 17: Sectoral density of employer organisations per Member State

Member State	Total of companies in the sector	Employer organisation members in the sector	Density
AT	6,773	n/a	n/a
BE	3,231	850	26.3%
BG	5,735	n/a	n/a
CY	1,348	49	3.6%
CZ	113,172	244	0.2%
DE	93,947	n/a	n/a

DK	5,823	1052	18.1%
EE	1,719	n/a	n/a
EL	16,351	n/a	n/a
ES	57,054	n/a	n/a
FI	7,444	1000	13.4%
FR	34,759	n/a	n/a
HR	5,386	83	1.5%
HU	17,549	34	0.19%
IE	3,757	10	0.3%
IT	108,689	n/a	n/a
LT	2,142	n/a	n/a
LU	246	30	12.2%
LV	1,613	140	8.7%
MT	505	88	17.4%
NL	18,175	18500	101.8%
PL	79,290	90	0.11%
PT	15,185	1208	8%
RO	8,982	n/a	n/a
SE	17,379	3492	20.1%
SI	3,518	n/a	n/a
SK	31,851	85	0.3%
UK	48,625	6000	12.3%

Not all the 70 sector-related employer organisations provided information on the number of member companies and on the total workforce of their member companies. For those employer organisations that provided this information, it is available in Table A5 in Annex 1. Table 17 sums up the membership data for all employer organisations per country. On that basis, organisational density rates are calculated as a proportion of all companies in the sector and also as a proportion of the sectoral workforce employed in the member companies.

Sectoral density in terms of companies calculated for 17 countries for which data were available:

- 5 countries show a density lower than 1%.
- 4 countries show a density of 1-10%.
- 5 countries show a density of 10-20%.
- 3 countries show a density higher than 20%.

Involvement of metal employer organisations in collective bargaining

In the previous section, the sector-relatedness and membership strength of employer organisations were considered, while in this section their involvement in collective bargaining is analysed in Table 18. The two columns to the right of the employer organisation names show whether they are involved in multi-employer collective bargaining or single-employer bargaining.

The column on the far right of the table presents the number of employees covered by the collective bargaining agreements signed by the respective employer organisation. A summarising overview of all this information is provided in Figure 7.

17 of the 70 employer organisations are not involved in any kind of collective bargaining, which means that the other 53 (or 76%) do indeed conduct collective bargaining. In 24 of the 28 Member States, there is at least one employer organisation involved in collective bargaining.

Table 18: Collective bargaining involvement of employer organisations

	Employer organisation	Multi-employer bargaining	Single-employer bargaining	Companies covered	Workforce covered
AT	FMMGI	x	x	724	126,000
	FVNE	x		26	6,500
	FEEI	x		178	48,000
	FVFI	x		100	30,000
	WKO - BSI	x		1,550	62,500
BE	AGORIA	x		155,181	155,181
BG	BBCMB	x		72	
	BASSEL	x			1,600
	BBAEII	x		1,600	
	BAMI	x		30	6,300
	BDIA				
CY	SYMEBIK	x		49	
CZ	SdruZenI automobiloveho prumyslu (AutoSAP)				
	Elektrotechnicka asociace Ceske republiky (EIA)	x	x	9	7,000
	Asociace leteckych vyrobcu CR (ALV CR)	x	x	5	1,756
	skoda Auto, a. s.		x	1	25,452
	Asociace obranneho a bezpecnostniho prumyslu Ceske republiky (AOBP)				
DE	Gesamtmetall	x		3,526	1,800,000
	BVM	x			
DK	DI	x		1,052	79,225
EE	<i>There are three employer organisations with members in the sector, but because none of them is involved in collective bargaining, nor affiliated to any EU organisation, they are not included in this study</i>				
TEL	GSEVEE	x			15,000

	POVAS	x		5,000	15,000
	HASDIG				
ES	CONFEMETAL	x			
FI	Teknologiateollisuus	x		7,500	131,000
FR	UIMM	x		43,000	1,340,621
	GIM	x		2,000	275,000
	UIMM MP	x		3,791	101,738
	A3M				62,500
HR	HUP-UMI (CEA		x	0	0
HU	MAGEOSZ				
IE	Ibec		x		
IT	Federmeccanica	x	x		
	Assolombardo			1,626	84,299
	Assistal	x	x		
	Unionmeccanica - Confapi	x	x		
	CONFIMI Impresa meccanica	x	x		
	Cna Metalmeccanica di Produzione	x	x	23,000	1e+05
	Confartigianato	x	x		
	Casartigiani	x	x		
	CLAAI				
	ANCPL			900	13,000
	Federlavoro e servizi - Confcooperative				
	AGCI Produzione e Lavoro				
LT	Linpra				
LU	Fedil Metal				
LV	MASOC	x	x		
MT	Malta Employers Association (MEA)			0	
	The Malta Chamber of Commerce, Enterprise and Industry (Malta Chamber)				
NL	FME	x	x	1,064	275,000
	Metaalunie	x		13,500	143,000
	Uneto-Vni	x		5,300	107,000
PL	ZPPPOiL	x			18,600

Representativeness of the European social partner organisations: Metal sector

	IGMnIR				
	SPPL				
PT	ANEME*	X		1,000	61,000
	FENAME	x		1,000	60,000
	AIMMAP	x		1,000	50,000
	ANIMEE	x		100	31,500
RO	FEPA - CM		x	23	13,204
	FP METALURGIA				
	APREL		x	107	
SE	Teknikföretagen	x		2,200	206,000
	Industriarbetsgivarna	x		360	7,500
	IKEM	x		950	6,000
SI	ZKovI-GZS	x		3,518	73,601
	ZDS	x		3,518	73,601
SK	ZSP SR	x		36	21,000
	ZHTPG	x		3	658
	ZEP SR	x		6	3,500
UK	EEF				

Note: The employer organisations marked in red in the table are the ones that are not affiliated to Ceemet.

** There is an indirect involvement in collective bargaining of ANEME through its memberships of FENAME.*

In the case of employer organisations, their involvement in collective bargaining differs from that of trade unions in the sector. Out of the 70 sector-related employer organisations identified in this study, 53 are directly involved in collective bargaining. In contrast to trade unions, multi-employer bargaining is the most common form of collective bargaining for employer organisations (53% of employer organisations). In total, 23% of employer organisations stated that they were not involved in collective bargaining of any kind.

Figure 7: Involvement of employer organisations in different forms of collective bargaining (percentage of total)

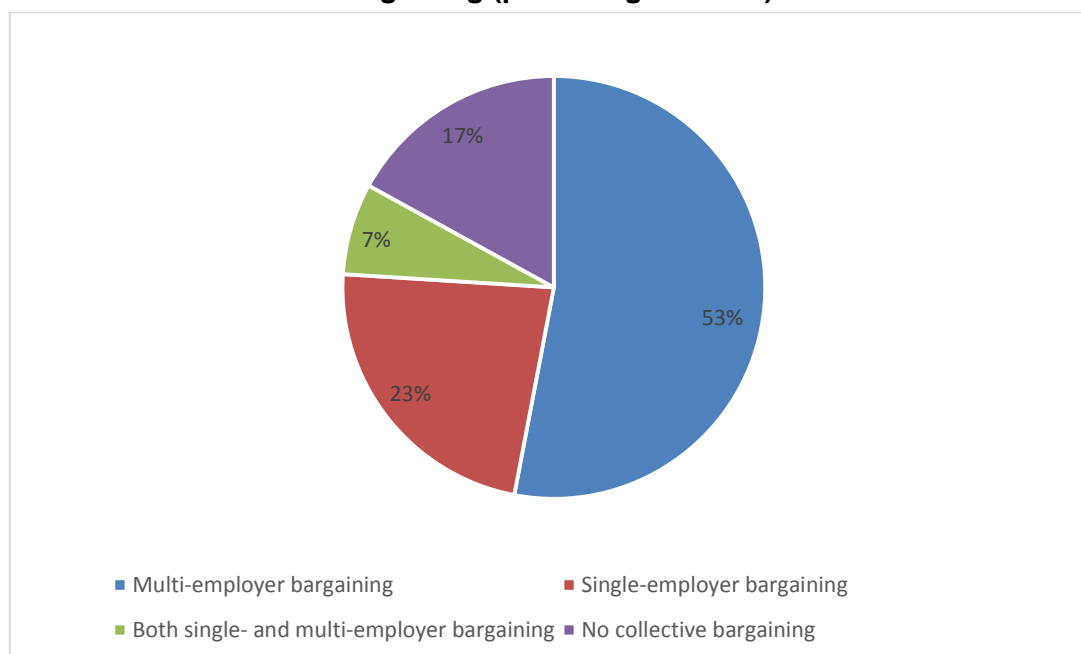


Table A4 in Annex 1 gives the information available on collective bargaining within each country, as collected by the Network of Eurofound Correspondents. Based on this information, Table 18 provides an overview of the collective bargaining coverage and the type of collective bargaining (single-employer, multi-employer, or both single- and multi-employer).

Collective bargaining patterns and social dialogue practices

The relevance of European sectoral social dialogue tends to increase with the ability of the national affiliates of the European organisations to influence national public policies affecting the sector (Perin and Léonard, 2011).

For 3 of the 102 sector-related trade unions there is no information available, meaning that there is info available for the remaining 99. Of those, 98 trade unions (96%) are involved in collective bargaining. For the employer organisations there is information available on this for 68 of the 70 metal sector employer organisations. Of them, there are 53 involved in collective bargaining (77%). The table below compares the types of collective bargaining involvement for national metal sector trade unions and employer organisations.

Table 19: Collective bargaining, absolute figures

	Trade unions		Employer organisations	
No collective bargaining involvement	1	98 (96%)	17	53 (77%)
Single-employer collective bargaining only	34		5	
Multi-employer collective bargaining	18		36	
Both single- and multi-employer collective bargaining	46		12	
Number of organisations for which info is available	99 *		68**	
Total number	102		71	

*no data for three trade unions **no data for two employer organisations

Table 20 presents the collective bargaining information on a country-by-country basis, illustrating the different national collective bargaining patterns and collective bargaining coverage. There is no country where collective bargaining does not exist. Table 21 shows the sole or most prevalent type of collective bargaining per country.

Table 20: Form/level of bargaining per country

Form/level of bargaining	Trade union organisations by country
Multi-employer	AT, DK, EL, IE
Multi-employer and single-employer	BE, BG, DE, ES, FI, FR, IT, LV, NL, PL, PT, SE, SI, SK
Single-employer	CY, CZ, EE, HR, HU, LT, LU, MT, RO, UK
No collective bargaining	--

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 represents 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).

Table 21 shows the most prevalent type of collective bargaining and the national coverage in the metal sector. There was no information in relation to the amount of collective bargaining coverage available in 3 of the 28 Member States. All countries with 90% or more collective bargaining coverage are involved in multi-employer agreements.

Table 21: Collective bargaining coverage and collective bargaining level

	Collective bargaining coverage				Information not available
	90% or more	50–80%	25–50%	1–25%	
Single-employer collective bargaining sole level or prevailing level		HR, LU, MT	HU, RO	CY, CZ, EE, ES, IE, PL, SK, UK	LV, LT
Multi-employer collective bargaining sole level or prevailing level	AT, BE, FI, FR , IT, NL, PT, SI, SE	DE , DK	BG		EL
No collective bargaining					
Information not available					

Source: Authors based on national contributions by the Network of Eurofound Correspondents (2016).

In bold in Table 21 are the Member States with the highest metal sector employment in Europe. In France, Italy, the Netherlands and Portugal, there exist significant levels of employment, with mostly multi-employer bargaining at 90% coverage or more. Germany also favours multi-employer bargaining, albeit with slightly less collective bargaining coverage. This contrasts with the situation in other countries with significant levels of employment in the sector, namely the UK, Spain, the Czech Republic, Poland and Slovakia. These countries favour single-employer bargaining, but it is apparent that the level of collective bargaining coverage is significantly lower (1-25%).

Table A4 in Annex 1 gives the information available on collective bargaining within each country, as collected by the Network of Eurofound Correspondents. Based on this information, Table 21 provides an overview of the collective bargaining coverage and the type of collective bargaining (single-employer, multi-employer, or both single- and multi-employer). There was no information available in relation to the amount of collective bargaining coverage in 3 of the 28 Member States.

Participation in public policy

Apart from the sector-relatedness and organisational and membership strength of social partners, and their active involvement in collective bargaining processes, their participation in public policy is an important indicator of the representativeness of national social partner organisations.

Interest associations may influence public policy in the following two ways.

- The authorities on matters affecting their members may consult them.
- They may be represented on ‘corporatist’ (in other words, tripartite) committees and policy consultation boards.

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

In 22 Member States, at least one trade union and one employer organisation reported being consulted on public policymaking. In four countries, only either trade union(s) or employer organisation(s) reported that they were consulted. In two countries (Spain and Slovenia), there is no participation by social partner organisations in public policymaking.

Trade unions or interest representations

A total of 61 out of the 102 trade unions indicated that they are consulted, of which 23 said this was on a regular basis and 38 on an ad hoc basis. 37 trade unions reported they are not consulted, while there was no information available for a further 4 trade unions.

In Croatia, Spain, Ireland and Slovenia, none of the trade unions said they were consulted (a response of either 'no' or 'no information available').

Employer organisations or business associations

A total of 47 out of the 70 employer organisations reported that they are consulted. 22 organisations indicated that no consultation took place, while there was no information available in 1 case. Of the 47 organisations that reported being consulted, 19 reported that they were consulted regularly and 28 said they were consulted on an ad hoc basis. In all countries where employer organisations are identified, these organisations were consulted, apart from in Luxembourg, Spain and Slovenia.

Table 22: Consultation of organisations by country

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

Notes: The countries marked in bold are those for which there is a tripartite or bipartite sector-specific board.

Tripartite and bipartite consultation

Table 23 identifies sector-related tripartite and/or bipartite bodies along with the participating trade unions and employer organisations. In total 15 countries (marked in bold in Table 22) have sector-related bodies.

Table 23: Tripartite and bipartite consultation per Member State

	Name of the body and scope of activity	Bipartite/tripartite	Origin: agreement/statutory	Trade unions participating	Employer organisations participating
BE	Social security Fund Metal industry pc 111 (FBZMN-FSEFM)	BI	Statutory/agreement	Yes (all representative unions in parity commission 209)	Agoria
	Social fund, white-collars, parity commission 209 (SFBM-FSEM)	BI	Statutory/agreement	Yes (all representative unions in parity commission 209)	Agoria
	Training fund (INOM)	BI	Statutory/agreement	Yes (Flemish region)	Agoria
	Training fund (IFPM)	BI	Statutory/agreement	Yes (Walloon region)	Agoria
	SERV Sectoral commission technology industry	BI	Statutory/agreement	Yes (Flemish region)	Agoria
BG	Sectoral Council for Tripartite Cooperation in Machinery construction, Ministry of Economy	TRI	Statutory	Podkrepa SFMM; MET; CITUB; NTUF Metal-Electro	BBCMB
	Sectoral Council for Tripartite Cooperation on healthy and safe	TRI	Statutory	Podkrepa SFMM; NTUF Metal-Electro	BBCMB

Representativeness of the European social partner organisations: Metal sector

	working conditions, Ministry of Economy				
	Sectoral Council for Tripartite Cooperation on labour and social security relations, Ministry of Economy	TRI	Statutory	Podkrepa SFMM; NTUF Metal-Electro	BBCMB
DE	Metall-Rente Sectoral pension fund covering workers of the metal, electrical, steel and woodcarving sector	BI	Agreement from 2001	IG Metall	Gesamtmetall
	Alliance on the Future of German Industry (Bündnis Zukunft der Industrie) Pact for promoting and developing industries and industrial policy	TRI	agreement	IG Metall is represented in the bipartite management office. The other trade union members are not sector- related (IGBCE, IG BAU NGG)	
DK	Metalindustriens Uddannelsesudvalg - The vocational training committee in metal industry	BI	Statutory	Danish Metalworkers' Union (Dansk Metal)	DI
	Industriens Branchearbejdsmiljøråd (I-Bar) - The environmental council of industry	BI	Statutory	CO-industri	DI
ES	Foundation of the metal sector for training, skills and employment	BI	Agreement	CCOO de Industria, FICA-UGT	CONFEMETAL
	Metal sector industrial observatory	TRI	Agreement	CCOO de Industria and FICA-UGT as representatives of the FMFCE foundation (bipartite)	CONFEMETAL as representative of the FMFCE foundation (bipartite)
FI	Occupational Safety Sector Group of the Centre for Occupational Safety for the Metal Sector	TRI	Agreement	Metalli, Pro, IL	Teknologiateollisuus
	National Education and Training Committee for the Mechanical and Metal Industry	TRI	Statutory	Metalli/SAK, Pro STTK IL/Akava, TEKAKava, Trade Union of Education OAJ	Teknologiateollisuus- EK, Federation of Finnish Enterprises (Suomen Yrittäjät)
FR	Commission Paritaire Nationale de l'Emploi de la métallurgie	BI	Statutory and agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération Confédérée FO de la Métallurgie	UIMM
	Observatoire prospectif et analytique des métiers	BI	Agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération	UIMM

Representativeness of the European social partner organisations: Metal sector

	et qualifications de la métallurgie			Confédération FO de la Métallurgie	
HU	Metallurgy Sectoral Dialogue Committee	BI	Statutory	VASAS; Munkástanácsok; Alumíniumipari Szakszervezetek Szövetsége	MVAE; HUNGAMOSZ
	Machinery Sectoral Dialogue Committee	BI	Statutory	Statutory	MAGEOSZ; MAJOSZ
	ICT Dialogue Committee	BI	Statutory	VASAS; Federation of Postal and Telecommunication Workers' Trade Unions	Federation of Telecommunication and Electronic Enterprises; Hungarian Cable Communication Federation
IT	National paritarian institution for metalworkers (EBM)	BI	Agreement	Fiom Cgil	Unionmeccanica Confapi
	Supplementary pension fund for workers in the metalworking sector	BI	Agreement	Fim Cisl, Uilm Uil	Federmeccanica Assital
	Interprofessional fund for vocational training)	BI	Agreement	Cgil, Cisl, Uil	Confindustria
	Supplementary health care	BI	Agreement	Fim Cisl, Uilm Uil	Federmeccanica Assista
	National observatory for cooperation	BI	Agreement	Cgil, Cisl, Uil	AGCI, Legacoop, Confcooperative
	SME health Supplementary health care fund for workers of SMEs active in the metalworking sector	BI	Agreement	Fim Cisl, Uilm Uil	Confimi Impresa meccanica
	Interprofessional fund for continuous vocational training for employees in the artisan sector	BI	Agreement	Cgil, Cisl, Uil	Confartigianato, Cna, Casartigiani, Clai
LV	National Tripartite Cooperation Council (Nacionalas trispusejas sadarbības padome, NTSP)	TRI	Statutory	LBAS, LIA is member of LBAS	LDDK, MASOC is member of LDDK
NL	Pensioenfond van de Metalektro (PME), pension fund / Opleidings - en Ontwikkelingsfonds voor het Metaalbewerkingsbedrijf (OOM), fund for education and training	BI	Agreement	CNV, De Unie, FNV, VHP2	FME
	Stichting Arbeidsmarkt	BI	Agreement	CNV, De Unie, FNV,	FME

	en Opleiding in de Metalektro (A+O), fund for education and training			VHP2	
	Raad van Overleg in de Metalektro (ROM), permanent consultation body for social partners in the Metalektro sector	BI	Agreement	CNV, De Unie, FNV, VHP2	FME
	Pensioenfonds Metaal & Techniek (PMT), pension fund	BI	Agreement	CNV, De Unie, FNV	Metaalunie
	Opleidings - en Ontwikkelingsfonds voor het Metaalbewerkingsbedrijf (OOM), fund for education and training	BI	Agreement	CNV, De Unie, FNV	Metaalunie
PL	Tripartite Team for Socio-Economic Conditions of Defence Potential Companies Restructuring	TRI	Statutory	National Section of Defence Industry, National Section of Aviation Industry, ZZPE, ZZIT, NSZZ 'Solidarność 80'	ZPPPOiL
RO	The Economic and Social Council (CES)	TRI	Statutory	All national trade union organisations' representatives	All national employer organisations' representatives
	Sectoral Committee of ferrous, non-ferrous metal working and refractory products industries	TRI	Statutory	FSS METAROM, FSLMN	Federatia Metalurgia, UniRomSider (representative body for Steel sector)
	Sectoral Committee for machine building industry and fine mechanics and equipment	TRI	Statutory	FSCM, FS "Automobilul Romanesc FSAR ", FNSS METAL	FEPA CNM
	Sectoral Committee for electrotechnics, automatic and electronics	TRI	Statutory	FNSS METAL, Electron M III	APREL
SK	Economic and Social Council (HSR). Usually deals with issues related to labour legislation, business conditions, working conditions, wages, and social security. Recently, e.g. the costs of energies, vocational education.	TRI	Statutory	OZ Kovo representing the Confederation of Trade Unions (KOZ SR)	ZHTPG, ZSP SR, ZEP SR and ZAP SR representing AZZZ SR or RUZ SR
	Industry Bipartite (all relevant issues)	BI	Agreement	OZ Kovo, Integrated Trade Union	ZHTPG, ZSP SR, ZEP SR, ZAP SR and

Representativeness of the European social partner organisations: Metal sector

	concerning involved sectors and related to agenda of HSR, in particular)			Association (IOZ) and Trade Union Association of Employees in Mines, Geology and Oil Industry (OZ PBGN)	Association of Slovak Construction Employer (ZSPS)
UK	Science, Engineering, Manufacturing and Technologies Alliance (SEMTA)	TRI	Statutory	Unite represented on board	No employer organisations represented on board, but individual employers, including Airbus, Jaguar Land Rover, Rolls-Royce and Siemens, are represented. SEMTA describes EEF as a strategic partner
	Automotive Council	TRI	Agreement	Unite	No employer organisations represented on board, though individual employers, including all major automotive producers, are represented

3. European level of interest representation

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

Secondly, the organisational capacity of Ceemet and IndustriAll Europe is evaluated in terms of their capacity to participate effectively in the European sectoral social dialogue committee and their capacity to negotiate. The ‘capacity to negotiate’ of European social partners is their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates.

Finally, every representativeness study also measures the limits of the representativeness of social partners involved in an European sectoral social dialogue committee, by counterweighting with the representativeness of other European associations and of the national organisations not represented by IndustriAll Europe and CEEMET in the committee for the metal sector.

As outlined in detail below, the study presents detailed data on two sector-related European associations – namely IndustriAll Europe on the employee side and Ceemet on the employer side. Both of them are listed by the Commission as a social partner organisation to be consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU). Supplementary information will be provided for other organisations (potentially) involved in social dialogue in the sector, where this information has become available in the course of the study.

Membership domain of IndustriAll Europe

Trade unions affiliated to the European Metalworkers’ Federation (EMF), the European Mine, Chemical and Energy Workers’ Federation (EMCEF) and the European Trade Union Federation for Textiles, Clothing and Leather (ETUF-TCL) joined forces on 16 May 2012 to create IndustriAll Europe. Through its affiliated trade union organisations, IndustriAll Europe represents 6.9 million workers across supply chains in manufacturing, mining and energy sectors throughout Europe.

IndustriAll Europe is affiliated to the European Trade Union Confederation (ETUC) at cross-sectoral level. Through its national affiliates, IndustriAll Europe covers all NACE code subheadings of the metal sector. With regard to overall organisation, IndustriAll Europe covers most manufacturing industries. Besides its involvement in the European sectoral social dialogue committee for metal and for the steel sector, it also operates in the committee for the shipbuilding sector, for the chemical sector, for extractive industries, electricity, gas, paper, footwear, leather, textiles and clothing. As such, the membership domain of IndustriAll Europe as a whole is multi-sectoral and therefore overlaps the metal sector under consideration in this report.

In the statutes of IndustriAll Europe, membership and affiliation are defined in articles 7 and 8. Member trade unions are required to be democratic and independent, and affiliated to a national cross-sector trade union confederation that is affiliated to the ETUC. The executive committee makes membership-related decisions, and can decide with a two-thirds majority to make an exception to the required affiliation to a cross-sector confederation that is member of the ETUC. The statutes of IndustriAll Europe provide for full membership only.

Of the 102 trade unions identified in the metal sector, 67 are affiliated to IndustriAll Europe. IndustriAll Europe has at least one sectoral affiliation in 27 out of the 28 Member States where sector-related unions were identified, the exception being Malta.

Table 24: Sector-related trade unions in Member States affiliated to IndustriAll Europe

	Trade unions affiliated to IndustriAll	Trade unions not affiliated to IndustriAll	Sectoral density of IndustriAll affiliates	Largest trade union affiliated to IndustriAll
AT	PRO-GE, GPA-djp		n/a	
BE	ACV-CSC METEA, ACLVB / CGSLB, LBC-NVK, SETCa-BBTK, ABVV Metaal, CNE-GNC, MWB (FGTB).		n/a	
BG	CITUB NTUF Metal-electro, Podkrepa SFMM (MET), CITUB Metalicy		14%	
CY	OVIEK-SEK	SEMMHK-PEO, BUILDERS UNION PEO, BUILDERS UNION SEK	n/a	Yes
CZ	OS KOVO	Odbory KOVO MB	8%	Yes
DE	IG Metall	CGM	47%	Yes
DK	Metal, IDA	3F, HK/Privat, Dansk El-forbund	18.5%	No
EE	IMTAL		3.1%	
EL	POEM		30.7%	
ES	CCOO de Industria, UGT-FICA, FI-USO, ELA Industria y Construcción	LAB Industria, CIG-Industria, IC Industria	n/a	Yes
FI	Metalli ⁹ , Pro, TEK, Union of Professional Engineers in Finland	DIFF, Ekonomit, YTN	11.8%	Yes
FR	FGMM-CFDT, FTM-CGT, FO Métaux, CFTEC Métallurgie, CFE-CGC Métallurgie		n/a	
HR	SSH SMH IS (MET)		12%	
HU	VASAS (MET), VDSZ		6.9%	
IE	SIPTU, TEEU ¹⁰ , Unite		n/a	
IT	Fiom Cgil, Fim Cisl, Uilm Uil	UGL metalmeccanici, Fismic, SAVT/MET,USAS/AS GB	n/a	Yes
LT	LMPSS (LPSK)		2.7%	

⁹ *Metalli* (old names *Metalliliitto* or *Metallityöväen Liitto* = Finnish Metalworkers' Union) is since May 2017, due to a merger, called *Teollisuusliitto ry* (Finnish Industrial Union).

¹⁰ In 2017 TEEU amalgamated with UCATT to form CONNECT trade unions

	Litmetal)			
LU	OGBL, LCGB		67.1%	
LV	LIA		n/a	
MT	--	GWU, UHM	n/a	
NL	FNV, CNV Metaal	De Unie, VHP2	41.6%	Yes
PL	Sekretariat Metalowców NSZZ „Solidarność”	FZZ ‘Metalowcy’, ZZPE, ZZIT	3.8%	Yes
PT	FIEQUIMETAL, SINDEL, SIMA	FETESE, SITESE	n/a	Yes
RO	FNSSM, FSS METAROM, FSLI-METAL	FSCM “Infratirea”, FSAR, FS ELECTRON M III	5.4%	Yes
SE	IF Metall, Unionen, Sveriges Ingenjörer	Ledarna	62%	Yes
SI	SKEI	SKEIE-KS 90, KNSS, Solidarnost	7.5%	Yes
SK	OZ Kovo		n/a	
UK	Community, GMB, RMT, USDAW, Unite	Prospect	28.5%	Yes

There are no trade unions with the congruent domain pattern for the NACE code sector definition (Table 8). Another 39 of the 67 IndustriAll Europe affiliates in the sector have a membership domain covering the entire NACE code defined sector, plus overlapping activities outside of the sector. Thus, in 15 Member States (Austria, Belgium, Croatia, Denmark, Finland, Germany, Ireland, Luxembourg, the Netherlands, Poland, Portugal, Romania, Spain, Sweden and the UK), IndustriAll Europe has at least one affiliate covering the entire metal industries sector.

The two IndustriAll Europe affiliates in Bulgaria cover only a section of the metal industries sector. For 16 of its other affiliates, the domain covered is also a section of the sector, plus other activities outside of the sector.

Membership domain of Ceemet

The Council of European Employers of the Metal, Engineering and Technology-Based Industries (Ceemet) is the European employer organisation representing the interests of the metal, engineering and technology-based industries. It has a particular focus on social policy and industrial relations issues. Ceemet was created in 1962 as the Western European Metal Trades Employers’ Organisation (WEM) and was renamed Ceemet in 2004. As a link to the cross-sector social dialogue, Ceemet is involved as one of the key actors in the European Employers Network (EEN) which coordinates a group of European sector-level employer organisations within the social affairs unit of Business Europe.

Ceemet’s member federations represent over 200,000 businesses across Europe, the majority of which are small and medium-sized enterprises (SMEs) with a total workforce of 17 million. In this are included the member companies of its affiliates in Australia, Norway, Switzerland and Turkey, which were not included in this study covering the 28 Member States. Ceemet members are active in a large number of sectors, including basic metals, fabricated metal goods, machinery and equipment, office machinery and computers, radio, television and communication equipment, medical, precision and optical instruments, watches and clocks, motor vehicles and trailers, and transport. Some of its member federations are also active in the iron and steel industries.

In the statutes of Ceemet, article 2 prescribes that members are ‘in principle national employers’ associations or federations, which are having in particular focus in representing the social, employment and industrial policy interests of these industries’, and that members ‘shall be independent from state authorities and trade unions’. Besides full members, associated membership is provided as well as observer status. The Ceemet General Assembly decides upon membership issues.

A total of 26 out of the 70 employer organisations in the metal sector are affiliated to Ceemet. Ceemet has sectoral affiliations in 18 out of the 27 Member States where employer organisations were identified. The missing Member States are Cyprus, the Czech Republic, Greece, Luxembourg, Malta, Poland, Romania and Slovakia. Ceemet has affiliates that cover the entire sector as defined by NACE divisions 24.4, 25, 26, 27, 28, 29, 30 and 30.3 in 11 Member States. There are no countries where Ceemet has an affiliate whose coverage is congruent with the sector definition. In seven of the 27 Member States where Ceemet has affiliates, they cover only a section of the entire sectoral NACE code definition, in some cases with additional coverage outside of this sector.

Table 25: Metal sector employer organisations affiliated to Ceemet and others not affiliated

	Employer organisations affiliated to Ceemet	Employer organisations not affiliated to Ceemet¹¹	Sectoral density of companies affiliated to Ceemet	Largest employer organisation affiliated to Ceemet
AT	FMMGI, FVNE, FEEL, FVFI, WKO - BSI		40.1%	
BE	Agoria		26.3%	
BG	BBKMB	BASSEL, BBAEII, BAMl, BDIA	4.9%	Yes
CY		SYMEBIK		
CZ		AutoSAP, EIA, ALV CR, skoda Auto, a. s., AOBP		
DE	Gesamtmetall	BVM		Yes
DK	DI		18.1%	
EE				
EL		GSEVEE, POVAS, HASDIG		
ES	Confemetal			
FI	Teknologiateollisuus		13.4%	
FR	UIMM, GIM, UIMM MP, A3M			
HR	HUP-UMI (CEA)		1.5%	
HU	MAGEOSZ		0.2%	
IE		Ibec ¹²		

¹¹ For CEEMET the status as employer organisation of some of the organisations not affiliated remains unclear.

¹² IBEC is a cross sector employers organisation, and not a metal sector related. It does, however, have membership in the metal sector and is reported to have involvement in company-level collective bargaining in the metal sector in Ireland.

IT	Federmeccanica, Assolombarda	Assistal, Unionmeccanica - Confapi CONFIMI Impresa meccanica, Cna Metalmecanica di Produzione, Confartigianato, Casartigiani, CLAAI, ANCPL, Federlavoro e servizi – Confcooperative, AGCI Produzione e Lavoro		n/a
LT	Linpra			
LU		Fedil Metal		
LV	MASOC		8.7%	
MT		MEA, The Malta Chamber of Commerce, Enterprise and Industry		
NL	FME	Metaalunie, Uneto-Vni	5.5%	Yes
PL		ZPPPOiL, IGMNiR, SPPL		
PT	ANEME	FENAME, AIMMAP, ANIMEE	3.3%	No
RO		FEPA – CM, FP METALURGIA, APREL		
SE	Teknikföretagen	Industriarbetsgivarna, IKEM	12.6%	Yes
SI	ZKovI-GZS	ZDS	5.1%	Yes
SK		ZSP SR, ZHTPG, ZEP SR		
UK	EEF		12.3%	

Note for Austria: Ceemet only counts one member organisation from Austria, WKO-BSI. The other Austrian organisations are indirectly affiliated to Ceemet, via their membership of WKO-BSI.

Note for France: Ceemet only counts one member organisation from France, UIMM. The other French organisations are indirectly affiliated to Ceemet via their membership of UIMM.

Some European countries do not have specific metal industry associations. Ceemet has therefore instead established contacts with cross-sectoral confederations. A number of Ceemet members are federations, which means that their members are either autonomous regional associations (France, Germany, Spain, United Kingdom) or professional branch groups (Austria, Denmark, Italy, Netherlands). In this context, companies are not directly affiliated to the federation, but to a regional association. The remaining members are associations to which companies are affiliated.

Metal sector representativeness of IndustriAll Europe and Ceemet

Table 26 summarises the metal sector representativeness of both IndustriAll Europe and Ceemet. There are 102 metal sector trade unions in 28 Member States, of which 64 trade unions (63%) are members of IndustriAll Europe. Out of the 98 metal sector trade unions involved in collective bargaining, 58 (59%) are affiliated.

As for the metal sector employer organisations, there are 71 organisations in 27 Member States, of which 26 (37%) are affiliated. Ceemet has a member organisation in 18 of the 27 Member States where there is an employer organisation. Out of 51 employer organisations involved in collective bargaining, 22 are members of Ceemet (43%).

Table 26: Membership structure in the metal sector of IndustriAll Europe and Ceemet

	Number of organisations	Number of Member States with organisations	Number of organisations involved in collective bargaining	Number of Member States with organisations involved in collective bargaining
All sector-related trade unions	102	28	98	28
Affiliates of IndustriAll Europe	64	27	58	27
Percentage affiliated	63%	96%	59%	96%
All sector-related employer organisations	71	27	51	22
Affiliates of Ceemet (direct and indirect)	26	18	22	15
Percentage affiliated	37% ¹³	67%	43%	73%

Source: Authors, based on national contributions by the Network of Eurofound Correspondents (2016).

Malta is the only Member State in which IndustriAll Europe does not have metal-related membership. At least one of the two Maltese trade unions, the GWU, is involved in single-employer bargaining in the sector, but not affiliated for its metal sector members to IndustriAll Europe. The metal sector in Malta counted 5,693 employees in 2015.

Table 27 presents the 10 Member States with a metal workforce larger than 270,000. All of those countries have at least one trade union affiliated to IndustriAll Europe and at least one IndustriAll Europe affiliate involved in collective bargaining.

Table 27: Affiliations in Member States with largest metal sector employment, 2016

	Employment	At least one trade union affiliated to IndustriAll Europe	At least one IndustriAll Europe affiliate involved in collective bargaining	One employer organisation affiliated to Ceemet	Ceemet affiliate involved in collective bargaining
DE	4,337,000	Yes	Yes	Yes	Yes
IT	1,487,185	Yes	Yes	Yes	Yes
UK	1,152,000	Yes	Yes	Yes	Yes

¹³ Ceemet challenges this result, as among the 71 organisations included there is a distinction between employer organisations and business associations. The 51 employer organisations involved in sector-related collective bargaining are presented separately on the right in Table 26.

FR	1,129,256	Yes	Yes	Yes	Yes
PL	829,273	Yes	Yes	No	No
ES	728,400	Yes	Yes	Yes	Yes
CZ	716,300	Yes	Yes	No	No
HU	423,828	Yes	Yes	Yes	No
SK	303,700	Yes	Yes	No	No
NL	272,000	Yes	Yes	Yes	Yes

Estonia is the only one of the 28 Member States for which no employer organisation is included in this study. Ceemet has 26 affiliated organisations from 18 different Member States. In 22 Member States, there is an employer organisation involved in collective bargaining. Ceemet has a member organisation involved in collective bargaining in 15 Member States. The 7 Member States where there is an employer organisation involved in collective bargaining that is not affiliated to Ceemet are Cyprus, the Czech Republic, Greece, Ireland, Poland, Romania and Slovakia.

Table 27 shows the 10 Member States with the largest metal sector workforce. In seven of those ten, Ceemet has a member organisation. The metal sector employer organisations of Poland, the Czech Republic and Slovakia are not affiliated to Ceemet, even though they are involved in collective bargaining. The Hungarian member organisation of Ceemet reported that it was not involved in metal sector collective bargaining, because there is only single-employer bargaining at company level, in which the employer organisation is not involved.

Other European trade union organisations

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

For practical reasons only European organisations that cover at least five trade unions are mentioned in the bulleted list that follows. This involves seven trade union organisations:

- European Public Service Union (EPSU), with 9 affiliations in 7 countries
- Union Network International (UNI) and the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT), with 8 affiliations in 5 countries
- The European Transport Workers' Federation (ETF) and the International Transport Workers' Federation (ITF), with 7 affiliations in 3 countries
- The International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers (IUF), with 6 affiliations in 4 countries
- Eurocadres, with 5 affiliations in 5 countries

Although the affiliations listed in Table 28 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 for IndustriAll Europe, but also because the presence of these organisations usually results from the multisector domains of the respective trade unions.

Table 28 illustrates whether the affiliation of sector-related trade unions is supplementary to their membership in IndustriAll Europe, or whether they are only affiliated to the other European trade union federations.

Table 28: Sector-related trade unions affiliated to IndustriAll Europe

Countries	Trade unions affiliated to IndustriAll Europe	Trade unions not affiliated to IndustriAll Europe	Other European trade union associations	National trade unions affiliated to other associations
AT	PRO-GE, GPA-djp		EFFAT	PRO-GE, GPA-djp
			ETUC	PRO-GE, GPA-djp
			EPSU	GPA-djp
			EFJ	GPA-djp
			UNI Europa	GPA-djp
BE	ACV-CSC METEA, ACLVB / CGSLB, LBC-NVK, SETCa-BBTK, ABVV Metaal, CNE-GNC, MWB (FGTB)			ACLVB /CGSLB
				ACLVB /CGSLB
			ETUC	ABVV Metaal, MWB (ABVV-FGTB), ACV-CSC METEA
BG	CITUB NTUF Metal-electro, Podkrepa SFMM (MET), CITUB TU Metalicy			
CY	OBIEK-SEK	SEMMHK-PEO, BUILDERS UNION PEO, BUILDERS UNION SEK	IUF	OBIEK-SEK
			UNI	OBIEK-SEK
			EFFAT	OBIEK-SEK
			TUIMM-WFTU	SEMMHK-PEO
			UITBB	BUILDERS UNION PEO
			BWI	BUILDERS UNION SEK
			EFBWW	BUILDERS UNION SEK
CZ	Odborový svaz KOVO (OS KOVO)			
DE	IG Metall	CGM	WOW-WFCW	CGM
			CESI	CGM
DK	Metal, IDA	3F, HK/Privat	ITF	3F
			PSI	3F
			UNI-Global	3F, HK/Privat
			BWI	3F
EE	IMTAL			
EL	POEM			
ES	CCOO de Industria, UGT-FICA, FI-USO, ELA Industria y Construcción	IC Industria		
FI	Teollisuusliitt, Pro, TEK,	DIFF, Ekonomit, YTN	UNI-Global	TEK

	Union of Professional Engineers in Finland		Nordic ICTS	TEK
			Nordic IN	TEK, Teollisuusliitt, Pro
			ETUC	TEK
			Eurocadres	TEK, Professional Engineers in Finland
			FEANI	Professional Engineers in Finland
FR	FGMM-CFDT, FTM-CGT, FO Métaux, CFTC Métallurgie, CFE-CGC			
HR	SSH SMH IS (MET)			
HU	VASAS VDSZ		EPSU	VASAS VDSZ
IE	SIPTU, TEEU, Unite			
IT	Fiom Cgil, Fim Cisl, Uilm Uil	UGL metalmeccanici, Fismic, SAVT/MET, USAS/ASGB		
LT	LMPSS (LPSK Litmetal)			
LU	OGBL, LCGB			
LV	LIA		ETUC	LIA
MT	General Workers' Union (GWU) ¹⁴	Union Haddiema Maghqudin (UHM)	ETUC	GWU
			EUROCADRES	GWU
			UNI EUROPA	GWU
			EURO-WEA	GWU
			FERPA	GWU
			ETF	GWU
			EFFAT	GWU
			EPSU	GWU
			EUROFEDOP	UHM
NL	FNV, CNV Metaal	De Unie, VHP2	Eurocadres	De Unie, VHP2
PL	Sekretariat Metalowców NSZZ „Solidarność”, FZZ ‘Metalowcy’, ZZPE	ZZIT	Eurocadres	ZZIT
PT	FIEQUIMETAL,		EPSU	SINDEL

¹⁴ The General Workers union (GWU) from Malta is affiliated to IndustriAll Europe, but according to the information provided it is not clear whether they are also affiliated for their members in the Metal sector.

	SINDEL, SIMA			
RO	FNSSM, FSS METAROM, FSLI- METAL	FSCM 'Infratirea', FSAR, FS ELECTRON M III		
SE	IF Metall, Unionen, Sveriges Ingenjörer	Ledarna	Nordic-IN	IF Metall
			Uni-Europe	Sveriges Ingenjörer
			Ledarna	CEC
SI	SKEI	SKEIE-KS 90, KNSS, Solidarnost	ETUC	SKEI
SK	OZ Kovo		EPSU	OZ Kovo
UK	Community, GMB, RMT, USDAW, Unite	Prospect	BWI	GMB, Unite
			ITF	GMB, Unite, RMT, Prospect, USDAW
			IUF	GMB, Unite, USDAW
			PSI	GMB, Unite, Prospect
			UNI-Global	GMB, Unite, Prospect
			ETF	RMT, USDAW, Unite
			EPSU	Prospect, GMB, Unite
			Eurocadres	Prospect
			EFFAT	USDAW, Unite
			EFBWW	Unite

Other European employer organisations and EU business associations

A similar twofold assessment of the limitations of the representativeness of Ceemet can be made. First, in considering the Member States in which Ceemet does not have an affiliated employer organisation, and the Member States where there are sector-related employer organisations involved in collective bargaining that are not affiliated to Ceemet. Secondly, in considering the representativeness of other metal sector related European employer organisations or EU business associations.

An overview of the membership of the national employer/business associations is given in Table 29. Most have no or relatively few affiliations to European associations other than Ceemet. Overall, only one alternative to Ceemet, with 14 affiliations, can be identified as having a significant influence, namely Orgalime. Orgalime is the European federation representing the interests at the level of the EU institutions of the European mechanical, electrical, electronic and metal articles industries as a whole. Orgalime's member federations directly or indirectly represent an industry employing over 11 million people. In the case of employer organisations, only those European organisations that cover at least three employer organisations are mentioned in the following bulleted list. This involves five employer organisations:

- Orgalime, with 14 affiliations in 12 countries

- AeroSpace and Defence Industries Association of Europe (ASD), with 6 affiliations in 5 countries
- Eurofer and Business Europe, each with 4 affiliations in 4 countries
- Eurometaux, with 3 affiliations in 3 countries.

In Table 29, red shading shows the 12 Member States in which Ceemet does not have an affiliated employer organisation.

Table 29: Metal sector related employer organisations affiliated to other European associations

Member States	Employers organisations affiliated to Ceemet	Employers organisations not affiliated to Ceemet	Other European employer associations	National employer organisations affiliated to these associations
AT	WKO - BSI	FMMGI, FVNE, FEEI, FVFI	ORGALIME	FMMGI, FEEI
			CAEF	FMMGI
			EUROPUMP	FMMGI
			ACEA	FVFI
			ACEM	FVFI
			CEMA	FVFI
			CLLCR	FVFI
			CONEBI	FVFI
			EUROFEU	FVFI
BE	Agoria		Eurometaux	AGORIA
BG	BBCMB	BASSEL, BBAEII, BAMI, BDIA	Eurofer	BAMI
			ORGALIME	BASSEL
			ASD	BDIA
CY				
CZ		AutoSAP, EIA, ALV CR, AOBP		
DE	Gesamtmetall	BVM	European Metal Union	BVM
DK	DI		BusinessEurope	DI
EE				
EL		GSEVEE, POVAS, HASDIG	ASD	HASDIG
ES	CONFEMETAL		ORGALIME	CONFEMETAL
FI	Teknologiateollisuus		ORGALIME	Teknologiateollisuus
			DIGITALEUROPE	Teknologiateollisuus
FR	UIMM, GIM, UIMM MP, A3M			
HR		HUP-UMI (CEA	Businesseurope	HUP-UMI (CEA
HU	MAGEOSZ		ORGALIME	MAGEOSZ
IE		IBEC		

Representativeness of the European social partner organisations: Metal sector

IT	Federmeccanica Assolombardo	Assistal, Unionmeccanica – Confapi, CONFIMI Impresa meccanica, Cna Metalmeccanica di Produzione, Confartigianato, Casartigiani, CLAAI, ANCPL, Federlavoro e servizi – Confcooperative, AGCI Produzione e Lavoro	CEA-PME	Unionmeccanica - Confapi
			UEAPME	Cna Metalmeccanica di Produzione, Confartigianato, Casartigiani
			EMU	Cna Metalmeccanica di Produzione, Confartigianato, Casartigiani
			CECOP-CICOPA	ANCPL, Federlavoro e servizi – Confcooperative, AGCI Produzione e Lavoro
LT	Linpra		ORGALIME	LINPRA
			EFFRA	LINPRA
			EUPC	LINPRA
			ECP	LINPRA
			MANUFUTURE	LINPRA
LU		Fedil Metal	ORGALIME	Fedil Metal
			FEM	Fedil Metal
			EUROMAP	Fedil Metal
			ECCS	Fedil Metal
LV		MASOC	ORGALIME	MASOC
MT		MEA, Enterprise and Industry (Malta Chamber)	CEEP	MEA
			BECC	MEA
			BusinessEurope	Enterprise and Industry (Malta Chamber)
			Eurochambres	Enterprise and Industry (Malta Chamber)
NL	FME	Metaalunie, Uneto-Vni	UEAPME	Metaalunie
			ORGALIME	FME, Metaalunie
			EMU	Metaalunie
			AIE	Uneto-Vni
PL		ZPPPOiL, IGMNiR, SPPL	Eurometaux	IGMNiR
			EUROMETREC	IGMNiR
			ASD	SPPL
			ACARE	SPPL
PT	ANEME	FENAME, AIMMAP, ANIMEE	ORGALIME	ANEME, AIMMAP
			FEM	ANEME
			CEMA	ANEME
			CECIMO	AIMMAP
			CEIR	AIMMAP
			EUMABOIS	AIMMAP

RO		FEPA – CM, FP METALURGIA, APREL	EUROFER	FP METALURGIA
SE	Teknikföretagen	Industriarbetsgivarna, IKEM	EUROFER	Industriarbetsgivarna
			ORGALIME	Teknikföretagen
			DIGITALEUROPE	Teknikföretagen
			CEFIC	IKEM
			ECEG	IKEM
SI	ZKovI-GZS	ZDS	BUSINESSEUROPE	ZDS
			ORGALIME	ZKovI-GZS
			EUROSAFE	ZKovI-GZS
			BIAC	ZDS
			CEE	ZDS
SK		ZSP SR, ZHTPG, ZEP SR		
UK	EEF		EUROFER	EEF

The second limitation to the representativeness of Ceemet comes from the other EU employer organisations and EU business associations to which national employer organisations are affiliated. These are marked in blue in Table 29. Several other EU employer associations and business associations appear in the analysis shown in Table 30.

Table 30: Other EU associations with metal sector national employer organisations as members

Other EU employer organisation / EU business association		Number of Member States with a sector-related employer organisation involved in collective bargaining (according to our bottom-up data collection)	Member States with an affiliate according to the organisation's website	Metal sector related (Yes or No)
Abbreviation	Full name			
ACARE	Advisory Council for Aeronautics Research in Europe	1	All Member States	No
ACEA	European Automobile Manufacturers' Association	1	BE, DE, FR, IT, NL, SE, UK	Yes
ACEM	European Association of Motorcycle Manufacturers	1	AT, BE, CZ, DE, FR, EL, ES, IE, IT, NL, PL, RO, SE, UK	No
AIE	European Association of Electrical Contractors	1	AT, BE, DE, DK, FI, FR, HU, LU, NL, SE, SI, UK	No
ASD	AeroSpace and Defence Industries Association of Europe	3	AT, BE, BG, CZ, DE, DK, EL, ES, FI, FR, IT, NL, PL, PT, SE, UK	Yes
BECC	Business European Capital Cities	1	CY, CZ, DE, EL, ES, FR, IT, MT, PL, PT	No

Representativeness of the European social partner organisations: Metal sector

BIAC	Business and Industry Advisory Committee to the OECD	1	AT, BE, BG, CZ, DE, DK, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, NL, PL, PT, SE, SI, SK, UK	No
BE CEE	Business Europe CEE	4	All Member States	No
CAEF	The European Foundry Association	1	AT, BE, BG, CY, CZ, DE, DK, ES, FI, FR, HR, HU, IT, LT, NL, PL, PT, SE, SI, UK	Yes
CEA-PME	European Confederation of Small and Medium Enterprises Associations	1	AT, BE, BG, DE, ES, FR, HU, IT, PL PT, RO, SI	No
CECIMO	European Association of the Machine Tool Industries	1	AT, BE, CZ, DE, DK, ES, FI, FR, IT, NL, PT, SE, UK	No
CECOP-CICOPA	The European Confederation of cooperatives active in industry and services	1	AT, BE, CZ, DK, ES, FR, IT, PL, PT, RO, SE, UK	No
CEEP	European Centre of Employers and Enterprises providing Public Services	1	AT, BE, CY, DE, DK, ES, FI, FR, HU, IT, LU, MT, NL, PT, SE, UK	No
CEIR	European Association for the Taps and Valves Industry	1	ES, FI, FR, IT, PT, SE, UK	No
CEFIC	European Chemical Industry Council	1	AT, BE, DE, DK, EL, ES, FI, FR, HU, IE, IT, PL, PT, SE, SI, SK, UK	No
CEMA	European Agricultural Machinery	2	AT, BE, DE, DK, ES, FR, IT, NL, UK	No
CONEBI	Confederation of the European Bicycle Industry	1	AT, BE, BG, DE, EL, ES, FI, FR, HU, IT, NL, PL, PT, SE, UK	No
DIGITALEUROPE		2	AT, BE, CY, DE, DK, EL, ES, FI, FR, HR, HU, IE, IT, LT, NL, PL, PT, RO, SE, SI, SK, UK	No
ECCS		1	AT, CZ, DE, DK, ES, FI, FR, HU, IT, LU, NL, PL, PT, RO, SE	
ECP4	The European Composites, Plastics and Polymer Processing Platform	1	BE, CZ, DE, DK, ES, FI, FR, IE, IT, LT, PT, UK	No
ECEG	European Chemical Employers Group	1	AT, BE, BG, CZ, DE, DK, EL, ES, FI, FR, HR, HU, IT, NL, PL, SE, SK, UK	
EFRA	European Federation of Radio Operated Model Automobiles	1	AT, BE, BG, CZ, DE, DK, EL, ES, FI, FR, HR, HU, IE, IT, LU, NL, PL, PT, SE, SI, SK, UK	No
EMU	European Metal Union	3	AT, BE, DE, HU, NL	Yes
EUMABOIS	European Federation of Woodworking Machinery	1	AT, BE, CZ, DE, ES, FI, FR, IT, LT, PL, PT, SK	No

Representativeness of the European social partner organisations: Metal sector

	Manufacturers			
EUPC	European Plastics Converters	1	AT, BE, BG, CY, CZ, DE, DK, EL, ES, FR, HR, IE, IT, LT, NL, PL, PT, RO, SE, UK	No
EUROCHAMBRES	The Association of European Chambers of Commerce and Industry	1	All Member States (except DK and UK)	
EUROFER	European Steel Association	4	AT, BE, BG, CZ, DE, EL, ES, FI, FR, HU, IT, LU, NL, PL, PT, RO, SE, SI, SK, UK	
EUROFEU	The European Committee of the Manufacturers of Fire Protection Equipment and Fire Fighting Vehicles	1	AT, BE, DE, ES, FR, IT, LU, NL	
EUROMAP	European Plastics and Rubber Machinery	1	AT, DE, ES, FR, IT, LU, UK	
EUROMETAUX	European non-ferrous metals association	2	AT, BE, BG, DE, FI, FR, IT, NL, PL UK	Yes
EUROPUMP	The European Association of Pump Manufacturers	1	AT, BE, CZ, DE, DK, EL, FI, FR, IT, NL, PL, SE, UK	No
EUROSAFE	European Association for Injury Prevention and Safety Promotion	1	AT, BE, DE, DK, FI, LU, NL, PT, UK	
EUROMETREC	European Metal Trade and Recycling Federation	1	AT, BE, BG, CZ, DE, EL, ES, FI, FR, HU, IT, NL, PL, PT, SE, SK, UK	
FEM	European Materials Handling Federation	2	BE, BG, DE, ES, FI, FR, IT, NL, SE, UK	No
MANUFUTURE	European Technology Platform	1	AT, BE, CZ, DE, DK, EL, ES, FI, FR, IE, IT, LU, NL, PL, PT, RO SE, SI, SK, UK	No
Orgalime	European federation of engineering industrial associations	12	AT, BE, BG, DE, DK, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, NL, PT, SE, SI, UK	Yes
UEAPME	European Association of Craft and Small and Medium-sized Enterprises	2	All Member States (except UK)	No

Many of the employer organisations are affiliated to Orgalime, which is the European federation representing the interests at the level of the EU institutions of the European mechanical, electrical, electronic and metal articles industries as a whole. Orgalime represents business interests of EU metal and engineering industry associations on selected issues. From a reading of its objectives as set out on the Orgalime website,¹⁵ it can be concluded that it is a European business association, without any contact or cooperation with trade unions, or involvement in social dialogue.

Four employer organisations stated that they were members of the European Steel Association (EUROFER). EUROFER was founded in 1976, and represents the entirety of steel production in the European Union. EUROFER members are steel companies and national steel federations throughout the EU. The major steel companies and national steel federations in Switzerland and Turkey are associate members.

¹⁵ <http://www.orgalime.org/page/about-orgalime>

Several employer organisations stated that they were members of the European Metal Union (EMU). EMU is a union of European associations for crafts and SMEs in the metalworking industry. EMU has members from all over Europe, namely Austria, Belgium, Denmark, Germany, Hungary, the Netherlands and Switzerland. The European Metal Union is a member of the UEAPME (European Association of Craft and Small and Medium-sized Enterprises). By being a member of this organisation, EMU can represent the interests of the members' associations of craftspeople and of SMEs in the metalworking sector at the European level. UEAPME is the employer organisation representing the interests of European crafts, trades and SMEs at EU level. UEAPME is a recognised European Social Partner. As the European SME umbrella organisation, UEAPME incorporates 67 member organisations from 34 countries consisting of national cross-sectoral SME federations, European branch federations and other associate members, which support the SME family.

Another relevant organisation is the AeroSpace and Defence Industries Association of Europe (ASD). The ASD is the voice of European aeronautics, space, defence and security industries, representing over 3,000 companies and actively supporting the competitive development of the sector in Europe and worldwide. Chapter 4 will focus in detail on the aerospace industries.

Negotiating capacity of IndustriAll Europe and Ceemet

Since the establishment of the European sectoral social dialogue committee for the metal sector in 2010, 15 joint texts have been achieved as output from the committee's activities. The rules of procedure of the committee, dating from September 2008, suggest that the formal establishment of the metal social dialogue committee may have been in 2010, though its activities were already ongoing in previous years.

Table 31: Agreed texts by Ceemet and IndustriAll Europe in the European social dialogue committee for the metal sector

List of all texts agreed between IndustriAll Europe (and previously EMF) and Ceemet	
27/06/2018	Ceemet-industriAll Europe joint pledge on the European Alliance for apprenticeships
27/06/2018	Joint event on "Future of work in the MET industries: stepping-up Vocational Education and Training", (European Economic and Social Committee)
21/06/2017	Joint event on "Meeting the skills challenges of the MET industries" (European Parliament)
19/06/2017	A skills agenda for Europe – no need for new but for swift action
17/03/2017	IndustriAll Europe-Ceemet statement on the 60th anniversary of the Treaty of Rome
08/12/2016	The impact of digitalisation on the world of work in the metal, engineering and technology based industries
19/09/2016	How to promote a fit for purpose European sectoral social dialogue – IndustriAll Europe and Ceemet views on the Commission initiative to relaunch European Social Dialogue
16/06/2016	Employers and trade unions united 'Yes' to UK in the European Union – for jobs and competitiveness in manufacturing
05/12/2013	Summary of joint conclusion on adaptability and flexible forms of employment
29/05/2013	Joint statement of the CEEMET EMF social dialogue committee ad hoc working group 'Education and Training'
13/03/2013	Ceemet-ECEG-EURATEX-IndustriAll Europe joint opinion on 'EU interface in wage setting lacks legal basis, ignores social partners' autonomy and is opposite of what industry needs to bring Europe out of the crisis'
27/02/2012	Ceemet-ECEG-IndustriAll Europe joint opinion on 'revision of IORP Directive must not lead to higher costs and shrinking occupational pensions' – within the context of the White Paper on 'an agenda for adequate, safe and sustainable pensions'
30/11/2011	Toolbox for recovering and strengthening competitiveness and safeguarding sustainable

	employment – experiences and examples of actions undertaken by EMF and Ceemet
27/10/2011	Permeability between vocational education and training (VET) and higher education
15/04/2011	Joint statement on the Commission communication on ‘Industry Policy for the globalisation era’
14/03/2011	Attracting people to the education pathways that lead to the metal, engineering and technology based industry – experiences and examples of actions undertaken by members of EMF and Ceemet
02/12/2010	Joint opinion on Competitiveness and employment in a globalised economy
02/12/2010	Education and training joint opinion
25/09/2008	Rules of procedures of the metal sector European sectoral social dialogue committee

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 sectoral social dialogue. 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.

IndustriAll Europe thus has a well-defined procedure for obtaining a mandate and getting European sectoral social dialogue texts approved by its member organisations. It has the capacity to negotiate binding agreements, such as the NEPSI agreement¹⁶, which also covers other sectors outside of the metal sector. Specifically for the metal sector, no such binding European sectoral social dialogue agreements have yet been reached.

Ceemet is not equipped with an explicit permanent mandate to negotiate on behalf of its members in matters of the European social dialogue. Instead, Ceemet adopted in its General Assembly, on 23 January 2009, clear internal rules for ‘formalised social dialogue with the EMF (now IndustriAll Europe)’. Detailed mandating, negotiating and decision-making procedures are determined by these internal rules, together with the Ceemet statutes and the initial Ceemet-EMF rules of procedure for the

¹⁶ The Agreement on workers’ health protection through the good handling and use of crystalline silica and products containing it.

European sectoral social dialogue committee for the metal, engineering and technology-based industries.

In the Ceemet statutes, its objectives orient the organisation towards cooperation on social issues, employment and industrial policy. Ceemet distinguishes itself from purely business associations that only advocate business-related interests. Furthermore, article 3§3 of its statutes provides that Ceemet may carry out

all acts, liaisons or operations, and may take all steps or measures, which may help in achieving its declared objectives, and particularly the cooperation between its members and between their affiliated companies.

The statutory bodies of Ceemet are its General Assembly (GA), its Board of Directors (BoD) and the Ceemet secretariat. They play a crucial role in the mandating, internal communication and decision-making on social dialogue matters, and regarding the implementation of social dialogue actions, joint opinions or negotiations.

These internal Ceemet rules on social dialogue indicate in Article 1A the important role of its General Assembly, which can delegate to the Board of Directors the task of defining the objectives to be achieved through social dialogue initiatives, setting out a mandate for actions or negotiations. Article 1B of these Ceemet internal rules adds the requirement that Ceemet needs to be clear about the form that the desired result is likely to have (a compilation of examples, a joint study/analysis, a recommendation or an agreement), as well as the likely consequences this may have at national level in terms of its implementation, including the possible costs of this.

Suggestions for topics to be addressed in social dialogue with IndustriAll Europe may be submitted to the Ceemet General Assembly by the Ceemet committees or ad hoc working groups (Art. 1C). If, however, during negotiations changes to the Ceemet mandate or position become necessary, due to responses or comments from IndustriAll Europe or the Commission, such changes need to be decided by the Ceemet General Assembly (or possibly delegated to the Ceemet BoD), as quickly as possible (Art. 1D).

Article 2 of the internal Ceemet rules aims to ensure that the basis for social dialogue is as representative as possible and well prepared. For the preparation of a Ceemet position, the Ceemet delegates in the European sectoral social dialogue committee in conjunction with the Ceemet secretariat should seek the views of and input from all Ceemet member organisations (Art. 2A), while a Ceemet position on a topic should be agreed by the Ceemet General Assembly before being discussed in the social dialogue process (Art. 2B). As a rule, Ceemet preparation or pre-meetings need to be held in a timely matter, possibly via e-mails, telephone or video conference (Art. 2C).

Ceemet decision-making is normally achieved by consensus. Though if this is not possible, a two-thirds majority is sufficient generally, according to article 5§4 of the Ceemet statutes. This threshold is placed higher in the ‘internal Ceemet rules on formalised social dialogue (Art. 1E)’, requiring a four-fifths majority, in case consensus is not possible. The 2008 Ceemet-EMF rules of procedure of the European sectoral social dialogue committee do prescribe (in article 9§2) that all decisions within the committee are taken by the plenary meeting by consensus between Ceemet and EMF (now IndustriAll Europe).

Further enforcing Ceemet’s capacity to negotiate and be fully representative of its members are the provisions in Articles 5 and 7 regarding internal communication and implementation within these internal Ceemet rules on social dialogue. Article 5 states that Ceemet members will be responsible for informing the Ceemet Secretariat of the way in which they have implemented the results of European social dialogue. While Article 7 adds that ‘social dialogue with IndustriAll Europe is a “standing item” on the agenda of all relevant Ceemet committees and Groups’.

Ceemet has thus proven to have clearly defined procedures for mandating, decision-making and implementation of social dialogue actions or agreements. Furthermore, it has proven in practice to have the capacity to negotiate a binding agreement, as it has signed the multi-sector NEPSI agreement, which covers several sectors, not only the metal sector as defined by this study. Besides

this NEPSI agreement, no metal sector specific binding agreement has been signed with IndustriAll Europe, except for the rules of procedure of the metal European sectoral social dialogue committee itself, of course. With 15 joint opinions produced, and joint presentations/events with the European Commission and European Parliament over a period of eight years, the output demonstrates that both Ceemet and IndustriAll Europe have the capacity to negotiate, to agree on texts, and to participate and contribute effectively in the committee.

Effective participation of IndustriAll Europe and Ceemet in the metal European sectoral social dialogue committee

Looking at the effective participation in the European social dialogue committee for the metal sector over the years 2016 and 2017, there were representatives involved from trade unions in 9 Member States (BE, DE, DK, ES, FI, FR, PT, SE, UK) and from employer organisations in 14 Member States (AT, BE, BG, DE, DK, FI, FR, HU, IT, LT, PT, SE, SI, UK).

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

4. Representativeness of IndustriAll Europe and Ceemet in aerospace activities (NACE 30.3)

On 2 February 2017, the General Secretary of IndustriAll Europe, Luc Triangle, and the Secretary General of the Aerospace and Defence Industries Association of Europe (ASD Europe), Jan Pie, addressed a letter to the Commission to express their interest in the establishment of an European sectoral social dialogue committee for the aerospace industry. The letter indicates the membership domain of ASD Europe in the aerospace industry and the vast membership domain of IndustriAll Europe in a number of sectors, amongst which the metals, engineering and technology-based industries (MET) sector, of which the aerospace subsector is part. The aerospace industry is presented as a major pillar of the European economy, generating a turnover of more than €120 billion and employing over one million workers throughout the EU and beyond. In the spirit of fruitful social partnership between several national associations of ASD Europe and IndustriAll Europe, the request has been launched for an European sectoral social dialogue committee for the aerospace industry.

The reply of the Commission refers to the criteria of sector-relatedness in Decision 98/500/EC, as well as to the present representativeness study for the metal sector, which is expected to provide some relevant information about the social partner organisations representative of the sector.

In the previous chapter, the representativeness of IndustriAll Europe and Ceemet was assessed for the entire metal sector, covering NACE codes 24.4, 25, 26, 27, 28, 29 and 30. In this chapter, the focus is on the aerospace industry as referred to by NACE 30.3, which is part of NACE 30 and as such a part of the wider metal sector.

In a first section, the degree to which IndustriAll Europe's membership domain covers the aerospace industry is examined. A second section will do the same for the membership domain of Ceemet, by identifying the number of Member States in which Ceemet has an affiliated national employer organisation that covers the aerospace industry. In both sections, tables will be included that also present the trade unions and employer organisations that have members in aerospace industries, but which are not represented in the metal European sectoral social dialogue committee, as they are not affiliated to either IndustriAll Europe or Ceemet.

A third section will briefly present the membership domain of ASD Europe, and how this relates to the aerospace industries in the EU in particular. Finally, the core of this chapter is a comparative analysis of the representativeness of Ceemet and ASD Europe, particularly for the aerospace industry (NACE 30.3). This comparison will be made thoroughly for a number of Member States, where both Ceemet and ASD Europe have different member organisations each covering different parts, sometimes overlapping parts, of the aerospace industries. This will allow some conclusions to be drawn at the end of this chapter, in section 5, regarding the representatives of social partner organisations in aerospace industries.

Aerospace activities covered by IndustriAll Europe membership domain

There are 62 trade unions with members in aerospace industries in 26 Member States. The majority of the metal sector trade unions are thus also representative for the aerospace industry.

Table 32: Sector-related trade unions affiliated to IndustriAll Europe

	Trade unions with members in aerospace		Metal sector trade unions without members in aerospace	
	Trade unions affiliated to IndustriAll	Trade unions not affiliated to IndustriAll	Affiliated to IndustriAll Europe	Not affiliated
AT	PRO-GE, GPA-djp			
BE	ACV-CSC METEA, ACLVB / CGSLB, LBC-NVK, SETCa-BBTK, ABVV Metaal, CNE-GNC, MWB (FGTB).			

BG	CITUB NTUF Metal-electro, Podkrepa SFMM (MET), CITUB TU Metalicy			
CY			OBIEK-SEK	SEMMHK-PEO, BUILDERS UNION PEO, BUILDERS UNION SEK
CZ	OS KOVO			Odbory KOVO MB
DE	IG Metall			CGM
DK	Metal, IDA	3F, HK/Privat, Dansk El-forbund		
EE			IMTAL	
EL	POEM			
ES	CCOO de Industria, UGT-FICA, FI-USO, ELA Industria y Construcción	LAB Industria, CIG-Industria, IC Industria		
FI	Metalli ¹⁷ , Pro, TEK, Union of Professional Engineers in Finland	DIFF, Ekonomit, YTN		
FR	FGMM-CFDT, FTM-CGT, FO Métaux, CFTC Métallurgie, CFE-CGC			
HR	SSH SMH IS (MET)			
HU	VASAS		VDSZ	
IE	SIPTU, TEEU, Unite			
IT	Fiom Cgil, Fim Cisl, Uilm Uil	UGL metalmeccanici, Fismic, SAVT/MET, USAS/ASG B		
LT	LMPSS (LPSK Litmetal)			
LU	OGBL, LCGB			
LV	LIA			
MT		GWU, UHM		
NL	FNV, CNV Metaal	De Unie, VHP2		
PL	Sekretariat Metalowców NSZZ „Solidarność”	FZZ ‘Metalowcy’, ZZPE, ZZIT		
PT	FIEQUIMETAL, SINDEL, SIMA	FETESE, SITESE		
RO	FSLI-METAL (has become industriAll-BNS.)	FSCM “Infratirea”	FNSSM, FSS METAROM	FSAR, FS ELECTRON M III
SE	IF Metall, Unionen, Sveriges Ingenjörer	Ledarna		

¹⁷ *Metalli* (old names *Metalliliitto* or *Metallityöväen Liitto* = Finnish Metalworkers’ Union) is since May 2017, due to a merger, called *Teollisuusliitto ry* (Finnish Industrial Union).

SI	SKEI	SKEIE-KS 90, KNSS,		Solidarnost
SK	OZ Kovo			
UK	GMB, Unite	Prospect	Community, RMT, USDAW	

In 25 Member States, IndustriAll Europe has an affiliated trade union with members in aerospace industries. In Cyprus and Estonia there do not appear to be trade unions with members in aerospace. In Malta, both the GWU and the UHM reported having trade union members in aerospace, but the UHM is not affiliated to IndustriAll Europe, and the GWU is not affiliated on its membership in the metal sector. No other European trade union federation has members in aerospace industries.

IndustriAll Europe also clearly covers specific aerospace-related industries, as its website shows.¹⁸ Thus, it has the structures in place within the organisation to ensure effective representation of the aerospace sector in the European sectoral social dialogue committee.

IndustriAll Europe's capacity to negotiate does, as was indicated in the previous chapter, also clearly cover aerospace industries in the metal sector. In conclusion, IndustriAll Europe is the only European trade union organisation representing aerospace workers, being fully representative for aerospace employees from 25 Member States.

Aerospace industries covered by Ceemet membership domain

Of the 70 metal sector employer organisations identified in the second chapter of this study, 40 also cover aerospace industries. It can thus be said that a majority of the metal sector employer organisations are also representative for the aerospace sub-sector.

Of these 40, there are 22 affiliated to Ceemet. Via them, Ceemet has, in 16 Member States, an affiliate that has members in aerospace industries. There are 7 Member States for which there is an employer organisation covering aerospace but not affiliated to Ceemet. This is the case for the Czech Republic, Greece, Luxemburg, Malta, Poland, Romania and Slovakia.

Table 33: Metal sector employer organisations affiliated to Ceemet and other organisations not affiliated

	Employer organisations with member companies in aerospace		Metal sector employment organisation without members in aerospace	
	Employer organisations affiliated to Ceemet	Employer organisations not affiliated to Ceemet		
AT	FMMGI, FVNE, FVFI, WKO - BSI		FEEI	
BE	AGORIA			
BG	BBCMB	BDIA		BASSEL, BBAEII, BAMI,
CY				SYMEBIK
CZ		ALV CR, AOBP		AutoSAP, EIA, skoda Auto, a. s.,
DE	Gesamtmetall			BVM
DK	DI			
EE				
EL		HASDIG		GSEVEE, POVAS

¹⁸ <https://news.industrial-europe.eu/p/aerospace>

ES	CONFEMETAL			
FI	Teknoliigatollisuus			
FR	UIMM, GIM, UIMM MP,		A3M	
HR	HUP-UMI (CEA)			
HU			MAGEOSZ	
IE		Ibec		
IT	Federmeccanica	Unionmeccanica - Confapi CONFIMI Impresa meccanica, ANCPL, Federlavoro e servizi – Confcooperative, AGCI Produzione e Lavoro		Assistal, Cna Metalmeccanica di Produzione, Confartigianato, Casartigiani, CLAAI
LT	Linpra			
LU		Fedil Metal		
LV	MASOC			
MT		MEA, The Malta Chamber of Commerce, Enterprise and Industry		
NL	FME	Metaalunie,		Uneto-Vni
PL		ZPPPOiL, SPPL		IGMNiR
PT	ANEME	FENAME, AIMMAP, ANIMEE		
RO		APREL		FEPA – CM, FP METALURGIA
SE	Teknikföretagen			Industriarbetsgivarna, IKEM
SI			ZKovI-GZS	ZDS
SK		ZSP SR		ZHTPG, ZEP SR
UK	EEF			

It is not known whether Ceemet deploys any specific industries for its aerospace members. Ceemet's capacity to negotiate, as described in the previous chapter, clearly also covers aerospace industries. This leads to the conclusion that Ceemet is representative for aerospace industries in 16 Member States.

ASD Europe membership domain in Aerospace industries.

The ASD Europe website states that 'ASD is the voice of European Aeronautics, Space, Defence and Security Industries with direct members including 15 major European companies and 24 National Associations headquartered in 18 countries' (ASD, n.d.). As Norway and Turkey are also counted here by ASD Europe, it covers 16 Member States.

ASD Europe covers not only aerospace and spacecraft industries (NACE 30.3) but also military vehicles (NACE 30.4) and security industries. As not all of its members were included in sector-related collective bargaining, they may not be included in the second chapter of this study. Consequently, it is difficult to assess specific domain coverage for aerospace industries alone, where no information is available on the membership domain of the ASD Europe member organizations. Its

Bulgarian member¹⁹ (BDIA – the Bulgarian Defense industry Association) and its Dutch member (NiDV - Netherlands Defence Manufacturers Association) seem to be defence sector associations covering only NACE 30.4. The assumption that these two organisations do not cover aerospace industries could not have been checked within the scope of this study. If this assumption is correct, it can be concluded that ASD Europe has aerospace members in 14 Member States: Austria, Belgium, the Czech Republic, Denmark, Germany, Finland, France, Italy, Greece, Poland, Portugal, Spain, Sweden and the UK.

Comparison of the ASD Europe and Ceemet aerospace membership domain

From the 14 Member States where ASD Europe has aerospace members, the Ceemet affiliates were asked to provide details on their own aerospace membership. Replies were received from 9 of these 14 countries. From the Czech Republic, Greece, Poland, Spain and the UK, no replies were received. The available information presented in Table 33 (in section 4.2) does, however, allow the following conclusions to be drawn for those five countries. In the Czech Republic, Greece and Poland, there appears to be an employer organisation covering aerospace but not affiliated to Ceemet. The Greek member of ASD Europe (Hasdig), its Czech member organisations (ALV and AOBP), as well as its Polish member (SPPL-APAI) have been included in this study as metal sector related employer organisations. However, none of them is affiliated to Ceemet.

For the UK and Spain, the situation is different. CONFEMETAL, the Spanish member of Ceemet, also covers aerospace in its membership domain. While TEDAE, the Spanish association for defence, security and space technology companies, affiliated to ASD Europe, did not appear in this study. Also the UK member of Ceemet, EEF, covers aerospace industries in its membership domain. ADS, which is the UK affiliate of ASD Europe, also did not appear in the data collected in this study. For Spain and the UK, both Ceemet and ASD Europe have a different affiliated organisation covering aerospace. The Ceemet member covers the entire metal sector, including aerospace industries, while the ASD Europe member only covers aerospace. The extent to which the companies that are members of the ASD member organisation are also affiliated to the Ceemet member organisation cannot be assessed here.

For the nine other Member States where both Ceemet and ASD Europe have member organisations covering aerospace, all the data have been provided to allow a thorough comparison of their respective membership domain.

In **Austria**, the two ASD Europe members AAIG and ADIG are also members of the Austrian Chambers of Commerce (WKO). The WKO has confirmed that all the companies affiliated to AAIG and ADIG are also, through WKO-Arge, represented in Ceemet.

For **Belgium**, Agoria and BSDI are members of ASD Europe. Agoria is a member of Ceemet, and has confirmed that all the companies represented by BSDI are also affiliated to Agoria.

For **Denmark**, FAD is a member of ASD Europe and is also affiliated to DI, which is the Danish member organisation of Ceemet. DI has confirmed that all the companies affiliated to FAD are also affiliated to DI.

The member of ASD Europe from **Finland** is AFDA, which is also a member of Teknologiateollisuus, the Finnish affiliate of Ceemet. Teknologiateollisuus (TT) confirmed that a quarter of the AFDA member companies are also directly affiliated to TT, while the other 75% are indirectly affiliated via Metaliinjalostajat, which is part of TT.

In **Germany**, ASD has as member organisations BDLI and BDSV, plus the corporate member Airbus. Airbus is a member of Nordmetall, which is one of the 22 regional metal sector employer organisations that form Gesamtmetall, the German member organisation of Ceemet. BDLI and BDSV

¹⁹ BBCMB, the Bulgarian member of Ceemet, provided the following information on the 17 member companies of BDIA, the Bulgarian affiliate of ASD Europe. Only 9 of them are part of the metal sector producing arms, while the others are trading, without producing them. Of the 9 metal sector companies, 4 are also member of BBCMI and thus represented in Ceemet. It is not, however, clear if these are aerospace companies or strictly defence sector companies.

are not members of Gesamtmetall, and no information is available about the extent to which their member companies are also affiliated to the regional organisations of Gesamtmetall.

For **France**, the Ceemet member organisation UIMM confirmed that the ASD-affiliated organisation GIFAS, as well as the ASD Europe corporate members Dassault, Safran, Thales and MBDA, are all also affiliated to the UIM, and as such represented in Ceemet.

In **Italy**, the same applies to AIAD, the Italian member organisation of ASD Europe, and the corporate members Leonardo and MBDA. All were reported as also being members of Federmeccanica, and as such also represented in Ceemet.

In **Portugal**, ASD Europe has as a member organisation AED Portugal. ANEME, the member organisation of Ceemet in Portugal, indicated that AED is not affiliated to ANEME and that none of the member companies of AED is also affiliated to ANEME. Nevertheless, there are some other companies, counting for less than a third of all aerospace companies in Portugal, that are members of ANEME and as such represented in Ceemet.

In **Sweden**, ASD Europe has SAI and SOFF as member organisations, and SAAB as a corporate member. SAAB is affiliated to Teknikföretagen, the Swedish member organisation of Ceemet, while SAI is not, and nor is SOFF. It can, however, be considered that some of the member companies of both SAI and SOFF, although less than a third in each case, are also members of Teknikföretagen.

Comparing the membership domains of ASD Europe and of Ceemet

From the first section in this chapter, it can be concluded that IndustriAll Europe has a member organisation in 25 Member States covering aerospace industries, and for Ceemet this is the case in 16 Member States. The third section indicated that ASD Europe organises the interests of not only aerospace companies but also defence companies, and that it may be assumed that it has members representing aerospace companies in 14 Member States.

In 16 Member States, Ceemet has a member organisation covering the aerospace industry (shaded grey in Table 34). ASD Europe has affiliated organisations covering the aerospace industry in 14 Member States (shaded blue in Table 34). Thus, in the Member States with a large aerospace sector (UK, FR, DE, etc.) membership of Ceemet and of ASD overlaps strongly. All the more so as the big company members of ASD (Airbus Industries and SAAB) are also, via national employer organisations, affiliated to Ceemet, in which they also play an important role.

The first column of Table 34 thus includes Member States where only Ceemet has member organisations covering aerospace companies. It has to be noted here that ASD Europe does have a defence sector affiliate (covering NACE 30.4) in Bulgaria and in the Netherlands, but from an analysis of the websites of those organisations it can be assumed that they do not cover the aerospace industry (NACE 30.3). The five Member States in which Ceemet thus represents the aerospace industry, without ASD Europe having an aerospace member organisation, are Bulgaria, Croatia, Latvia, Lithuania and the Netherlands (shaded green in the table).

Table 34: Member States where Ceemet and ASD Europe represent the aerospace industry

Ceemet member organisations in aerospace industries		ASD Europe member organisations in aerospace industries		
5 Member States where only Ceemet has a member organisation covering NACE 30.3	11 Member States where both Ceemet and ASD Europe have a member organisation covering NACE 30.3		Member States where only ASD Europe has a member covering 30.3	Employer organisation covering 30.3 not affiliated to Ceemet or ASD Europe
	In 6 Member States, all the companies in the ASD Europe affiliate are also members of the Ceemet affiliate.	In 5 Member States, both Ceemet and ASD Europe have some representativeness, partly different, partly overlapping.		
				No employer organisation covering 30.3 identified

BG ²⁰ HR LI NL ²¹	AT BE DK FI FR IT	DE ES PT SE UK	CZ EL PT ²²	LU MT RO SK	CY EE HU SI
Ceemet has, in 17 Member States, a member organisation covering NACE 30.3					
	ASD Europe has, in 14 Member States, an affiliated organisation covering NACE 30.3				

The conclusion of this detailed country-by-country comparison of the aerospace membership of these organisations is threefold. First, there are six Member States where all the representativeness of ASD Europe is also represented in Ceemet. Secondly, there is a different and also partly overlapping membership in the aerospace industries in another five Member States. While, finally, there are three Member States for which ASD Europe can be considered to hold representativeness for the aerospace industries, without Ceemet having any.

In 6 of the 14 Member States where ASD Europe has member organisations in the aerospace industries, all of them are also represented by the member organisations of Ceemet in those countries. This is the case for Austria, Belgium, Denmark, Finland, France and Italy.

For Spain, the UK, Germany, Portugal and Sweden, both Ceemet and ASD Europe have different member organisations covering aerospace industries. The ASD Europe member only covers aerospace, while the Ceemet member covers the entire metal sector and some companies in the aerospace industries as well. The ASD Europe corporate members SAAB and Airbus are also affiliated to the Swedish and German members of Ceemet. Also, in the case of the companies that are members of the ASD employer organisations in those countries, there are some companies that are also members of the Ceemet-affiliated organisation, though this is assessed as being less than one-third of them in Portugal and Sweden. For the other countries, there is no further information available regarding the overlapping membership domain in aerospace industries.

The three remaining Member States where ASD Europe has a member organisation in the aerospace industries, while Ceemet does not, are Greece, the Czech Republic and Poland. The relevant ASD Europe member organisations are Hasdig in Greece, ALV and AOBP in the Czech Republic and SPPL in Poland. In Table 18, it can be seen that both Hasdag in Greece and SPPL in Poland are not involved in sector-related collective bargaining. As for ALV and AOBP in the Czech Republic, ALV is the only one involved in collective bargaining in five different aerospace companies, covering 1,756 employees. AOBP is not involved in collective bargaining.

Conclusions on representativeness in the European aerospace industry

While the entire European metal sector employs about 13 million employees, the aerospace industries has, according to Eurostat data, around 390,000 employees, corresponding to 3% of the entire metal sector. ASD Europe claims that the total number of employees of the aerospace sector in the EU (based upon information from its affiliates) is 543,000, of which two-thirds would be for civil aviation and one-third for defence.

²⁰ ASD Europe has a member organisation in Bulgaria, but it only covers defence activities in NACE 30.4

²¹ ASD Europe has a member organisation in the Netherlands, but it only covers defence activities in NACE 30.4

²² Only one affiliate (covering 1,756 employees) is involved in collective bargaining.

The conclusion regarding representativeness is that in 12 Member States, Ceemet has for sure full representativeness for the entire aerospace industries, and in another 5 Member States it certainly covers part of them. ASD Europe, on the other hand, has aerospace industry related member organisations 14 Member States for certain. In the 11 Member States shaded grey in Table 34, both Ceemet and ASD Europe have an entirely or partly overlapping membership in the aerospace industries.

The unique representativeness that ASD Europe has, and which is not represented by Ceemet in the metal sector European sectoral social dialogue committee, is to be found in the entire aerospace industries of the Czech Republic, Greece and Poland, and in a significant part of the aerospace industries of Germany, Portugal, Spain, Sweden and the UK. ASD Europe has representativeness in three Member States, where Ceemet has none; this is the case for the Czech Republic, Greece and Poland. Whereas Ceemet has unique representativeness in five Member States where ASD Europe does not have any member organisation. This is the case for Bulgaria, Croatia, Latvia, Lithuania and the Netherlands.²³

This underscores the conclusion that the aerospace industries are strongly woven into the metal sector industrial relations landscape. And that only together can ASD Europe and Ceemet convincingly claim representativeness for the aerospace industries.

Singling the aerospace sector out from the metal sector would require the support and involvement of Ceemet, as Ceemet organises in at least as big a part of the aerospace industries as ASD, and has a well-defined mandate for social dialogue (as indicated in section 3.6).

²³ ASD Europe indicated that it does have a member organisation in both Bulgaria and in the Netherlands, though these organisations only cover defence activities in NACE 30.4, not NACE 30.3

5. Conclusions

With a workforce of 13 million people,²⁴ the European metal sector represents an important share of the national workforce in certain countries. In a number of Member States, metal sector employment exceeds 10% of the working population. Also, in the industrial relations settings of a number of Member States, the collective bargaining agreements reached for the metal sector may set the pattern for bargaining in other sectors.

In this study, 102 sector-related trade unions and 71 metal sector employer organisations were identified. In each of the 28 Member States, there was at least one trade union with members in the metal sector. On the employers' side, Estonia is the only country without a relevant employer organisation included in this study.

In each of the 28 Member States, some form of collective bargaining takes place in the metal sector. For 19 Member States this is multi-employer bargaining, while for 9 others, only single- employer bargaining takes place at the company level. Almost all trade unions, 98 of the 102, are involved in collective bargaining. While out of the 71 employer organisations, 51 conduct collective bargaining, in 22 of the 28 Member States.

At the European level, Ceemet and IndustriAll Europe have been developing European social dialogue in the metal sector European sectoral social dialogue committee since 2010. They are mutually recognised social partners for the metal sector.

The membership domain of **IndustriAll Europe** covers the entire metal sector, including the aerospace industry and shipbuilding, but also a number of other sectors. Its membership domain is thus of the overlapping type.

64 sector-related trade unions from 27 Member States are affiliated to IndustriAll Europe. In Malta, IndustriAll Europe does not have metal-related membership. With 58 of its metal-related member organisations involved in collective bargaining, IndustriAll Europe has metal sector collective bargaining in every Member State except Malta.

IndustriAll Europe has a clear mandate and decision-making procedures to endorse European sectoral social dialogue outcomes. It has also proven to have the capacity to participate and contribute effectively to the European sectoral social dialogue committee.

As for the other European trade union organisations with members in the sector, none of them appeared to be sector-related.

This leads to the conclusion that **IndustriAll Europe is the only and thus the most representative European trade union organisation in the metal sector.**

The membership domain of Ceemet is more or less congruent with NACE Codes 24.4, 25, 26, 27, 28, 29 and 30. The metal sector European sectoral social dialogue committee covers the shipbuilding sector (NACE 28.11, 30.11, 30.12 and 33.15) (see Eurofound, 2017 for a representative study for the shipbuilding sector). The aerospace industry (NACE 30.3) is also fully covered within the scope of the metal European sectoral social dialogue committee. In 12 Member States, Ceemet has an affiliate covering the entire metal sector. Whereas the Ceemet affiliates from Bulgaria, Hungary, Portugal and Slovenia cover only some of the activities.

Ceemet has 26 affiliated employer organisations in 18 Member States. Of them, 22 member organisations are involved in collective bargaining. Thus, in 15 Member States, Ceemet has an affiliate conducting collective bargaining (see Table 26). The seven Member States where an employer organisation is involved in collective bargaining without being affiliated to Ceemet are Cyprus, the Czech Republic, Greece, Ireland, Poland, Romania and Slovakia.

Looking at the 10 Member States with the largest metal sector workforce (Table 27), Ceemet does not have an affiliate in Poland, the Czech Republic or Slovakia. Also among the countries with a large

²⁴ Ceemet indicates a workforce of 17 million employees in the sector, but in this are included the employees of the member companies of its affiliates in Australia, Norway, Switzerland and Turkey. Those countries are, however, not included in this study on the 28 Member States.

metal sector workforce is Hungary, where Ceemet has a member organisation, but as there is only single-employer bargaining at company level, this member is not involved in collective bargaining.

A number of other European associations have been identified as having members from the metal sector (see section 3.5). Some do have member organisations in a significant number of Member States and have been found to be sector-related. Orgalime, for example, has members in 12 Member States. Those other organisations are, however, limited to the advocacy of purely business interests of a particular sub-sector or industry that is a small part of the entire metal sector. A search on the websites of those other organisations indicated that they can be considered as having interests in or activities on social dialogue matters at European level. The other European organisations can be considered as European Business Associations, whereas CEEMET clearly is a European Employers' Organisation.

Ceemet has, in the objectives set in its statutes and in procedures foreseen mainly in internal rules established in 2009, provided mandating procedures, rules for decision-making, internal communication and implementation of social partner actions and negotiations. Ceemet's capacity to negotiate is well developed, both in practice and in the rules and procedures provided.

This leads to the conclusion that **Ceemet is the most representative European metal sector organisation.** Ceemet is also the only European organisation active and involved in the field of social dialogue, and thus **the only European social partner organisation representative for the entire metal sector.**

When it comes to aerospace activities, Chapter 4 has illustrated how the industrial relations landscape is embedded within the wider metal sector. Without Ceemet, ASD Europe has only a limited representativeness, and no aerospace industry social dialogue can be advised without the involvement of Ceemet.

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Annex 1: Details of individual organisations

Table A1: List of abbreviations of trade union names

Country	Abbreviation in English	Full name in English	Full name in original language
AT	PRO-GE	Manufacturing Union	Produktionsgewerkschaft
AT	GPA-djp	Union of Salaried Private Sector Employees, Graphical Workers and Journalists	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier
BE	ACV-CSC METEA	ACV-CSC METEA	ACV-CSC METEA
BE	ACLVB / CGSLB		Algemene Centrale der Liberale Vakbonden van België /Centrale Générale des Syndicats Libéraux de Belgique
BE	LBC-NVK	National Federation of White- Collar Workers and Professionals/High Potential Workers	Landelijke Bediendencentrale – Nationaal-Verbond voor Kaderleden
BE	SETCa-BBTK	SETCa-BBTK (white-collar union)	SETCa-BBTK
BE	ABVV Metaal		
BE	CNE-GNC	National Federation of White-Collar workers	Centrale nationale des employés
BE	MWB (FGTB)	Metallurgists Wallonia Brussels	Métallurgistes Wallonie-Bruxelles
BG	CITUB NTUF Metal-electro	National Federation Metal-electro	
BG	Podkrepa SFMM (MET)	Syndical Federation of Machinebuilders and Metalworkers PODKREPA	
BG	NFTINI	National Federation Technical Industry, Science, Informatics	
BG	SFOEMI	Trade Union Federation of Organisations of Electronics, Mechanical and Informatics	
BG	CITUB TU Metalicy	Trade Union Metalicy	
BG	FTUMIC	Federation of Trade Unions of the Military Industrial Complex	
CY	OBIEK-SEK	Federation of Industrial Workers of Cyprus	
CY	SEMMHK-PEO	Cyprus Metalworkers, Mechanics and Electricians Trade Union	
CY	BUILDERS UNION PEO	Cyprus Building Wood, Mine and General Workers Trade Union PEO	
CY	BUILDERS UNION SEK	Federation of Construction Workers, Miners and	

Representativeness of the European social partner organisations: Metal sector

		related Occupations of Cyprus (O.O.I.M. - SEK)	
CZ	Odborový svaz KOVO (OS KOVO)	Trade Union KOVO	OS KOVO
CZ	Odbory KOVO MB	Trade Unions KOVO MB	Odbory KOVO MB
DE	IG Metall	German Metalworkers' Union	Industriegewerkschaft Metall
DE	CGM	Christian Metalworkers' Union	Christliche Gewerkschaft Metall
DK	Metal	Danish Metalworkers' Union	Dansk Metal
DK	3F	United Federation of Danish Workers	United Federation of Danish Workers
DK	HK/Privat	HK Denmark	HK Danmark
DK	IDA	The Danish Society of Engineers	Ingeniørforeningen i Danmark
DK	Dansk El-forbund	Danish Union of Electricians	Dansk El-forbund, DEF
EE	IMTAL	Federation of Estonian Industrial and Metal Workers' Unions	Eesti Industriaal- ja Metallitöötajate Ametiühingute Liit
EL	POEM	Hellenic Federation of Metalworkers	
ES	CCOO de Industria	Federation of Industry of the Confederation of Workers' Commissions	Federación de Industria de Comisiones Obreras
ES	UGT-FICA	Federation of Industry, Construction and Agriculture of the General Workers' Union	Federación de Industria, Construcción y Agro de la Unión General de Trabajadores
ES	FI-USO	Federation of Industry of the Workers' Trade Union	Federación de Industria de la Unión Sindical Obrera
ES	ELA Industria y Construcción	Federation of Industry and Construction of the Basque Workers' Solidarity	Federación de Industria y Construcción de ELA (Euskal Langileen Alkartasuna)
ES	LAB Industria	Federation of Industry of Nationalist Workers' Committees	Federación de Industria de LAB (Langile Abertzaleen Batzordeak)
ES	CIG-Industria	Federation of Industry of the Inter-union Galician Confederation	Federación de Industria de la Confederación Sindical Gallega
ES	IC Industria	Federation of Industry of the Inter-union Canarian confederation	Federación de Industria de la confederación Intersindical Canaria
FI	Metalli (since May 2017: Teollisuusliitto)	Finnish Metalworkers' Union (since May 2017: Finnish Industrial Union)	Metallityöväen Liitto ry (since May 2017: Teollisuusliitto)
	<i>Metalli</i> (old names <i>Metalliliitto</i> or <i>Metallityöväen Liitto</i> = Finnish Metalworkers' Union) is since May 2017, due to a merger, called <i>Teollisuusliitto ry</i> (Finnish Industrial Union).		
FI	Pro	Trade Union Pro	Ammattiliitto Pro ry
FI	TEK	Academic Engineers and Architects in Finland	Tekniikan akateemiset TEK

Representativeness of the European social partner organisations: Metal sector

FI	IL	Union of Professional Engineers in Finland	Insinööriliitto ry
FI	DIFF	Engineers in Finland (unofficial translation)	DIFF – Ingenjörerna I Finland
FI	Ekonomit	The Finnish Business School Graduates	Suomen Ekonomit ry
FI	YTN	Federation of Professional and Managerial Staff	Ylemmät toimihenkilöt YTN ry
FR	FGMM-CFDT	General Federation of Mining and Metal Industry - French Democratic Confederation of Labour	Fédération Générale des Mines et de la Métallurgie – Confédération Française démocratique du Travail
FR	FTM-CGT	Workers' Federation of the Metal Industry – General Confederation of Labour	Fédération des Travailleurs de la Métallurgie – Confédération générale du travail
FR	FO Métaux	Metal Industry Federation FO	Fédération Confédérée FO de la Métallurgie
FR	CFTC Métallurgie	Metalworkers' union CFTC	Syndicat CFTC de la Métallurgie
FR	CFE-CGC	French Confederation of Professional and Managerial Staff/ General Confederation of Professional and Managerial Staff – Metalworking Federation	Fédération des Cadres, de la Maîtrise et des Techniciens de la Métallurgie – Confédération Générale de l'Encadrement/Confédération générale des cadre
HR	SSH SMH IS (MET)	Metal Workers' Trade Union Of Croatia - Industrial Trade Union	Sindikat metalaca Hrvatske - Industrijski sindikat
HU	VASAS	Hungarian Metalworkers' Federation	Vasas Szakszervezeti Szövetség
HU	VDSZ	Federation of Trade Unions of the Chemical, Energy and Allied Workers	Magyar Vegyipari, Energiaipari és Rokon Szakmákban Dolgozók Szakszervezeti Szövetsége
IE	SIPTU	Services Industry Professional & Technical Union	Services Industry Professional & Technical Union
IE	TEEU	Technical Electrical & Engineering Union	Technical Electrical & Engineering Union
	In 2017 TEEU amalgamated with UCATT to form CONNECT trade unions		
IE	Unite	Unite the Union	Unite the Union
IT	Fiom Cgil	The Federation of Metallurgical Employees and Workers	Federazione Impiegati operai metallurgici
IT	Fim Cisl	Italian Metalworkers' Federation	Federazione italiana metalmeccanici
IT	Uilm Uil	Italian Metalworkers' Union	Unione italiana lavoratori metalmeccanici
IT	UGL metalmeccanici	The General Union of Work, Metalworkers	Unione generale del lavoro, metalmeccanici
IT	Fismic	Autonomous Trade Union of Metalworkers and Related Industries	Sindacato autonomo metalmeccanici e industrie collegate

Representativeness of the European social partner organisations: Metal sector

IT	SAVT/MET	Autonomous Trade Union of Valle D'Aosta "Travalleurs"/MET	Sindacato autonomo valdostano "Travalleurs"/MET
IT	USAS/ASGB	Sud-Tirol Autonomous Trade Unions	Sindacato autonomo del Sud Tirol
LT	LMPSS (LPSK Litmetal) ²⁵	Unification of Lithuanian Metalworkers' Trade Unions	Lietuvos metalistų profesinių sąjungų susivienijimas
LU	OGBL	Processing of metal and garages union – Trade Union Confederation of Luxembourg	Syndicat Transformation sur Métaux et Garages – Onofhängege Gewerkschaftsbond Lëtzebuerg (OGBL)
LU	LCGB	Union of the Companies of the Steel and Metallurgy	Syndicat des Entreprises de la Sidérurgie et de la Métallurgie
LV	LIA	Latvian Industrial Workers Trade Union	Latvijas industriālo nozaru arodbiedrība
MT	GWU	General Workers Union	General Workers Union
MT	UHM	UHM Voice of the Workers	Union Haddiema Maghqudin
NL	FNV	Federation of Dutch Trade Unions	Federatie Nederlandse Vakbeweging
NL	CNV Metaal	Christian National Trade union Federation Metal	CNV Vakmensen Metaal
NL	De Unie	The Union	De Unie
NL	VHP2	Association for Higher Personnel ²	Vereniging voor Hoger Personeel ²
PL	Sekretariat Metalowców NSZZ 'Solidarność'	Metalworkers' Secretariat NSZZ 'Solidarność'	Sekretariat Metalowcow Niezaleznego Samorządowego Związku Zawodowego 'Solidarność'
PL	FZZ 'Metalowcy'	Trade Union Federation 'Metalworkers'	Federacja Związków Zawodowych 'Metalowcy'
PL	ZZPE	Trade Union of Electromechanical Industry	Związek Zawodowy Przemysłu Elektromaszynowego
PL	ZZIT	Trade Union of Engineers and Technicians	Związek Zawodowy Inżynierów i Techników
PT	FIEQUIMETAL	Federation of Unions in the Metal, Chemical, Pharmaceutical and Electric Industries and in Energy and Mining	Federação Intersindical das Indústrias Metalúrgicas, Química, Farmacêutica, Elétrica, Energia e Minas
PT	SINDEL	National Union of Manufacturing and Energy	Sindicato Nacional da Indústria e da Energia
PT	SIMA	Union of Manufacturing in Metal and related Industries	Sindicato das Indústrias Metalúrgicas e Afins
PT	FETESE	Federation of Unions in Manufacturing and Services	Federação dos Sindicatos da Indústria e Serviços
PT	SITESE	Union of Workers and Technicians in Services	Sindicato dos Trabalhadores e Técnicos de Serviços

²⁵ LMPSS and LPSK Litmetal is the same organisation: see <http://www.litmetal.lt/en>

Representativeness of the European social partner organisations: Metal sector

RO	FNSSM	National Trade Union Federation “Solidaritatea Metal”	Federatia Nationala Sindicala ‘SOLIDARITATEA METAL’
RO	FSS METAROM	Trade Union Federation of Steel Workers “Metarom”	Federatia Sindicala a Siderurgistilor ‘METAROM’
RO	FSLI-METAL	Industry Employees Trade Union Federation “METAL”	Federatia Sindicala a Lucratorilor din Industrie – ‘METAL’
RO	FSCM ‘Infratirea’	The Machine Building Trade Unions Federation – FSCM “Infratirea”	Federatia Sindicatelor din Constructii de Masini ‘Infratirea’
RO	FSAR	Trade Unions Federation of Romanian Car’s Manufacturing	Federatia Sindicatelor ‘Automobilul Romanesc’
RO	FS ELECTRON M III	ELECTRON M III Trade Union Federation	Federatia Sindicala ELECTRON – M III
SE	IF Metall	The Union of Metal Workers	Industrifacket Metall
SE	Unionen	Unionen	Unionen
SE	Sveriges Ingenjörer	Swedish Association of Graduate Engineers	Sveriges Ingenjörer
SE	Ledarna	The Confederation of Executives and Managerial Staff	Ledarna
SI	SKEI	Trade Union for Metal and Electrical Industry of Slovenia	Sindikat kovinske in elektroindustrije Slovenije
SI	SKEIE-KS 90	Trade Union of Metal, Electrical and Electronics	Sindikat kovinske, elektroindustrije in elektronike-Konfederacija sindikatov 90
SI	KNSS	Confederation of New Trade Unions of Slovenia	Neodvisnost, Konfederacija novih sindikatov Slovenije
SI	Solidarnost	Association of Workers Trade Unions of Slovenia – Solidarity	Zveza delavskih sindikatov Slovenije – Solidarnost
SK	OZ Kovo	Metal Trade Union Association	Odborovy zvez Kovo
UK	Community	Community	Community
UK	GMB	GMB	GMB
UK	RMT	National Union of Rail, Maritime and Transport Workers	National Union of Rail, Maritime and Transport Workers
UK	Prospect	Prospect	Prospect
UK	USDAW	Union of Shop, Distributive and Allied Workers	Union of Shop, Distributive and Allied Workers
UK	Unite	Unite the Union	Unite the Union

Table A2: Total companies and employment in the metal sector, 2010–2015 (approx.)

	Year	Number of companies	Year	Total employment	Female employment	Female employment as percentage of total employment	Total sectoral employment as percentage of total employment in economy
AT	2010	6,656	2010	245,343	47,070	19%	6.1%
	2015	6,773	2015	265,740	n/a	n/a	6.5%
BE	2010	3,568	2010	169,856	25,785	15%	3.8%
	2015	3,231	2015	155,728	23,358	15%	3.4%
BG	2010	6,134	2010	132,228	44,901	34%	5.2%
	2015	5,735	2015	145,430	49,105	34%	5.7%
CY	2010	120,958	2010	585,800	176,300	30%	12%
	2015	113,172	2015	716,300	216,400	30%	14.2%
CZ	2010	96,711	2010	4,189,000	792,000	19%	10.5%
	2015	93,947	2015	4,337,000	833,000	19%	10.8%
DE	2010	35,427	2010	1,137,109	249,031	22%	n/a
	2015	34,759	2015	1,129,256	201,120	18%	n/a
DK	2010	6,058	2010	123,255	28,764	23%	4.6%
	2015	5,823	2015	117,063	25,595	22%	4.3%
EE	2010	1,423	2010	27,797	n/a	n/a	6.9%
	2015	1,719	2015	32,179	n/a	n/a	7.2%
EL	2010	20,393	2010	99,281	8,550	9%	2.238%
	2015	16,351	2015	65,516	7,202	11%	1.807%
ES	2010	4,642	2010	81,595	23,906	29%	9.6%
	2015	3,518	2015	84,070	23,221	28%	10.4%
FI	2010	56,062	2010	794,400	152,800	19%	4.2%
	2015	57,054	2015	728,400	132,200	18%	4.1%
FR	2010	7,909	2010	147,654	n/a	n/a	6.3%
	2015	7,444	2015	133,524	n/a	n/a	5.5%
HR	2010	1,507	2010	6,133	905	15%	1.53%
	2015	1,348	2015	4,480	658	15%	1.25%
HU	2010	6,616	2010	72,967	n/a	n/a	5.2%
	2015	5,386	2015	68,867	n/a	n/a	5.3%
IE	2010	18,804	2010	338,691	116,651	34%	9%
	2015	17,549	2015	423,828	125,103	30%	10%
IT	2010	4,872	2010	75,500	n/a	n/a	4%
	2015	3,757	2015	78,900	n/a	n/a	3.9%
LT	2010	1,602	2010	n/a	n/a	n/a	n/a
	2015	2,142	2015	n/a	n/a	n/a	n/a
LU	2010	252	2010	9,843	1,598	16%	2.73%
	2015	246	2015	9,844	1,539	16%	2.42%

LV	2010	118,327	2010	1,587,176	290,672	18%	7%
	2015	108,689	2015	1,487,185	285,534	19%	6.7%
MT	2010	1,144	2010	17,166	4,667	27%	3.2%
	2015	1,613	2015	23,339	5,590	24%	3.8%
NL	2010	566	2010	5,989	1,857	31%	4%
	2015	505	2015	5,693	1,537	27%	3%
PL	2010	17,905	2010	269,000	34,000	13%	3.1%
	2015	18,175	2015	272,000	35,000	13%	3.1%
PT	2010	n/a	2010	768,669	n/a	n/a	5%
	2015	79,290	2015	829,273	n/a	n/a	5.2%
RO	2010	17,130	2010	170,409	48,596	29%	4.8%
	2015	15,185	2015	169,962	n/a	n/a	n/a
SE	2010	31,545	2010	243,400	78,900	32%	10.5%
	2015	31,851	2015	303,700	85,500	28%	12.5%
SI	2010	17,281	2010	n/a	n/a	n/a	n/a
	2015	17,379	2015	n/a	n/a	n/a	n/a
SK	2010	8,431	2010	10,139	n/a	n/a	2%
	2015	8,982	2015	9,851	n/a	n/a	2%
UK	2010	54,335	2010	1,119,700	189,300	17%	3.8%
	2015	48,625	2015	1,152,000	207,700	18%	3.7%

Figure A1: Trends in the number of companies from 2010 to 2015 (difference in percentage)

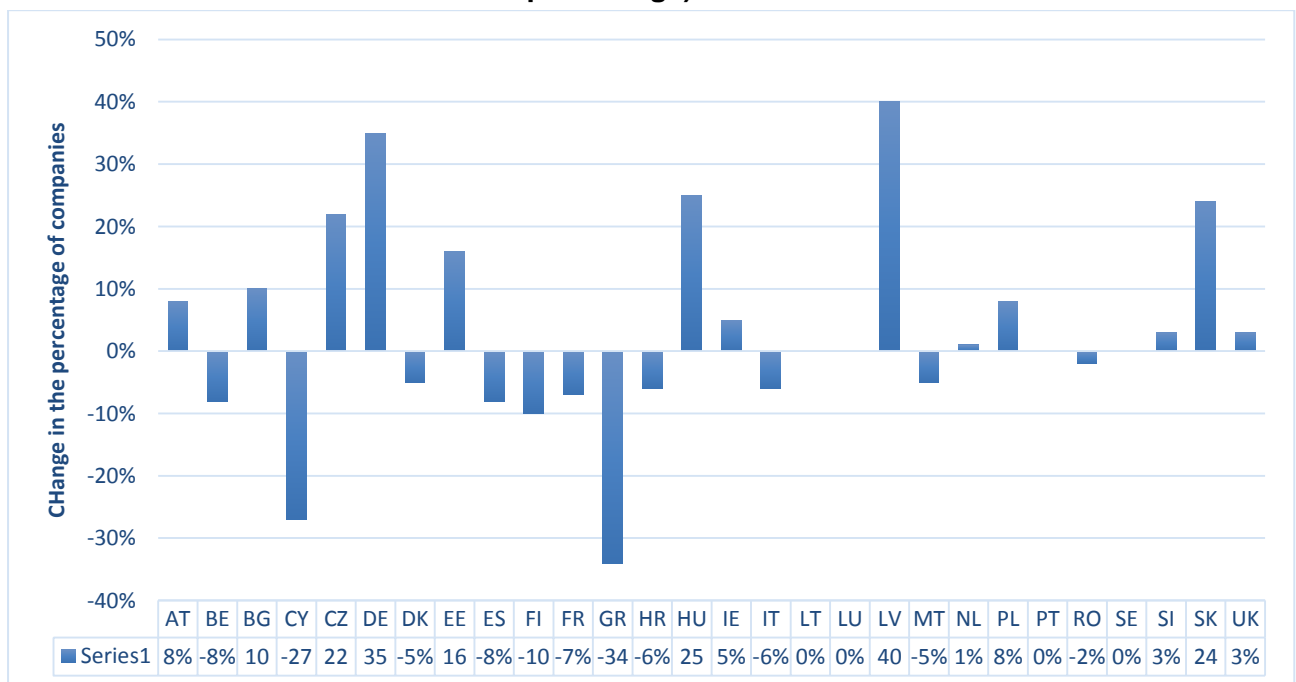


Table A3: Total employees in the metal sector, 2010–2015

	Year	Total employees	Female employees	Female employees as percentage of total employees	Total sectoral employees as percentage of total employment in economy
AT	2010	20,231	1,848	9%	0.6
	2015	21,104	n/a	n/a	0.6
BE	2010	15,364	1,000	7%	0.4
	2015	11,502	881	8%	0.43
BG	2010	4,639	1,106	24%	0.2
	2015	2,911	682	23%	0.1
CY	2010	n/a	n/a	n/a	n/a
	2015	n/a	n/a	n/a	n/a
CZ	2010	5,584	33	1%	5
	2015	5,323	29	1%	4
DE	2010	153,100	17,405	11%	0.5
	2015	147,678	16,719	11%	0.4
DK	2010	2,128	354	17%	0.1
	2015	2,133	348	16%	0.1
EE	2010	n/a	n/a	n/a	n/a
	2015	n/a	n/a	n/a	n/a
EL	2010	6,445	759	12%	0.224
	2015	4,175	346	8%	0.178
ES	2010	90,300	11,200	12%	0.6
	2015	78,100	9,200	12%	0.5
FI	2010	n/a	n/a	n/a	n/a
	2015	n/a	n/a	n/a	n/a
FR	2010	41,607	n/a	n/a	n/a
	2015	39,951	n/a	n/a	n/a
HU	2010	6,857	1,097	16%	0.2
	2015	6,485	908	14%	0.2
HR	2010	1,565	n/a	n/a	0.1
	2015	965	n/a	n/a	0.1
IE	2010	n/a	n/a	n/a	0.1
	2015	2,243	n/a	n/a	0.3
IT	2010	75,533	5,210	7%	0.4
	2015	71,828	5,513	8%	0.4

LT	2010	597	n/a	n/a	0
	2015	443	n/a	n/a	0
LU	2010	5,018	435	9%	1.48
	2015	4,131	443	11%	1.08
LV	2010	2,739	551	20%	0.5
	2015	725	173	24%	0.1
MT	2010	12	n/a	n/a	0
	2015	9	n/a	n/a	0
NL	2010	11,800	944	8%	0.2
	2015	11,100	888	8%	0.2
PL	2010	n/a	n/a	n/a	n/a
	2015	n/a	n/a	n/a	n/a
PT	2010	1,780	276	16%	0.05
	2015	n/a	n/a	n/a	n/a
RO	2010	27,745	n/a	n/a	0.5
	2015	20,300	n/a	n/a	0.3
SE	2010	21,833	n/a	n/a	0.54
	2015	22,075	n/a	n/a	0.52
SI	2010	3,120	413	13%	0.4
	2015	2,915	n/a	n/a	n/a
SK	2010	22,000	2,000	9%	1.1
	2015	22,400	3,200	14%	1.1
UK	2010	67,600	11,200	17%	0.3
	2015	58,300	5,500	9%	0.2

Table A4: Collective bargaining, consultation and affiliations of trade unions in the metal sector, 2015–2017

	Trade union	Collective bargaining (M: multi-employer; S: single-employer)	Collective bargaining coverage	Consultation/frequency	National and European affiliations
AT	PRO-GE	M	14,000	Regularly	IndustriAll Global Union, ILO, ITUC-CSI-IGB, IUUF- UITA- IUL, TUAC, IndustriAll European Trade Union, EFFAT, ETUC
	GPA-djp	M	7,000	Ad hoc	IndustriAll Global Union, ITUC-CSI-IGB, UNI global union, IndustriAll European Trade Union, ETUC, EPSU, EFFAT, EFJ
BE	ACLVB /CGSLB	M + S	1,1305	Regularly	IVV , EVV, IndustriAll Europe
	Meteva (ACV-CSC)	M + S	7,200	Regularly	ETUC, IndustriAll

Representativeness of the European social partner organisations: Metal sector

	CNE (ACV-CSC)	M + S	4,076	Regularly	IndustriAll, ETUC
	LBC-NVK (ACV-CSC)	M + S	4,076	Ad-hoc	IndustriAll Europe and Global
	SETCa-BBTK (FGTB-ABVV)	M + S	n/a	Regularly	IndustriAll
	ABVV Metaal	M + S	7,200	Ad hoc	ETUC, IndustriAll Europe, IndustriAll Global
	MWB (ABVV-FGTB)	M + S	7,200	Ad hoc	ETUC, IndustriAll Europe, IndustriAll Global
BG	TU Metalicy	M + S	1,700	Ad hoc	IndustriAll Europe, IndustriAll global
	NF Metallurgy	M + S	1,700	Regularly	IndustriAll Europe, IndustriAll global
CZ	Odborový svaz KOVO (OS KOVO)	S	20,200	Ad hoc	IndustriAll
DE	IG Metall	M + S	n/a	Ad hoc	IndustriAll
DK	3F	M	2,089	Ad hoc	Central Organisation of Industrial Employees in DK (CO-industri), IndustriAll Europe, ITF, PSI, Uni-global, BWI, ETF, NTF, EFFAT, UNI Europa, EFBWW, EPSU
	Metal	M	2,089	Ad hoc	
	HK/Privat	M	n/a	n/a	Central Organisation of Industrial Employees in DK (CO-industri), IndustriAll Europe, UNI Global Union, UNI Europa
	IDA	n/a	n/a	n/a	IndustriAll Global, IndustriAll Europe
	Dansk El-forbund	M	2,089	n/a	Central Organisation of Industrial Employees in DK (CO-industri), IndustriAll Europe
EL	Union of Workers at SIDENOR S.A	S	n/a	Info not available	
ES	CCOO de Industria	M + S	n/a	Ad hoc	IndustriAll Global, IndustriAll Europe
	UGT-FICA	M + S	n/a	Ad hoc	IndustriAll Global Union, IndustriAll Europe
	FI-USO	M + S	n/a	n/a	IndustriAll Global Union, IndustriAll Europe
	ELA Industria y Construcción	M + S	125,000	n/a	IndustriAll Global Union, IndustriAll Europe
	LAB Industria	M + S	n/a	n/a	
	CIG-Industria	M + S	n/a	n/a	
	IC Industria	M + S	n/a	n/a	
FI	Metalli	M	5,750	Regularly	IndustriAll Global, IndustriAll Europe, Nordic-IN
	Pro	M	23,000	Ad hoc	IndustriAll Europe, IndustriAll Global Nordic-IN
	TEK	n/a	n/a	Regularly	ETUC, Eurocadres, IndustriAll Global, UNI Global / Europe / Nordic ICTS, Nordic-IN, Cooperation with Nordic engineer organisations
	IL	n/a	n/a	Regularly	IndustriAll Global, IndustriAll Europe, Eurocadres, European Federation of National Engineering Associations (FEANI), UNI Europa

Representativeness of the European social partner organisations: Metal sector

	YTN	M	55,000	Ad-hoc	ETUC (via Akava), Eurocadres (via Akava)
	Sähköliitto	M	n/a	n/a	BWI, IndustriAll Global, NBTF, NEF, IndustriAll Europe, EFBWW
FR	FGMM-CFDT	M + S	29,108	n/a	IndustriAll Global, IndustriAll Europe
	FTM-CGT	M + S	29,108	n/a	IndustriAll Global, IndustriAll Europe
	FO Métaux	M + S	29,108	n/a	IndustriAll Global, IndustriAll Europe
	CFTC Métallurgie	M + S	29,108	n/a	IndustriAll Global, IndustriAll Europe
	CFE-CGC	M + S	29,108	n/a	IndustriAll Global, IndustriAll Europe, European Federation of Managers in the Steel Industry (FEDEM)/CEC European Managers
HR	SMH	S	n/a	n/a	IndustriAll Europe, IndustriAll-Global
HU	VASAS	S	5,300	Ad hoc	IndustriAll Europe, IndustriAll-Global
IE	SIPTU	S	3,000	Info not available	IndustriAll
	TEEU	S	n/a	Info not available	IndustriAll In 2017 TEEU amalgamated with UCATT to form CONNECT trade unions
	In 2017 TEEU amalgamated with UCATT to form CONNECT trade unions				
IT	Fiom Cgil	M + S	n/a	Ad-hoc	IndustriAll Europe, IndustriAll Global
	Fim Cisl	M + S	n/a	Ad-hoc	IndustriAll Europe, IndustriAll Global
	Uilm Uil	M + S	n/a	n/a	IndustriAll Europe, IndustriAll Global
	UGL metalmeccanici	M + S	n/a	Regularly	
	Fismic	M + S	70,000	Ad-hoc	
	SAVT/MET	M + S	n/a	n/a	
	USAS/ASGB	M + S	n/a	n/a	
LT	LMPSS	n/a	0	n/a	IndustriAll
LU	OGBL	S	4,180	Ad hoc	IndustriAll Europe, IndustriAll Global
	LCGB	S	4,180	Regularly	IndustriAll
LV	LIA	M + S	0	Regularly	ETUC via LBAS, IndustriAll Europe, IndustriAll Global
NL	CNV Vakmensen	M + S	11,100	Info not available	Via CNV to ETUC and Eurocadres, IndustriAll
	De Unie	M + S	11,100	n/a	
	FNV	M + S	11,100	Ad hoc	ETUC, Eurocadres, IndustriAll
	VHP Tata Steel	S	8,500	n/a	Via VCP to ETUC and Eurocadres
	VHP2	M	650	Ad hoc	Eurocadres
PL	KSH NSZZ Solidarność	S	15,000	Regularly	IndustriAll Europe
	FHZZ	S	30,000	Ad hoc	IndustriAll Europe
	SH PZZ 'Kadra'	S	11,000	Ad hoc	IndustriAll Global
	SKHOiK ZZIT	S	12,000	Regularly	
	SH OZZZ PRC	S	n/a	Info not available	
PT	FIEQUIMETAL	M + S	0	n/a	

Representativeness of the European social partner organisations: Metal sector

	SINDEL	M + S	38,000	n/a	IndustriAll Europe, IndustriAll Global, EPSU
	SIMA	M + S	n/a	Regularly	IndustriAll Europe
	FETESE	M + S	n/a	n/a	
	SITESE	M + S	n/a	n/a	
RO	FSS Metarom	S	17,000	Ad hoc	IndustriAll Europe, IndustriAll Global
	FNS Solidaritatea Metal	S	3,000	Ad hoc	IndustriAll Europe, IndustriAll Global
SE	IF Metall	M	12,700	Ad hoc	IndustriAll Europe, IndustriAll Global, Nordic-IN
	Unionen	M	n/a	Ad-hoc	IndustriAll Europe
	Sveriges Ingenjörer	M	n/a	Ad-hoc	IndustriAll Europe, IndustriAll Global
	Ledarna	M	n/a	Ad-hoc	CEC European Managers (CEC)
SI	SKEI	M + S	2,915	n/a	ETUC, IndustriAll
	KS 90 - SKEIE	M	2,900	n/a	
	KNSS - SKEM	M	2,915	n/a	
SK	OZ KOVO	M + S	15,500	Regularly	IndustriAll
UK	Community	S	22,000	Ad hoc	IndustriAll Europe, IndustriAll Global
	GMB	S	11,000	Ad hoc	IndustriAll Global, BWI, ITF, IUF, PSI, UNI Global, EFFAT, EPSU, ETF, UNI Europa
	Unite	S	13,000	Ad hoc	IndustriAll Global Union, BWI, ITF, IUF, PSI, UNI Global Union, EFFAT, EPSU, ETF, UNI Europa

Table A5: Domain coverage and membership of employer/business organisations in the metal sector

	Employer organisation	Membership				
		Type	Companies	Companies in sector	Employees	Employees in sector
AT	FVBS	Compulsory	120	15	17,244	15,109
	FMMGI	n/a	724	35	126,000	6,000
	BSI	Compulsory	6,047	50	415,059	21,000
BE	G.S.V.	Voluntary	11	9	11,502	11,502
BG	BAMI	Voluntary	33	3	8,000	1,700
CY	SYMEBIK	Voluntary	52	2	n/a	22
CZ	OSHŽ	Voluntary	11	8	15,000	13,700
DE	AGV Stahl	Voluntary	70	50	75,000	70,000
	WV Stahl	Voluntary	78	78	86,000	86,000
	VdS	Voluntary	22	22	15,200	15,200
DK	DI	Voluntary	10,000	22	1,200,000	2,089
EL	ENXE	n/a	n/a	n/a	n/a	n/a
ES	UNESID	Voluntary	44	44	22,364	22,364

Representativeness of the European social partner organisations: Metal sector

	CONFEMETAL	Voluntary	n.a.	n/a	n/a	n/a
FI	Metallinjalostajat	Voluntary	7	3	14,500	8,400
FR	GESIM	Voluntary	85	85	26,957	26,957
	UIMM	Voluntary	13,000	n/a	2,315,000	n/a
	A3M	Voluntary	350	n/a	62,500	n/a
HR	HUP-UMI	Voluntary	94	1	2,100	20
HU	MVAE	Voluntary	14	2	6,100	4,550
IT	Federmeccanica	Voluntary	16,000	n/a	800.000.	n/a
	Unionmeccanica - Confapi	Voluntary	20,000	n/a	n/a	n/a
	CONFIMI Impresa meccanica	Voluntary	n/a	n/a	n/a	n/a
	Cna Metalmeccanica di Produzione	Voluntary	40,000	n/a	150,000	n/a
	Confartigianato	Voluntary	30,000	n/a	85,000	n/a
	Casartigiani	Voluntary	30,000	n/a	85,000	n/a
	CLAAI	Voluntary	18,000	n/a	90,000	n/a
	Federacciai	Voluntary	133	133	40,000	40,000
LT	LINPRA	Voluntary	81	n/a	n/a	n/a
LV	MASOC	Voluntary	153	5	12	1,775
MT	MEA	Voluntary	490	12	55,000	n/a
NL	FME	Voluntary	2,300	26	225,000	26,000
PL	ZPPH	Voluntary	20	n/a	n/a	18,000
	HIPH	n/a	n/a	n/a	n/a	n/a
PT	ANEME	Voluntary	850	850	60,000	60,000
	FENAME	Voluntary	1,000	1,000	61,000	61,000
	AIMMAP	Voluntary	800	5	44,915	500
RO	Metalurgia	Voluntary	30	25	21,138	11,078
SE	Industriarbetsgivarna	Voluntary	900	160	90,000	30,000
SI	ZKM-GZS	Voluntary	64	6	7,400	1,315
	ZDS	Voluntary	1,400	7	n/a	1,500
SK	ZHTPG	Voluntary	29	2	18,803	10,653
UK	UK Steel	Voluntary	21	21	20,000	20,000

Table A6: Collective bargaining, consultation and affiliations of employer/business organisations in the metal sector, 2016

	Employer organisation	Collective bargaining (M: multi-employer; S: single-employer)	Collective bargaining coverage		Consultation/ frequency	National and European affiliations
			Companies	Employees		
AT	FVBS	M + S	15	15,000	Info not available	WKO, EUROFER, CET, CIELFFA, ESTA
AT	FMMGI	M	35	6,000	On a regular/	WKO, ORGALIME, CAEF,

Representativeness of the European social partner organisations: Metal sector

					institutional basis	EUROPUMP, CIMAC
AT	BSI	M	49	7,000	On a regular/ institutional basis	WKO, Ceemet
BE	G.S.V.	M	9	11,502	On an ad hoc basis	VOKA, Flanders Chamber of Commerce and Industry , Union Wallonne des Entreprises, EUROFER, CET, CIELFFA, ESTA
BG	BAMI	M	3	1,700	n/a	BIA, EUROFER, WSA
CY	SYMEBIK	M	2	19	On an ad hoc basis	OEB
CZ	OSHŽ	n/a	n/a	n/a	On a regular/ institutional basis	Svaz prumyslu a dopravy CR Hospodářská komora CR, EUROFER, WSA
DE	AGV Stahl	M + S	61	65,000	n/a	BDA
DE	WV Stahl	n/a	n/a	n/a	On a regular/ institutional basis	BDI, EUROFER, WSA
DE	VdS	M	22	15,200	On an ad hoc basis	VSU, BDA, BDI
DK	DI	M	22	2,089	On an ad hoc basis	Confederation of Danish Employers (DA), Ceemet, BusinessEurope, BIAC
EL	ENXE	n/a	n/a	n/a	n/a	EUROFER
ES	UNESID	n/a	n/a	n/a	On an ad hoc basis	CEOE, AENOR, EUROFER, ESTA, CIELFA, WORLSTEEL
ES	CONFEMETAL	M	52	52	Info not available	CEOE, CEPYME; Ceemet, ORGALIME
FI	Metallinjalostajat	M	70	8,400	On a regular/ institutional basis	Confederation of Finnish Industries (EK), Federation of Finnish Technology Industries, EUROFER, ESTA, Worldsteel
FR	GESIM	M	n/a	24,892	On an ad hoc basis	MEDEF – UIMMI, EUROFER
FR	UIMM	M	415	4,216	On an ad hoc basis	MEDEF – CGPME, Ceemet
FR	A3M	n/a	n/a	n/a	n/a	MEDEF UIMM, GFI, AIMCC,EUROFER, Eurometaux, Worldsteel
HR	HUP-UMI	n/a	0	0	On a regular/ institutional basis	Croatian Employers’ Association
HU	MVAE	n/a	n/a	n/a	On an ad hoc basis	Confederation of Hungarian Employers and Industrialists (MGYOSZ), Hungarian National Association of Machinery and Power Engineering Industries (MAGEOSZ), EUROFER, Worldsteel
IT	Federmeccanica	M + S	n/a	n/a	On a regular/ institutional basis	Confindustria, Ceemet

Representativeness of the European social partner organisations: Metal sector

IT	Unionmeccanica - Confapi	M + S	n/a	n/a	Info not available	CONFAPI, CEA-PME
IT	CONFIMI Impresa meccanica	M + S	n/a	n/a	Info not available	CONFIMI
IT	Cna Metalmeccanica di Produzione	M + S	n/a	n/a	Info not available	CNA PRODUZIONE, UEAPME, EMU
IT	Confartigianato	M + S	n/a	n/a	Info not available	Confartigianato, UEAPME, EMU
IT	Casartigiani	M + S	n/a	n/a	n/a	Confartigianato, UEAPME, EMU
IT	CLAAI	n/a	n/a	n/a	n/a	None
IT	Federacciai	n/a	n/a	n/a	On an ad hoc basis	Confindustria, EUROFER
LT	LINPRA	n/a	0	0	On an ad hoc basis	LPK, ORGALIME, EFFRA, EUPC, ECP4, Ceemet, MANUFUTURE
LV	MASOC	M + S	n/a	n/a	On a regular/institutional basis	LDDK, ORGALIME, Ceemet
MT	MEA	n/a	n/a	n/a	n/a	CEEP, BECC, IOE, ILO
NL	FME	M	154	2,600	On a regular/institutional basis	VNO-NCW, Ceemet, Orgalime
PL	ZPPH	n/a	0	0	On a regular/institutional basis	Employers of Poland
PL	HIPH	n/a	n/a	n/a	n/a	
PT	ANEME	n/a	n/a	n/a	On a regular/institutional basis	CIP, FENAME, ORGALIME, Ceemet, FEM
PT	FENAME	M	100	61,000	n/a	None
PT	AIMMAP	M	1000	50,000	n/a	CIP, CECIMO, CEIT, EUMABOIS, ORGALIME
RO	Metalurgia	n/a	n/a	n/a	On an ad hoc basis	CONPIROM, EUROFER
SE	Industri-arbetsgivarna	M	160	30,000	On an ad hoc basis	Confederation of Swedish Enterprise, EUROFER
SI	ZKM-GZS	M	13	n/a	n/a	GZS
SI	ZDS	M	13	2,915	n/a	BUSINESSEUROPE CEE, BIAC, IOE
SK	ZHTPG	M	2	10653	On a regular/institutional basis	RUZ SR, APZ
UK	UK Steel	n/a	n/a	n/a	On an ad-hoc basis	EUROFER, CET, CIELFFA, ESTA

Table A7: The system of sectoral collective bargaining

Country	Collective bargaining coverage (estimates)	Share of multi-employer agreements in total collective bargaining coverage (estimates)	Practice of extending multi-employer agreements to employers who are not affiliated to the signatory employer organisations in the sector
AT	100%	100%	No
BE	100%	n/a	Yes
BG	57%	n/a	No
CY	40%	n/a	No
CZ	42%	0%	n/a
DE	100%	0%	n/a
DK	80%	Multi-employer bargaining prevailing	No
EE	0%	0%	n/a
EL	n/a	n/a	No
ES	100%	n/a	Yes
FI	100%	100%	Yes
FR	n/a	47%	Yes
HR	0%	0%	n/a
HU	70%	0%	n/a
IE	20%	n/a	No
IT	n/a	100%	Yes
LT	0%	0%	No
LU	100%	0%	No
LV	n/a	0%	n/a
MT	0%	0%	n/a
NL	90%	25%	Yes
PL	42%	0%	No
PT	100%	50%	Yes
RO	99%	n/a	No
SE	90%	100%	Yes
SI	100%	Multi-employer bargaining prevailing	No
SK	80%	47%	Yes
UK	40%	0%	No

Table A8: Reasons for fragmentation of trade unions

Member State	Trade union	Reasons for fragmentation of trade unions				
		Employees outside the sector	Blue- and white-collars	The whole sector (NACE codes)	All regions of the country	All legal forms/size classes of enterprises
AT	PRO-GE	Yes	No	Yes	Yes	Yes
	GPA-djp	Yes	No	Yes	Yes	Yes
BE	ACV-CSC METEA	Yes	No	Yes	Yes	Yes
	LBC-NVK	Yes	No	Yes	No	Yes
	SETCa-BBTK	Yes	No	Yes	Yes	Yes
	ABVV Metaal	Yes	No	No	No	Yes
	CNE-GNC	Yes	No	Yes	No	Yes
	MWB (FGTB).	Yes	No	Yes	No	Yes
BG	Podkrepa SFMM (MET)	Yes	Yes	No	No	Yes
	NFTINI	Yes	Yes	No	Yes	Yes
	SFOEMI	Yes	Yes	No	No	Yes
	CITUB TU Metalicy	Yes	Yes	No	No	Yes
CY	OBIK-SEK	Yes	Yes	Yes	Yes	No
	SEMMHK-PEO	Yes	Yes	Yes	Yes	No
	BUILDERS UNION PEO	Yes	Yes	No	Yes	No
	BUILDERS UNION SEK	Yes	Yes	No	Yes	No
CZ	Odborový svaz KOVO (OS KOVO)	Yes	Yes	Yes	Yes	No
DK	HK/Privat	Yes	No	Yes	Yes	Yes
	IDA	Yes	No	Yes	Yes	Yes
	Dansk El-forbund	Yes	No	Yes	Yes	Yes
EE	IMTAL	Yes	Yes	No	Yes	Yes
EL	POEM	Yes	Yes	No	Yes	Yes
ES	ELA Industria y Construcción	Yes	Yes	Yes	No	Yes
	LAB Industria	Yes	Yes	Yes	No	Yes
	CIG-Industria	Yes	Yes	Yes	No	Yes
	IC Industria	Yes	Yes	Yes	No	Yes
FI	Metalli	Yes	No	Yes	Yes	Yes

Representativeness of the European social partner organisations: Metal sector

	Pro	Yes	No	Yes	Yes	Yes
	TEK	Yes	No	Yes	Yes	Yes
	Insinööriliitto	Yes	No	Yes	Yes	Yes
	DIFF	Yes	No	Yes	Yes	Yes
	Ekonomit	Yes	No	Yes	Yes	Yes
	YTN	Yes	No	Yes	Yes	Yes
HU	VASAS	Yes	Yes	No	Yes	Yes
IE	TEEU	Yes	No	Yes	Yes	Yes
	Unite	Yes	Yes	No	Yes	Yes
IT	SAVT/MET	Yes	Yes	Yes	No	Yes
	USAS/ASGB	Yes	Yes	Yes	No	Yes
NL	De Unie	Yes	No	n/a	Yes	Yes
	VHP2	Yes	No	Yes	Yes	Yes
RO	FSS METAROM	Yes	Yes	No	Yes	Yes
	FSLI-METAL	Yes	Yes	No	Yes	Yes
SE	IF Metall	Yes	No	Yes	Yes	Yes
	Unionen	Yes	No	Yes	Yes	No
	Sveriges Ingenjörer	Yes	No	Yes	Yes	Yes
	Ledarna	Yes	No	Yes	Yes	Yes
SI	SKEI	Yes	Yes	No	Yes	Yes
	SKEIE-KS 90	Yes	Yes	No	Yes	Yes
	KNSS	Yes	Yes	No	Yes	Yes
	Solidarnost	Yes	Yes	No	Yes	Yes
UK	Community	Yes	Yes	No	Yes	Yes
	GMB	Yes	Yes	No	Yes	Yes
	RMT	Yes	Yes	No	Yes	Yes
	Prospect	Yes	No	No	Yes	Yes
	USDAW	Yes	Yes	No	Yes	Yes

**Included above is information for trade unions that have provided complete data*

Table A9: Reasons for fragmentation of employer organisations

Member State	Employer organisation	Reasons for fragmentation of employer organisations			
		Companies/business activities outside the sector	All legal forms/size classes of enterprises	The whole sector (NACE codes)	All regions of the country
AT	FMMGI	Yes	No	Yes	Yes
	FEEI	Yes	No	No	Yes
	FVFI	Yes	No	No	Yes

	WKO - BSI	Yes	No	Yes	Yes
BG	BBCMB	Yes	Yes	No	Yes
	BAMI	Yes	Yes	No	Yes
CY	SYMEBIK	Yes	Yes	No	Yes
CZ	Sdružení automobilového průmyslu (AutoSAP)	Yes	No	No	Yes
	Asociace leteckých výrobců CR (ALV CR)	Yes	Yes	No	Yes
	Skoda Auto, a. s.	Yes	No	No	No
	Asociace obranného a bezpečnostního průmyslu České republiky (AOBP)	Yes	Yes	No	No
EL	GSEVEE	Yes	No	No	Yes
	HASDIG	Yes	Yes	No	Yes
FR	A3M	Yes	Yes	No	Yes
HR	HUP-UMI (CEA	Yes	Yes	Yes	Yes
HU	MAGEOSZ	Yes	Yes	No	Yes
IT	Federmeccanica	Yes	No	Yes	Yes
	Assistal	Yes	Yes	No	Yes
	Unionmeccanica - Confapi	Yes	No	Yes	Yes
	CONFIMI Impresa meccanica	Yes	No	Yes	Yes
	Cna Metalmeccanica di Produzione	Yes	No	Yes	Yes
	Confartigianato	Yes	No	Yes	Yes
	Casartigiani	Yes	No	Yes	Yes
	CLAAI	Yes	No	Yes	Yes
	ANCPL	Yes	No	Yes	Yes
	Federlavoro e servizi - Confcooperative	Yes	No	Yes	Yes
	AGCI Produzione e Lavoro	Yes	No	Yes	Yes
LV	MASOC	Yes	Yes	No	Yes
NL	FME	Yes	No	Yes	Yes
	Metaalunie	Yes	No	No	Yes
	Uneto-Vni	Yes	Yes	No	Yes
PL	ZPPPOiL	Yes	Yes	No	Yes
	IGMNiR	Yes	No	No	No

	SPPL	Yes	Yes	No	Yes
PT	FENAME	Yes	No	No	Yes
	AIMMAP	Yes	No	No	Yes
RO	APREL	Yes	No	No	No
SE	Industriarbetsgivarna	Yes	Yes	No	Yes
	IKEM	Yes	Yes	No	Yes
SI	ZKovI-GZS	Yes	Yes	No	Yes
	ZDS	Yes	Yes	No	Yes
SK	ZSP SR	Yes	Yes	No	Yes
	ZHTPG	Yes	Yes	No	Yes
	ZEP SR	Yes	Yes	No	Yes

**Included above is information for employer organisations that have provided complete data.*

Table A10: Bipartite and tripartite sector-specific boards

	Name of the body and scope of activity	Bipartite/tripartite	Origin: agreement/statutory	Trade unions participating	Employer organisations participating
BG	Sectoral Council for Tripartite Cooperation in Metallurgy	Tripartite	Statutory	TU Metalicy, NF Metallurgy	BAMI
	Sectoral Council for Tripartite Cooperation on healthy and safe working conditions, Ministry of Economy	Tripartite	Statutory	TU Metalicy, NF Metallurgy	BAMI
	Sectoral Council for Tripartite Cooperation on labour and social security relations, Ministry of Economy	Tripartite	Statutory	TU Metalicy, NF Metallurgy	BAMI
DK	The vocational training committee in the metal industry	Bipartite	Statutory	Danish Metalworkers' Union (Dansk Metal)	DI
	The environmental council of industry	Bipartite	Statutory	CO-industri	DI
EE	Professional Council of Engineering, Metal and Machine Industry	Tripartite		IMTAL	EML
ES	Foundation of the metal sector for training, skills and employment monitoring sectoral	Bipartite	Agreement	CCOO de Industria, FICA-UGT	The FMFCE bipartite foundation was created in 2003 by the most representative trade unions and employer

	trends				organisations in the metal sector. The Interministerial Working Group was created by the government - it includes the most representative trade unions in the steel sector and the most relevant trade association in the steel sector.
	Metal sector industrial observatory	Tripartite	Agreement	CCOO de Industria and FICA-UGT	n/a
	The Interministerial Working Group on the future of the steel industry	Tripartite	Government initiative (2014)	CCOO de Industria FICA-UGT	n/a
FI	Occupational Safety Sector Group of the Centre for Occupational Safety for the Metal Sector	Tripartite	Agreement	Metalli, Pro, IL	Teknoliateollisuus
	National Education and Training Committee for the Mechanical and Metal Industry	Tripartite	Statutory	Metalli-SAK, Pro-STTK, IL-Akava, TEK-Akava, Trade Union of Education OAJ	Teknoliateollisuus-EK, Federation of Finnish Enterprises (Suomen Yrittäjät)
FR	Commission Paritaire	Bipartite	Statutory and agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération Confédérée FO de la Métallurgie	GESIM
	Institute to promote health and safety	Bipartite	Agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération Confédérée FO de la Métallurgie	GESIM
	Institution to promote social dialogue on sectoral level and the attractiveness of the sector	Bipartite	Agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération Confédérée FO de la Métallurgie	GESIM
	Institution to promote the skills and to launch studies forecasting the future needs of competencies	Bipartite	Agreement	CFDT, CFE-CGC, CFTC, CGT, Fédération Confédérée FO de la Métallurgie	GESIM

Representativeness of the European social partner organisations: Metal sector

HU	Metallurgy Sectoral Dialogue Committee	Bipartite	Statutory	VASAS, Munkástanácsok, Alumíniumipari Szakszervezetek Szövetsége	MVAE, HUNGAMOSZ
IT	National paritarian institution for metalworkers (EBM)	Bipartite	Agreement		Unionmeccanica - Confapi
	Supplementary pension fund for workers in the metalworking sector	Bipartite	Agreement	Fim Cisl, Uilm Uil	Federmeccanica Assital
	Inter-professional fund for vocational training	Bipartite	Agreement	Cgil, Cisl Uil	Confindustria
	Supplementary health care fund for workers of SMEs active in the metalworking sector	Bipartite	Agreement	Fim Cisl	Federmeccanica Assital, Confimi Impresa meccanica,
	Inter-professional fund for continuous vocational training for employees in the artisan sector	Bipartite	Agreement	Cgil, Cisl, Uil	Confartigianato, Cna, Casartigiani, Clai
LU	Steel Tripartite Conference	Tripartite	Agreement	OGBL, LCGB	ArcelorMittal
LV	National Tripartite Cooperation Council	Tripartite	Statutory	LBAS	LDDK
NL	Pension fund for employees of the Social Unit IJmuiden	Bipartite	Agreement	FNV, VHP Tata Steel	None
PL	The Tripartite Sectoral Team for Social Conditions of Restructuring in Steel Industry	Tripartite	Agreement	KSH NSZZ Solidarność, SKHOiK ZZIT FHZZ SH OZZZ PRC SH PZZ Kadra	ZPPH
SK	Economic and Social Council of the Slovak Republic (HSR)	Tripartite /	Statutory /	OZ KOVO representing the KOZ SR /	ZHTPG
	Industry Bipartite	Bipartite	Agreement	OZ KOVO, IOZ and OZ PBGNT	HTPG, ZSP SR, ZAP SR, ZEP SR, ZSPS
UK	Steel Council	Tripartite	Agreement	Community, GMB, Unite	UK Steel (plus individual companies)

Table A11: IndustriAll Europe metal sector affiliates, 2017

Country	Membership
AT	PRO-GE, GPA-djp
BE	ACLVB /CGSLB, Metea (ACV-CSC), CNE (ACV-CSC), LBC-NVK (ACV-CSC), SETCa-BBTK (FGTB-ABVV), ABVV Metaal, MWB (ABVV-FGTB),
BG	TU Metalicy, NF Metallurgy
CZ	OS KOVO
DE	IG Metall
DK	Metal, IDA
ES	CCOO de Industria, UGT-FICA, FI-USO, ELA Industria y Construcción
FI	Metalli, Pro, Tek, IL, Sähköliitto
FR	FGMM-CFDT, FTM-CGT, FO Métaux, CFTC Métallurgie, CFE-CGC
HR	SMH
HU	VASAS
IE	SIPTU, TEEU
IT	Fiom Cgil, Fim Cisl, Uilm Uil
LT	LMPSS
LU	OGBL, LCGB
LV	LIA
NL	CNV Vakmensen, FNV
PL	KSH NSZZ Solidarność, FHZZ, SH PZZ
PT	FIEQUIMETAL, SINDEL, SIMA
RO	FSS Metarom, FNS Solidaritatea Metal
SE	IF Metall, Unionen, Sveriges Ingenjörer, Ledarna
SI	SKEI
SK	OZ KOVO
UK	Community, GMB, UNITE

Table A12: Ceemet membership, 2017

Country	Membership
AT	WKO
BE	Agoria
DE	Gesamtmetall
DK	Dansk Industri
ES	Confemetal
FI	Teknoliateollisuus
FR	UIMM
HR	CEA

Representativeness of the European social partner organisations: Metal sector

HU	MAGEOSZ
IT	Federmeccanica
LT	Linpra
LV	Masoc
NL	FME
PT	ANEME
SE	Teknikföretagen
SI	ZKovI-GZS
UK	EEF

Annex 2: Network of Eurofound Correspondents

Table A13: Correspondents who contributed to the study

Country	Correspondent	Organisation
AT	Bernadette Allinger	FORBA
BE	Dries Van Herreweghe Guy Van Gyes	HIVA – KU Leuven
BG	Gabriela Yordanova	Bulgarian Academy of Sciences
CY	Pavlos Kalosinatos	Cyprus Labour Institute (INEK-PEO)
CZ	Petr Pojer	Research Institute for Labour and Social Affairs
DE	Sandra Vogel Birgit Kraemer	Cologne Institute for Economic Research Hans-Böckler-Stiftung (HBS)
DK	Carsten Jorgensen	FAOS, University of Copenhagen
EE	Ingel Kadarik	Praxis Centre for Policy Studies
EL	Penny Georgiadou	Labour Institute of GSEE
ES	Maria Caprile	Notus
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This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the metal sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue and their capacity to negotiate agreements. The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. This study identified Ceemet (representing employers) and IndustriAll Europe (representing employees) as the most representative European-level social partner organisations in the metal sector.

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